



# Report

GVA  
10 Stratton Street  
London  
W1J 8JR

## **West Oxfordshire Retail Needs Assessment Update**

West Oxfordshire District Council  
November 2012



WEST OXFORDSHIRE  
DISTRICT COUNCIL

[gva.co.uk](http://gva.co.uk)

Prepared By: Rachel Crick

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Reviewed By: Caroline Marginson

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**For and on behalf of GVA Grimley Ltd**

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# 1. Executive Summary

## Background and Key Study Outputs

- 1.1 In June 2012, GVA was instructed by West Oxfordshire District Council to undertake a comprehensive review of retail uses within the District's main town centres in order to provide an update of the 2007 Retail Needs Assessment to inform policy and development management decisions in the District.
- 1.2 The Council is currently in the process of revising its local planning policy and development strategy. The Council's current planning policy is contained within the Local Plan 2011 (adopted 2006) however this policy is soon to be replaced by the new Local Plan for the District. The purpose of this assessment is to provide up to date evidence to inform the preparation of the new Local Plan. This information will also be at the Councils disposal to assist in the determination of relevant planning applications.
- 1.3 To inform the retail needs assessment we commissioned a bespoke telephone household survey, which focuses on retail and town centre issues in West Oxfordshire. We have also provided audits of Witney, Chipping Norton, Carterton, Burford and Woodstock town centres. The study reviews the current status of retail activity in the District, local shopping patterns and flows of expenditure, and identifies the need for new retail floorspace over the plan period to 2029. Over the longer term retail capacity forecasts are increasingly subject to margins of error. As such, the main period of relevance is up to 2019 (the first five years following adoption of the Local Plan) and forecasts after this time are less reliable.
- 1.4 We have used a conventional and widely accepted step by step methodology, consistent with best practice, which draws on the results of the household telephone survey. We have:
- Calculated the total convenience and comparison goods expenditure available within the West Oxfordshire catchment area;

- Allocated this spend to shopping destinations, on the basis of the household telephone survey of shopping patterns, to provide estimates on current sales and forecasts of future sales;
- Compared the total expenditure for each shopping destination with current retail floorspace to assess sales densities in each shopping destination;
- Building on the baseline position, we have explored the capacity for further convenience and comparison retail floorspace, having regard to the performance of existing floorspace.

## **Retail Trends, Government Research and Policy**

- 1.5 The UK retail industry has undergone a major transformation in recent years. Technological advances and multi-channel retailing (such as click and collect services) are impacting the way we shop. These changes have direct implications on the role and function of town centres, and the impact of these changes have been exacerbated by the recession.
- 1.6 Higher levels of unemployment and central Government spending cuts have increased pressure on disposable incomes. Not only does this limit the extent to which consumers are able to save, but also means that consumers are more considered with their spending decisions – researching their purchases and buying online to ensure they get the best value for money.
- 1.7 Internet sales are expected to continue growing, although at a more modest pace than experienced in recent years. This will maintain pressure on traditional high street, bricks and mortar retailers. The growth of online shopping and the movement towards multi-channel retailing are resulting in retailers cutting back on physical space to improve efficiencies. Retailers are moving towards opening larger flagship stores in strategic locations (including out of centre locations), which are supported by smaller satellite stores and websites. Smaller town centres in non-strategic locations will therefore be likely to be more vulnerable to store closures.
- 1.8 In this context, the traditional high street faces a number of challenges over the development plan period. Emerging trends suggest that town centres will be used more for leisure and social activities, with more bars, restaurants, food outlets and community spaces opening in vacant units, and residential uses becoming more common.
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- 1.9 These trends are of major importance to West Oxfordshire's town centres, which will need to continue to attract local shoppers, as well as tourists, by broadening their non retail offer. To ensure centres remain viable moving forwards, the Council must seek to maintain and improve footfall levels to increase dwell times which will increase town centre vitality and drive retail and leisure spend through impulse purchases.
- 1.10 Centres within West Oxfordshire are smaller than the surrounding higher order shopping destinations (e.g. Oxford, Banbury and Swindon), and therefore while these centres are currently performing strongly, they are likely to come under continued pressure from these larger centres. Over the plan period, it will be important that the West Oxfordshire centres continue to provide a differentiated retail and leisure offer, tailored to the local catchment and encouraging resident and tourist spend.
- 1.11 The Portas Review (2011) highlighted the challenges facing town centres and made recommendations to tackle the decline of the high street. Portas advised that markets should be encouraged in town centres, affordable town centre car parking should be provided, and the setting of business rates and landlord roles should be revisited. Portas also advocated that communities should be given greater say in the future planning of their town centre and that Town Teams should be used to manage high streets. The Council should bear these recommendations in mind when planning for future retail strategies for the District's town centres.
- 1.12 This report has been undertaken in accordance with the National Planning Policy Framework (NPPF). The NPPF was adopted in March 2012 and sets out the Government's most up to date, consolidated, planning guidance. The policies contained within the NPPF are underpinned by a 'presumption in favour of sustainable development', and as such seek to support sustainable economic growth and support town centre vitality and viability.

## Convenience Goods

- 1.13 Our review of existing convenience goods (e.g. food and groceries) provision in West Oxfordshire identified a reasonable level of convenience goods coverage in the three main towns. The majority of these stores are located within town centre locations. There
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are two main out of centre foodstores (Sainsbury's and Lidl) which draw a significant proportion of convenience goods market share, both located in Witney.

- 1.14 Based on our analysis, we estimate that the combined turnover of the main convenience goods provision within the District is approximately £159.6m (which represents 53% of total turnover from the survey area). Within the District (Zones 1, 2, 3, 5, 6, 9, 10 and 11), existing stores retain £152.9m of generated spend, which equates to a strong retention rate of 69% within these zones.
- 1.15 The results of our analysis indicates that several of the stores in West Oxfordshire are overtrading compared to company averages, in particular, the Waitrose and out of centre Sainsbury's in Witney, the Co-op in Chipping Norton and the Aldi in Carterton, with the majority of the other stores performing broadly in line with company averages. It is not necessarily undesirable for stores to trade at above company average levels, and overtrading does not inevitably result in a need for further foodstore provision.
- 1.16 Based on constant market shares, the performance of existing foodstore provision and forecast growth in population and expenditure, and taking into account existing commitments the study identifies capacity to support 3,234 sqm net across the District by 2014, rising to 3,832 sqm net by 2019, increasing to 4,681 sqm net by 2024, and again to 8,504 sqm net by 2029. We consider that this capacity is sufficient to support an additional foodstore, or a combination of smaller format stores and extensions in the District over the development plan period.
- 1.17 The Council must identify sufficient sites in sequential locations to accommodate this need, although it is noted that the above capacity figures do not take into account current proposals for a Morrison's store at Carterton of 2,182 sqm net which is expected to reduce the forecast capacity at both Carterton and Witney. The proposed Morrison's store will re-distribute existing shopping patterns towards Carterton, resulting in more sustainable shopping patterns, and will also be likely to alleviate overtrading at foodstores in Witney.
- 1.18 The table below sets out the indicative convenience goods capacity identified for the three main centres in the District up to 2029. The main period of relevance is up to 2019 and beyond this forecasts are less reliable.
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**Table 1.1: Indicative Locational Split: Convenience Goods Capacity (sqm)**

Centre	2014	2019	2024	2029
Witney	1,579	1,939	2,472	5,978
Chipping Norton	230	272	349	416
Carterton	509	629	793	947

Source: GVA, Appendix 1, Tables 13, 14 and 15

## Comparison Goods

- 1.19 The results of the household telephone survey show that Witney is the most dominant comparison goods (e.g. clothes, jewellery and electrical items) shopping destination in the District, with an overall market share of 34% from the survey area, and has a 69% retention rate within the Witney zone. Witney town centre is found to be performing exceptionally strongly, with a high sales density for a centre of this size. Chipping Norton and Carterton provide less of a comparison shopping role (although we note that Chipping Norton does have a strong proportion of comparison shop units), as both these centres cater primarily to the convenience goods market and due to their smaller scale, serve a smaller, localised catchment area. The centres within West Oxfordshire face strong competition for comparison goods from higher order centres in the wider sub-region (in particular Oxford, Banbury and Swindon).
- 1.20 Based on the current market shares of the main town centres in the District, and after taking into account existing commitments, the study identifies that there is not capacity arising for comparison goods floorspace in the District up to 2014, however by 2019 there is capacity to support 3,987 sqm net, increasing to 8,732 sqm net by 2024, and increasing again to 13,685 sqm net by 2029.
- 1.21 The table below sets out the indicative comparison goods capacity identified for the three main centres in the District up to 2029.

**Table 1.2: Indicative Locational Split: Comparison Goods Capacity (sqm)**

Centre	2014	2019	2024	2029
Witney	56	3550	7616	11,868
Chipping Norton	-59	318	768	1,231
Carterton	-94	15	142	274

Source: GVA, Appendix 2, Tables 13, 14 and 15

## Witney Town Centre

- 1.22 Witney has a particularly good comparison shopping offer, maintaining a strong market share for a centre of this size and achieving a very high sales density. The centre benefits from the recently extended Woolgate shopping centre and the new Marriotts Walk shopping centre which provide a range of modern format shop units as part of an extension to the town centre.
- 1.23 In and out of centre foodstores in Witney draw a strong market share from across the study area, and achieve good sales densities which indicate the stores are performing well and they provide competition to foodstores outside the District (for example foodstores in Abingdon and Kidlington). We anticipate that if the application for a Morrison's foodstore in Carterton is granted consent and implemented, this store would clawback trade from Witney, thereby reducing the convenience goods capacity arising in the town and diverting trade from the overtrading stores in Witney. This trade diversion would support more sustainable shopping patterns in the District, and increase the retention of convenience goods market share within the Carterton area.
- 1.24 Our analysis of the centre identifies that Witney is performing very strongly as a vital and viable town centre. This is corroborated by the findings of the household and in centre surveys which identified that local residents and visitors to Witney have a very high level of satisfaction with the town centre, particularly in relation to the range of multiple retailers and independent shops and the attractive quality of the historic urban environment.
- 1.25 Respondents to the household telephone survey highlight that the free car parking provision in the town centre is popular and is a key attractor to the town centre in

comparison to other competing centres which do not provide this facility. We understand there are concerns that the town centre car parks are reaching capacity at peak times. We recommend that effective car parking management in the town centre is developed to limit the opportunity for commuters to take advantage of the free parking, whilst still providing free car parking to shoppers and tourists to encourage these visitors to spend time in the town centre, increase dwell times and support local shops.

1.26 Over the development plan period Witney is likely to face continued pressure from competing centres outside the District, most notably Oxford city centre. If the Westgate shopping centre extension is implemented in Oxford it will be crucial for Witney to continue to improve its comparison goods offer to retain its current market share. There are options for the organic growth of Witney town centre and the opportunities arising at the Woolgate Centre and Welch Way should be pursued to secure future investment in the centre.

- We recommend that the Council should start to plan for the phased development of strategic sites at the Woolgate shopping centre and land off Welch Way which are capable of accommodating the identified retail capacity to reinforce the role of the town centre.

## Chipping Norton Town Centre

1.27 Chipping Norton town centre provides an attractive historic shopping environment and our findings show there is a good mix of quality comparison, convenience and service operators, supplemented with street markets and high end independent retailers. The comparison goods shopping role appears to be supported by the main food shopping function the centre currently provides.

1.28 Convenience goods retailing is the main attractor to the town centre, demonstrated by 86% of respondents to the in centre survey stating that the main purpose of their visit is to undertake food shopping. Foodstores in the town centre are currently performing strongly, drawing a strong market share in the local catchment area, with a strong level of trade retention. The two main foodstores in the town are achieving good sales densities. The evidence demonstrates that this is the strongest and most cited reason for visiting Chipping Norton town centre and therefore we consider the foodstores are a key

footfall driver in the town. This function is supporting the other comparison shops and services in the centre as people undertake linked trips in addition to their food shopping.

- 1.29 For a centre of its size, Chipping Norton has a reasonable retail provision of mainstream multiple retailers, however the comparison goods role the centre offers is more limited in comparison to Witney. Chipping Norton currently serves a relatively localised catchment area, with the majority of respondents undertaking their main comparison goods shopping in the higher order centre of Banbury.
- 1.30 Despite a more limited range of comparison retailers in Chipping Norton, the quality of operators is good, attracting local people, as well as tourists and visitors. Results from the Chipping Norton Neighbourhood Plan survey indicate that local residents like to support local shops and we consider this is a key strength of the centre. If this function were to erode we expect that visitations rates could drop which would consequently result in a detrimental impact on Chipping Norton town centre. Therefore the retail and leisure offer should be protected and consolidated over the plan period to ensure the continued health of the centre. A co-ordinated town centre marketing strategy to retain trade in Chipping Norton as proposed by the 'Experience Chipping Norton' Town Team is a positive step.
- 1.31 One of the key issues in the town is the availability of car parking. Although we anticipate that the current lack of car parking spaces may in part be addressed through the planned expansion of the Co-op and extra parking spaces, there will be a continued need to identify further opportunities for additional car parking provision where appropriate.
- 1.32 Taking into account the proposals to extend the Co-op, our assessment has identified no significant capacity arising to support large scale retail development for convenience and comparison goods over the development plan period. Councils are required to allocate a sufficient range of sites to meet identified retail needs in town centres, however we consider that the Council does not need to identify significant development sites beyond Chipping Norton town centre to accommodate the retail needs arising over the plan period.
- The key recommendation for Chipping Norton is that the small capacity arising for retail floorspace would be best delivered within the town centre to maintain its

vitality and viability. There is scope to provide a better range of shops in the town centre to create a stronger food and non-food retail offer. Due to the constrained nature of the town centre, it will be crucial that the Town and District Council is proactive in bringing forward complex town centre sites where possible, with future retail development directed towards the town centre in the first instance.

## **Carterton Town Centre**

- 1.33 Carterton town centre is a more modern centre, which performs a more functional and convenience based role, catering to the day to day shopping needs of a localised resident population. Due to the nature of the town centre environment, Carterton is less constrained than the historic town centres of Witney and Chipping Norton and therefore has the physical capacity to accommodate future retail and leisure proposals.
- 1.34 The town centre currently has a good convenience goods offer, benefiting from two foodstores which are performing reasonably strongly. Due to the predominant convenience goods role that the centre provides, results from the household survey show that local shoppers who do visit Carterton undertake trips to the centre regularly.
- 1.35 We are aware of the Morrison's application to develop a foodstore in the SW Quadrant. Although the scale of store is larger than the floorspace capacity arising for convenience goods, we consider that a store of this size could claw back trade from Witney to encourage shoppers in the Carterton zone to shop locally and support sustainable shopping patterns, whilst improving the qualitative food offer in the town. It will be important for any proposal on this site to provide strong linkages and connectivity to the retail core of the town centre to encourage accessibility between the site and the existing shops.
- 1.36 In relation to comparison retail, Carterton has a below average representation of non-food shops in the town centre, which currently provide a mid to low end retail offer. The centre also lacks a varied choice and range of comparison goods retailers, and provides only a limited number of multiple retailers. The centre falls within Witney's catchment area and therefore competes for market share with Witney.
- 1.37 The provision of an enhanced range and choice of comparison goods retailers in the town should be a priority for the Council over the development plan period. There is
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scope for the town to improve its comparison goods offer to retain a higher market share within the Carterton zone. A realistic strategy should be developed to identify physical site opportunities within the SW Quadrant and include demographic profiling and retailer demand to test the commercial interest in the area and secure future investment from comparison goods retailers following the resolution to grant planning consent for the Morrison's development. We note that Carterton submitted a Portas Town Team bid, which although unsuccessful has secured some funding which could support the development of the future town centre strategy for Carterton.

- 1.38 There is also scope to enhance the leisure offer in the centre through the provision of restaurants and bars to increase the number of people visiting the centre for daytime and evening eating and drinking and to increase dwell time in the centre which will help support town centre shops.
- The key recommendation for Carterton is to develop a strategy to capture investment from comparison retailers following the resolution to grant planning consent for a Morrison's supermarket in the SW Quadrant area (subject to signing a S106 Agreement). To improve the retail offer in the centre design work should be undertaken to establish site opportunities, and commercial soft market testing and demographic profiling will enable the centre to attract new comparison retailers to invest in Carterton.

## **Burford and Woodstock**

- 1.39 Burford and Woodstock are currently performing well in their roles in the retail hierarchy as secondary town centres, meeting the day to day needs of local residents. The centres have low vacancy rates, and a good mix of essential services and top up food shops. Both of these centres provide high end, luxury comparison goods shops, which cater to both residents and tourist visitors. Burford and Woodstock both have a very high quality historic environment which provides a pleasant shopping experience.
- 1.40 We do not consider there is a need to plan for new retail development in these centres, and the development plan strategy should seek to resist the loss of shops in these towns. The vitality and viability of these centres should be maintained over the forthcoming development plan period, aiming to protect existing retail units, while encouraging

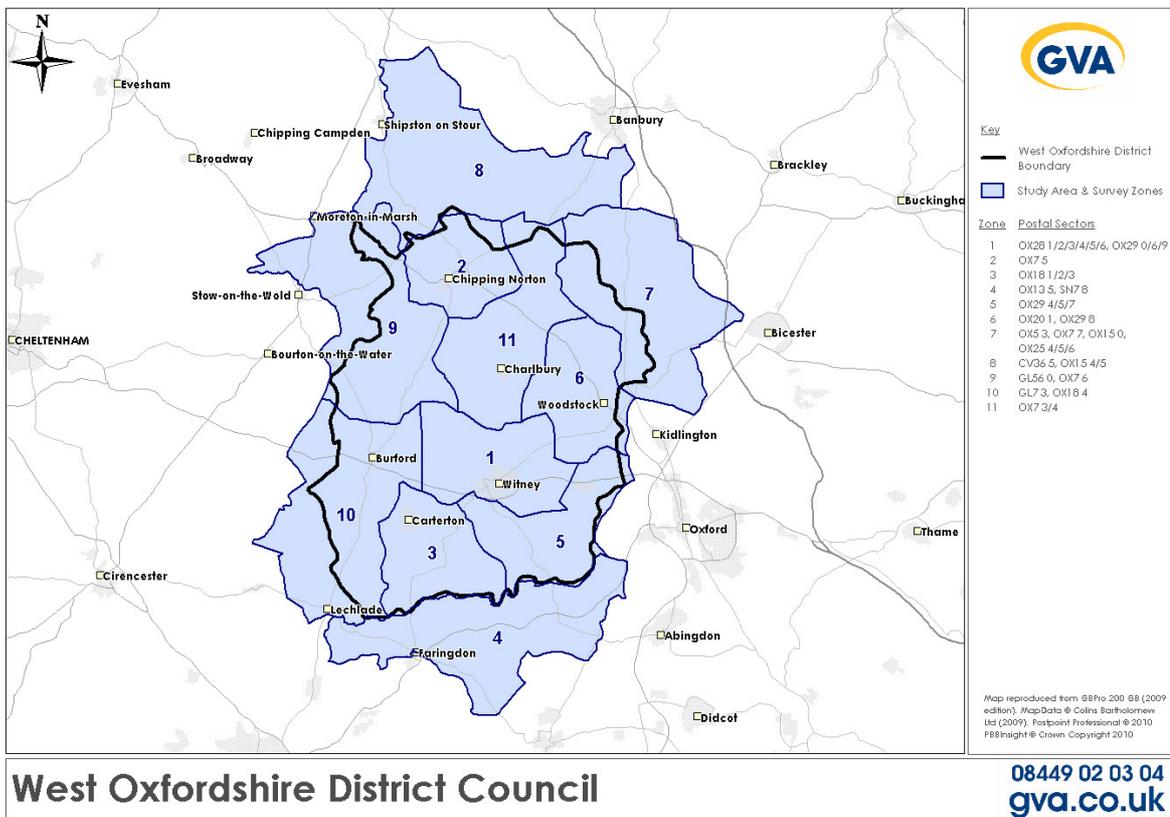
investment to maintain the attractive shopping and leisure destination these centres offer.

- We recommend that Burford and Woodstock should maintain the centre's provision of local shops and services to meet local needs and that the current problems with car parking in both of these centres need to be addressed over the plan period to ensure that the centres are accessible to local residents and visitors to maintain levels of footfall to support local shops.

## 2. Introduction

- 2.1 In June 2012, GVA were instructed by West Oxfordshire District Council to undertake a comprehensive review of retail uses within the District's town centres to provide an update of the 2007 Retail Needs Assessment which is now out of date.
- 2.2 This study provides up to date advice on the need and capacity for new retail floorspace across the District up to 2029. We examine the existing supply of retail and leisure uses within the District's main town centres; Witney (Principle Town Centre), Carterton (Primary Town Centre) and Chipping Norton (Primary Town Centre), and provide a brief assessment of the retail and leisure function of the Districts two Secondary Town Centres (Burford and Woodstock). The outputs of this study will enable the Council to identify current and future needs and to plan positively for an appropriate scale and form of development in the District's retail hierarchy.
- 2.3 This study has been undertaken in accordance with the National Planning Policy Framework (NPPF), and provides a robust and sound evidence base to inform the preparation of the new Local Plan for West Oxfordshire (previously referred to as 'Core Strategy'). It also follows the DCLG Practice Guide on the Assessment of Need, Impact and the Sequential Approach, prepared by GVA, which has been retained following the adoption of the NPPF.
- 2.4 In line with good practice, we have adopted a transparent approach, where the key steps of our analysis, data inputs and assumptions are clearly set out and justified. Our approach is underpinned by up to date survey data to establish shopping patterns, town centre catchments and market share estimates for both convenience (e.g. food and groceries) and comparison (e.g. clothes, jewellery and electrical) goods retailing. Our detailed methodology is set out in Section 10.
- 2.5 In order to provide factual information on the shopping patterns in West Oxfordshire, GVA commissioned a new household survey covering 1,100 households. GVA designed the survey questionnaire in consultation with West Oxfordshire District Council and NEMs market research company who undertook the interviewing and data processing in July 2012. The survey area is illustrated in the plan below (Plan I of Plans and Appendices) and is broken down into 11 zones.

### Household Telephone Survey Area Plan



2.6 The study also considered the quantitative and qualitative retail issues arising within West Oxfordshire. The study examines the global capacity for new convenience and comparison floorspace over the period between 2012 and 2029, and provides an update of the previous capacity projections for the centres in the District which covered the period to 2026.

### Structure

2.7 This report draws together the results of our research, incorporating the findings of detailed survey-based technical analysis and health check assessments. The report is structured as follows:-

- **Section 3** summarises the national, regional and local planning policies relevant to retail planning in West Oxfordshire;

- **Section 4** considers national trends in the retail sector, and in particular the implications of the economic downturn and technological advances which are impacting on shopping habits;
- In **Section 5** we consider the key competing centres within the wider sub-region and examines the influence these centres have on the role of the future role of the centres in West Oxfordshire;
- **Sections 6 to 9** provide detailed qualitative town centre audits of the retail and service offer in the centres of Witney, Chipping Norton and Carterton, as well as audits of Burford and Woodstock town centres;
- In **Section 10** we undertake a detailed review of current shopping patterns for convenience and comparison goods, drawing on the results of the up-to-date household telephone survey. We also present our capacity forecasts for additional retail development, taking account of current shopping patterns and the economic climate up to 2029; and
- **Section 11** draws the analysis together and sets out our conclusions and recommendations in respect of the current health and composition of the District's main town centres and the need and opportunities for future growth.

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## 3. Policy Framework

- 3.1 This section sets out the current national, regional and local policy framework which provides the context for this study.

### National Policy

#### The National Planning Policy Framework (March 2012)

- 3.2 The National Planning Policy Framework (NPPF), published on 27 March 2012 sets out the Government's planning policies for England and replaces the suite of national Planning Policy Statements, Planning Policy Guidance and Circulars with a single document.
- 3.3 The NPPF continues to recognise that the planning system is plan-led and therefore Local Plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application. In line with the Government's aim to streamline the planning process, each Local Planning Authority (LPA) should produce a single Local Plan for its area with any additional documents to be used only where clearly justified.
- 3.4 The NPPF maintains the general thrust of previous policy set out in PPS4 – Planning for Sustainable Economic Growth (2009). It advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. In planning for town centres LPAs should:
- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
  - Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
  - Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary shopping frontages in designated centres and set policies that make clear which uses will be permitted in such locations;
  - Promote competitive town centres that provide customer choice and a diverse retail offer which reflect the individuality of town centres;

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- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
  - Allocate a range of suitable sites to meet the scale and type of economic development needed in town centres. Where town centre sites are not available, LPAs should adopt a sequential approach to allocate appropriate edge of centre sites;
  - Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
  - Recognise that residential development can play an important role in ensuring the vitality of centres; and
  - Where town centres are in decline, plan positively for their future to encourage economic activity.

3.5 LPAs should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. LPAs should use the evidence base to assess, inter alia;

- The needs for land or floorspace for economic development, taking account of both quantitative and qualitative requirements for all foreseeable types of economic activity over the plan period, including retail and commercial leisure development;
- The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs;
- The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
- The capacity of existing centres to accommodate new town centre development.

3.6 Consistent with transitional arrangements, the Local Plan will be examined by an independent inspector whose role it is to assess whether the plan is sound. In order to be found sound the Plan should be:

- **Positively prepared** i.e. based on a strategy which seeks to meet objectively assessed development and infrastructure requirements
- **Justified** i.e. the most appropriate strategy, when considered against the alternatives;

- **Effective** i.e. deliverable over its plan period and based on effective joint working; and
- **Consistent with national policy** i.e. enable the delivery of sustainable development

3.7 Overall, the NPPF adopts a positive approach, with a presumption in favour of sustainable development and support for economic growth. In terms of decision-making, applications for planning permission must be determined in accordance with the development plan unless material considerations indicate otherwise. The NPPF is a material consideration in planning decisions.

## Regional Policy

### The South East Plan (May 2009)

- 3.8 The Government has announced its intention to abolish Regional Spatial Strategies (RSS). Whilst the RSS remains part of the statutory development plan, the Government's intention to revoke RSSs is a material consideration in the determination of planning applications.
- 3.9 The South East Plan sets out the long term spatial planning framework for the region over the years 2006 – 2026. Policy TC1 outlines a Strategic Network of town centres for the region. None of the centres within West Oxfordshire District are allocated in the Strategic Network of town centres as either Primary or Secondary Regional Centres. However, retail growth is not restricted to the centres identified in the Strategic Network. Local authorities are encouraged to identify the network of towns, villages and local centres in their area and review their local needs to provide a strategy for their future development. The two closest Strategic Centres to the District are Oxford (which is also Centre for Significant Change) and Banbury, both Primary Regional Centres. Further commentary on these and other competing centres is set out in Section 5.
- 3.10 Within the sub-region of Central Oxfordshire, Oxford will be allowed to grow physically and economically to accommodate its own needs to contribute to the wider region over the plan period. Greater emphasis will be given to increasing social and economic self-containment within the centres of Bicester, Didcot, Wantage/Grove, and to a lesser extent Witney.

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## Local Policy

### West Oxfordshire Local Plan 2011

3.11 The West Oxfordshire Local Plan 2011 was adopted in June 2006. The vast majority of policies were 'saved' following Direction from the Secretary of State in accordance with the Planning and Compulsory Purchase Act (2004) in June 2009.

3.12 In accordance with the NPPF (Paragraph 215) the Council is able to give due weight to the saved policies according to their degree of consistency with the NPPF (i.e. the closer the policies in the plan to the policies in the NPPF, the greater the weight that may be given to them).

#### *Town Centres and Shopping*

3.13 The saved policies aim to protect and improve the town centres of West Oxfordshire in terms of their appearance and the range of services they offer. The retail hierarchy for West Oxfordshire is:

- Principal Town Centre – **Witney**;
- Primary Town Centres - **Carterton and Chipping Norton**;
- Secondary Town Centres - **Woodstock and Burford**; and
- Local and Village Centres.

3.14 Policy SH1 'New Retail Development' requires proposals for retail development, other than to meet purely local needs, to be located in accordance with the following town centre first sequence; within the town centres; then on the edge of town centres; and finally in out of centre locations that are or can be made readily accessible by a choice of means of transport.

3.15 Policy SH1 also states that proposals for retail and other town centre uses in locations other than town centres will only be permitted where:

- The need for the development has been established (note that it is no longer a national requirement to demonstrate the retail 'need' for a development proposal) ;
- The sequential approach has been followed and there are no suitable sequentially preferable sites available;

- The development would not harm either directly or cumulatively the vitality and viability of any nearby town centre or planned measures to improve it;
- The development proposed is appropriate in nature and scale to the location; and
- The proposal accords with other policies in the plan with regard to traffic impact, amenity and environment.

3.16 Policy SH3 relates to 'Changes of Use in Town Centres' and states that the following proposals will be permitted:

- The change of use of existing premises to Class A1 shops, except for proposals in Burford and Woodstock which would;
  - Result in the loss of a permanent dwelling; or
  - Fall outside the central policy areas defined for Burford and Woodstock
- The change of use of ground floor retail premises in the primary shopping frontages defined for Witney and Chipping Norton to other uses only where the proposed use would be of overall benefit to the shopping activities along the designated frontage.

3.17 Policy SH4 'Shopping Facilities for the Local Community' makes provisions to permit applications for small scale individual shops to meet the daily needs of the local community within towns and villages provided that:

- The site is easily accessible by bicycle and on foot;
- The proposal would not harm the vitality and viability of an existing town centre or an established village centre for shopping; and
- There is no detrimental impact on the amenity of occupiers of residential property.

3.18 Policy SH5 seeks to retain 'Local Shops and/or Post Offices' where viable. Policy SH7 'Farm Shops' permits farm shops in the open countryside provided there is a need to sell goods produced on the farm and it would not undermine the viability and vitality of shopping provision in existing villages. Policy SH8 'Garden Centres' supports provision of garden centres on land within or adjacent to medium or larger sized settlements.

#### *Tourism, Leisure and Community Facilities*

3.19 The Council seek to promote West Oxfordshire's intrinsic qualities, protect the local culture, heritage and environmental quality and encourage facilities which enhance the existing

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character of the District. Policy TLC1 'New Tourism, Leisure and Community Facilities' states that permission will be granted for visitor related proposals, community facilities to meet local needs, recreational and cultural use of land on a small scale and the provision of new recreational and cultural buildings that are essential to the existing use of the land.

- 3.20 It also states that applications for new leisure, tourist and community developments will not be granted if they would have an adverse impact on the character or environment of the countryside or on towns and villages within the District or would generate unacceptable levels of traffic on the local highway network. Whilst the Council generally encourage tourism and further recreation provision in the District, paragraph 8.9 recognises that the character of Woodstock and Burford need to be protected from the unfettered expansion of tourist orientated facilities.
- 3.21 Policy TLC12 'Protection of Existing Community Services and Facilities' seeks to protect existing services (e.g. public halls, local shops, pubs and post offices) and encourage new provision where appropriate. The loss of useful local services and facilities is resisted unless it can be demonstrated that the existing use is not viable, or that adequate and accessible alternative provision remains or will be provided.
- 3.22 In Witney, Policy WIT2 resists the further intensification of shopping and commercial uses at the High Street, Bridge Street and Staple Hall area which might lead to increased traffic congestion or highway safety risks. Policy WIT1 resists the expansion of commercial uses into the Church Green area.
- 3.23 Within Carterton town centre, Proposal 18 allocates the area covering the south west quadrant for comprehensive refurbishment and redevelopment. Within this area, additional retail development and ancillary town centre uses which are well integrated with existing facilities will be permitted.

### Draft West Oxfordshire Core Strategy (January 2011)

- 3.24 The draft West Oxfordshire Core Strategy (now referred to as the draft Local Plan) sets out the overall strategy for future growth in the District. A revised strategy was due to be published in May 2012, but due to unforeseen circumstances was delayed. Consultation on the strategy is now expected during November and December 2012 and adoption is anticipated to be early 2014.

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- 3.25 The draft Core Strategy seeks to focus new housing and employment development to be directed towards the three main service centres in the District; Witney, Carterton and Chipping Norton. Woodstock and Burford are both identified, along with many other areas, as 'rural service centres' and considered suitable for development of an appropriate scale and type that would help reinforce the existing service centre role (Policy CS2).
- 3.26 Policy CS18 supports town and village centres through a 'town centre first' approach, in line with national planning policy. The loss of A1 uses will be resisted along the defined primary shopping frontages and uses such as restaurants and cafes will be allowed where they would complement and enhance the shopping offer of the defined shopping frontage. The town centre hierarchy is as follows;
- Principal town centre – Witney;
  - Primary town centres – Carterton, Chipping Norton; and
  - Town centres with a significant tourist role – Burford and Woodstock.

### **West Oxfordshire Retail Needs Assessment (December 2007)**

- 3.27 In December 2007, Nathaniel Lichfield and Partners published the West Oxfordshire Retail Needs Assessment which was used to inform the preparation of the District's draft Core Strategy. The Study assessed the quantitative and qualitative need for additional retail floorspace over the plan period (2007-2026), analysed the shopping hierarchy and recommended a strategy for retail development in the District.
- 3.28 The study identified a District wide capacity for 14,161 sqm gross additional comparison goods floorspace and 1,958 sqm gross additional convenience goods floorspace up to 2026. These requirements were broken down for each of the main town centres, and the majority of the need arising for additional retail floorspace was identified after 2016.
- 3.29 Qualitatively, the Study identified that comparison retail sales floorspace within the District is trading healthily, with a limited number of multiple retailers and low vacancy levels. For convenience goods, the southern part of the District was found to have good access to a range of large foodstores, whilst a qualitative deficiency of foodstores was identified in the Chipping Norton area. The Study identified that if Chipping Norton increased its market

share, there would be potential scope to support the development of a small foodstore (c.1,000 sqm net) in this location.

- 3.30 No over-riding need to identify development sites for large scale retail warehouses in the District was identified in the Study, although NLP acknowledged that future retail warehouse applications will need to be assessed on their own merits.

## Relevant Government Research

### The Portas Review (December 2011)

- 3.31 In addition to the significant reduction in retail spending growth and the impact of the internet on future floorspace needs, the recession has had a significant negative impact on high streets. In May 2011, Mary Portas was appointed to lead an independent review into the future of the high street. The report, published in December 2011, suggests measures to tackle the further decline of the high street.
- 3.32 Amongst 28 separate recommendations in the report, there is a call to strengthen planning policy in favour of 'town centres first' following the publication of the draft NPPF. In summary the recommendations aim to:
- **Run town centres like businesses:** by strengthening the management of high streets through 'Town Teams', developing the BID model and encouraging new markets;
  - **Get the basics right:** by looking at how the business rate system could better support small businesses and independent retailers, encouraging affordable town centre car parking and looking at further opportunities to remove red tape on the high street;
  - **Level the playing field:** by ensuring a strong town centre first approach in planning, introduce Secretary of State 'exceptional sign off' and encouraging large retailers to show their support for high streets by mentoring local businesses;
  - **Define landlords' roles/responsibilities:** by looking at disincentives for landlords leaving properties vacant, and empowering local authorities where landlords are negligent and making proactive use of Compulsory Purchase Order powers; and
  - **Give communities greater say:** by including the high street in neighbourhood planning and encouraging innovative community uses of empty high street spaces.

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## Government Response to Portas Review (March 2012)

- 3.33 The Government published its formal response to the Portas Review in March 2012, which accepted virtually all of Portas' recommendations. It announced that they will run 24 'Portas Pilot' towns to set up Town Teams to create plans for the future of their high streets. We note that both Chipping Norton and Carterton submitted bids to become a Portas Town Team pilot, and although unsuccessful, both towns have secured funding to progress their proposals.
- 3.34 In addition the Government will provide investment to help Business Improvement Districts access loans for their set-up costs and funding for a Future High Street X-Fund to reward towns which are delivering innovative plans to bring their town centres back to life. In its response, the Government also supports a National Market Day in June and plans to double small business rate relief.
- 3.35 The Government supports community involvement in the redesigning of their high streets to reinvigorate areas of decline and to increase footfall and encourage people to live in their town centres.
- 3.36 The Government did not support the call to introduce Secretary of State 'exceptional sign off' for all new out-of-town developments and require all large new developments to have an 'affordable shops' quota. The Government stated that LPAs are best placed to understand local needs and 'exceptional sign off' is contrary to the Government's ethos of devolution. As such, the Government will continue to use the call-in power sparingly.

## Understanding High Street Performance (December 2011)

- 3.37 The Department for Business, Innovation and Skills (BIS) has also published a report which explores the many factors impacting on the economic and social performance of town centres and high streets. This study is intended to help inform government and local authority decision-making regarding town centres and high streets.
- 3.38 The study, based on a review of the available research and literature on high streets, identifies key issues that the public, private and third sectors need to take into consideration when taking action or investing in high streets. The study identifies a range of influencing factors which have stimulated and affected change on the high street:

- **Externalities** – despite planning policies to protect town centres, high levels of retail and landlord debt and public spending cuts have squeezed consumer spending.
- **Spatial and physical factors** – large format stores, accessible by car and where shopping is done under one roof, dominate the market to the detriment of traditional high streets.
- **Market Forces** – the growth in market share of out-of-centre shopping centres, major supermarkets and retail parks in comparison to town centres, demonstrates that consumers are voting with their feet.
- **Management** – high streets are difficult to manage and as a result are disadvantaged compared with supermarkets and shopping centres.

3.39 The study also highlights the response to high street change which have been implemented to date. These include; town centre masterplanning and public realm improvements; differentiation and emphasising a distinctive retail offer; policy prioritisation; and more developed place management (e.g. TCM and BIDs).

3.40 Moving forwards the study highlights that for high street performance (which is largely retail-based), the broad trends are downwards. Town centres will continue to be impacted by the growth in out-of-centre retail, supermarkets non-food sales and the internet. The high street of the future will need to differentiate itself from shopping centres, as a social space with a range of functions.

3.41 The report concludes that the traditional high street faces a number of challenges, not least from the tightening of retail spend and changing consumer behaviour but also from increasing competition posed by the Internet and out-of-centre developments. Whilst the future is uncertain, strategies which support the high street are considered ever more vital, and the latest BIS Retail Strategy (2012), outlines its continued support for the implementation of Portas' recommendations to support high streets.

## Summary

- The National Planning Policy Framework (NPPF) was adopted in March 2012 and replaces the suite of national Planning Policy Statements, including PPS4. The NPPF maintains the general thrust of PPS4 and advocates a 'town centres first' approach. It requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period.

- The South East Plan sets out the regional context within which LPAs must set their local planning policies. None of the centres within West Oxfordshire are allocated as Regional Centres in the South East Strategic Network of centres. The neighbouring centres of Oxford and Banbury are the closest competing centres in the region.
- Saved policies in the West Oxfordshire Local Plan 2011 (adopted 2006) set out the policies which guide development in the District. The Local Plan identifies the retail hierarchy for West Oxfordshire as Witney (Principle Town Centre), Chipping Norton and Carterton (Primary Town Centres) and Burford and Woodstock (Secondary Town Centres), and local and village centres. The Local Plan policies support the provision of retail, town centre and leisure uses in town centres to meet local needs, in accordance with the town centre first approach.
- Policies contained within the draft Core Strategy (January 2011), focus housing and economic development in Witney, Chipping Norton and Carterton as 'main service centres'. Burford and Woodstock are identified as 'rural service centres'. These five centres are included in the retail hierarchy. The draft policies support the 'town centre first' approach, and resist the loss of A1 uses within defined primary shopping frontages.
- The Council's retail policies have been underpinned by the 2007 Retail Needs Assessment, which is now out of date. Since the study was published, the recession has had a significant negative impact on high streets and this has led the Government to recognise that many high streets face a number of challenges, the Government now supports a number of measures aimed at tackling the further decline of town centres, based on recommendations from the Portas Review.

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## 4. National Retail Trends

- 4.1 To put our assessment of the quality of existing provision and the need for additional retail floorspace in West Oxfordshire into context, it is relevant to consider the wider economic and social trends likely to influence retailing in the study area. This section considers key trends and drivers for change in the retail industry, of particular relevance to West Oxfordshire. Our review draws on a range of published data sources including research by Verdict, Mintel and Experian.

### Economic Outlook

- 4.2 The latest advice published by Experian (Retail Planner 9, September 2011) presents a bleak picture for the economy as the recovery from the recession runs out of steam and new data released points to further weaknesses in the economy. It is anticipated that household spending will continue to be constrained by subdued disposable income growth and a weak labour market. Pressures on disposable incomes will limit the extent to which consumers are able to save and consumers will therefore be more considered in their spending decisions and researching to ensure they get best value. In many circumstances, the cost savings offered by the internet will be more readily seized.
- 4.3 Consumers will remain cautious with spending not only on discretionary items, but also on needs, cutting waste, which will impact on sale volumes of food. Big ticket and home-related purchases will remain low, particularly as uncertainty continues to keep house prices down. Once the housing market recovers (anticipated c.2013), the home furnishing and DIY sectors will benefit from pent up demand. However, sales for these goods from town centres will remain weak, as online and out of centre retailers continue to take a greater market share for sales of furniture, floorcoverings and electricals.

### The Internet and Multichannel Retailing

- 4.4 Consistent with wider economic trends, growth in e-Retail declined in 2009 as a result of the recession reducing overall consumer demand. Austerity cuts on the spending ability of the most prolific online shoppers (35-44 year olds), has also had an impact on demand

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during this period. Overall the pace of growth in online shopping is set to slow down significantly as the channel matures and competition increases<sup>1</sup>.

- 4.5 By 2015, online sales are estimated to account for 13.8% of all retail spending<sup>2</sup>. The growth in online sales will reduce the need for so many bricks and mortar stores, however, the growth in multi-channel retailing (for example click and collect services), will ensure that the need remains for physical stores. High streets will need to compete with the choice that online retailing provides. This will not only be driven by the price and range of products, but also by service and expertise. Online shopping has driven expectation of convenience and service upwards and customers now expect more from in-store ambience to tempt them to make a purchase<sup>3</sup>. Town centres and high streets will increasingly have to provide a shopping 'experience' that the internet is unable to match.
- 4.6 Trends indicate that the online and in-store shopping channels are becoming gradually more blurred as shoppers increasingly research purchases online or in stores before making purchases. According to Verdict, in 2010, 63% of shoppers researched goods online before purchasing in stores (an increase from 54% in 2007). At the same time, it is estimated that 29% of customers research purchases in store before buying online, representing a high increase from 13% in 2007<sup>4</sup>.
- 4.7 New technologies such as QR Codes (Quick Response Codes) have increased consumer and retailer interaction, enabling customers to scan QR barcodes on their mobile phones to gain direct access to the product website. Retail spending through smartphones (m-Commerce) is set to increase its strength by 2015<sup>5</sup>.
- 4.8 While the internet and new technologies pose challenges to the high street, retailers are constantly looking for ways to exploit trading opportunities available through offering a multichannel shopping experience. The advantages of physical stores, in terms of the overall shopping experience and immediacy of products, will see a network of key stores

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<sup>1</sup> Verdict Research, "Retail Futures H1 2011 – e-Retail", March 2011

<sup>2</sup> Verdict Research, "UK Retail Futures to 2015", February 2012

<sup>3</sup> Verdict Research, "How Britain Shopping: Overall 2011", March 2011

<sup>4</sup> Verdict Research, "UK e-Retail 2011", May 2011

<sup>5</sup> Verdict Research, "UK Remote Shopping 2012 – the Main Pillar of Multichannel Retailing", October 2011

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remain a fundamental component of retailer's strategies to provide an integrated multichannel retail proposition.

## Sales Efficiency

- 4.9 An efficiency growth rate represents the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (e.g. rent, rates and service charges), by increasing their average sales densities. The application of a turnover 'efficiency' growth rate is a standard approach used in retail planning studies and has been used in this study in accordance with good practice.
- 4.10 Following the recession, many retailers have struggled to increase or maintain sales density levels, and together with other financial problems, has led some retailers into closure. With the expectation of weaker expenditure growth, sales density growth is also expected to be lower than previous estimates. Based on continuing trends for more modern, higher density stores, Experian expect an efficiency growth rate of c.1.7% per annum for comparison goods over the next 16 years. This is around half the rate seen during the boom of the 1990s.
- 4.11 Scope for increased sales densities is much more limited for convenience goods. For convenience goods an efficiency growth rate of 0.4% per annum between 2012 and 2019, and 0.2% per annum post 2019 have been incorporated into our analysis.

## Space Requirements

- 4.12 During the recession some independent retailer's margins have become too tight to survive and some multiple retailers have either collapsed or have shrunk their store portfolios after entering administration. This has led to a decline in the amount of occupied retail space in town centre locations. These losses have not been offset by new developments as many town centre schemes have been put on hold or scaled downwards during the recession. With online presence allowing national coverage, it is expected that retailers will remain cautious about expansion.
- 4.13 Retailers are moving towards opening larger flagship stores in strategic locations which are supported by smaller satellite stores and transactional websites. The larger flagships will accommodate the fuller range while smaller stores will offer a more select range

supplemented by internet kiosks allowing access to the wider range. This model offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions.

## Out of Centre

- 4.14 As retailers opt to develop stores in the most strategic and cost effective locations, there has been a notable resurgence to out of centre destinations which offer benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out of town retailing is the only channel which has seen store numbers increase consistently since 2000. BIS report that the number of out of centre stores has increased by up to c.1,800 (25%) since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.
- 4.15 Many traditional town centre retailers have developed an out of town store format, including John Lewis, who operate six 'At Home' stores in out of centre locations, and other retailers such as Next, Primark and H&M.

## The Role of the Town Centre

- 4.16 The town centre has been the main shopping channel for the last 30 years. However, its role is set to change dramatically. Emerging trends suggest that it will be used more for leisure and social activities with more bars, restaurants, food outlets and community spaces opening in vacant units. Whilst vacancy levels do not pose a significant risk to the vibrancy and vitality of the West Oxfordshire centres, it will be important that these town centres protect their non-retail offer to provide an attractive shopping and leisure experience that is not provided online.
- 4.17 As retailers improve their multichannel offer, town centre stores will be used more to support e-retailing with click and collect points and safe drop boxes for customers to collect their online orders as well as satellite stores opening for customers to make online purchases. As demand for retail floorspace declines, it is anticipated that more secondary and tertiary space which suffers from lower levels of footfall, will increasingly be converted into residential uses.

4.18 In order to ensure that town centres have a viable function moving forwards, it will be important for Councils to drive footfall and improve dwell time to increase awareness of offers and impulse purchases. This can be achieved by getting a better understanding of the catchment area and what local people want, improving the mix of retail and non-retail outlets in the town to make them stay longer. This could be encouraged through the retention of the free car parking which currently exists in West Oxfordshire's town centres. Town centres will need to create their 'unique selling point' to differentiate them from the competition and encourage people to continue to visit. For smaller centres, it will become increasingly important to create a differentiated offer, tailored to the local catchment to encourage local residents to shop and socialise locally, as well as benefiting from tourist trade.

## Summary

- It is evident that the traditional high street faces a number of challenges, not least from the tightening of retail spending and changing consumer behaviour, but also from increasing competition posed by the internet and out of centre developments.
- In light of this, town centre strategies which support the high street are considered ever more vital. This may involve providing a high quality shopping 'experience', maximising the benefits of tourist trade, improving the mix of retail and non-retail outlets to increase length of stay and the retention of free car parking.

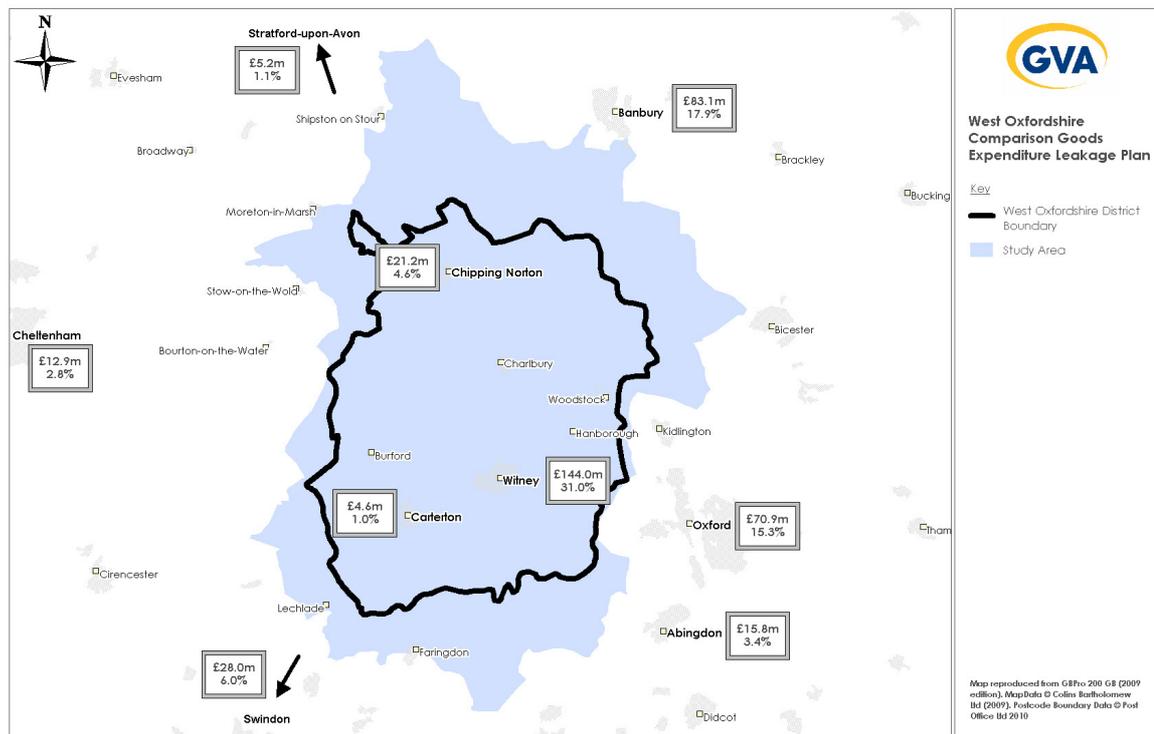
## 5. Competing Centres

- 5.1 This section examines the retail performance of Witney, Chipping Norton and Carterton in the context of the retail network across the wider sub-region and examines the influence of key competing strategic centres on the current and future role of the District's centres.
- 5.2 Our analysis draws extensively on the household telephone survey data, which underpins the entire retail study, and a number of other published data sources referenced where relevant. These identify the main retail offer and floorspace provision in each competing centre, and the extent to which this is likely to change and influence future shopping patterns in the region. Qualitative research was also undertaken to establish major pipeline development proposals in competing centres.
- 5.3 Results from the household telephone survey show that the main competing centres which have an influence over shopping patterns within the survey area are: Abingdon, Banbury, Cheltenham, Oxford, Stratford upon Avon and Swindon.

### Customer Views and Behaviour

- 5.4 Shopping patterns derived from the telephone survey allow us to calculate the amount of comparison goods expenditure that each centre draws from within the study area. This indicator reflects the strength of the retail offer as well as the centres' accessibility. The total comparison goods expenditure leaking to competing centres is set out in Table 5.1 (below) and Plan 5 (illustrated below).

### Comparison Goods Expenditure Leakage



West Oxfordshire Retail Study 2012

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### Market Share/Trade Patterns

Table 5.1: Study Area Comparison Goods Trade Draw: Key Competing Centres

Competing Centre	£	Market Share (%)
<b>Witney</b>	<b>£144m</b>	<b>31.00%</b>
Banbury	£83.1m	17.88%
Oxford	£70.9m	15.25%
Swindon	£28m	6.03%
<b>Chipping Norton</b>	<b>£21.2m</b>	<b>4.57%</b>
Abingdon	£15.8m	3.40%
Cheltenham	£12.9m	2.77%
Stratford upon Avon	£5.3m	1.13%
<b>Carterton</b>	<b>£4.6m</b>	<b>0.99%</b>

Source: GVA 2012

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- 5.5 Results from the survey show that Witney town centre retains approximately £144m of comparison goods expenditure (31%) from within the survey area, and is therefore the dominant centre within the study area. Outside of the District, Banbury town centre is the main competing centre to the West Oxfordshire centres, as it retains approximately £83.1m of comparison goods expenditure (c 18%). However this centre still achieves a lower market share than Witney.
- 5.6 Chipping Norton retains approximately £21.2m of comparison goods expenditure, this equates to a relatively low market share (c. 5%) across the whole survey area. Plan 6 illustrates that Banbury town centre draws approximately half of all comparison goods spend from Zone 2, whilst Chipping Norton (the main centre in this zone), draws 37% of comparison goods spend from Zone 2.
- 5.7 Carterton retains the lowest comparison goods expenditure of £4.6m which equates to circa 1% of the market share from the survey area. This is significantly lower than any other competing centre, reflecting the local role that this centre performs. Plan 6 illustrates that Carterton town centre draws only 4% of comparison goods expenditure within Zone 3 (Carterton zone), indicating that shoppers are more likely to travel to higher order centres for their non-food shopping needs. Approximately half of the residents from within Zone 3 shop in Witney town centre, whilst 20% shop in Swindon and 12% in Oxford.

### Shopping Patterns by Goods Type

- 5.8 The household telephone survey identifies where people do their shopping for different comparison goods. When shopping for clothing, footwear and other fashion goods, respondents to the survey are most likely to shop in Witney (37%), followed by Banbury (20%), Oxford (16%), Swindon (7%) and Cheltenham (4%). Witney draws a high proportion of spending on clothing and footwear from Zones 1, 3, 4, 5, 6, 9, 10 and 11. Banbury draws a significant proportion of spend from the northern zones (Zones 2, 7, 8, 9, and 11), whilst Oxford draws spend from the southern and eastern zones (Zones 4, 5, 6 and 7).
- 5.9 The results of the household survey indicate that when shopping for furniture, floor coverings and households textiles people are most likely to shop in Witney, Banbury or Abingdon (c. 19%, 12% and 11% retrospectively). The choice of centre is dependent on the respondent's proximity, retail offer and scale of each centre.

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- 5.10 Similar trends are apparent for respondents who shop for DIY and decorating goods. The most popular location to shop for these goods is Witney; however people appear to travel to their nearest large centre. For example, people living in Zones 1, 3, 5, 6 and 9 all shop in Witney. Plan 1 illustrates that these Zones surround Witney town centre.
- 5.11 When shopping for domestic appliances, people visit a broader range of centres, including; Witney, Botley Road Retail Park (Oxford), Chipping Norton, Banbury and Oxford.
- 5.12 It is evident that people are increasingly likely to visit a retail park to shop for TV, Hi-Fi, Radio, photographic and/or computer equipment. Both Botley Road Retail Park (Oxford) and Banbury Cross Retail Park are popular destinations for such purchases. Circa 17% of those surveyed visit Botley Road Retail Park and 11% visit Banbury Retail Park. However, the most popular in-centre destination to purchase these goods is Witney, which attracts 20% of those surveyed.
- 5.13 When people shop for personal/luxury goods, (such as books, jewellery, glass and cosmetics) they most frequently shop in Witney (c. 49% of all respondents). This centre attracts people from all zones apart from the Zone 8 (the furthest zone from Witney). Centres outside the district also draw a proportion of this spend; Banbury attracts 14% of those surveyed, and Oxford attracts 11%.

### Attitudinal Views

- 5.14 Results from the household telephone survey identify that people are most likely to shop for clothes, footwear or other fashion goods in the higher order centres of Witney, Banbury, Cheltenham, Oxford or Swindon. Chipping Norton and Carterton draw comparatively low market share for comparison goods.
- 5.15 In general, people shop at the larger, most popular centres (stated above) because they are convenient and/or because they have a good range of shops. Circa 38% of people that shop in Banbury state that they like it because it is convenient and 42% of people who shop in Cheltenham state they like it because the centre has a good range of shops.
- 5.16 When respondents were asked what they dislike about their shopping centre of choice, if anything, they mainly commented on parking and overcrowding. However, 55% of all respondents stated that there was nothing they disliked about their specified centre. People who shop in Oxford found overcrowding the most significant problem (c. 25%),

however people also raised their discontent about the price and access to parking facilities (each 11%). This indicates that problems relating to transport, access and parking are the most significant issues relating to Oxford, which provides the centres in West Oxfordshire with an opportunity to benefit from the existing free car parking facilities in the District's town centres.

- 5.17 People are most likely to travel as a driver to their centre of choice (59%). 11% of all respondents would travel by bus.

### **Profile of Competing Centres**

- 5.18 Summary tables which set out the key performance indicators, anchor store representations and retailer split for each centre are analysed in this section.
- 5.19 The rank of each centre, set out in Table 5.2, has been derived by Javelin (Venuescore, 2011). This is an up-to-date ranking of UK shopping venues across a number of key indicators – scale, market positioning, fashionability and age positioning of the retail offer. The score that is attached to each operator is weighted to reflect their overall impact on shopping patterns. For example, an anchor store such as John Lewis or Marks and Spencer receives a higher score than unit store retailers to reflect their major influence on shopping patterns. The aggregate score for each venue is called its Venuescore. The table below compares the 2011 and 2009 rank results.

**Table 5.2: Key Comparative Indicators**

Competing Centre	Retail Floorspace (sqm gross)	Rank (2011)	Rank (2009)	Retailer Requirement
Cheltenham	166,975	26	27	35
Oxford	104,655	44	33	70
Swindon	124,351	64	50	12
Banbury	100,883	118	124	7
Stratford upon Avon	89,038	172	132	24
<b>Witney</b>	<b>53,001</b>	<b>231</b>	<b>320</b>	<b>10</b>
Abingdon	31,206	-	-	3
<b>Chipping Norton</b>	<b>17,141</b>	-	-	<b>2</b>
<b>Carterton</b>	<b>10,637</b>	-	-	<b>0</b>

Source: GVA 2012; Experian Goad Category Reports; Venuescore/Javelin; and Focus, July 2011.

- 5.20 The table above outlines that Cheltenham, Swindon, Oxford and Banbury have the largest retail floorspaces (>100,000 sqm), whereas Carterton and Chipping Norton have significantly less retail floorspace in their centres (<20,000 sqm). The retail floorspace in Witney is approximately a third of the size of the largest competing centre (Cheltenham).
- 5.21 The centre with the highest Javelin rank in 2011 is Cheltenham (26); this reflects the size of the retail floorspace capacity in the centre. Oxford and Swindon also have high ranks (44 and 64 retrospectively), however these have fallen since 2009. Although Stratford upon Avon has a relatively large retail floorspace, its rank is the second lowest out of the competing centres studied (172). Banbury and Cheltenham have managed to increase their rank since 2009 which suggests that either their retail offer has been strengthened, or the other centre's performances have fallen relative to these centres.
- 5.22 Oxford city centre has the highest number of retailer requirements (retailers which have expressed an interest in acquiring a unit in a town) at present (70 requirements). Cheltenham, the largest competing centre with regards to retail floorspace, has 35 retailer requirements. Carterton, Chipping Norton and Abingdon all have very few retailer requirements (≤ 3 retailer requirements).

**Table 5.3: Anchor Store Representation**

Competing Centre	Department Store(s)
Abingdon	N/A
Banbury	Debenhams, Marks and Spencer, BHS
<b>Carterton</b>	N/A
Cheltenham	Debenhams, Cavendish House ,Marks and Spencer
<b>Chipping Norton</b>	West Gate Department Store (now Beales)
Oxford	Marks and Spencer, Debenhams, BHS
Stratford upon Avon	Marks and Spencer, Debenhams
Swindon	House of Fraser, BHS, Marks and Spencer
<b>Witney</b>	Marks and Spencer, Debenhams

Source: Experian Goad Category Reports; and EGI

- 5.23 Table 5.3 illustrates that Abingdon and Carterton do not have any anchor or department stores. The largest competing centres have the most anchor stores, such as Cheltenham (Debenhams, Cavendish House and Marks and Spencer), Swindon (House of Fraser, BHS and Marks and Spencer) and Oxford (Marks and Spencer, Debenhams and BHS).
- 5.24 The representation of independent retailers is crucial to the role and function of a centre. Drawing from Experian Goad, information has been gathered to analyse the split between multiple and independent retailers in each competing centre.

**Table 5.4: Independent/Multiple Retailer Split by Centre**

Competing Centre	Multiple Retailer (%)	Independent Retailer (%)	Vacant (%)	Total (%)
Chipping Norton	26	68	6	100
Carterton	34	63	3	100
Witney	38	56	6	100
Stratford upon Avon	33	56	11	100
Abingdon	34	54	12	100

Cheltenham	38	47	15	100
Banbury	39	46	15	100
Swindon	38	44	18	100
Oxford	53	40	7	100

Source: Experian Good Category Reports

- 5.25 Table 5.4 shows that the centres within the District have high percentages of independent retailers. This is also apparent in the competing centres; Abingdon, Banbury, Cheltenham and Stratford upon Avon. This indicates strength in visitor attraction in respect of the niche retailing offer provided by high end independent retailers. On the other hand, Oxford has 53% multiple retailer occupancy, which is the highest percentage in comparison to the other competing centres, and demonstrates the centre provides the strongest high street multiple retail offer within the survey area and surrounds.
- 5.26 Centres within West Oxfordshire have particularly low levels of vacant units. Centres outside the District including Swindon, Cheltenham and Banbury have the highest percentage of vacant units (18%, 15% and 15% retrospectively).

## New and Proposed Retail / Town Centre Developments

- 5.27 The information above reviews the current position of the competing centres in and around West Oxfordshire District. This section considers the new and proposed retail and town centre developments in these centres to assess the likely increased draw capacity of the various centres that may compound trade leakage and impact on retail performance.

### *Banbury - Banbury Gateway Development*

- 5.28 Cherwell District Council granted consent in March 2012 for the development of an out of centre retail park on the former Pro-Drive site, adjacent to the M40. The development will provide c.26,500 sqm GIA of Class A1 and Class A3 floorspace. Confirmed pre-lets include Marks and Spencer and Next.

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### *Bicester Village – Extension*

- 5.29 A planning application for a multimillion pound extension to Bicester Village and relocation of Tesco has recently been submitted. Proposals including the provision of c.30 new units at Bicester Village, whilst Tesco will relocate to an adjacent site linked to Bicester Business Park.

### *Bicester Town Centre – Sainsbury’s*

- 5.30 A mixed use development project is being undertaken by Sainsbury’s, Stockdale Land and Cherwell District council. The development is set to include a Sainsbury’s supermarket, a cinema, new retail and restaurant units, a new bus interchange, improved car parking facilities and make provision for a new landmark civic building in the town centre. The site comprises 10,126 sqm additional retail floorspace. This development is currently under construction and completion is expected summer 2013.

### *Oxford – Westgate Centre*

- 5.31 Full planning permission was granted in February 2012 for the redevelopment and extension of the Westgate Centre. A 21,368 sqm John Lewis store is set to anchor the development. The shopping centre itself is due to be extended to 69,677 sqm floorspace, and include some residential elements. Work is scheduled to commence in 2014.

### *Stratford upon Avon – Town Square*

- 5.32 London and Regional Properties have submitted an application for the redevelopment /reconfiguration of the Town Square shopping centre to include shop and restaurant units and multiplex. It must be noted that this will result in a reduced retail floorspace (-3,252 sqm). However, the increase in leisure facilities has potential to increase the attraction to the centre. Therefore, this development should enhance the overall offer of the centre.

### *Stratford upon Avon – Waitrose*

- 5.33 In July 2012 a Waitrose supermarket opened at the Rose Bird Centre, Shipston Road in Stratford upon Avon. The foodstore is for c.2,000 sqm sales floorspace and is likely to affect food shopping patterns in the north of the study area.

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### *Swindon - Union Square*

- 5.34 Outline planning consent was granted in November 2011 for an office led mixed use development at the former Exchange site. Within the scheme, 13,936 sqm has been allocated to ancillary retail floorspace, along with a hotel, 400 residential units and 60,387 sqm office space.

### *Swindon – Regent Circus*

- 5.35 The 12,618 sqm mixed use development at Regent Circus comprises of Morrison's foodstore (6,613 sqm), multi-screen cinema, cafes/bars/restaurants and offices. Demolition on site is underway, and completion is expected spring 2014. The tenant line up so far is; Cineworld, Prezzo, Nandos and ASK.

## Summary

- In terms of the sub-regional context, the household telephone survey has identified Banbury, Oxford and Swindon as the main competing centres outside West Oxfordshire District, and to a lesser degree Abingdon, Cheltenham and Stratford-upon-Avon. Oxford is the main competing centre to Witney within Zone 1, whilst Banbury is the main competing centre to Chipping Norton in Zone 2 and Swindon is the main competing centre outside the survey area to Carterton in Zone 3.
- It is evident that Witney is the dominant centre in the survey area, and although significantly smaller than the competing centres of Banbury, Oxford, Cheltenham and Swindon, is performing well in terms of the scale and quality of its retail offer, drawing nearly a third of comparison goods trade draw from within the survey area.
- Witney is performing exceptionally well for a centre of its size and role in the retail hierarchy. Witney's strongest competitor is Banbury, as the survey results indicate that it captures the next highest market share from the study area (18%), closely followed by Oxford (15% market share). Banbury's strong performance is understandable given the close proximity of the centre to the northern part of the District. The consent for the Banbury Gateway development is likely to increase Banbury's overall retail offer and competitiveness against Witney and Chipping Norton over the Local Plan period.
- Within Oxford town centre, planning consent has been granted for the redevelopment and extension of the Westgate Centre, and with work expecting to commence in 2014,

this scheme is likely to increase Oxford's retail attraction and increase competitiveness, particularly to Witney town centre. The survey however indicated significant transport, access and parking issues relating to Oxford, which provides the centres in West Oxfordshire with an opportunity to benefit from the existing free car parking facilities in the District's town centres.

- Overall, it will be appropriate for Witney to strengthen its leading retail role within West Oxfordshire to maintain its dominance within the district and to remain competitive with larger competing centres in the sub-region.
- Chipping Norton and Carterton face strong competition from Witney and higher order centres outside the District and there is a risk that if these centres are unable to increase their attractiveness and retail offer, these centre's catchments and market share may be further eroded. It will also be necessary for these centres to continue to promote new retail investment and town centre development alongside improving accessibility and the shopping 'experience' on offer.

## 6. Witney Town Centre Audit

- 6.1 Witney town centre is identified as a principal town centre in the West Oxfordshire Local Plan (2006) and provides a wide range of retail and service uses. Situated in the south east of the District, Witney is approximately a 15 minute drive from Carterton and Burford in the west and Woodstock in the east. The A40 which runs to the south of the town also provides links to the wider road network and larger centres outside the District, including Oxford in the east (20 minutes drive), Bicester in the north east (30 minutes drive), and Swindon, Cirencester and Cheltenham to the south and west (45 minutes drive).
- 6.2 The Local Plan (2006) Proposals Map identifies that the Primary Shopping Frontage in Witney comprises Wesley Walk, both sides of the High Street (south), the Woolgate shopping centre and the eastern side of the Market Square.

### Diversity of Uses

- 6.3 The Experian Goad category report for Witney town centre (March 2011) identifies a total of approximately 53,001 sqm of ground floor floorspace for retail trade and service units (retail, leisure and financial and business services), comprising 295 units. The floorspace figures derived from Experian Goad only use the footprints of the units and therefore only provide an indicative floorspace figure. Table 6.1 sets out the composition of the number of units in Witney.

**Table 6.1: Witney Town Centre Composition of Units**

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	14	4.75	8.02	-3.27
Comparison	140	47.46	33.55	13.91
Service	123	41.69	46.28	-4.58
Vacant	18	6.1	12.16	-6.06
<b>TOTAL</b>	<b>295</b>	<b>100</b>	<b>100</b>	<b>-</b>

Source: Number of units taken from West Oxfordshire District Council Audit (July 2012)

Note: UK Average relates to Experian Goad Category Report (June 2012)

- 6.4 The main convenience goods offer in Witney town centre comprises Waitrose and Co-op supermarkets and the Marks and Spencer foodhall. The Waitrose is located adjacent to

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the Woolgate centre and has a net sales area of c.1,980 sqm, whilst the Co-op on the High Street is slightly smaller at c.1,200 sqm net. The Marks and Spencer store at Marriotts Walk provides c.650 sqm net of the sale of food. The convenience goods offer is supplemented by a variety of local retailers including delicatessens, butchers, newsagents, health food stores and specialist stores selling Polish and Oriental produce. The proportion of convenience goods units is below the national average, however it is important to note that a large out of centre Sainsbury's supermarket is located at Witan Way, just to the south of the town centre (c.4,980 sqm net).

- 6.5 The proportion of comparison goods units in Witney is above the national average, and the centre benefits from a broad retail offer including a range of independents and multiple retailers. There is a particularly high proportion of ladies and mens fashion retailers, art dealers, bookshops and department/variety stores in Witney.
- 6.6 The proportion of service units in Witney is below the national average. Although there is an above average proportion of financial and businesses services (including property services and banks), and an average proportion of retail services (for example travel agents and health and beauty shops), there is a below average proportion of leisure services. While Witney benefits from an above average proportion of restaurants, pubs and bars, the centre has a below average proportion of fast food takeaways and betting offices, however, concentrations of such uses can be considered to be less desirable in town centres and therefore this raises little concern.

## Retailer Representation

- 6.7 The Experian Goad category report (March 2011) identified that there were 92 multiple retailers in Witney (38% of retail units). These stores are relatively dispersed throughout the centre, although many are clustered in the two shopping centres: Marriotts Walk and Woolgate shopping centre.
- 6.8 Marriotts Walk opened in October 2009 and is a modern style retail and leisure development providing large modern shop units, restaurants and a Cineworld cinema as part of a western extension to the town centre. The provision of these large format stores at Marriotts Walk complements the smaller traditional shop units located on the High Street and Market Square, and enables a range of shop formats to be provided in the town

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centre to suit a variety of retailer requirements. Key multiple retailers at Marriotts Walk include Marks and Spencer, Debenhams, New Look and Monsoon, amongst others.

- 6.9 The Woolgate shopping centre opened in 1987, and is an attractive shopping centre, built in traditional Cotswold stone. Accessed from Market Square, the shopping centre leads through to the Waitrose supermarket and surface car park. Key multiple retailers include WH Smiths, Superdrug, Curry's, Cargo, Costa and Holland and Barrett. The Woolgate shopping centre was extended in 2010 by c.1,600 sqm net, and occupied by H&M and Next.
- 6.10 There are also a number of multiple retailers on the High Street and Market Square including Boots, Argos, Co-op, Burton, Barclays, and Clarks.
- 6.11 Independent retailers are also well represented in the town centre and provide a range of shops and services. Independent retailers are primarily located on the High Street, Corn Street and Market Square and generally occupy smaller, traditional shop units. Street markets take place in Witney on Thursdays and Saturdays, and a monthly farmers market is held at Marriotts Walk. These markets add to the vibrancy of the retail offer and act as a key attractor to the town.

## Vacancies

- 6.12 The proportion of vacant units in the town centre is approximately half of the national average and indicates that Witney is continuing to perform strongly, despite the economic downturn. The below average proportion of vacant units demonstrates the attractiveness of Witney as a location for shoppers and for retailers.
- 6.13 There are no specific problem areas or clusters of vacant units in Witney, with a couple of vacant units on the more traditional shopping streets including the High Street and Corn Street, as well as some vacancies at Marriotts Walk. The vacancies at Marriotts Walk may indicate that these Prime Zone A rents are higher than elsewhere in the town and therefore unaffordable for smaller, independent retailers.
- 6.14 Very low vacancy levels in a centre may be symptomatic of under provision of space, however taking into consideration the recent development and provision of new retail floorspace at Marriotts Walk, this is unlikely to be a significant concern in Witney.

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## Environmental Quality

- 6.15 Witney is a traditional market town, and historic shops built from Cotswold stone extend along the linear High Street and Market Square to provide an attractive shopping environment. The shopping pitch widens at the tree lined Market Square, and the wide pavements enable pedestrian movement while benches also encourage shoppers to spend time in this location.
- 6.16 The whole of Witney town centre falls within the Witney Conservation Area and many statutorily Listed Buildings containing shops and services are located on High Street, Market Square and Corn Street. It is evident that the historic market town character has been protected and enhanced through planning controls and many multiple retailers have used bespoke signage sympathetic to the historic context.
- 6.17 The Woolgate shopping centre reflects the traditional character of the area through the use of traditional building materials and serves to anchor the southern part of the town. Marriotts Walk provides a complementary modern shopping development with a variety of unit sizes anchoring the north of the town. Whilst Marriotts Walk has been developed on the edge of the Primary Shopping Frontage (as defined on the adopted Local Plan Proposals Map), the site is only a short walk from the High Street and forms an extension to the town centre. The draft Core Strategy (2011) proposals map showed the Primary Shopping Frontage being extended to include Marriotts Walk and this has been taken forward into the draft Local Plan (2012). Both shopping centres and the High Street provide an attractive shopping environment.
- 6.18 Traffic issues currently detract from the quality of Corn Street. We note that a project is underway to refurbish the Market Square which will include new paving, electricity hook ups for market traders and new street furniture.

## Accessibility

- 6.19 There are good pedestrian and cycle links to the town centre from residential areas and high frequency bus services run through the town centre connecting Witney to Oxford and Carterton. Other bus services also connect to Woodstock, Burford, Bampton, Eynsham and Chipping Norton. There is no train station in Witney; the nearest station is at Long Hanborough. Witney benefits from free car parking on street and provided in the

surface car park behind the High Street and Woolgate Shopping Centre and also at the multi-storey car park at Marriotts Walk. Surface car parking also exists adjacent to Marriotts Walk and was provided on a temporary basis whilst the scheme was built but remains. There are time management controls and enforcement to ensure there are adequate levels of short stay spaces for shoppers and visitors as well as some longer stay parking.

- 6.20 The provision of free parking encourages shoppers to visit and spend time in the town centre for shopping and leisure purposes. Free car parking is a significant attraction for the centre but it is noted that car parking is nearing capacity and traffic congestion are issues at peak times. Local retailers engaged in the Town Centre forum have also indicated the need improve visitor facilities including drop off and waiting areas.
- 6.21 West Oxfordshire District Council undertook an in-centre survey in September 2012 to understand travel and car parking issues in Witney town centre. The results indicate that the majority of visitors travel to Witney by car (71%), this is because of convenience. The majority of these drivers parked at the Woolgate Centre car park (c. 52%).

## Out of Centre Retail Provision

- 6.22 There are several out of centre foodstores in Witney. The largest is the Sainsbury's supermarket to the south of the centre on Witan Way (c. 4,980 sqm net). The store includes a deli, bakery, café, hot food counter, pharmacy, fish monger, butcher, photo processing, dry cleaners, clothing, homeware ranges and a 'click & collect' service. A Lidl has been developed at Ducklington Lane which provides 800 sqm net convenience sales and opened in 2009. There are various small supermarkets within the residential areas.

## Shopping Patterns

- 6.23 The telephone survey undertaken in July 2012 identified local shopping patterns in Zone 1 (which includes Witney). Analysis of these shopping patterns provides an overview of the current role and function of Witney as a shopping destination.

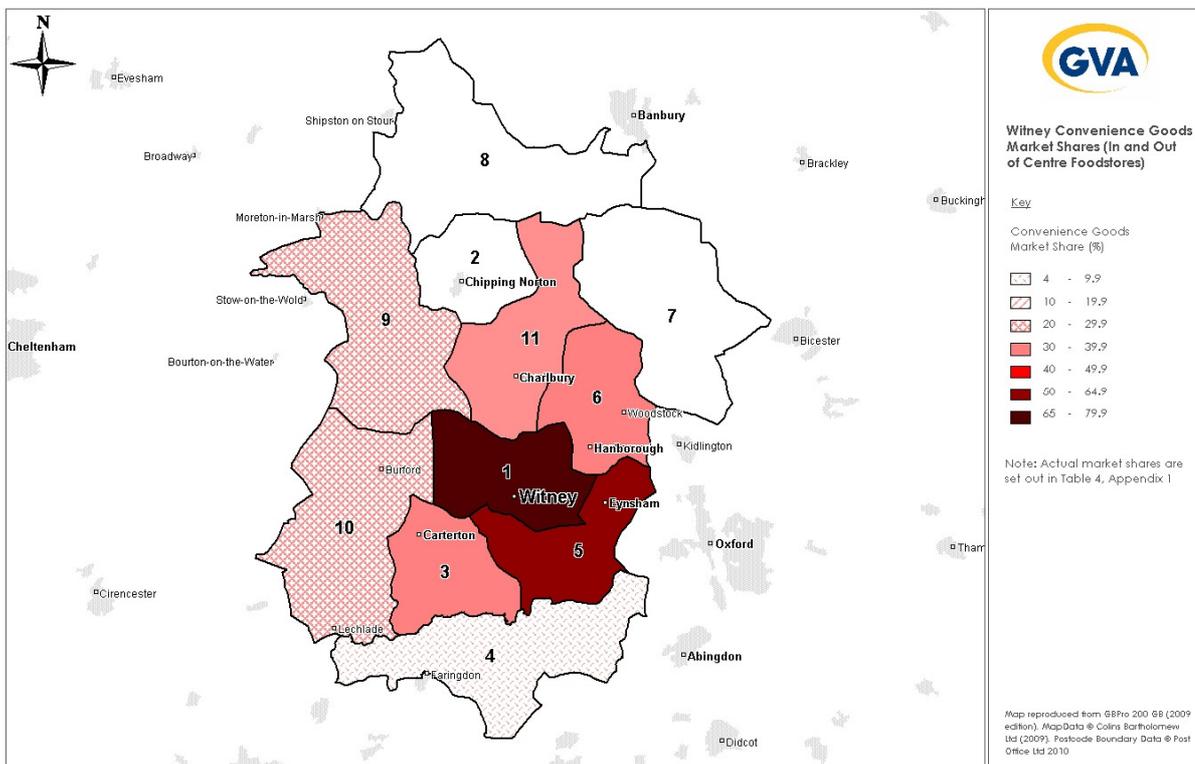
## Convenience Goods

- 6.24 The foodstores most visited in Witney town centre are Waitrose, Marks and Spencers, Co-op and 'other' (local convenience stores). The most popular out of centre shopping destinations cited by respondents to the survey are Sainsbury's, Witan Way and Lidl,

Ducklington Lane. This is a reasonably strong convenience goods offer, and these stores all perform a 'main' and 'top-up' (meeting day to day shopping needs, e.g. buying bread and milk) food shopping role.

6.25 Within Zone 1, the in centre and out of centre foodstores in Witney combined retain a 74.4% market share. Note that this figure is a weighted market share comprising 70% main food spend and 30% top up food spend (Appendix 1, Table 4). The market share includes the main responses for food shopping in Witney (and excludes smaller stores which only achieved a very low market share). The out of centre Sainsbury's draws the majority Witney's market share in Zone 1 (43.5%), while Waitrose draws 17.1% and Lidl draws 8.4%. This is a strong level of trade retention in this Zone.

**Witney Convenience Goods Market Share Plan**

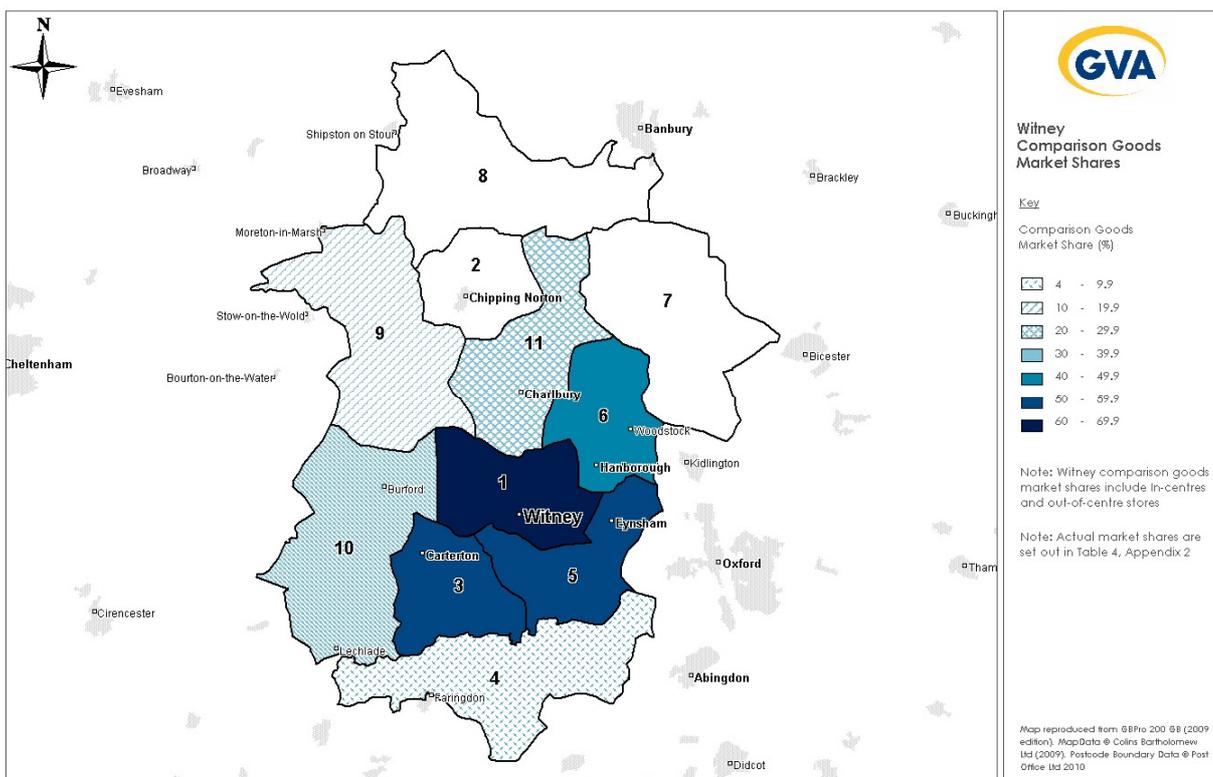


6.26 The plan above (Plan 4 in Plans and Appendices) illustrates that Witney has a wide catchment area for food shopping, with the town centre and out of centre foodstores drawing a particularly high proportion of trade from Zones 3, 5, 6 and 11, and also extending to Zones 4, 9 and 10.

## Comparison Goods

6.27 Witney also performs an important and strong comparison goods shopping role in the District. Within Zone 1, Witney town centre draws a market share of 63.4%. The Plan below (Plan 6 in Plans and Appendices) illustrates that Witney also draws a high proportion of trade from Zones 3 and 5, as well as a reasonable proportion of trade from Zones 6, 9, 10 and 11.

### Witney Comparison Goods Market Share Plan



6.28 Respondents within Zone 1 also chose to undertake their main non-food shopping in Oxford city centre and retail parks (16.6%), whilst a smaller proportion chose to shop in Abingdon town centre and retail parks (2.6%) or Swindon town centre and retail parks (2.4%).

6.29 The results of the household telephone survey indicate that across the survey area, Witney was identified as the place that the majority of people (37%) normally go to undertake their clothing, footwear and fashion shopping. Witney also attracts the highest proportion of shopping trips for personal and luxury goods (49%), shopping trips for domestic appliances (25% of all trips) and for electricals such as TVs and computers (20% of trips).

For DIY and decorating goods, the B&Q in Duckington, Witney draw the highest proportion of trade from across the survey area (37%).

## Customer Views and Behaviour

6.30 The household telephone survey included various attitudinal questions about the frequency of visits to Witney town centre, the reasons for choosing to visit and likes and dislikes about the town centre. The key findings from the telephone survey are summarised below:

- 71% of respondents stated that they shop in Witney town centre for food and/or non-food shopping. Results indicate that within the survey area, 29% of respondents visit Witney once a week, and 25% visit between 2 and 3 times a week.
- The majority of those who visit Witney do so to 'browse' (61%). 16% stated they specifically go to shop in Waitrose, 12% go to visit Sainsbury's and 9% go to visit Marks and Spencer. People also visit the town to access other services including banks (7%) and health services (4%).
- Witney attracts a high proportion of respondents from within Zone 1 for leisure uses. Approximately 48% of respondents visit the town for daytime eating and drinking, 47% visit for a leisure trip (e.g. to the cinema) and 41% visit for evening eating and drinking.
- Witney also attracts a significant proportion of visitors from the wider survey area for leisure uses. 36% of respondents from the whole study area visit for daytime eating and drinking, 32% visit for evening eating and drinking, 10% visit for a day out and 43% visit for a specific leisure use, such as the cinema.

6.31 Taking the survey area as a whole, the majority of respondents liked Witney because it is close to home (27%), has a good range of chain / well known stores (26%), it has free car parking (22%), a good range of independent stores (21%), and it has an attractive environment (21%).

6.32 Notably, a high proportion of respondents (64%) said there was nothing or very little they disliked about Witney, with the main concerns relating to traffic congestion (9%), and it being difficult to park (4%). When asked what would make you shop in or visit Witney town centre more often, the top results from the whole survey area were: nothing (59%), more independent shops (5%), a department store (5%), more chain / well known stores (5%),

and easier / more car parking (4%). These results reflect the high satisfaction levels that residents within the survey area have with Witney town centre.

- 6.33 Respondents to the in-centre survey undertaken by West Oxfordshire District Council (Car Parking Team) in September 2012 identified that Witney has 'very good' to 'excellent' shopping facilities (c. 50% respondent's state the facilities are 'very good' and 21% state the facilities are excellent). Generally, people visit the town centre a several times a week (c. 35%). The majority of people visiting Witney do so to purchase food, clothing and goods for the home (c. 76%, 24% and 24% respectively). However, it is apparent that people make linked trips by also making use of leisure facilities. For example, c. 65% of visitors purchase refreshments and c. 39% to eat a meal.
- 6.34 The survey showed that the visitors to Witney are most likely to visit Boots (39%), Waitrose, Co-op and 99p Store (33%) In contrast, only 8% shop at the market. When asked which stores visitors to Witney would like to see in the town, responses includes large department stores (such as John Lewis and BHS), food retailers (including Iceland and Asda), comparison goods retailers (including Primark, The Body Shop, Laura Ashley and Matalan), chain restaurants (such as KFC and Pizza Hut), as well as more independent retail units.
- 6.35 The majority of visitors parked at the Woolgate Centre car park (52%), followed by the car parks at Marriotts Walk (19%) and Woodford Way (10%). 19% of respondents who drove to Witney parked on street.
- 6.36 The survey also shows that the majority of people make use of Witney town centre because of its good selection of high street and independent retailers (70%). A high proportion of respondents also specifically use Witney town centre because of the free car parking (60% of respondents). In addition, 25% of respondents visit Witney because of the clean environment and 23% like the attractive environment and open spaces.

## Proposals and Commitments

- 6.37 There is an extant (i.e. unimplemented) planning permission for the development of an out of centre 3,175 sqm net sales DIY store at Station Lane (application ref. 11/0140/P/OP). A further permission has subsequently been granted on this site for the development of a 1,672 sqm discount retail warehouse unit (application ref. 12/0782/P/FP). This application allows for the relocation of Poundstretcher from their current store at Buttercross to this location (resulting in a net uplift of retail floorspace of 819 sqm). We understand from

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discussions with the Council that they anticipate that the Poundstretcher scheme is most likely to come forward instead of the DIY scheme. As such we include the Poundstretcher commitment in our comparison goods capacity modelling later.

- 6.38 There is also consent at Electricity Showrooms on Welch Way for an extension comprising 450 sqm (GEA) (338 sqm net sales). We understand this development is currently under construction (application ref. 11/0470/P/FPEXT).
- 6.39 A further consent for further retail floorspace at the High Street has been completed while this study has been undertaken. The proposals involved the conversion of the former car sales showroom to Majestic Wine and will provide an additional 430 sqm net sales floorspace (application ref. 06/0804/P/FP). This has been factored in to our assessment as a convenience goods commitment.

## Summary

- Witney is an attractive and historic town, which benefits from a high quality public realm and a strong representation of small independent retailers which trade alongside a good range of high street multiple retailers. Witney has a particularly strong comparison goods offer, benefiting from the recently extended Woolgate shopping centre and the new Marriotts Walk shopping centre which provides a range of modern format shop units as part of an extension to the town centre.
- Witney town centre performs an important comparison shopping role for the District, drawing high market shares from an extensive number of zones, which equates to 63.4% of comparison goods spend from Zone 1.
- For convenience goods, in and out of centre foodstores in Witney draw a strong level of trade from Zone 1 and a reasonable market share from across the study area, providing competition to foodstores outside the district (such as at Abingdon and Kidlington).
- Residents and visitors to the town centre have a very high satisfaction level with Witney town centre, particularly in relation to the range of shops and the quality of the urban environment. However, there is a general need to continue to maintain and improve the environmental quality of the centre.
- Respondents to the household telephone survey highlight that the free parking provision in the town centre is popular and is a key attractor to the town over other

centres which do not provide this service (e.g. Oxford). Car parking capacity is however an issue at peak times.

- There are a number of pubs and restaurants in the town, and the development of the Cineworld cinema at Marriotts Walk has added to the overall offer of the town centre.
- Overall Witney appears to be a vital and viable town centre, which has a very low vacancy rate. It will be crucial over the Local Plan period to encourage investment in the town centre to sustain and enhance the retail and leisure offer and address car park capacity issues to ensure that the centre continues to perform strongly within the District and to compete effectively with centres outside of the study area. There should be no room for complacency in the context of increased competition from competing centres, out of centre retailing and internet sales.

## 7. Chipping Norton Town Centre Audit

- 7.1 Chipping Norton is located in the north of the District and is identified in the West Oxfordshire Local Plan (2006) as a 'Primary Town Centre'. The town is located within the Cotswolds Area of Outstanding Natural Beauty (AONB) and within an extensive Conservation Area. The Proposals Map identifies a Primary Shopping Frontage comprising the eastern side of the High Street and part of the western side of the High Street.
- 7.2 Chipping Norton is approximately a 30 minute drive north of Witney and Carterton. Banbury and Bicester are also a 30 minute drive from Chipping Norton to the north east and east respectively. The A44 runs directly through Chipping Norton town centre along the High Street and New Street, providing connections to Oxford city centre in the south east and Worcester in the north west.

### Diversity of Uses and Retailer Representation

- 7.3 The Experian Goad category report for Chipping Norton town centre (August 2011) identifies a total of 17,141 sqm of ground floor floorspace for retail trade and service units (retail, leisure and financial and business services), comprising 101 units. This is only an indicative floorspace figure. Table 7.1 sets out the composition of the number of units in Chipping Norton.

**Table 7.1: Chipping Norton Town Centre Composition of Units**

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	9	8.91	8.02	0.90
Comparison	38	37.62	33.55	4.08
Service	47	46.53	46.28	0.26
Vacant	7	6.93	12.16	-5.33
<b>TOTAL</b>	<b>101</b>	<b>100</b>	<b>100</b>	<b>-</b>

Source: Number of units taken from West Oxfordshire District Council Audit (July 2012)

Note: UK Average relates to Experian Goad Category Report (June 2012)

- 7.4 The proportion of convenience shop units is slightly above the national average. The main convenience offer in Chipping Norton comprises a Sainsbury's and a Co-op supermarket.

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The Sainsbury's supermarket is located on the west of the High Street at the junction of New Street and Market Place and comprises 638 sqm net floorspace. The store provides an in-house bakery and a click and collect service. The Co-op supermarket is located behind the Beales department store between the High Street and Albion Street. The store is larger than Sainsbury's and comprises 766 sqm net sales floorspace. The food offer in the town is also supplemented by local independent retailers including two butchers, two newsagents, a bakery and a deli.

- 7.5 Chipping Norton has an above average proportion of comparison goods retail units, and provides a good range of non-food shops for a centre of this size. Shops include clothing, antiques, furniture, florists, jewellers, book shops, hardware stores and charity shops. There are a mix of multiple retailers and independent retailers in Chipping Norton, and the independent retailers perform an important function, providing a significant proportion of shops which provide a high quality, speciality retail offer.
- 7.6 The August 2011 Experian Good Category Report identified 28 multiple retailers in Chipping Norton, approximately a quarter of all retail units. This is a relatively strong proportion of multiple retailers and includes operators such as WHSmith, Natwest, Boots, Burton, Dorothy Perkins, Scrivens and HSBC, which cater to more mid-market shopping needs.
- 7.7 The town centre audit identified a strong proportion of financial and business services, including 6 estate agents and 4 banks. However, the town does have a slightly below average proportion of retail service units in comparison to the national average. Analysing the composition of service units further, it is evident that there is a lower number of health and beauty shops and bars than national averages.
- 7.8 Street markets are held at Chipping Norton on Wednesdays, and a monthly farmers market is also held in the town. These markets add to the vibrancy and overall retail offer of the centre.

## Vacancies

- 7.9 The proportion of vacant retail units is well below the national average, and only 7 vacant units were identified in the town centre audit (July 2012). This indicates that the town centre is performing strongly, there is strong demand for retail floorspace, and that retailers are continuing to perform well, despite the recession. The vacant units identified are

evenly distributed throughout the centre, and there are no areas in the town which contain problem areas of clusters of vacant units.

## Environmental Quality

- 7.10 Chipping Norton is an attractive market town and the character of the centre and the surrounding Cotswold countryside is recognised through the AONB designation which covers much of the town. Shop fronts have been designed to be in keeping with the Conservation Area.
- 7.11 There are a significant number of listed buildings which line the High Street, Market Street, West Street and New Street and provide shops with a historic setting. The buildings, shopfronts and public areas are well maintained and provide an attractive environment for shoppers and tourists.
- 7.12 Public car parks on either side of Market Place intersect the High Street and Market Street and provide free car parking. There are time management controls and enforcement of these. In addition to the cars parked in the town centre, the Market Place is a busy road, which at peak times makes it difficult to cross from one side of the shops to the other, although there is a pedestrian crossing to ease pedestrian flows. The town centre is situated on a hill, and the eastern side of the High Street is higher than the shops located on the western side at Market Street, which also acts to fragment the town centre.

## Accessibility

- 7.13 The town centre is easily accessible by car and benefits from in centre parking for shoppers. At Market Place there are approximately 73 car parking spaces. In addition, both Sainsbury's and Co-op have their own foodstore car parks to the rear of their stores.
- 7.14 West Oxfordshire District Council undertook an in-centre survey in June 2012 to understand travel and car parking issues in Chipping Norton town centre. The results indicate that the majority of people travel to Chipping Norton by car (c. 80%). These people park in a variety of car parks around the town centre, these include; Albion Street, Cattlemarket, Market Square, New Street and Topside. The parking facilities in Chipping Norton are highly regarded (74% of drivers believe there are no negative aspects to the town centre car parks, and 96% of drivers find the car parks easy to find). However, we are aware that

there are issues surrounding the town centre car parks, with many at capacity at peak times. The survey identified several issues with car parking provision including inadequate signage, not enough parking spaces and the spaces available are too tight.

- 7.15 Whilst Chipping Norton does not benefit from its own train station, Kingham and Charlbury train stations are only a 10-15 minute drive. Chipping Norton town centre is well served by bus, with regular services running to Oxford, Kingham, Banbury, Witney, Stratford, and Woodstock.

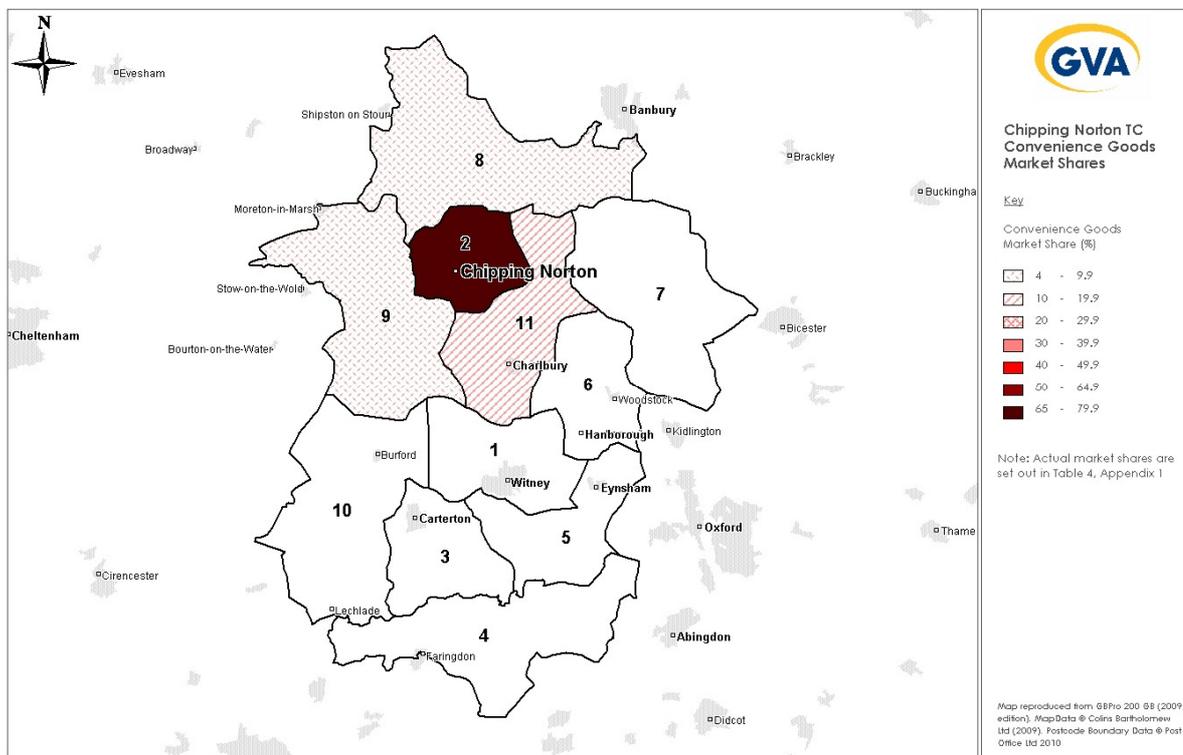
## Shopping Patterns

- 7.16 The telephone survey undertaken in July 2012 identified local shopping patterns in Zone 2 (which includes Chipping Norton). Analysis of these shopping patterns provides an overview of the current role and function of Chipping Norton as a shopping destination.

## Convenience Goods

- 7.17 The Co-op and Sainsbury's foodstores in Chipping Norton perform both 'main' food and 'top-up' food (meeting day to day shopping needs, e.g. buying bread and milk) shopping roles. Within Zone 2, the Co-op draws the highest market share (43.6%) of main and top up food shopping (weighted 75% main / 25% top-up shopping). The Sainsbury's draws a market share of 20%, whilst local convenience stores draw 2.7%. This indicates that the foodstores in Chipping Norton are performing strongly, and represents a good level of trade retention (66.3%) within Zone 2.
- 7.18 Stores outside West Oxfordshire District draw the majority of the remaining market share within Zone 2, specifically Sainsbury's in Banbury (7.8%) and Tesco Stow-on-the-Wold and Morrison's in Banbury (both drawing 3%). The remaining 20% of convenience goods market share in Zone 2 is spread between a number of other stores in Banbury, Bicester, Kidlington and Witney, which attract relatively small market shares from within this zone. The plan below (also Plan 4 of Plans and Appendices) illustrates Chipping Norton's catchment area for food shopping. This illustrates a strong market share within Zone 2, and a reasonable level of trade drawn from the surrounding Zones (8, 9 and 11).

### Chipping Norton Convenience Goods Market Share Plan

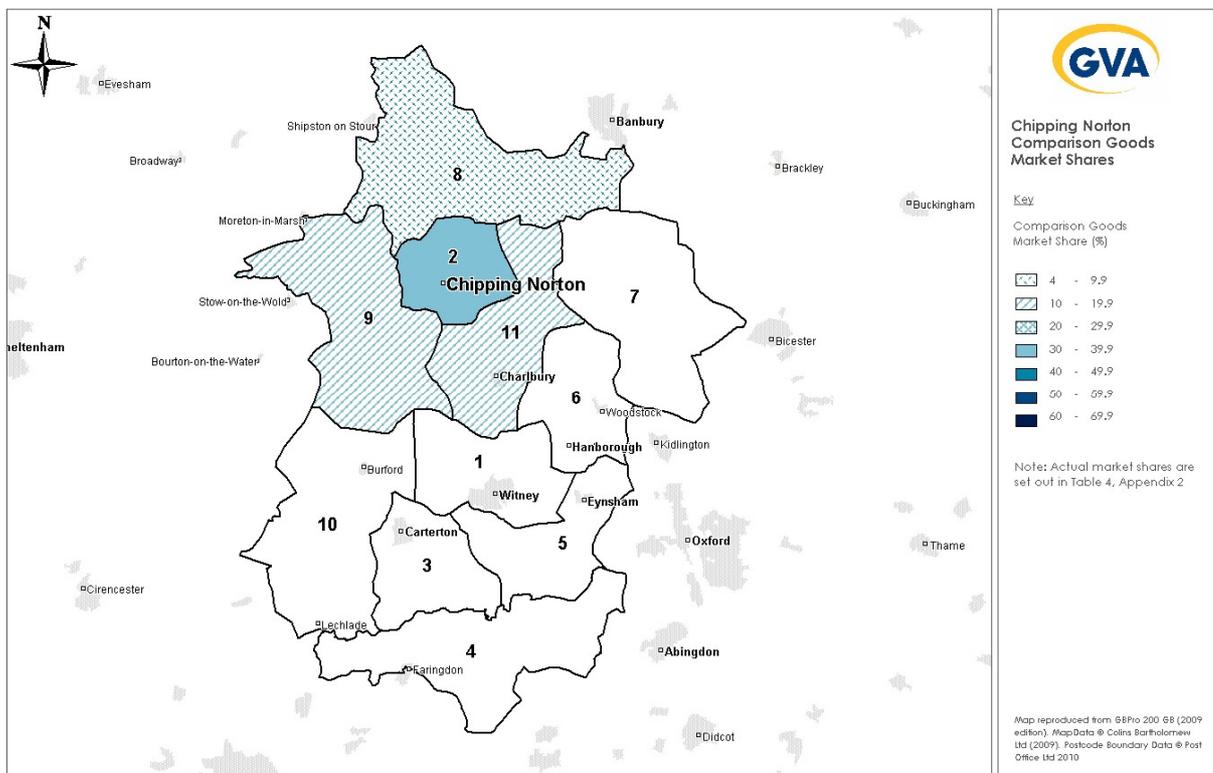


### Comparison Goods

7.19 For comparison goods, Chipping Norton retains a smaller market share from Zone 2 (approximately 36.7%). This is still a reasonably strong market share considering the size of the centre, and the role the centre plays in the regional retail hierarchy. The plan on the following page (also Plan 6 of Plans and Appendices) illustrates that Chipping Norton also draws trade for non-food shopping from the surrounding Zones (8, 9 and 11). The plan also illustrates that the market share for comparison retailing is weaker than for convenience goods retail, and indicates that the primary role of Chipping Norton town centre is for food shopping.

7.20 Nearly half of all the respondents within Zone 2 chose to visit Banbury town centre and retail parks to undertake their main non-food shopping (49.4%). 3.9% of respondents in this Zone visit Oxford city centre and retail parks, whilst 2.4% visit Witney town centre.

### Chipping Norton Comparison Goods Market Share Plan



### Customer Views and Behaviour

7.21 The telephone survey undertaken in July 2012 included various attitudinal questions about the frequency of visits to Chipping Norton town centre, the reasons for choosing to visit and likes and dislikes about the town centre. The key findings from the telephone survey are summarised below:

- Within the whole survey area, 28% of respondents stated that they shop in Chipping Norton town centre for food and/or non-food shopping. Results indicate that within the survey area, the majority of respondents who visit Chipping Norton do so once a month (18%), whilst 16% visit 2 or 3 times a week.
- Within Zone 2 (Chipping Norton zone), nearly all of the respondents stated that they visit Chipping Norton town centre for food and/or non-food shopping (98% of respondents). Respondents from Zone 2 are also likely to visit the town centre most regularly, with 51% of respondents from zone 2 visiting Chipping Norton on a daily basis, and 36% of people visiting the town 2-3 times a week.

- The majority of respondents which stated they shop in Chipping Norton town centre for food and/or non-food shopping primarily go to browse (49%). Of those who visit to go to a particular shop, 14% go to shop at the Co-op, 11% go to visit Sainsbury's, 6% go to use a bank and 5% either go for food shopping or to use a health service. These figures illustrate the importance of the convenience goods sector in the strength of performance of Chipping Norton town centre, with the existing foodstores providing a key incentive to visit the town.
  - 31% of respondents in the survey area who visit Chipping Norton do so for evening eating and drinking, and 28% visit for daytime eating and drinking, demonstrating the reasonable representation of restaurants and cafes. 10% of respondents visit Chipping Norton for a day out, and 4% visit to go to The Theatre, Chipping Norton located on Spring Street.
- 7.22 Taking the survey area as a whole, the majority of respondents who visit Chipping Norton like the attractive environment (25%), it is close to home (23%), good range of independent stores (17%), nothing / very little (12%), easy to park (8%) and compact shopping area (8%).
- 7.23 The main things that respondents to the survey disliked about Chipping Norton are nothing / very little (48%), difficult to park (21%), traffic congestion (7%), lack of non-food stores (6%) and too steep / hilly (5%). When asked what would make you shop in or visit Chipping Norton town centre more often, the top results from the whole survey area were nothing (57%), easier / more car parking (10%), more non-food stores (7%), more food stores (5%) and a larger supermarket (4%).
- 7.24 The in-centre survey undertaken by West Oxfordshire District Council (Car Parking Team) identified that 75% of respondents use Chipping Norton more than once a week and the majority of shoppers are visiting to purchase food (c. 86%). These results confirm the findings of the household telephone survey, which highlighted the strength of the centre in Zone 2 and particularly its food shopping role. The majority of people have linked their trips with leisure uses, such as purchasing refreshments (55%). The majority of shoppers also use the market during their visit when possible (78%). The majority of respondents (c.77%) have stated that they also visit Banbury for non-food shopping; they state that this is because there is a better range of shops here (c. 87%).
- 7.25 People stated that they choose to visit Chipping Norton because of its convenience (c. 36%), parking facilities (25%) and range of shops (25%). The most apparent issue in

Chipping Norton town centre appears to be congestion; this was flagged up by 38% of respondents. The majority of people require a better range of food shopping facilities in the town centre (50%).

- 7.26 A survey was undertaken in July 2012 to inform the preparation of the Chipping Norton Neighbourhood Plan. This survey identified that 74% of respondents use Chipping Norton town centre to use the shops or other facilities more than one day a week. The majority of respondents (73%) shop in the town centre because they 'like to support local shops'. Other reasons to choose to shop in Chipping Norton are because 'it saves time' (65%) and 'it saves transport costs' (63%). It is also interesting to note that a high proportion of respondents (41%) identified that issues surrounding retail and shopping are most important regarding the future of Chipping Norton over the next 10 years. Of particular interest was the importance of providing diverse retail opportunities in the town and a desire for more shops.
- 7.27 Chipping Norton submitted a bid to become a Portas Town team pilot, which was unsuccessful, however the Town Team has secured funding to promote the town centre.

## Out of Centre Retail Provision

- 7.28 There are currently no out of centre foodstores or retail warehouse provision located in and around Chipping Norton.

## Proposals and Commitments

- 7.29 In July 2012, planning permission was granted for a revised scheme for the Co-op and Beales department store extension, incorporating changes to car park levels (application ref. 12/0681/P/FP). The revised proposals include a 1,161 sqm extension to the Co-op foodstore and Beales department store.

## Summary

- Chipping Norton town centre is an attractive town which is considered to be reasonably vital and viable, with a low vacancy rate and a good mix of quality comparison, convenience and service operators which is supplemented with street markets and high end independent retailers. However, the qualitative strength of the

centre is only one aspect of town centre vitality. The health of any centre must also take account of the economic performance of the centre as a whole (as assessed in more detail in Section 10). Due to the economic climate and increasing competition from competing centres, we consider there is no room for complacency in relation to the performance of the Chipping Norton town centre over the plan period.

- For a centre of its size, Chipping Norton has a reasonable retail provision from mainstream multiple retailers, alongside a good range of independent retailers. The traditional market town provides an attractive historic shopping environment for local residents and also attracts tourist visitors. There are very few vacant units in the town centre which indicates the strength of retailer demand in the centre.
- Findings from the household telephone survey, in-centre parking survey and neighbourhood plan survey all corroborate that food retailing is the main attraction to Chipping Norton town centre. The market share plans illustrate the strong convenience goods role the centre currently performs, and the foodstores in the town centre demonstrate a good level of trade retention.
- The comparison goods offer in the centre is good, although the centre performs a more limited comparison goods role in comparison to Witney, which is not surprising due to the centre's size. The comparison retail provision in Chipping Norton appears to be supported by the main food shopping function the centre currently performs, with people undertaking linked trips in addition to their food shopping.
- Results from the household telephone survey indicate that people choose to visit the town centre primarily because it provides an attractive environment and it is close to home.
- There is scope to provide a better range of shops in Chipping Norton over the plan period to create a stronger food and non-food offer in the centre. The consent to extend the Co-op foodstore will contribute towards improving the retail offer of the centre. Chipping Norton has scope to promote the leisure offer further to increase the centre's tourism role.
- A key issue identified in the surveys is the traffic congestion in Chipping Norton and difficulties relating to car parking in the town centre.

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## 8. Carterton Town Centre Audit

- 8.1 Carterton is located in the south of West Oxfordshire District, to the south of the A40. The A40 connects Carterton to Witney town centre in the east. Burford town centre is located to the north west. Both are a 15 minute drive away. Carterton is roughly equidistant to Oxford in the east, Swindon in the south and Cirencester in the west.
- 8.2 Carterton town centre is identified as a primary town centre in the West Oxfordshire Local Plan (2006) and primarily provides a local shopping role for Carterton and the nearby Brize Norton RAF base.
- 8.3 In comparison to Witney and Chipping Norton, Carterton was developed relatively recently and provides a more modern shopping environment. The main retail offer is provided around the junction between Alvescot Road, Burford Road, Brize Norton Road and Black Bourton Road.
- 8.4 The existing Proposals Map does not identify a primary shopping frontage for Carterton. The draft Proposals Map proposes a Primary Shopping Frontage along the south side of Alvescot Road and along the Co-op frontage. The draft Proposals Map also retains the SW Quadrant Development Area between Alvescot Road and Black Bourton Road in accordance with the Local Plan (2006) allocation.

### Diversity of Uses

- 8.5 The Experian Goad category report for Carterton town centre (July 2011) identifies 10,637 sqm of ground floor floorspace for retail trade and service units (retail, leisure and financial and business services), over 60 units. The floorspace figures only provide an indicative floorspace figure. Table 8.1 sets out the composition of the number of units in Carterton.

**Table 8.1: Carterton Town Centre Composition of Units**

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	9	15	8.02	6.98
Comparison	15	25	33.55	-8.55
Service	34	56.67	46.28	10.39
Vacant	2	3.33	12.16	-8.83
<b>TOTAL</b>	<b>60</b>	<b>100</b>	<b>100</b>	<b>-</b>

Source: Number of units taken from West Oxfordshire District Council Audit (2012)

Note: UK Average relates to Experian Goad Category Report (July 2012)

- 8.6 The proportion of convenience goods retail units in Carterton is above the national average. There are two main supermarkets in Carterton; the Co-op on Black Bourton Road and a new Aldi foodstore on Alvescot Road. The town centre is anchored by the Co-op foodstore which comprises 1,765 sqm and provides a range of facilities including a Post Office, café, dry cleaning, travel agents, deli and bakery and car parking. The Aldi foodstore opened in May 2012 and provides 1,000 sqm convenience goods floorspace. There are also several newsagents, a butchers and a confectioners in the town centre.
- 8.7 In contrast the proportion of comparison goods retail units in Carterton is below the national average, with only 15 comparison units in the town centre. The majority of these units are independent retailers, and cater to a mid to low end market. The comparison goods offer is varied and includes a florist, dvd hire, factory outlet clothing, carpets, stationery and several charity shops.
- 8.8 Carterton does provide a strong service offer, with the proportion of retail, financial and business service units currently above the national average. There are several pharmacies, banks, opticians, hairdressers, estate agents and insurance companies in the centre. The centre is not performing a strong leisure offer. The current offer is dominated by fast food takeaways and bookmakers, and the centre is lacking a wider café, bar and restaurant offer.

## Retailer Representation

- 8.9 The July 2011 Experian Goad Category Report identified 21 multiple retailers in Carterton, which represents 34% of all shop units. Key multiple retailers in the town include the Co-op

and Aldi, as well as several high street banks (Lloyds, HSBC and Barclays). Other multiple retailers in the town include Thomas Cook, Blockbuster, Thorntons and Lloyds Pharmacy.

- 8.10 The main retail offer in Carterton comes from independent retailers, which provide the majority of retail and service units (for example the butchers, take away restaurants, barbers and charity shops).
- 8.11 A weekly street market is held in Carterton on Thursdays. This adds to the overall retail offer of the centre. Unlike Witney and Chipping Norton, no farmer's market is currently held in the town.

## Vacancies

- 8.12 The Council's Town Centre Audit in July 2012 identified only 2 vacant units in Carterton, which is well below the national average. This indicates that the current stock is meeting the demand from the existing type of operators, but also demonstrates that the town does not offer any new space to improve the shopping and leisure role of the centre. There are no particular problem areas of vacant units. The below average proportion of comparison goods retail units in the town does indicate that at present the retail unit offer in Carterton is restricted and the lack of available retail units may limit growth in comparison goods retailing.

## Environmental Quality

- 8.13 Although Carterton does not benefit from the historic character of the other centres in the district, the town centre has a pleasant and more modern shopping environment. There has clearly been some investment in the public realm, and the main shopping street is lined with trees, planters, benches and quiet areas of public seating. Pavements and shopfronts are generally well maintained although some unattractive and fragmented frontages remain. Pedestrian crossings at the main cross roads in the town centre provide convenient access for shoppers between the Co-op supermarket and the rest of the town centre. However, there is scope to provide continued investment and further enhancement to the public realm.

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## Accessibility

- 8.14 The centre is easily accessible by car, and there is a good availability of free car parking. There are two public long stay car parks in Carterton, one off Black Bourton Road and one on Alvescot Road. In addition, short stay parking is available at the Co-op and Aldi foodstores.
- 8.15 West Oxfordshire District Council undertook an in-centre survey in June 2012 to understand travel and car parking issues in Carterton town centre. The results indicate that visitors travel to Carterton by foot or car (49% and 44% retrospectively). The majority of drivers park at Co-op or Black Burton Road (33% and 28% retrospectively).
- 8.16 There is no train station at Carterton, and therefore public transport consists of bus services. Regular bus services connect Carterton to Oxford, Witney, Eynsham, Swindon, and Lechlade.

## Shopping Patterns

- 8.17 The telephone survey undertaken in July 2012 identified local shopping patterns in Zone 3 (which includes Carterton). Analysis of these shopping patterns provides an overview of the current role and function of Carterton as a shopping destination.

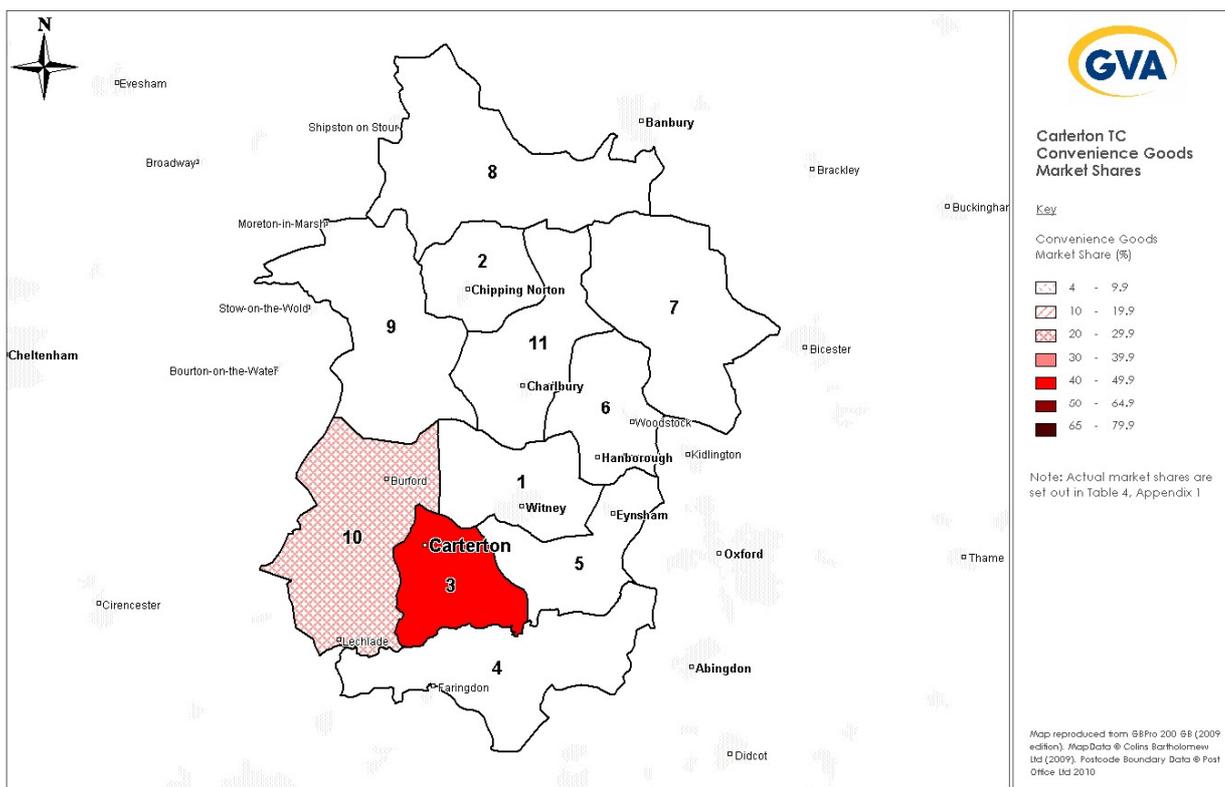
## Convenience Goods

- 8.18 The Co-op and Aldi foodstores in Carterton perform both 'main' food and 'top-up' food (meeting day to day shopping needs, e.g. buying bread and milk) shopping roles. Within Zone 3, the Aldi in Carterton draws a high market share (22.6%) of main and top up food shopping (weighted 75% main / 25% top-up shopping). The Co-op draws a market share of 17.9%, whilst local convenience stores draw 2.5%. This represents a relatively low level of trade retention (43%) within Zone 3.
- 8.19 Foodstores in Witney also draw a significant proportion of trade from Zone 3. The majority of respondents from Zone 3 shop at the out of centre Sainsbury's in Witney (29.8%) and 4.9% of respondents from this zone shop at Waitrose in Witney town centre. The plan on the following page (also Plan 4 of Plans and Appendices) illustrates that Carterton's catchment area for convenience shopping also extends to Zone 10 (to the west of

Carterton). This demonstrates that Carterton’s food shopping catchment area is relatively limited and curtailed by its close proximity to Witney.

8.20 However, the food shopping role of Carterton town centre is more dominant than the comparison goods shopping role the centre currently performs. The convenience goods role of Carterton is therefore important for the health of the town centre.

### Carterton Convenience Goods Market Share Plan



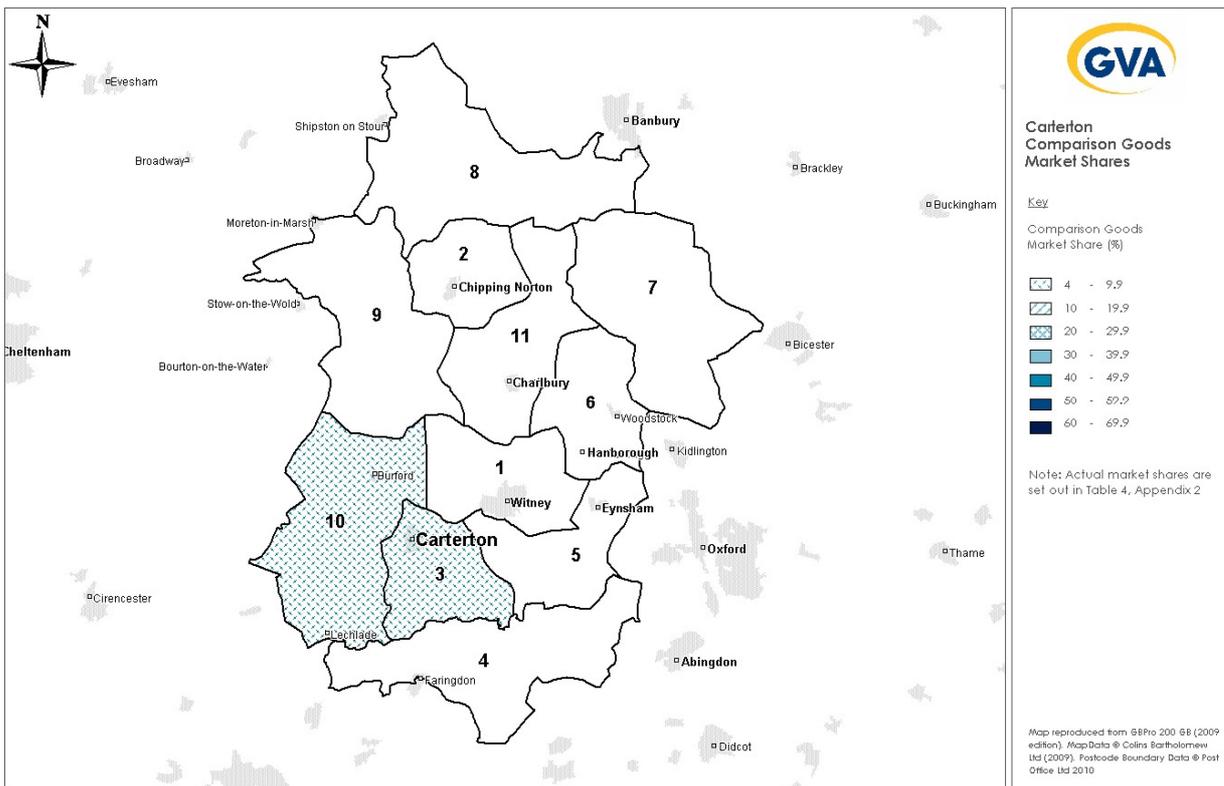
### Comparison Goods

8.21 For comparison goods, Carterton retains a very small market share from Zone 3 (approximately 4.3%). Carterton town centre also draws a 5.3% of market share from Zone 10. The plan on the following page (also Plan 6 of Plans and Appendices) illustrates Carterton’s market share for non-food shopping.

8.22 The majority of respondents from Zone 3 visit Witney to undertake their main comparison goods shopping (47.7%). 20% of respondents in Zone 3 visit Swindon town centre and retail parks for their non-food shopping, 11.8% of respondents in this zone shop in Oxford city centre and retail parks and 4.5% of respondents shop in Abingdon. This indicates that

there is leakage of non-food goods trade to centres outside the District. This is not surprising given Carterton’s lower order role in the retail hierarchy and location in the south of the district. However this clearly demonstrates that there is an opportunity to enhance and improve the town centre’s trade retention.

**Carterton Comparison Goods Market Share Plan**



**Customer Views and Behaviour**

8.23 The telephone survey undertaken in July 2012 included various attitudinal questions about the frequency of visits to Carterton town centre, the reasons for choosing to visit and likes and dislikes about the town centre. The key findings from the telephone survey are summarised below:

- 28% all of respondents to the household telephone survey stated that they partake in food and/or non-food shopping in Carterton town centre. Results indicate that the majority of these respondents visit the centre regularly, with 28% of shoppers visiting once a week, and 18% of respondents visiting 2 or 3 times a week.
- Within Zone 3 (Carterton zone), 77% of respondents stated that they shop in Carterton town centre, compared to 88% of respondents from within the same zone who stated

that they shop in Witney. Within this zone, the majority of respondents (34%) visit Carterton once a week, while 31% visit the centre 2-3 times a week and 23% visit the town centre daily.

- The majority of respondents which stated they shop in Carterton town centre for food and/or non-food shopping primarily go to browse (34%). 33% of respondents from the survey area visit to go specifically to the Co-op, whilst 19% visit to go to the Aldi.
- Carterton town centre provides a limited leisure role. Only 11% of respondents from the survey area visit for daytime eating and drinking, and 9% visit for evening eating and drinking. The highest proportion of responses were from respondents in Zone 3, although some respondents from the neighbouring Zones 5 and 10 also visit for eating and drinking. Within Zone 3 only 18% of respondents visit Carterton for day time or evening eating or drinking.

8.24 Taking the survey area as a whole, the majority of respondents who visit Carterton stated that they like the centre 'very little' (39%), whilst 24% like it because 'it is close to home', 6% stated it had a good range of independent stores, and 5% like the town because it is easy to park.

8.25 The main things that respondents to the survey disliked about Carterton were the lack of non-food stores (17%), lack of foodstores (10%), poor range of chain / well known stores (9%) and unattractive / run down (8%), while 46% of respondents stated that they disliked nothing/very little about the town. When asked what would make you shop in or visit Carterton town centre more often, the top results from the whole survey area were more non-food stores (15%), more food stores (13%), more chain / well known stores (11%) and a department store (9%), while 48% stated 'nothing'.

8.26 The in-centre survey undertaken by West Oxfordshire District Council (Car Parking Team) identified that the majority of people chose to use Carterton town centre because of its good selection of high street and independent retailers (c. 67%). These visitors tend to visit more than once a week (c. 87%).

8.27 Respondents stated that their primary reason to visit Carterton town centre was to purchase food (c. 82%), however, most visitors also purchase refreshments or eat in the town centre (c. 73% and 40% retrospectively). The majority of shoppers visit the Co-op (81%) and/or Aldi (62%) during their visit to Carterton town centre.

- 8.28 When asked why visitors chose to shop in Carterton, the majority stated that this is because of convenience (85%). Respondents stated that the worst aspect of Carterton town centre is the lack of choice in places to shop (c. 47%). Many people also stated that it is too expensive (c. 17%). Circa 51% of respondents stated that they would like more clothes stores in Carterton. Furthermore, 45% stated that an improvement in the foodstore offer would be preferable.

## Out of Centre Retail Provision

- 8.29 There are non-food bulky goods retail warehouse units at West Oxfordshire Business Park which comprise 2,372 sqm of retail floorspace. The retail units are restricted for the sale of non-food bulky goods only, but the units remain vacant.

## Proposals and Commitments

- 8.30 Planning permission has been granted for the development of a new retail unit with flats above on Burford Road. The proposed unit will comprise 200 sqm retail floorspace (application ref. 09/1567/P/FP).
- 8.31 Consent has also been granted for the development of a new petrol station, retail unit and two residential flats on Upavon Way. The proposals include the provision of 368 sqm gross retail floorspace (application ref. 10/1314/P/FP).
- 8.32 During the development of this Study, West Oxfordshire District Council have resolved to grant consent for a Morrison's foodstore in the SW Quadrant area, subject to the signing of a Section 106 Agreement (application ref. 12/1217/P/FP). The proposed foodstore comprises 3,675 sqm gross retail floorspace (2,182 sqm net sales).

## Summary

- Carterton town centre is a more modern centre which does not have the same historic character as Witney and Chipping Norton. Rather than attracting visitors, day trippers and tourists like the centres of Witney and to an extent Chipping Norton, the centre provides a more functional role. People primarily choose to shop in Carterton because of the convenience of the centre.

- Carterton is a smaller scale centre and serves a predominantly local catchment catering towards day to day needs of local residents. The town centre has a strong convenience goods offer for a centre of its size, benefiting from two large foodstores (Co-op and Aldi). Due to predominant convenience goods role that the centre provides, shoppers in Carterton do undertake trips to the centre regularly.
- The service offer in Carterton is also strong, although there is scope to enhance the leisure offer in the centre through the provision of restaurants and bars to increase the number of people visiting the centre for daytime and evening eating and drinking.
- The low vacancy rate indicates that the centre is currently meeting demand from retail operators, however, the centre does not offer any new space for new operators to improve the retail and leisure role in the centre.
- Overall, Carterton appears to be functioning reasonably well in accordance with its intended role, however the centre has clear weaknesses. There is a below average representation of comparison goods units in the town, which currently provide a mid to low end retail offer. Carterton also has a lack of choice and range of comparison goods retailers, and the centre falls within Witney's catchment area and therefore loses market share to Witney. The provision of an enhanced range and choice of comparison goods retailers and leisure opportunities in the town should be a priority for the town over the Local Plan period.
- Since this study has been undertaken, the Council have resolved to grant planning permission for a Morrison's scheme in the SW Quadrant, subject to signing a S106 Agreement. We consider that the proposals will provide scope for Carterton to clawback trade from surrounding centres to increase the town's convenience goods trade retention.

## 9. Burford and Woodstock Town Centres

### Burford Town Centre

- 9.1 Burford town centre is identified as a Secondary Town Centre in the West Oxfordshire Local Plan (2006). The town is located just north of the A40 in the west of the District, approximately 11 km west of Witney. Burford is a traditional and picturesque medieval market town, often referred to as the 'gateway to the Cotwolds'. The High Street slopes down towards the River Windrush and is lined by historic shop fronts which date back to Tudor and Georgian times. The history of the town and the centre's attractiveness result in Burford's strong tourism role.

### Diversity of Uses

- 9.2 The town centre audit for Burford undertaken in 2012 identifies that there are 70 retail and service units in the town centre. These shops and services are interspersed with residential units and other services including the Methodist Church, tourist information and the town council. The town centre audit identified the following uses.

**Table 9.1: Burford Town Centre Composition of Units**

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	4	5.71	8.02	-2.30
Comparison	41	58.57	33.55	25.02
Service	25	35.71	46.28	-10.56
Vacant	0	0	12.16	-12.16
<b>TOTAL</b>	<b>70</b>	<b>100</b>	<b>100</b>	<b>-</b>

Source: Number of units taken from West Oxfordshire District Council Audit (July 2012)

Note: UK Average relates to Experian Goad Category Report (June 2012)

- 9.3 The convenience goods shops include a Budgens convenience store, a butchers, a deli and a newsagents. The comparison goods units represent over half of all units and include a range of independent clothing, jewellers, art galleries, kitchen and interior shops and antique shops. There are three retail service units including two hair salons and a post office. There is a total of 16 leisure service uses, including hotels, pubs and restaurants.

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Burford also benefits from 6 financial and business service units including banks, estate agents and solicitors.

- 9.4 No vacant units were identified in the town centre. The majority of the units in the centre are independent retailers, which provide a high end retail offer. The composition of retail units and the nature and quality of the retail and leisure offer demonstrates that the centre primarily serves a tourism role, however the centre does provide some shopping and service facilities to meet local residents day to day needs.
- 9.5 We note that retailers have reported there has been a decline in footfall levels over the last year, which could be as a result of the recession and poor weather. However this has not affected vacancy levels which have remained low.
- 9.6 During the summer months restaurants and pubs offer outdoor seating on the High Street which adds vibrancy to the centre. Some on street and off street car parking is available along the High Street.

### Shopping Patterns

- 9.7 The telephone survey undertaken in July 2012 identified local shopping patterns in Zone 10 (which includes Burford and also extends southwards towards Lechlade). Analysis of these shopping patterns provides an overview of the current role and function of Burford as a shopping destination.

#### *Convenience Goods*

- 9.8 Local convenience stores in Burford (including Budgens), provide a predominantly 'top-up' food shopping role (meeting day to day shopping needs of local residents, for example buying bread, milk etc.).
- 21% of residents in Zone 10 undertake their 'top-up' food shopping in Burford and only 3.3% of residents in this zone undertake their 'main' food shopping.
  - Calculating the weighted average for all food shopping in this zone (using 75% main food / 25% top-up food) indicates that Burford draws a total market share of 8.6% in Zone 10.
  - Burford also draws a total market share of 0.4% of residents from Zones 4 and 9, and no trade from the other zones in the survey area.

9.9 Within Zone 10, the most popular stores (for 'main' and 'top-up' food shopping) are Co-op, Black Bourton Road, Carterton (13.9%), Waitrose, Woolgate Centre, Witney (13.3%), Sainsbury's, Witan Way, Witney (12.5%), and Aldi, Alvescot Road, Carterton (6.4%). This demonstrates that residents in Zone 10 predominantly undertake their food shopping in Witney and Carterton. These centres have a wider foodstore offer and are easily accessible from Burford. Foodstores in Cirencester (including Tesco Extra and Waitrose) also draw some trade from Zone 10.

### *Comparison Goods*

9.10 As we would expect for a centre of this size, Burford performs less of a main non-food shopping role, as residents choose to shop in larger centres for the majority of their non-food shopping needs. Notwithstanding this, Burford draws a reasonable market share for clothing and footwear (8.5%) and personal/luxury goods including books, jewellery, china, glass and cosmetics (5.1%) from within Zone 10. Burford also draws a 4% market share for clothing and footwear from within Zone 11, and a smaller proportion (c.1%) from Zones 1, 2, 4 and 9. Burford's comparison goods shopping role is predominantly focused on visitor and tourist retailing and this is reflected by the type of comparison goods shops within the centre (for example art galleries and antique shops).

9.11 Very few shoppers undertake most of their shopping for furniture, DIY, domestic appliances, electricals in Burford. Instead, residents in Zone 10 are most likely to visit Witney (26.2% of residents), Swindon (22.9% of residents), or Cheltenham (11.7%) for their more bulky non-food shopping needs.

### *Customer Views and Behaviour*

9.12 The telephone survey undertaken in July 2012 included various attitudinal questions about why people visit Burford town centre, likes about the town centre and what would make people use the town centre more often. The key findings from the telephone survey are summarised below.

9.13 Within Zone 10, results from the survey show that Burford draws a significant number of shoppers and visitors:

- 39% of those surveyed in Zone 10 undertake non-food shopping in Burford;
- 30% of those surveyed in Zone 10 visit Burford for daytime eating and drinking;

- 
- 30% of those surveyed in Zone 10 visit Burford for evening eating and drinking;
  - 26% of those surveyed in Zone 10 undertake food shopping in Burford; and
  - 21% of those surveyed in Zone 10 visit Burford for a day out / day trip.
- 9.14 Burford also attracts a high proportion of non-food shoppers and visitors from across the survey area:
- 17.7% of respondents in the survey area visit Burford for non-food shopping (including 30% of respondents in Zone 9, 22% of respondents in Zone 1 and 20% of respondents in Zone 6).
  - 16.7% of respondents in the survey area visit Burford for a day out / day trip (including 21% of respondents in Zone 3, and 19% of respondents in Zones 1 and 6).
  - Daytime eating and drinking was also a popular reason to visit Burford (drawing 14.6% of respondents from the survey area, 22% of respondents from Zone 3, 21% of respondents from Zone 6 and 15% of respondents in Zone 1).
- 9.15 Taking the survey area as a whole, the majority of respondents liked Burford's attractive environment (60.4%), good range of independent stores (31.5%), restaurants and cafes (6.4%) and history and character (5.6%).
- 9.16 When asked what would make people shop in or visit Burford more often, the top results from the whole survey area were nothing (66%), easier / more parking (19.2%), less traffic (2.6%), and more food and non-food stores (1.6%). The opportunity and appropriateness for more parking to serve the town centre should be considered in a wider parking review for the town.

## Woodstock Town Centre

- 9.17 Woodstock town centre is identified as a Secondary Town Centre in the West Oxfordshire Local Plan (2006). The town is located in the east of the District, 15 km north east of Witney. The A44 runs through the town and connects the centre to Oxford in the south east and Chipping Norton in the north west. Woodstock is a historic market town, located adjacent to Blenheim Palace, which attracts a significant amount of tourists. The traditional stone buildings lining the High Street provide an attractive shopping environment for local residents and the wide range of leisure services cater to visitors to the centre. However we note that the town centre has a complex relationship with Blenheim Palace and that

there are concerns that increased events and activity at Blenheim do not necessarily provide benefits to the town centre in terms of increased footfall and trade.

### Diversity of Uses

- 9.18 The town centre audit for Woodstock undertaken in 2012 identifies that there are 78 retail and service units in the town centre. In addition to the shops and services there is a local library, doctors surgery and the Oxfordshire County Museum. The town centre audit identified the following uses.

**Table 9.2: Woodstock Town Centre Composition of Units**

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	4	5.13	8.02	-2.89
Comparison	35	44.87	33.55	11.33
Service	35	44.87	46.28	-1.41
Vacant	4	5.13	12.16	-7.03
<b>TOTAL</b>	<b>78</b>	<b>100</b>	<b>100</b>	<b>-</b>

Source: Number of units taken from West Oxfordshire District Council Audit (July 2012)

Note: UK Average relates to Experian Goad Category Report (June 2012)

- 9.19 The convenience goods units in Woodstock include a Co-op convenience store, a deli, a bakers and a shoe repair shop. There are 35 comparison goods units in the town, including antique dealers, art galleries, clothing shops, charity shops and florists. Within the retail service sector eight units were identified including hairdressers, opticians and a post office. A high proportion of leisure service units were identified (21 units), including a range of hotels, pubs, restaurants and cafes. Woodstock also has 6 financial and business service units including banks and estate agents. Four vacant units were identified in the Council's audit, however this proportion of vacant units is still below the national average.
- 9.20 Woodstock town centre provides a relatively good mix of local shops and services which cater to both local residents day to day needs and tourists. The retail offer is dominated by independent retailers, the most notable multiple retailers are Co-op, Natwest and Barclays banks. There are 9 hotels and bed and breakfasts in Woodstock which support the tourism offer. A monthly farmer's market is also held in Woodstock, which adds to the overall retail offer and vibrancy of the town centre. The loss of utility shops (e.g. hardware

store, fish monger and one of the butchers) has been highlighted as a key concern through the town's partnership work.

## Shopping Patterns

9.21 The telephone survey undertaken in July 2012 identified local shopping patterns in Zone 6 (which includes Woodstock and Long Hanborough). Analysis of these shopping patterns provides an overview of the current role and function of Woodstock as a shopping destination.

### *Convenience Goods*

9.22 Local convenience stores in Woodstock (including the Co-op), provide a predominantly 'top-up' food shopping role (meeting day to day shopping needs of local residents, for example buying bread, milk etc.). For example:

- 23% of residents in Zone 6 undertake their 'top-up' food shopping in Woodstock and 5.3% of residents in this zone undertake their 'main' food shopping.
- Calculating the weighted average for all food shopping in this zone (using 75% main food / 25% top-up food) shows us that Woodstock draws a total market share of 10.6% in Zone 6.
- Woodstock also draws a total market share of 2.9% of residents from Zone 7, and no trade from other zones in the survey area.

9.23 Within Zone 6, the most popular stores (for 'main' and 'top-up' food shopping) are Sainsbury's, Witan Way, Witney (20.9%), local stores in Hanborough (18.5%), Sainsbury's, Oxford Road, Kidlington (14.6%), and Waitrose, Woolgate Centre, Witney (12.1%). This indicates that over a quarter of all residents in Zone 6 undertake their food-shopping within Zone 6 (in stores in Woodstock and Hanborough), a reasonable level of trade retention. Foodstores in Witney draw around a third of residents from Zone 6. The main competing foodstore outside the District is Sainsbury's in Kidlington, located in close proximity to this zone.

### *Comparison Goods*

9.24 As we would expect for a centre of this size, Woodstock performs less of a main non-food shopping role, as residents choose to shop in larger centres for the majority of their non-food shopping needs. Woodstock performs most strongly for shopping for personal/luxury

goods (including books, jewellery, china, glass and cosmetics). Approximately 8.1% of residents in Zone 6 undertake shopping for these goods in Woodstock.

9.25 Very few shoppers undertake most of their shopping for clothing, furniture, DIY, domestic appliances, electricals in Woodstock. Instead, residents in Zone 6 are most likely to visit Witney (37.5% of residents), or Oxford (31.9% of residents).

## Customer Views and Behaviour

9.26 The telephone survey undertaken in July 2012 included various attitudinal questions about why people visit Woodstock town centre, likes about the town centre and what would make people use the town centre more often. The key findings from the telephone survey are summarised below.

9.27 Within Zone 6, results from the survey show that whilst Woodstock may not be residents' main shopping destination, the centre still draws a significant number of shoppers and visitors.

- 43% of those surveyed in Zone 6 undertake food shopping in Woodstock;
- 30% of those surveyed in Zone 6 visit Woodstock for evening eating and drinking;
- 27% of those surveyed in Zone 6 visit Woodstock for daytime eating and drinking;
- 25% of those surveyed in Zone 6 undertake non-food shopping in Woodstock; and
- 16% of those surveyed in Zone 6 visit Woodstock for a day out / day trip.

9.28 Woodstock also attracts a significant proportion of shoppers and visitors from Zones 7 and 11, which border Zone 6. Around 24% of residents in Zone 7 and 12% of residents from Zone 11 visit Woodstock for daytime eating and drinking. 20% of residents in Zone 7 visit Woodstock for non-food shopping and 16% of residents in Zone 11. Between 9% and 12% of residents from Zones 2, 5 and 8 visit Woodstock for a day out / day trip, which indicates that the centre has a reasonably wide visitor catchment.

9.29 Taking the survey area as a whole, the majority of respondents liked Woodstock's attractive environment (54%), good range of independent stores (18%), closeness to home (11%), and restaurants and cafes (11%).

9.30 When asked what would make you shop in or visit Woodstock more often, the top results from the whole survey area were nothing (64%), easier / more parking (17%), more food

stores (3%), more non-food stores (2%), and more independent shops (2%). The opportunity and appropriateness for more parking to serve the town centre should be considered in a wider parking review for the town

## Summary

- Burford and Woodstock town centres provide a high quality retail and leisure service offer, tailored towards the visitor economy whilst also providing for the day to day needs of local residents.
- Current adopted Local Plan policy seeks to resist the expansion and sprawl of these centres to protect their character but current issues relate more to the loss of shops, particularly those which provide for the day to day needs of local residents.
- These centres do not provide a strong main food shopping role, instead the convenience goods offer is focused on top-up food shopping catering for everyday needs. Both Burford and Woodstock manage to retain a reasonable market share for convenience goods for centres of this size (8.6% and 10.6% respectively). Larger foodstores in Witney draw trade from both Zones 6 and 10. Shoppers in Zone 6 (Woodstock) also undertake food shopping in Kidlington, whilst shoppers in Zone 10 (Burford) also shop at foodstores in Carterton.
- Comparison shops are generally high end, specialist independent retailers providing luxury and niche products. Due to the nature of this retail offer, main comparison shopping is generally undertaken in larger, higher order centres, for example Witney, Swindon (in Zone 10) and Oxford (in Zone 6).
- Notwithstanding this, Burford and Woodstock both attract visitors from across the survey area for convenience and comparison goods shopping, eating and drinking and day trips. It is reasonable to assume that whilst not a main food and non-food shopping destination, these centres draw shoppers for smaller, less frequent items.
- The main reason cited by respondents for visiting Burford and Woodstock is the attractive environment of these centres.
- A key issue in Burford and Woodstock is the provision and availability of car parking.

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## 10. Retail Capacity Projections

10.1 In this section we evaluate the current performance of the three larger town centres in the District; Witney, Chipping Norton and Carterton. This is the basis for forecasting the need for further convenience and comparison retail floorspace to 2029, incorporating interim years of 2014, 2019 and 2024. It is important to note that capacity forecasts become increasingly open to margins of error over time and should be updated over the plan period – ideally every 5 years. The capacity tables accompanying this assessment are attached in Appendix 1 and 2.

10.2 We have used a conventional and widely accepted step by step methodology, consistent with best practice, which draws upon the results of the household telephone survey of existing shopping patterns to model the existing flows of available expenditure to centres in West Oxfordshire and also identifies the main competing centres which have an influence on shopping patterns in the District. To develop the baseline position we have:

- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the West Oxfordshire catchment area;
- Allocated the available expenditure to the convenience and comparison goods shopping destinations, on the basis of the household telephone survey of shopping patterns, so as to provide estimates on current sales and forecasts of future sales;
- Compared the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities in each shopping destination;
- Building on the baseline position, we have explored the capacity for further convenience and comparison retail floorspace, having regard to the performance of existing floorspace. These projections should be used as a guide, and where floorspace capacity arises it does not justify out of centre shopping development in the District. Similarly, identification of negative capacity does not indicate that the Council should seek to reduce retail floorspace.

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## Data Inputs

### Survey Area and Household Telephone Survey

- 10.3 In order to provide factual information on the shopping patterns in West Oxfordshire, GVA commissioned a new household survey covering 1,100 households. GVA designed the survey questionnaire in consultation with West Oxfordshire District Council and NEMs market research company who undertook the interviewing and data processing in July 2012. The survey area is illustrated in Plan 1 and is broken down into 11 zones.
- 10.4 The survey results identify shopping habits of households for both convenience and comparison goods. Where necessary, survey results have been rebased to remove some responses (such as 'don't shop for particular goods' and 'internet shopping') to ensure consistency with categories excluded in the expenditure projections.
- 10.5 For convenience goods, the household telephone survey included questions on main food and top-up food shopping. The results of the two types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for by each goods type (75% main food / 25% top-up food). This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.
- 10.6 The survey also included five questions on specific comparison goods types which coincide with Experian Business Strategies definitions of comparison goods expenditure. The retail needs modelling exercise uses the weighted averages of the household survey results for each goods type based on the proportion of per capita spend on that goods type. This process establishes the pattern of spending for residents of each zone in terms of the following goods types:
- Clothing and footwear;
  - Furniture, floor coverings and household textiles;
  - DIY and decorating goods;
  - Domestic electrical appliances; and
  - Personal and luxury goods.

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## Estimates of Population in the Survey Area

- 10.7 Population estimates and forecasts for each of the survey zones were prepared using the Experian E-Marketer in-house system. This provides estimates of population in 2012, 2014, 2019, 2024 and 2029. The Experian data is based on trend line projections. We have sense checked this data against population estimates by Oxfordshire County Council published in 2010 and consider that overall Experian's population projections seem reasonable and in line with the County estimates.
- 10.8 Overall, the population of the survey area in 2012 is currently 148,726. It is forecast to grow to 150,898 by 2014, and again to 156,485 by 2019, and 162,347 by 2024. By 2029, the population of the survey area is forecast to reach 167,512. This represents an overall strong increase of 13%.

## Available Expenditure in the Survey Area

- 10.9 The Experian E-Marketer system provides estimates of per capita expenditure for convenience and comparison goods expenditure in 2010 prices. We have made deductions for Special Forms of Trading (SFT) which represent expenditure not available to spend in shops (for example internet or catalogue shopping). The deductions applied for SFT for convenience and comparison goods are set out in Table 2 of Appendix 1 and 2.
- 10.10 We have applied growth rates for convenience goods of -0.3% between 2010 and 2011; -0.4% between 2011 and 2012; 0.5% pa from 2012 to 2019; and 0.6% pa from 2019 onwards. For comparison goods, we use growth rates of 0.5% for the period 2010 to 2011; 1.6% pa for the period between 2011 and 2012; rising to 2.8% pa between 2012 and 2014; and 3.0% pa from 2014 onwards. These growth rates are based on the latest economic forecasts published by Experian Business Strategies (Retail Planner 9, September 2011).
- 10.11 These growth rates reflect that we expect spending on comparison goods to grow faster than on convenience goods, as the scope to purchase more food is limited. These assumptions take into account current economic circumstances and the effects of the recession, which have had a significant impact on forecast levels of growth expected over the period to 2029.
- 10.12 Taking these considerations into account, we have generated the expenditure within each zone to highlight variations across the survey area, and grown these expenditure

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figures accordingly to 2012 and 2014 and then in 5 year intervals (2019, 2024 and 2029), which represent 5 year forecasting periods as required by the NPPF.

- 10.13 Table 3 Appendix 1 applies per capita expenditure within each zone to the population forecasts, which indicates that total available convenience goods expenditure within the survey area at 2012 is £298,779m. This is forecast to grow to £303,477m by 2014; rising to £319,942m by 2019; and £340,235m by 2024; and to £359,494m by 2029. This equates to an overall growth of £60,716m (20% growth) between 2012 and 2029.
- 10.14 Comparison goods expenditure within the survey area at 2012 is £464,621m. This is forecast to grow to £490,119m by 2014; rising to £585,174m in 2019; £703,050m in 2024; and £840,193m in 2029. This equates to an overall growth for comparison goods expenditure in the survey area of £375,571m (81%) between 2012 and 2029 (Table 3, Appendix 2).

### Floorspace Data

- 10.15 The comparison and convenience goods floorspace data used in our modelling has been drawn from the Institute of Grocery Distribution (IGD), West Oxfordshire District Council and Experian Goad. Our floorspace assumptions for the foodstores include adjustments, where necessary, to identify the proportion of purely convenience goods floorspace. Most superstores include a proportion of non-food floorspace; we have adjusted the net floorspace to identify the proportion of sales floorspace allocated for convenience goods. These assumptions have been informed through site visits of the main foodstores in the District. This accords with the expenditure data and the expenditure assumptions used.

### Convenience Goods Capacity Projections

- 10.16 Addressing global capacity for the district and then capacity arising within each town centre in turn, we review shopping patterns, the performance of existing convenience goods floorspace and highlight identified capacity. The modelling tables are set out in Appendix 1. Using the adjusted market shares derived from the household telephone survey and baseline expenditure estimates, we have calculated the convenience goods turnover of the main convenience provision in the District.
- 10.17 The main foodstore provision within the District is listed in Table 10.1 below, and illustrated on Plan 3. It is evident from Plan 3 that there is a reasonably good coverage of main foodstore provision within the built up areas of the District and that the majority of existing

provision is concentrated within existing centres. However, there are two main out of centre foodstores in Witney (identified below).

**Table 10.1: Main Convenience Goods Provision in West Oxfordshire**

Centre	Main Foodstore	Zone
Witney (in centre)	Waitrose, Co-op, Marks and Spencer	Zone 1
Witney (out of centre)	Sainsbury's Witan Way, Lidl, Ducklington Lane	Zone 1
Chipping Norton	Co-op, Sainsbury's	Zone 2
Carterton	Co-op, Aldi	Zone 3

Source: Table 4, Appendix 1

### Global Convenience Capacity Projections for West Oxfordshire District

- 10.18 We have examined the global capacity for additional convenience goods floorspace in the District up to 2029, incorporating interim years of 2014, 2019 and 2024. It is important to note that capacity forecasts become increasingly open to margins or error over time and should be updated over the plan period – ideally every 5 years. The period up to 2019 is therefore the most robust, and forecasts after this date are less reliable.
- 10.19 In order to ensure our capacity forecasts are as up to date and robust as possible, we have taken into account new convenience goods developments coming forward in the main town centres as a result of existing planning permissions. These include the extension to the Co-op foodstore at High Street, Chipping Norton, the petrol filling station shop on Upavon Way, Carterton and the Majestic Wine store on High Street, Witney. We are aware of the proposals for a Morrison's foodstore at Carterton but as this application had not yet been determined during the course of the study it has not been taken into account in the baseline capacity forecasts.
- 10.20 Based on the combined turnover and current market share of the main convenience destinations in West Oxfordshire (including out of centre foodstores), we estimate that there will be surplus convenience goods expenditure of c.£39.1m at 2014. By virtue of the forecast growth in population and expenditure, and after allowing for existing in-centre convenience stores to improve sales efficiency in line with Experian's advice, we estimate that the identified surplus of available expenditure will increase to £46.8m by 2019, rising to £57.8m by 2024 and £106m by 2029.
- 10.21 To translate this surplus expenditure into floorspace, we have assumed that mainstream foodstore operators would aim to achieve an average sales density of around £12,000 per

sqm net. As is our normal practice, we have not prepared low and high sales density capacity forecasts, instead we have focussed on the capacity available to support main foodstores. If smaller operators or discount retailers came forward, the amount of capacity arising would be greater as they achieve a lower sales density.

- 10.22 Based on constant market shares we estimate that the global convenience goods capacity for the District will be 3,234 sqm net by 2012, rising to 3,832 sqm net by 2019, increasing to 4,681 sqm net by 2024, and again to 8,504 sqm net by 2029.
- 10.23 Taking into account growth in population and expenditure, there is identified capacity to support additional convenience goods floorspace in the District over the period to 2029. This is largely arising as a consequence of significant overtrading of stores in the District, particularly the Sainsbury's and Waitrose in Witney, the Co-op in Chipping Norton and the Aldi and Co-op in Carterton (discussed below). It is not unusual or undesirable for some stores to trade above company averages and where floorspace capacity is indicated it does not justify out of centre shopping development in the District, and convenience goods floorspace should be directed to town centres first, in accordance with the NPPF. A priority for the Council should be to ensure that the town centres continue to perform a strong convenience goods role.

### Witney Town Centre

- 10.24 We have estimated the trade draw of Witney town centre for convenience goods (Table 4, Appendix 1). This breaks down the trade drawn from in centre stores in Witney (Waitrose, Co-op, Marks and Spencer foodhall and other smaller and independent convenience stores (including delicatessens, butchers and specialist food stores), and trade drawn from the two main out of centre foodstores (Sainsbury's and Lidl).
- 10.25 It is evident that Witney in centre and out of centre foodstores combined draw a 74% convenience goods market share within Zone 1. This is a high level of trade retention within this zone. Table 4 (Appendix 1) and Plan 4 illustrates that foodstore provision in Witney also has a significant influence on shopping patterns in the surrounding Zones 5, 11, 6 and 3 (with market shares of 57%, 40%, 37% and 36% respectively). Foodstore provision in Witney also has a more limited influence in shopping patterns in Zones 10, 9 and 4 (market shares of 26%, 21% and 9% respectively). This indicates the foodstores in Witney have a strong trade retention within West Oxfordshire District.

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- 10.26 It is evident that within the survey area, the out of centre Sainsbury's at Witan Way has the strongest influence on shopping patterns, drawing a market share in Zone 1 of 44%. Sainsbury's also draws high market shares from Zones 5, 3, 6 and 11 (drawing 35%, 30%, 21% and 19% market shares respectively). In total, we estimate that the store has a total convenience goods turnover of approximately £60.6m (Table 5, Appendix 1). Based on an estimated floorspace of 3,285 sqm net convenience floorspace, this equates to a sales density of circa £18,455 per sqm net. Compared to an average sales density for Sainsbury's of £12,526 per sqm net, this analysis indicates that the store is currently trading very strongly at above company average levels.
- 10.27 Within Witney town centre, the Waitrose foodstore draws a 17% market share from Zone 1. The Waitrose also draws trade from Zones 11, 6 and 5 (drawing market shares of 18%, 12% and 12% respectively). We estimate that the store has a total convenience goods turnover of approximately £24.6m. Based on an estimated convenience goods floorspace of 1,587 sqm net, this equates to a sales density of £15,497 per sqm. Company average sales densities for Waitrose are £11,320 per sqm, which indicates that this store is also performing strongly at above company average levels.
- 10.28 The turnover of the Marks and Spencer's foodhall is £2.8m. Using a floorspace estimate of 650 sqm net convenience goods sales floorspace, this indicates that the store has a sales density of £4,282 per sqm net. Comparing this to Marks and Spencer's company average sales density of £10,833 per sqm this indicates that the store is underperforming, however we often find that people understate the extent to which they visit Marks and Spencer stores for top up food shopping and therefore we consider it is likely that responses to the telephone survey have underestimated the actual store's market share. Our site visit found that the store was busy and appeared to be performing well, therefore we anticipate that the actual turnover of this store is higher.
- 10.29 Other convenience stores and independent food retailers in Witney (including the out of centre Lidl store) draw a market share of 11.2% in Zone 1 and 14.9% in Zone 5. These foodstores principally cater for 'top-up' food shopping, although the Lidl supermarket also draws a reasonable proportion of 'main' food shopping. We forecast that these stores achieve a turnover of approximately £10.9m, equating to an average turnover of £4,191 per sqm net, which is a relatively strong level of turnover for local town centre shops.

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- 10.30 We estimate that the total convenience goods turnover of Witney (including in centre and out of centre foodstores), is currently £98.9m, approximately 33% of total available expenditure in the survey area. Based upon a total net sales floorspace of approximately 8,116 sqm net, Witney currently has an average convenience goods sales density of £12,182 per sqm net. This is significantly higher than our estimate of company average sales densities for the main foodstores in and outside Witney town centre (£9,790 per sqm net), and indicates that convenience stores in the town are performing very strongly.
- 10.31 The telephone survey does not pick up tourist or business users who may undertake lunchtime shopping trips to the town centres foodstores. These stores are also less likely to be recognised as main food shopping destinations. Trade not identified within the raw data of the household survey will boost the estimated turnover figures above. These factors may increase spending in foodstores thus contributing to the need for additional retail floorspace.

#### *Convenience Goods Capacity: Witney*

- 10.32 We have examined the capacity for additional convenience goods floorspace in Witney up to 2029, incorporating interim years of 2014, 2019 and 2024. In order to ensure our capacity forecasts are as up to date and robust as possible, we take account of new convenience goods developments already coming forward as a result of existing planning permissions. We have factored into our assessment the commitment for the Majestic Wines store on the High Street. This development, which includes an uplift in floorspace, has been implemented during the duration of the study and is included as a commitment.
- 10.33 We estimate there will be surplus convenience goods spend to support further convenience goods floorspace in Witney between 2014 and 2029. Our projections are summarised in Table 13, Appendix 1, and indicate that by 2014 there will be £19.1m residual expenditure to support convenience goods floorspace, which is forecast to grow to £23.9m in 2019; and £30.8m in 2024; to £75.3m by 2029. When converting this residual expenditure into floorspace we have assumed that mainstream foodstore operators would aim to achieve an average sales density of £12,000 per sqm net. If smaller operators and discount food retailers came forward, the amount of capacity would be greater as they achieve a lower sales density (e.g. Lidl have a sales density of £2,987 per sqm).

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- 10.34 Using a sales density of £12,000 per sqm net, and assuming constant market shares, there is capacity for an additional 1,579 sqm net of convenience goods floorspace by 2014, growing to 1,939 sqm net by 2019, rising to 2,472 sqm net by 2024, and again to 5,978 sqm net by 2029.
- 10.35 This capacity arising is largely as a consequence of the significant overtrading of the existing Witney foodstores, in particular the Sainsbury's and Waitrose supermarkets, which are collectively overtrading by around £26.1m. We anticipate that if the Morrison's application in Carterton is granted consent and implemented, this store would clawback trade from Witney, thereby reducing the convenience goods capacity arising in the town and diverting trade from the overtrading stores in Witney. Over the plan period if the proposed Morrison's store is implemented and claws back expenditure from Witney, the effect of this must be tested robustly through future retail assessments, testing of the impact of the new store on shopping patterns in the District.

### Chipping Norton Town Centre

- 10.36 We have estimated the trade draw of Chipping Norton town centre for convenience goods (Table 4, Appendix 1). This breaks down the trade drawn from in centre stores in Chipping Norton; the Co-op and Sainsbury's supermarkets. The trade draw of convenience stores in Chipping Norton includes main food and top-up food convenience goods shopping. 'Other' town centre food stores include smaller independent convenience goods retailers in the town centre (including butchers and bakers).
- 10.37 It is evident from our analysis that the town centre convenience goods trade draw in Chipping Norton is reasonably self-contained in comparison to Witney town centre. Chipping Norton is located in the north of the District, and as we would expect, the highest convenience goods trade draw is within Zone 2 (66%). Chipping Norton also has a smaller influence in surrounding Zones 8, 9 and 11, with market shares of 10%, 10% and 12% respectively (as illustrated on Plan 4). There are very low market shares throughout the rest of the survey area (Table 4, Appendix 1).
- 10.38 It is evident that the Co-op store at Market Place has the strongest influence within Zone 2 (44%), and draws a more limited market share from the adjoining Zones 8, 9 and 11 (7%, 5% and 9% respectively). In total, we estimate that the store has a total convenience goods turnover of c.£12.1m (Table 5, Appendix 1). This equates to a sales density of

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approximately £18,994 per sqm net. Compared to an average sales density for the Co-op of £7,530 per sqm net, this analysis indicates that the town centre store is currently trading at well above average levels.

- 10.39 Trade draw to the Sainsbury's supermarket in Chipping Norton was identified to be lower than the Co-op store, with a market share of 20% in Zone 2, 3% in Zone 8, 5% in Zone 9 and 3% in Zone 11. We estimate that Sainsbury's has a total convenience goods turnover of approximately £6m (Table 5, Appendix 1). This equates to a sales density of £11,857 per sqm net, which is slightly below the Sainsbury's company average (£12,526 per sqm net). These findings highlight the stronger role of the Co-op in Chipping Norton town centre.
- 10.40 Trade draw to the 'other' town centre foodstores is significantly weaker than the main two foodstores, drawing a market share of only 3% from Zone 2. We estimate that these stores achieve a turnover of around £0.5m, equating to an average turnover of £1,571 per sqm net (Table 5, Appendix 1). We consider that this is a low level of turnover for local town centre convenience goods shops, although the actual turnover of the stores may be higher after taking account of their 'top-up' food shopping roles, which may have been underestimated by respondents to the household telephone survey.
- 10.41 Overall, we estimate that the total convenience goods turnover of Chipping Norton is currently £18.7m. Within Chipping Norton's core catchment area (Zone 2), the town centre foodstores account for approximately 66% of total available convenience goods expenditure within this zone. Based on a total net sales floorspace of 1,484 sqm, Chipping Norton town centre currently has an average convenience goods sales density of £12,573 per sqm net. This is above our estimate of company average sales densities for the town centre foodstores (£8,444 per sqm net). This confirms the strong role that food shopping plays in the performance of the town centre.

#### *Convenience Goods Capacity: Chipping Norton*

- 10.42 We have examined the capacity for additional convenience goods floorspace in Chipping Norton up to 2029, incorporating interim years of 2014, 2019 and 2024. In order to ensure our capacity forecasts are as up to date and robust as possible, we take account of new convenience goods developments already coming forward as a result of existing planning permissions. Accordingly, we have factored into our assessment the commitment to extend the Co-op foodstore on the High Street by 946 sqm net.

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- 10.43 We estimate that there will be a small surplus convenience goods expenditure to support further convenience goods floorspace in Chipping Norton between 2014 and 2029. Our projections are summarised in Table 14, Appendix 1, which indicates that by 2014 there will be £2.8m residual expenditure to support convenience goods floorspace, which is forecast to grow to £3.4m in 2019; and £4.3m in 2024; to £5.2m by 2029. When converting this residual expenditure into floorspace we have assumed that mainstream foodstore operators would aim to achieve an average sales density of £12,000 per sqm net. If smaller operators and discount food retailers came forward, the amount of capacity would be greater as they achieve a lower sales density.
- 10.44 Using a sales density of £12,000 per sqm net, assuming constant market shares, there is capacity for 230 sqm net of convenience goods floorspace by 2014, growing to 272 sqm net by 2019, rising to 349 sqm net by 2024, and again to 416 sqm net by 2029.
- 10.45 The above figures take into account the proposed extension to the Co-op foodstore, which is likely to absorb the residual spend arising within Chipping Norton, resulting in only a small amount of additional spend to support provision of further convenience goods floorspace in the town centre.

### Carterton Town Centre

- 10.46 We have estimated the trade draw of Carterton town centre for convenience goods (Table 4, Appendix 1). This breaks down the trade drawn from in centre stores in Carterton; the Co-op and Aldi supermarkets. The trade draw of the convenience stores in Carterton town centre is made up of main food and top-up food convenience goods shopping. 'Other' town centre food stores include smaller independent convenience goods retailers in the town centre (including local butchers and newsagents).
- 10.47 Our analysis demonstrates that Carterton town centre has a relatively contained trade draw in comparison to Witney and Chipping Norton. Carterton is located in Zone 3 of the survey area, and as we would expect, the town centre has the highest convenience goods trade draw in this zone (43%). Beyond Zone 3, Carterton has a more limited influence on food shopping patterns, drawing a 20% market share from Zone 10 (immediately to the west), and nominal market shares from Zones 1, 4, 5, 9 and 11 (Table 4, Appendix 1).

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- 10.48 Within Zone 3, the Aldi supermarket (opened May 2012), was found to be the strongest performing foodstore, with a market share in Zone 3 of 23%, and 6% in Zone 10. In total, we estimate that the Aldi store has a total convenience goods turnover of around £12.5m (Table 5, Appendix 1). This equates to a sales density of £13,878 per sqm net. Compared to an average sales density for Aldi of £7,397 per sqm net, this analysis indicates that the newly opened store is already performing strongly, and is trading at well above company average levels.
- 10.49 The Co-op supermarket on Black Bourton Road also has a reasonable influence on shopping patterns in Zone 3, drawing a market share of 18%, and within Zone 10 drawing a market share of 14%. Our analysis suggests that the store has a total convenience goods turnover of £11.6m (Table 5, Appendix 1). Based on a net convenience floorspace of 1,412 sqm net, this equates to a sales density of £8,242 per sqm net. Compared to an average sales density for the Co-op of £7,530 per sqm net, this analysis indicates that this store is also trading well at above company average levels.
- 10.50 Trade draw to other smaller and independent convenience goods retailers in Carterton town centre is significantly lower than the main foodstores in the town. Within Zone 3, the 'other' town centre stores draw a market share of only 3%, and the stores draw no trade from any of the other survey zones (Table 4, Appendix 1). Collectively the 'other' town centre stores achieve a turnover of approximately £1m, equating to an average turnover of £3,231 per sqm net. We consider that this turnover is slightly below average for local town centre convenience goods shops, however this level of turnover appears reasonable for a centre of this size.
- 10.51 We estimate that the total convenience goods turnover of Carterton town centre is currently £25.2m. Within the Carterton Zone (Zone 3), foodstores in Carterton draw £17.8m or 43% of total available convenience goods expenditure available in this zone. Based on a total net sales floorspace of approximately 2,632 sqm net, Carterton town centre currently has an average convenience goods sales density of £9,560 per sqm net. This indicates that Carterton town centre is performing above the levels based on company average sales densities (£7,055 per sqm net).

#### *Convenience Goods Capacity: Carterton*

- 10.52 We have examined the capacity for additional convenience goods floorspace in Carterton up to 2029, incorporating interim years of 2014, 2019 and 2024. To ensure our

capacity forecasts are as up to date and robust as possible, we take account of committed convenience goods developments coming forward as a result of existing planning permissions. Accordingly, we have factored into our assessment the development of a petrol filling station and shop (assumed to be used for the sale of convenience goods), which comprises 368 sqm net convenience floorspace. The Council resolved to grant consent for a proposed Morrison's foodstore in October 2012, and as such has not been included as a commitment for the purposes of our capacity forecasts.

- 10.53 We estimate that there will be a surplus of convenience goods expenditure to support further convenience goods floorspace in Carterton between 2014 and 2029. Our projections are summarised in Table 14, Appendix 1, which indicates that by 2014 there will be £6.2m residual expenditure to support convenience goods floorspace, which is forecast to grow to £7.8m in 2019; and £9.9m in 2024; to £11.9m by 2029. When converting this residual expenditure into floorspace we have assumed that mainstream foodstore operators would aim to achieve an average sales density of £12,000 per sqm net. If smaller operators and discount food retailers came forward, the amount of capacity would be greater as they achieve a lower sales density.
- 10.54 Using a sales density of £12,000 per sqm net, and assuming constant market shares, there is capacity for an additional 509 sqm net of convenience goods floorspace by 2014, growing to 629 sqm net by 2019, rising to 793 sqm net by 2024, and again to 947 sqm net by 2029.
- 10.55 The current proposals for a Morrison's foodstore in Carterton town centre would claw back trade currently leaking to foodstores in other areas notably Witney. This would influence shopping patterns in the area, reducing the need for residents from Zone 3 travelling to Zone 1 to undertake their main food shopping, thereby supporting sustainable shopping patterns in Carterton.

## Comparison Goods Capacity Projections

### Global Comparison Goods Capacity

- 10.56 In assessing capacity for future comparison goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time, and we have assumed an annual growth in existing sales per sqm net of 1.7%. Total floorspace in

West Oxfordshire is currently trading at an average of £6,617 per sqm net. Drawing on our experience elsewhere in similar sized and performing centres, we have used assumptions for sales densities for new comparison goods floorspace of £5,000 per sqm net on the basis that new floorspace will distribute and dilute expenditure. We also forecast that this will grow by 1.7% per annum.

- 10.57 This assessment has considered the effect of West Oxfordshire maintaining its existing market share and used growth in available expenditure to support the development of new floorspace. In the latter part of the development plan period, centres in West Oxfordshire are likely to face increasing competition from centres in the wider sub-region if new town and city centre schemes are developed (notably Oxford). Maintaining the District's market share will become increasingly important to the vitality and viability of the centres. We have factored in commitments arising within Witney, Chipping Norton and Carterton, which in total will provide 1,572 sqm net additional comparison goods floorspace.
- 10.58 Based on our assessment, it is evident from Table 12, Appendix 2, that there will be capacity to support further comparison goods floorspace over the development plan period after 2019. We estimate that within the District that there will be negative capacity arising for comparison goods floorspace of -80 sqm net up to 2014, however by 2019 there is capacity to support 3,987 sqm net, increasing to 8,732 sqm net by 2024, and increasing again to 13,685 sqm net by 2029.
- 10.59 It should be noted that any floorspace capacity arising does not justify the development of further out of centre comparison goods floorspace. In line with Government policy it will be necessary to direct global capacity into the town centres in the first instance. There are also vacant retail units available in West Oxfordshire Business Park in Carterton at the current time (2,372 sqm net), which are restricted to the sale of non-food bulky goods only. Should these units be occupied they would absorb some of the identified capacity arising for comparison goods floorspace.

### Witney Town Centre

- 10.60 Table 4, Appendix 2 indicates the trade draw of Witney town centre and B&Q store on Thorney Leys Park (no other out of centre stores achieved a significant trade draw although it is noted there are other out of centre stores such as within the Station Lane

Industrial Estate). It is evident that the comparison goods catchment of Witney (including in and out of centre stores) is relatively disbursed, drawing high levels of comparison goods trade from Zone 1, 3, 5, 6 and 11 (the zones closest to Witney), and also drawing trade from Zones 4, 9 and 10 which are further afield. The centre has its highest market share in Zone 1 (69%), the Zone in which it is located, and also achieves the following market shares 51% (Zones 3 and 5), 40% (Zones 6 and 11), 29% (Zone 10), 20% (Zone 9) and 7% (Zone 4). Plan 6a illustrates the extent of the town centre's influence throughout the defined survey area highlighting variations in market share.

- 10.61 On the basis of current market shares, we estimate that Witney town centre currently retains approximately 34% of comparison goods trade within the study area. This equates to a comparison goods turnover of £155.8m. With an existing shop floorspace of approximately 17,528 sqm net, we estimate that Witney town centre has a sales density of around £8,891 per sqm net. Based on our experience elsewhere, we consider that Witney is performing extremely strongly for a town centre of this size. This is consistent with our qualitative review of the town centre.

#### *Witney Capacity*

- 10.62 This assessment has considered the effect of Witney maintaining its existing market share and used growth in population and expenditure to support the development of new floorspace. Potentially, over the latter part of the development plan period, Witney could face increasing competition in the wider sub-region, particularly Oxford, if the extension of the Westgate Centre goes ahead. Maintaining existing market share will become increasingly important.
- 10.63 In assessing capacity for comparison goods we have factored in existing commitments for comparison goods floorspace in Witney, including the development of a replacement Poundstretcher at Station Lane and the Electricity Showrooms development at Welch Way, which in total will provide 1,157 sqm net comparison goods floorspace.
- 10.64 Based upon our assessment it is evident from Table 13, Appendix 2, that there will be residual capacity to support further comparison goods floorspace in Witney by virtue of growth in population and available expenditure. We estimate that by 2014, based on current market shares, there would be theoretical capacity to support an additional 56 sqm net of comparison goods floorspace, increasing to 3,550 sqm net by 2019, and to 7,616 sqm net by 2024 and again to 11,868 sqm net by 2029.

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## Chipping Norton Town Centre

- 10.65 Table 4, Appendix 2 identifies the trade draw of Chipping Norton town centre for comparison goods. It is evident that the comparison goods catchment area for Chipping Norton is more localised than Witney town centre, being predominantly constrained to Zone 2, however Chipping Norton does also draw some trade from the surrounding Zones (8, 9 and 11). This is illustrated in Plan 6b, which reflects the settlement pattern in the catchment area and competing provision, particularly from Witney in the south and Banbury in the north. The centre has its highest market share in Zone 2 (37%), the Zone in which it is located, and also achieves a market share of 14% in Zone 11, 11% in Zone 9 and 9% in Zone 8.
- 10.66 Chipping Norton town centre currently retains approximately 4.6% of comparison goods trade within the study area. The town centre therefore has a comparison goods turnover of approximately £21.2m. With an existing comparison shop floorspace of approximately 4,738 sqm net, we estimate that Chipping Norton town centre has a sales density of £4,477 per sqm net. Based on our experience elsewhere, we consider Chipping Norton is performing reasonably well for a town centre at this level in the retail hierarchy, however if the sales density was any lower this would be a concern.

### *Chipping Norton Capacity*

- 10.67 This assessment has considered the effect of Chipping Norton maintaining its existing market share and used growth in population and expenditure to support the development of new floorspace. Maintaining and enhancing existing market share will be increasingly important over the development plan period as the centre will continue to face increasing competition from centres in the wider sub-region if new town centre schemes go ahead.
- 10.68 In our capacity forecast we have factored in commitments for additional retail floorspace in Chipping Norton, which will soak up some capacity arising for new comparison goods floorspace. The main commitment in Chipping Norton is the reconfiguration of the Co-op store which will include a 215 sqm extension to the Beales department store and relocation of the Co-op travel agent and pharmacy (Table 11, Appendix 2).
- 10.69 Based upon our assessment at Table 14, Appendix 2, there will be capacity to support further comparison goods floorspace in Chipping Norton over the development plan

period by virtue of growth in population and available expenditure. We estimate that, based on current market shares, there will be negative capacity arising for comparison goods in 2014 (-59 sqm net), however there will be capacity arising in 2019 for 318 sqm net, increasing in 2024 to 768 sqm net, and rising again at 2029 to 1,231 sqm net.

### Carterton Town Centre

- 10.70 Table 4, Appendix 2 indicates the trade draw of Carterton town centre. It is evident that the comparison goods catchment area is particularly constrained to Zones 3 and 10. Zone 3 comprises Carterton town, and Zone 10 borders this zone. This tight catchment area reflects the settlement pattern in the catchment area and the competing provision from within and outside the study area. The centre has its highest market share in Zone 10 (5%), whilst Zone 6 (the zone in which it is located), draws a slightly lower market share (4%). Plan 6c illustrates the extent of the town centre's influence throughout the survey area, indicating a relatively low trade draw from a limited catchment.
- 10.71 Carterton retains approximately 1% of comparison goods trade within the study area. On the basis of current market shares we estimate that the town centre has a total turnover of £4.6m. With an existing shop floorspace of approximately 1,758 sqm, this means that Carterton town centre has a sales density of around £2,612 per sqm net. Taking into account the size of this centre, we consider that Carterton is not performing adequately for a town centre at this level in the retail hierarchy.

### *Carterton Capacity*

- 10.72 This assessment has considered the effect of Carterton maintaining its market share and used growth in population and expenditure to support the development of new floorspace. Potentially Carterton could face increasing competition from centres in the wider sub-region over the plan period if new town centre schemes go ahead and therefore maintaining Carterton's market share will become increasingly important. Over the plan period it will also be important to boost Carterton's comparison goods market share to ensure that the town centre is performing adequately for a centre of this scale in the retail hierarchy and to promote sustainable shopping patterns.
- 10.73 In our capacity forecast we have factored in commitments for additional retail floorspace in Carterton, which will soak up some capacity arising for new comparison goods floorspace. The main comparison goods commitment in Carterton is the development of

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new shop units at 19 Burford Road, which will provide 200 sqm net additional retail floorspace in the town (Table 11, Appendix 2). We anticipate that the proposed Morrison's foodstore in the SW Quadrant will contain an element of comparison goods floorspace, however the Section 106 Agreement has not yet been signed, and as such the proposal has not been factored into our assessment as a commitment.

- 10.74 Based upon our assessment of current market shares, it is evident at Table 15, Appendix 2, that there will be limited capacity to support further comparison goods floorspace in Carterton over the development plan period by virtue of growth in population and available expenditure. We estimate that there will be negative comparison goods capacity arising in 2014 (-94 sqm net), however capacity will arise after this period, with 15 sqm net arising in 2019, rising to 142 sqm net in 2024 and increasing again to 274 sqm net in 2029. However, the proposed implementation of a Morrison's superstore in the town provides an opportunity to increase the market share of the town and the potential to increase the comparison goods floorspace above the capacity identified by attracting new comparison goods retailers to the invest in the centre.

## Summary

- 10.75 Baseline capacity projections are based on current market shares, identifying capacity for new convenience and comparison goods floorspace by virtue of population and expenditure growth. The potential scope for changes to shopping patterns and market shares within West Oxfordshire District is assessed in further detail in Section 11 of this report.
- 10.76 Our capacity projections have factored in known convenience and comparison goods commitments, which have absorbed some of the residual expenditure arising in the District. The figures set out below in Table 10.2 represent capacity arising within the West Oxfordshire District, following the implementation of known commitments which excludes current proposals for a Morrison's store at Carterton (2,182 net sales). Furthermore, the figures also do not take account of vacant non-food bulky goods units at the West Oxon Business Park (2,372 sqm net) which if occupied would reduce the baseline capacity further.
- 10.77 The location of any new retail development should be subject to the sequential test and guided by Section 11 of this report which discusses development opportunities and

strategy. It should be noted that capacity figures arising towards the end of the development plan period (2024-2029) are more likely to be subject to margins of error.

**Table 10.2: Baseline Capacity Forecasts for Convenience and Comparison Goods in West Oxfordshire**

	2014	2019	2024	2029
<b>Convenience Goods</b>				
Residual Expenditure (£000)	39,125	46,816	57,771	106,000
Witney Indicative Capacity (sqm net)	1,579	1,939	2,472	5,978
Chipping Norton Indicative Capacity (sqm net)	230	272	349	416
Carterton Indicative Capacity (sqm net)	509	629	793	947
<b>Global Floorspace Capacity (sqm net)</b>	<b>3,234</b>	<b>3,832</b>	<b>4,681</b>	<b>8,504</b>
<b>Comparison Goods</b>				
Residual Expenditure (£000)	-416	22,429	53,450	91,130
Witney Indicative Capacity (sqm net)	56	3,550	7,616	11,868
Chipping Norton Indicative Capacity (sqm net)	-59	318	768	1,231
Carterton Indicative Capacity (sqm net)	-94	15	142	274
<b>Global Floorspace Capacity (sqm net)</b>	<b>-80</b>	<b>3,987</b>	<b>8,732</b>	<b>13,685</b>

Source: Table 12, Appendix 1 and Table 12, Appendix 2

Notes: Indicative floorspace capacity excludes current proposals for Morrison's store at Carterton (2,182sqm net sales)

Notes: The retail capacity figures for the three main centres (Witney, Chipping Norton and Carterton) do not total the global capacity figure, which also includes capacity arising within the smaller centres in the rest of the district (e.g. Burford, Woodstock, Hanborough and Charlbury).

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## 11. Conclusions and Recommendations

- 11.1 Drawing on our qualitative and quantitative analysis this section considers the scope for accommodating new retail development in the District. We examine each of the town centres assessed in this report in turn to review the scope for new retail development in these centres over the forthcoming development plan period.
- 11.2 The NPPF advises Council's to plan positively to meet needs arising for town centre uses. Policies should support the vitality and viability of town centres, and allocate a range of suitable sites to meet the scale and type of retail development needed in town centres. This section addresses these requirements and makes recommendations to provide the Council with up to date evidence to prepare suitable town centre strategies for the District.

### Witney Town Centre

- 11.3 Our assessment of Witney has identified a vital and viable centre, performing exceptionally well against a number of indicators. The analysis highlighted a strong comparison goods offer, good representation from both multiple and independent retailers and low vacancy rates. The town centre also provides an attractive shopping environment incorporating the traditional High Street and Corn Street and the Woolgate Centre and Marriotts Walk shopping centres and provision of free car parking. Witney will need to continue to build on these strengths in the town centre over the development plan period to ensure that the centre remains competitive with higher order centres such as Oxford.
- 11.4 In terms of convenience goods, our analysis has highlighted a strong representation of multiple and independent retailers. Waitrose is the key anchor foodstore within the town centre, in addition there is a Co-op on the High Street, and the provision of a Marks and Spencer's foodhall at Marriotts Walk has helped to improve the quality of the main food offer.
- 11.5 The majority of foodstores in Witney achieve good sales densities which indicate they are performing strongly. The turnover achieved by Witney's town centre foodstores is just over half the turnover achieved by the out of centre Sainsbury's foodstore which is located in

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relatively close proximity to the town centre. The Sainsbury's supermarket provides the main convenience goods offer in the Witney area, and draws trade from most of the zones in the survey area.

- 11.6 Our convenience goods capacity projections for Witney have highlighted residual capacity for an additional 1,579 sqm net floorspace up to 2014, growing to 1,939 sqm net up to 2019, increasing to 2,472 sqm net by 2024 and again to 5,978 sqm net by 2029. We are not aware of any proposals or commitments for new foodstore provision in Witney at present.
- 11.7 These convenience goods figures are based on current market shares, and it is evident from the results of our analysis that the foodstore provision in and around Witney accounts for £98.9m or 33% of total available convenience goods expenditure within the survey area. The foodstores draw trade from a relatively wide catchment area, and the stores perform strongly within Zone 1, retaining 74% of convenience goods market share in this zone.
- 11.8 The identified convenience goods floorspace capacity identified is based on growth in population and expenditure above the turnover required to support existing foodstores in line with company averages. The floorspace capacity arising in Witney is also in part due to the strength in performance of the existing foodstores, most of which are trading at significantly above company average levels. It is not unusual or undesirable for some stores to trade above company averages and where floorspace capacity is indicated it does not necessarily mean there is a need for further foodstore provision to alleviate overtrading or to justify out of centre shopping development in the District.
- 11.9 We strongly recommend that any foodstore development in Witney over the development plan period should be directed towards the town centre to strengthen the in-centre foodstore provision. We note that some of the capacity arising in Witney will be clawed back to Carterton if the Morrison's foodstore proposal is permitted and implemented. This change in shopping patterns is consistent with the principles of sustainable economic development and making shopping facilities more locally accessible. In this context we do not consider that the Council needs to allocate a specific site in Witney to accommodate a new foodstore, as the capacity arising will be met within the more sustainable location of Carterton.

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- 11.10 Our town centre audit also identified a good representation of multiple and independent comparison goods retailers in Witney, which provide a relatively high proportion of comparison goods units and floorspace against the national average. The results from the household telephone survey highlight that Witney town centre is performing strongly at present, with a turnover of £155.8m, and a sales density of £8,891 per sqm net.
- 11.11 The previous NLP Retail Study for the District (2007) estimated that at 2007, Witney had a total comparison goods turnover of £66.82m. Since the study was undertaken the town centre development at Marriotts Walk and its adjoining free multi-storey car park has been implemented as has an extension to the Woolgate Shopping Centre and this study estimates that the town centre comparison goods turnover has significantly increased to £155.8m. This is a considerable increase in turnover and suggests that this development, in addition to the multi-storey car park provision with free car parking, has had a significant positive impact on the town centre comparison goods turnover.
- 11.12 Our capacity projections for additional comparison goods floorspace in Witney, based on maintaining current market shares, only identified limited residual expenditure to support floorspace in 2014 (56 sqm net), however this increases to 3,550 sqm net by 2019, to 7,616 sqm net by 2024 and to 11,868 sqm net by 2029.
- 11.13 At present, Witney achieves a strong market share for a town of its size, although it is evident that the town faces pressure from other centres outside the District, most notably Oxford city centre. We consider that if the redevelopment and extension of the Westgate Centre in Oxford is implemented over the plan period it will be crucial for Witney to continue to improve its comparison goods offer to retain its current market share. The Council must encourage the development of town centre sites to provide enhanced comparison goods floorspace to ensure that Witney remains competitive with Oxford.
- 11.14 While we recognise that the Marriotts Walk development has only opened relatively recently, there are no significant future town centre schemes identified in Witney. We consider that due to the significant retail scheme coming forward at Oxford over the plan period it will be important for the Council to take a pro-active role in identifying a range of suitable sites to accommodate the identified comparison goods capacity and 'other' town centre uses in Witney.
- 11.15 Based on our overview of opportunities in the town centre, there are potential development sites which could help secure additional retail floorspace over the longer
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development plan period. It will be critical that any new development is effectively integrated into the established retail core, and planned in such a way as to reinforce the centre as a whole. We consider that subject to further investigation, there are two sites which could contribute to meeting Witney's long term convenience and comparison needs; the Woolgate Centre and Land Off Welch Way. We discuss these sites below.

- 11.16 The Woolgate Centre is an open air shopping centre which originally opened in 1987, and has recently been extended to accommodate H&M and Next. The centre provides a key link between the primary shopping area and the car park to the east of the town centre. The Woolgate Centre provides an attractive shopping environment, although we are aware that several of the units (particularly at the western end of the centre) are too small to meet the modern floorspace requirements of multiple retailers who require larger floorplates. As demonstrated through the recent expansion of the Woolgate Centre, we are aware that the owners of this site are keen to provide larger retail units to accommodate these retailer requirements.
- 11.17 Scope to provide additional retail floorspace in this location could be through an intensification of the existing shopping centre and secondly through expansion into the eastern car park. Existing units in the shopping centre have potential to be amalgamated and extended in to the rear servicing yards or upwards to provide retail floorspace at first floor, subject to issues of conservation, design, amenity and access/servicing arrangements. Such a scheme would contribute to the retail offer of the centre and meet modern multiple retailer requirements.
- 11.18 The second option for the Woolgate Centre would be for the expansion of the existing shopping centre in to land comprising the eastern car park to provide additional retail units. Expansion into the car park will provide an opportunity to deliver units with large modern floorplates, built to the same high standards of design and construction of the Next and H&M stores, to meet retailer demand. However, such a scheme should be carefully planned and promote strong linkages with the primary shopping frontage at Market Square and High Street to encourage linked trips to the rest of the town centre and beyond to Marriotts Walk. Proposals for the expansion of the Woolgate Centre on to the car park must provide strong evidence of linkages to the High Street to maintain footfall within the retail core and not imbalance the distribution of retail in the centre.

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- 11.19 Such a scheme would be likely to have a significant impact on car parking within the town centre which we understand is already nearing capacity at peak times. Any expansion of the Woolgate Centre onto the adjoining car park would need to address issues relating to the loss of car parking spaces, impact on the conservation area, design and access. Opportunities to improve the layout, signage and efficiency of the existing car park which could increase the number of spaces available, should be investigated in the first instance but is unlikely to yield significant additional spaces and therefore the scope to increase the capacity of the car park further such as through the construction of a car park deck should also be considered.
- 11.20 The second site in Witney is the land off Welch Way to the rear of the retail units at High Street and Market Square, which is an edge of centre location. This is a brownfield site which adjoins the college and currently comprises a mix of land uses including a BT Exchange and poorer quality 60s and 70s commercial and community buildings. Part of the site comprises frontage on to Welch Way. The comprehensive redevelopment of the site could incorporate the redevelopment of the Welch Way frontage, leading on from the committed development of the Electricity Showrooms, to create an active frontage along Welch Way. This frontage, in addition to the land behind, could provide a significant level of additional town centre floorspace, and provide modern retail units with large floorplates. The development of this site would improve the linkages between Marriotts Walk and the town centre.
- 11.21 The site is currently in multiple ownerships and therefore the Council will need to consider options for a comprehensive or incremental approach to redevelopment is secured at the earliest opportunity. Any future development at this site will also need to consider, inter alia, the impact on the conservation area, design, access and car parking. The comprehensive redevelopment of the site will also need to provide strong linkages between Welch Way and the retail core of the centre to High Street and Market Square through to the Woolgate Centre. As such, we recommend that development on this site should enhance the existing retail core and provide strong frontages along Welch Way. We consider that Witney could accommodate development on both sites, provided that the retail and leisure offer is complementary and not tailored towards meeting the same demands.
- 11.22 We recommend that these development opportunities are investigated further to assess how the phased extension of Witney can be delivered to maximise connections to the
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Primary Shopping Area to strengthen the shopping core. The Council should not be complacent about the performance of Witney town centre. As such, investment in the town should be supported and encouraged to enable the deliverable and organic growth of Witney's town centre over the plan period.

- 11.23 The Council currently provide free short and long term car parking in various locations through the town. Responses to the household telephone survey and the Council's car parking survey demonstrate that this free car parking provision attracts a large number of respondents to shop in the town. The provision of the additional free car parking at the multi-storey car park in Marriotts Walk is likely to have contributed to the significant increase in turnover of the town centre. We consider that free car parking could be a key attractor to the town over other centres in the sub-region, such as Oxford.
- 11.24 We understand that there are concerns that town centre car parks in Witney are reaching capacity at peak times and that the centre suffers from traffic congestion. We recommend that free car parking in the town is maintained because it is a key driver to footfall and spend in the town centre. However to address the car parking capacity issues, we would encourage the effective management of car parking provision to ensure that traffic is calmed at peak times and use of car parks for commuting purposes is restricted, whilst encouraging shoppers and visitors to spend time in the town centre.
- 11.25 We recommend the identification of a Primary Shopping Frontage in the draft Local Plan along the retail core of Witney; between Marriotts Walk, the High Street and the Woolgate Centre. Within this area we recommend that the Council resists the loss of Class A1 retail units.
- 11.26 We also recommend that a secondary retail frontage should be designated in the Local Plan to support the existing town centre uses within the more secondary areas of the town. Accordingly, a secondary retail frontage should be identified; north from the primary frontage on the High Street; south from the primary frontage on the western side of Market Square to Corn Street; and retail units on Corn Street. In accordance with the NPPF, secondary frontages should be designated to provide greater opportunities for a diverse range of uses including restaurants, business and leisure uses to provide greater flexibility for change of uses in these locations, encourage occupation of vacant units, and provide greater support for existing retailers in these areas who would otherwise be considered as 'edge of centre' locations.

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11.27 Together, the primary and secondary frontages in Witney will comprise the Primary Shopping Area, and sites within this area would be considered as 'in centre' for the purposes of the main retail planning policy tests.

### Recommendations

- Start to plan for phased development of strategic sites which are capable of accommodating the identified retail capacity to reinforce the town centre as a whole;
- Develop an efficient car parking management strategy to enable the continued provision of free car parking for shoppers and visitors to the centre to maintain footfall to support local shops;
- Continue to promote the overall shopper and visitor 'experience' of the centre continuing to improve the environment, market town character and accessibility of the centre;
- Designate primary and secondary retail frontages and the Primary Shopping Area for Witney.

## Chipping Norton Town Centre

11.28 Our assessment of Chipping Norton indicates that the centre is performing well as a shopping destination, with a good mix of multiple and independent retailers, a low vacancy rate, a good range of comparison goods shops and an attractive shopping environment. The centre does, however, have some weaknesses and areas for improvement over the development plan period, including the qualitative convenience goods and leisure offer of the town centre and the lack of car parking provision.

11.29 Convenience goods retailing in Chipping Norton is a key attractor to the town centre, with 86% of respondents to the in centre car parking survey stating that the main purpose of their visit is to undertake food shopping. The importance of convenience goods retailing in role of the town centre is significant as this function is supporting the other comparison

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shops and services in the centre as people undertake linked trips in addition to their food shopping.

- 11.30 We identified some limited capacity arising to support additional convenience goods floorspace in Chipping Norton, based on constant market shares and having taken into account the proposed extension to the Co-op. In 2014 we identified residual capacity to support 230 sqm net, which increases to 272 sqm net in 2019, rising to 349 sqm net in 2024 and again to 416 sqm by 2029.
- 11.31 The existing Co-op and Sainsbury's stores draw from a relatively localised catchment, and achieve good sales densities. However both of these supermarkets occupy relatively small stores on constrained sites and this limits the qualitative convenience offer in the centre. We consider that the committed development to extend the Co-op foodstore will absorb the majority of the capacity arising for additional convenience goods floorspace in Chipping Norton. The proposed Co-op extension will also address the qualitative deficiency of the centre and improve the convenience goods offer.
- 11.32 The NPPF requires local authorities to allocate a sufficient range of sites to meet identified retail needs in town centres. Our assessment has not identified significant capacity for retail floorspace arising in Chipping Norton and as a result we consider that the Council does not need to identify significant development sites beyond Chipping Norton town centre to accommodate the convenience goods needs arising over the development plan period. Any future planning applications for out of centre retail development in Chipping Norton will need to be carefully considered against the sequential and impact tests to ensure that there is no significant adverse impact on Chipping Norton town centre.
- 11.33 The household telephone survey highlights that Chipping Norton is currently performing strongly, with a comparison goods turnover of £21.2m and a sales density of £4,477 per sqm net. Our projections identify some capacity for additional comparison goods floorspace in Chipping Norton over the development plan period. On the basis that Chipping Norton maintains its current market share in the face of growing competition, we estimate that there is negative capacity (-59 sqm net) up to 2014, with capacity arising for 318 sqm net in 2019, increasing to 768 sqm net in 2024, and rising to 1,231 sqm net up to 2029. The negative capacity arising up to 2014 is due to the implementation of the proposal to extend the Beales department store in conjunction with the Co-op extension, which absorbs most of the residual comparison goods expenditure arising in the short

term. As such, we consider that there is no need to identify more sites outside Chipping Norton town centre to accommodate the comparison goods needs arising.

- 11.34 At present, Chipping Norton has a relatively localised catchment area, and the majority of people within Zone 2 choose to undertake most of their comparison goods shopping in Banbury. Banbury is a higher order centre than Chipping Norton and we anticipate that these shopping patterns are unlikely to change significantly over the development plan period without major expansion of the town centre. Due to the constrained nature of the centre, it will be crucial that Chipping Norton maintains and where possible enhances its comparison goods shopping role in order to continue to provide a complementary shopping offer with the surrounding, larger order centres.
- 11.35 Due to the constrained historic nature of the built environment which falls within a Conservation Area, there are only limited sites available to accommodate future retail growth. The scale and design of future retail development must be particularly sensitive to the historic nature of the centre and maintain and enhance the high quality retail provision in Chipping Norton. We have identified potential sites which provide opportunities to accommodate the retail capacity arising in Chipping Norton, in addition to the Co-op site which already has planning permission for a store extension and reconfiguration.
- 11.36 These sites include the Sainsbury's car park, which we consider is currently underused and has the potential to accommodate an extension to the existing store. The burgage plots between the High Street and Albion Street provide a further site with potential to accommodate further retail growth, and the site is relatively well linked to the existing retail core. The development of the Chipping Norton Neighbourhood Plan provides an opportunity to consider the suitability of these sites to accommodate future retail growth in the town.
- 11.37 To conclude, we consider that the Co-op extension will absorb the majority of the need for convenience goods floorspace over the plan period. The small retail capacity identified in Chipping Norton should be directed to the town centre. While the centre is physically constrained and there are limited sites available to accommodate large scale retail development, we consider that the capacity arising is likely to be able to be delivered through the intensification and expansion of existing stores, or on the sites identified above (subject to careful consideration of conservation and design issues).

- 11.38 The lack of car parking is a key threat to the town centre. A priority over the plan period is retaining the level of local resident support for local shops. As such it will be crucial to encourage visitors to use the town centre and shop. Therefore a car parking strategy should be developed to improve the ease of access to the town centre.
- 11.39 Chipping Norton Town Council is a Neighbourhood Plan frontrunner, and we understand that a Neighbourhood Plan is currently being prepared. This provides an opportunity for the local community to positively engage in developing the future strategy for the town centre. Whilst the Chipping Norton Town Team was unsuccessful in its bid to become a Portas Town Team Pilot, we understand that funding has been secured to promote the town centre and raise the profile of the town.
- 11.40 A primary shopping frontage should be allocated along the High Street, and also include the Sainsbury's store on Market Street. We also recommend that a secondary shopping frontage should be introduced along Market Place and Market Street to support the existing town centre uses in this area. Together, the primary and secondary shopping frontages will provide Chipping Norton's Primary Shopping Area for the purposes of the national retail planning policy tests.

## Recommendations

- There is no significant capacity arising to support large scale retail development (convenience and comparison goods) over the plan period; and
- We consider that the small capacity arising for convenience and comparison goods is best delivered within the town centre in order to maintain the centre's vitality and viability. The Council, working with the Neighbourhood Plan, should be pro-active in bringing forward additional retail development within and then on the edge of the town centre where possible, with future retail development directed to the town centre first.
- The Chipping Norton Town Team should promote and co-ordinate the offer of the town centre to maintain and enhance the vibrancy of the centre. This should be linked to addressing car parking issues and traffic congestion within the town centre to encourage people to visit the centre.
- Designate primary and secondary retail frontages and the Primary Shopping Area for Chipping Norton.

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## Carterton Town Centre

- 11.41 Our assessment of Carterton town centre identified a reasonably strongly performing centre in relation to a number of key indicators. The town has a strong convenience goods and service goods offer and, similarly to Witney and Chipping Norton, achieves a very low vacancy level. However our analysis also identified some weaknesses in the centre, including an under provision of comparison goods shops and leisure units, which provide an opportunity to strengthen the role of this centre over the development plan period.
- 11.42 The Aldi and Co-op foodstores in Carterton are currently providing a main food and top up shopping role within Zone 3, and both stores were found to be performing strongly, however these foodstores have a relatively contained trade draw. Within Zone 3 (where Carterton is located), a significant proportion of trade is being drawn to supermarkets in Witney. This indicates that there is scope for Carterton to increase its convenience goods market share within its immediate catchment.
- 11.43 Our convenience goods capacity projections for Carterton highlighted capacity for an additional 509 sqm net up to 2014, growing to 629 sqm net up to 2019, rising to 793 sqm net up to 2024, and again to 947 sqm net up to 2029.
- 11.44 We are aware that Morrison's have recently submitted a planning application to develop a 2,182 sqm net foodstore in Carterton. Whilst this scale of foodstore is larger than the capacity identified for the town, we consider that development of such a store could help to maintain and enhance Carterton's convenience goods market share, claw trade back from Witney, and improve the qualitative food offer in the town. The proposed foodstore is located on Black Bourton Road, on an allocated site and therefore the proposed retail use is considered to be suitable for this location.
- 11.45 It is noted that the proposals do not incorporate the whole of the SW quadrant allocation (Local Plan Proposal 18), and we consider it will be crucial to ensure that any development on this site increases accessibility to the town centre by providing strong linkages to reinforce the retail core of the town centre. No details have been provided about the split between the proposed convenience and comparison goods floorspace, however we conclude that the sale of comparison goods from the store would be appropriate in this town centre location.

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- 11.46 Results from the household telephone survey indicate that at present Carterton has a comparison goods turnover of circa £4.6m and a sales density of around £2,612 per sqm net, which is reasonable for a town of this size. In quantitative terms, our capacity projections did not identify a significant amount of capacity arising within Carterton; 15 sqm net additional comparison goods floorspace by 2019, rising to 142 sqm net in 2024 and increasing again to 274 sqm net in 2029.
- 11.47 However, we consider that there is a qualitative need to improve comparison goods floorspace provision in the town. Our analysis indicates that the proportion of the number of comparison goods units in the centre is below the national average, and that the range and offer of comparison goods is relatively limited in comparison to the other centres in the District.
- 11.48 We consider that over the development plan period, it will be important for the Council to encourage retail development within Carterton town centre to enhance the quantity and quality of the comparison goods retail offer. The town has scope to enhance its market share by clawing back trade from competing centres, in order to meet a wider range of local 'needs' and support sustainable shopping patterns. The resolution to grant planning consent for the Morrison's scheme in Carterton has the potential to act as an attractor to the centre, uplift market share and attract a range of new retailers to the town.
- 11.49 The extent of market share uplift will be dependent on the scale of floorspace proposed and the retail/tenant mix provided through any new town centre development schemes.
- 11.50 We consider that Carterton town centre is a less constrained town centre in comparison to the most historic centres of Witney and Chipping Norton, and therefore the town centre provides a greater opportunity for new retail and leisure development.
- 11.51 The proposed foodstore in the SW quadrant may act as a catalyst for the future expansion of shopping facilities in the town and therefore it will be crucial that any new development in this area is effectively integrated into the established retail core, and planned in such a way to reinforce the centre as a whole. The northern section of the SW quadrant provides an opportunity to intensify retail provision along the Alvescot Road frontage. We understand that as part of the Section 106 negotiations the Council are seeking to secure a financial contribution from the Morrison's proposal to upgrade street furniture within the town and improve the integration of the store with the retail core of the town centre.
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- 11.52 We recommend that a town centre strategy should be developed for Carterton, which evaluates the demographics in the locality and draws on the results of soft market testing to identify commercial interest in the centre, to produce realistic and achievable aspirations, tailored to the requirements of local residents. New retail floorspace might include the provision of 2-3 larger format units occupied by key market operators (for example retailers such as Boots and TK Maxx). Large floorplate, full line stores would substantially improve the existing comparison goods offer in the town centre, providing a different retail offer to Witney and Chipping Norton. These stores could provide a substantial product range for local residents and those at the RAF base. Clearly, such a strategy would need to be tested further and site opportunities identified in the first instance to encourage interest and generate retailer demand.
- 11.53 The town centre strategy for Carterton should be developed in accordance with some of the key recommendations of the Portas Review, for example encouraging communities to have a greater say in the planning of their high street and exploring options to run the town centre as a business through a 'Town Team'. Despite not being chosen as a Portas Town Team pilot, the team managed to secure funding towards establishing design principles for the town centre, which should be pursued to influence future town centre development and to help integrate the proposed Morrison's foodstore.
- 11.54 In terms of retail frontages, we consider that the primary retail frontage in Carterton runs along the south of Alvescot Road and the Co-op store. We consider that a secondary retail frontage could be developed on the northern side of Alvescot Road and along Black Bourton Road and Burford Road. Together, the primary and secondary frontages will provide the Primary Shopping Area for the purposes of the national retail planning policy tests.

## Recommendations

- Carterton should maintain its strong convenience goods offer;
- We consider there is scope to enhance the competitiveness of the centre and increase the comparison goods and leisure service offer of the town;
- Carterton town centre has the physical opportunity to accommodate future retail and leisure proposals as it is a less constrained centre than the others in the District;

- There is an opportunity to improve the town centre's comparison goods offer over the development plan period to retain a higher market share within this zone. A realistic strategy should be developed to identify physical site opportunities, demographic profiling and retailer demand to test commercial interest in the area; and
- Designate primary and secondary retail frontages and the Primary Shopping Area for Carterton.

## Burford and Woodstock Town Centres

- 11.55 Burford and Woodstock are currently performing well in their roles in the retail hierarchy as secondary town centres, meeting the day to day needs of local residents. The centres have low vacancy rates, and a good mix of essential services and top up food shops. Both of these centres provide high end, luxury comparison goods shops, which cater to both residents and tourist visitors. Burford and Woodstock both have a very high quality historic environment which provides a pleasant shopping experience.
- 11.56 We do not consider there is a need to plan for new retail development in these centres, and the development plan strategy should seek to resist the loss of shops in these towns. The vitality and viability of these centres should be maintained over the forthcoming development plan period, aiming to protect existing retail units, while encouraging investment to maintain the attractive shopping and leisure destination these centres offer.
- 11.57 Car parking facilities in these centres should be effectively managed and expanded where possible. Local communities should be encouraged to engage in the running of their high streets to maintain local shoppers and tourists visits to these centres.

## Recommendations

- Burford and Woodstock should maintain the centre's provision of local shops and services to meet local needs; and
- Current problems with car parking in both of these centres need to be addressed over the plan period to ensure that the centres are accessible to local residents and visitors to maintain levels of footfall to support local shops.

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## Retail Warehousing

- 11.58 At present there is only very limited retail warehouse provision within the West Oxfordshire District. The B&Q warehouse in Witney is the main occupied retail warehouse unit cited by respondents to the household telephone survey. It is evident from the household telephone survey that a proportion of DIY and bulky goods expenditure is leaking to centres outside the survey area (for example in Oxford, Swindon and Banbury).
- 11.59 However, we do not consider that there is any significant need to plan for new retail warehouse provision in West Oxfordshire. We are aware that retail units at West Oxfordshire Business Park remain unlet, and these units (which are conditioned to the sale of non-food, bulky goods items), are capable of accommodating any need for bulky goods floorspace arising over the development plan period. If any applications for out of centre retail warehouse provision come forward, the Council will be required to assess such applications on their own merits and in accordance with the sequential and impact tests.

### Recommendations

- We do not consider there is any need to plan for additional retail warehousing in the District over the plan period. Any applications for out of centre retail development will need to be assessed on their own merits and against the sequential and impact tests.

### Locally Appropriate Impact Threshold

- 11.60 The NPPF sets a default threshold for requiring an impact assessment for applications for retail developments which are outside town centres and are not in accordance with a development plan of 2,500 sqm. The NPPF directs Local Planning Authorities to consider setting a local threshold for retail impact assessments. Taking into consideration the small scale of the centres in West Oxfordshire, there is merit in the Council setting significantly lower thresholds than national planning policy for requiring retail impact assessments.
- 11.61 Accordingly, we have reviewed the existing net floorspaces of foodstores in West Oxfordshire. Excluding the small local village and town centre shops, the smallest main foodstore is the Sainsbury's in Chipping Norton (510 sqm net). We consider that the out of centre development of a foodstore of a similar scale could have an adverse impact on centres within West Oxfordshire. Therefore to protect against medium and large out of

centre retail developments which may have an adverse impact, we recommend that all retail planning applications which are over 500 sqm net, located outside town centres and not in accordance with a development plan should undertake a retail impact assessment.

### Recommendations

- Set a local retail impact threshold of 500 sqm net to provide adequate control in the determination of edge and out of centre planning applications for retail development.