



Swindon Retail and Main Town Centre Uses Needs Study

Main Report

On behalf of **Swindon Borough Council**



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Appendix D	Household Survey Questionnaire
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1 Introduction

1.1 Purpose of the Study

1.1.1 Stantec UK Ltd¹ is commissioned by Swindon Borough Council to undertake the Swindon Retail and Main Town Centre Uses Needs Study on its behalf. The purpose of this report is to update the retail and commercial leisure evidence base to support the preparation of the New Swindon Local Plan. In this main report, we provide our quantitative assessment of retail needs arising over the period to 2041², informed by a new telephone survey of households which establishes current retail and leisure expenditure patterns. We also provide our qualitative assessment of retail needs, informed by our visits to Swindon's centres.

1.1.2 The regeneration of Swindon Town Centre is a key strategic corporate priority and therefore the report also reviews the role of the town centre as well as its regeneration opportunities.

1.1.3 In accordance with the Council's brief, this main report contains:

- a review of national and local planning policies;
- an overview of national trends in the retail and leisure markets;
- health checks (which we refer to as 'performance analyses') of the Borough's 'main centres' as well as audits of the remaining district centres, primary rural centres and several important local and neighbourhood centres;
- an overview of current shopping and leisure expenditure patterns based on up-to-date survey data, which establishes current market shares for defined centres and other destinations;
- a quantitative assessment of retail floorspace requirements in both the convenience and comparison goods sectors up to 2041, taking into account the latest population and expenditure data, and the effects of multi-channel retailing (the most significance of which is online shopping);
- a qualitative assessment of retail and leisure needs informed by our visits to Swindon's centres;
- recommendations in terms of how to meet the identified floorspace requirements, having regard to the performance of centres and their capacity to accommodate new development; and
- policy recommendations in respect of the regeneration of Swindon Town Centre as well as the long-term vitality and viability of other centres within Swindon's network.

1.1.4 The separately bound 'Appendices Volume' contains various appendices, which we refer to throughout this main report.

¹ Hereafter referred to as 'Stantec'

² The technical end date of the emerging Swindon Local Plan is 2043, but our quantitative assessment of retail needs is based on forecasts of expenditure and population growth published by Experian, which run until 2041.

1.2 Structure of the Report

1.2.1 The remainder of our report is structured as follows:

- Section 2 sets out the policy and legislative context and the implications for Swindon Borough;
- Section 3 summarises key market and economic trends of relevance to planning for town centres;
- Section 4 provides our health check assessments of the 'main centres' (Swindon Town Centre, Swindon Old Town and Swindon Designer Outlet)³;
- Section 5 summarises current patterns of retail and leisure spending within the study area, based on the household telephone survey;
- Section 6 contains our assessment of quantitative and qualitative requirements for additional retail floorspace; and
- Section 7 provides a summary of our findings and our recommendations.

³ Our centre audits of the remaining district centres (Cavendish Square, Gorse Hill, Orbital Retail Park and West Swindon Shopping Centre), the primary rural centres (Highworth Town Centre and Wroughton Village Centre) and three local centres (Clive Parade, Manchester Road and Rodbourne Road) are provided within Appendix A of the Appendices Volume.

2 Policy and Legislative Context

2.1 National Planning Policy Framework

- 2.1.1 The National Planning Policy Framework ('NPPF') sets out the Government's planning policies for England and how they should be applied. The NPPF provides a framework within which locally prepared plans can provide for sufficient housing and other development in a sustainable manner.
- 2.1.2 The original NPPF was published by the (then-named) Department for Communities and Local Government on 27 March 2012. The NPPF has been revised on multiple occasions and the latest update was published in December 2023.

Ensuring the vitality of town centres

- 2.1.3 Paragraph 90 of the NPPF states that *'planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation.'* To this end, local planning authorities should *'define a network and hierarchy of town centres and promote their long-term vitality and viability.'* The NPPF puts particular emphasis on allowing town centres to *'grow and diversify'* in response to changes in the retail and leisure markets and through enabling a suitable mix of uses (including housing).
- 2.1.4 The NPPF also requires local planning authorities to define the extent of town centres and primary shopping areas, retain and enhance existing markets and allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead.
- 2.1.5 Paragraph 90 requires local planning authorities to apply a sequential test to planning applications for main town centre uses which are neither in an existing centre nor in accordance with an up-to-date plan. Priority should be given to town centres, then edge-of-centre locations and, only if suitable sites are not available (or expected to become available within a reasonable period), should out-of-centre sites be considered.
- 2.1.6 Chapter 7 goes on to state that *'when assessing applications for retail and leisure development outside town centres, which are not in accordance with an up-to-date plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500m² of gross floorspace).'*

Promoting healthy and safe communities

- 2.1.7 Paragraph 96 of the NPPF notes that planning policies and decisions should aim to achieve healthy, inclusive and safe places which, inter alia, promote social interaction through, for example, mixed-use developments, strong neighbourhood centres and active street frontages. Local planning authorities should plan positively for the provision of community facilities (such as local shops), guard against the unnecessary loss of facilities and services which enable communities to meet their day-to-day needs and ensure these shops, facilities and services are able to develop and modernise.

2.2 Planning Practice Guidance

- 2.2.1 The Planning Practice Guidance ('PPG') on 'Town Centres and Retail' provides further guidance on planning for retail and other town centre uses.

2.2.2 The original PPG was published by the Government on 3 March 2014. The PPG on 'Town Centres and Retail', which was last updated in September 2020, provides guidance on:

- a. planning for town centre vitality and viability;
- b. permitted development and change of use in town centres; and
- c. assessing proposals for out-of-centre development.

2.3 Local Planning Policy

2.3.1 The Borough Council is preparing the New Swindon Local Plan, with a plan period to at least 2043. The Council's retail and leisure evidence base therefore needs updating, to take account of the latest trends in home / online shopping, recent changes in the composition of uses within town centres and up-to-date population and retail expenditure forecasts.

2.3.2 The current principal planning policy document for the Borough is the Swindon Borough Local Plan 2026 (adopted March 2015). Other development plan documents of relevance to this study include Swindon Central Area Action Plan (adopted February 2009), which we provide a brief summary of below, and the neighbourhood plans for Wroughton (adopted July 2016) and Highworth (adopted July 2017).

Swindon Borough Local Plan 2026

2.3.3 Local Plan Policy SD2 ('The Sustainable Development Strategy') notes that development will be concentrated within Swindon's urban area and at allocated strategic sites. Swindon's Central Area will be the main focus and first preference for retail and leisure as well as other main town centre uses. Outside of Swindon, rural development will be located primarily at Highworth and Wroughton, which are key settlements outside the Swindon urban area.

2.3.4 It should be noted, however, that whilst the adopted spatial strategy predominantly continues a long-standing pattern of accommodating growth through large-scale expansion of Swindon's urban area, the regeneration of Swindon Town Centre is now a key strategic corporate priority. A spatial strategy refocused more on the Town Centre is therefore already emerging, along with a spatial approach which seeks to promote new mixed-use and residential growth in and around centres and other accessible locations where growth would more directly support and benefit from existing (and new) services, facilities and transport links.

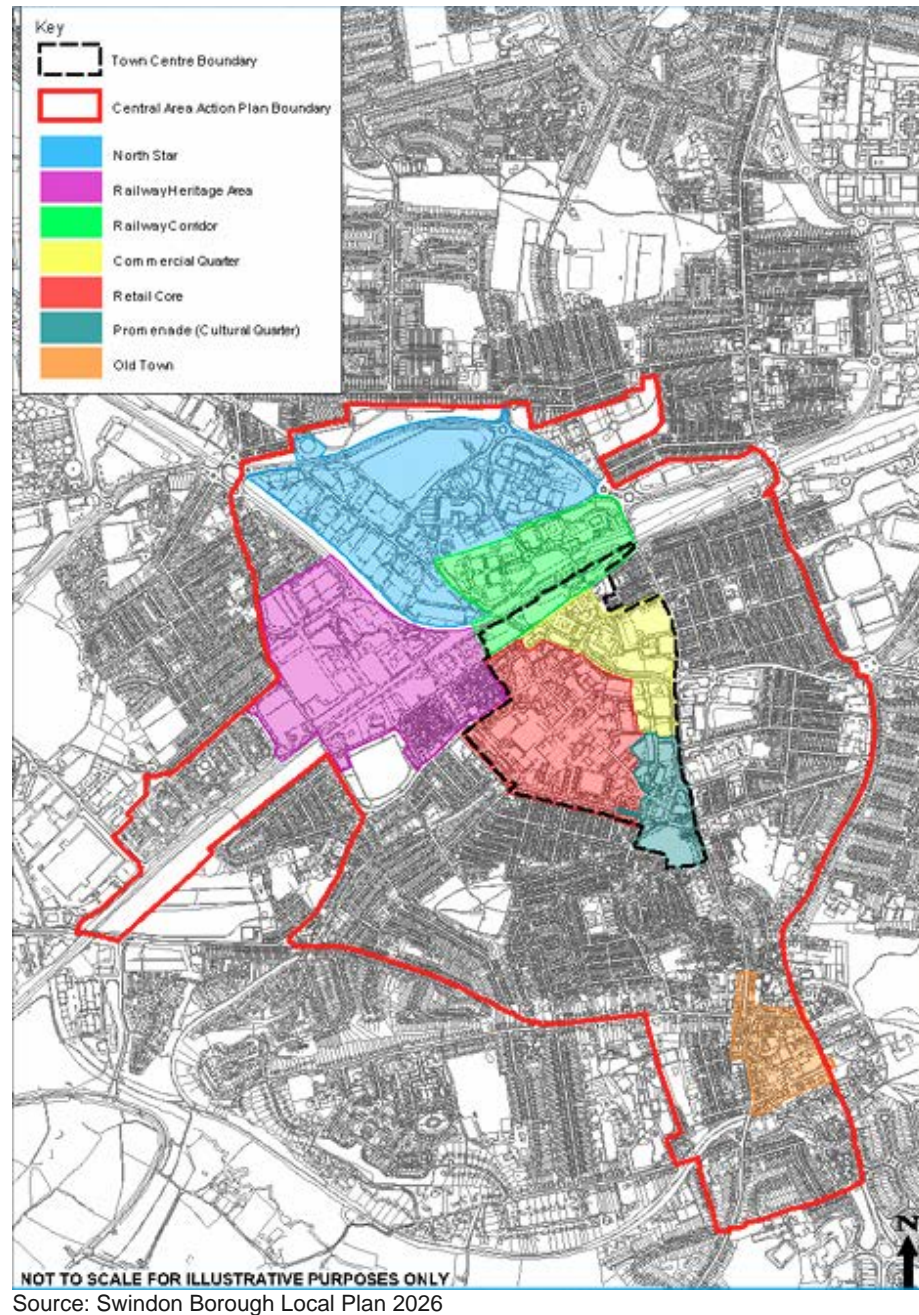
2.3.5 Policy EC3 ('The Role of the Centres and Main Town Centre Uses') sets out the conditions for proposals for main town centre uses outside of Swindon Central Area. Policy EC3 also specifies the percentage of the street frontage which must be occupied by Class A1 uses (now subsumed within Class E) within Swindon Town Centre as well as District, Primary Rural and Local Centres. The Council requires all retail development proposals with a floorspace exceeding 600 sq.m to be accompanied by a Retail Impact Assessment.

2.3.6 Policy SC1 ('Swindon's Central Area') notes that, in order to improve and enhance Swindon's Central Area, the following areas (among others) will have their own specific role:

- 'The Retail Core - the focus of retail-led development;
- The Promenade (Cultural Quarter) - the focus for cultural activities, but will also provide civic and leisure facilities;
- North Star - the location for a new regional leisure facility; and
- Old Town - the focus for niche shopping and leisure uses, complementing the shopping and leisure offer in the Town Centre.'

- 2.3.7 Policy SC1 goes on to state that provision shall be made for at least 53,700 sq.m of additional comparison retail floorspace in the Town Centre Primary Shopping Area (that is, The Retail Core) and, to secure Central Swindon as the focal point for Swindon's network of specialist leisure facilities, the Oasis Leisure Centre will be enabled to be redeveloped and expanded to reinforce its role as Swindon's flagship regional leisure destination⁴.

Figure 2-1 Swindon Central Area Diagram



⁴ The Oasis Centre is currently shut but the Council is working with a third party to reopen the centre.

- 2.3.8 Policy SC2 ('Swindon's Existing Urban Communities') sets out the priorities for Swindon's existing urban communities, which include the regeneration of Swindon Central Area and regeneration at target areas in need of renewal and investment, particularly at the Local Centres.
- 2.3.9 Policies RA1 ('Highworth') and RA2 ('Wroughton') focus on retaining the independent identity of Swindon's Primary Rural Centres.

Swindon Central Area Action Plan

- 2.3.10 The Swindon Central Area Action Plan provides a policy framework for delivering the regeneration of Central Swindon, an area that encompasses the Town Centre, the Railway Village, the historic Great Western Railway Works, North Star, Old Town and surrounding residential areas (depicted by Figure 2-2 below).

Figure 2-2 Swindon Central Area



Source: Swindon Central Area Action Plan

2.3.11 The Action Plan contains the following statement:

'Development in Central Swindon has failed to match the economic success of the rest of the Borough. As a result Central Swindon fails to provide a real focus for the town. Central Swindon's poor image and the limited facilities that it offers threaten the future development of the town. Regeneration is essential to enable Central Swindon to develop to the level expected of a town of Swindon's status and to support the town's role as a regionally important centre.'

2.3.12 All planning applications within Central Swindon will be assessed against the policy framework contained within the Action Plan.

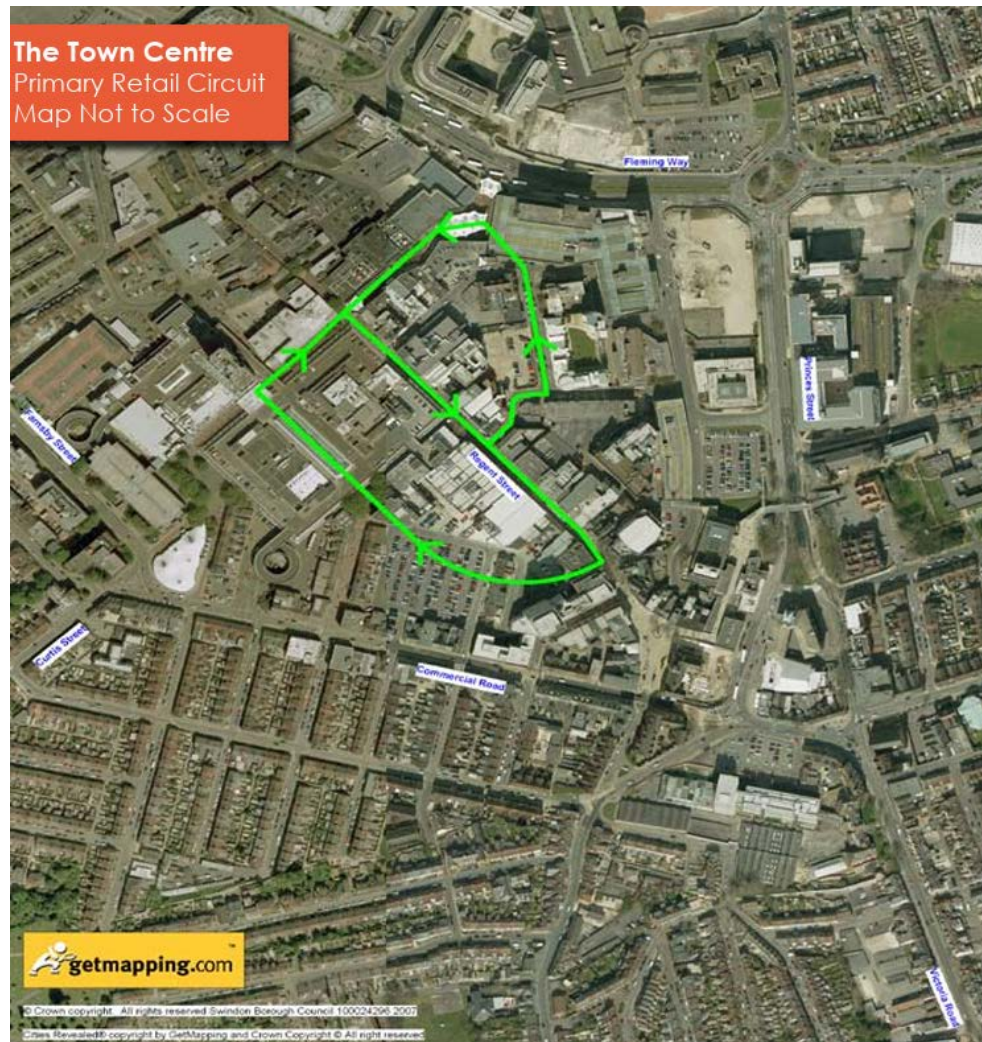
2.3.13 Part I of the Action Plan translates the Council's core objectives for Central Swindon into a series of development principles. The four development principles (Transport & Movement, Sustainability, Public Realm and Design) are to be applied across Central Swindon. Part II identifies five distinct 'character areas' within Central Swindon, each of which is subject to its own policy framework. One of the character areas is Swindon Town Centre.

2.3.14 Supplementing the four core principles are a further nine guiding principles. One of those principles is 'Retail', which states *'The Action Plan will seek to radically improve the linkages between the Town Centre, Old Town and the Great Western Designer Outlet Centre to create in Central Swindon a shopping destination with the critical mass to allow the area to function as the prime shopping and leisure destination for a potential 250,000 resident population by 2026.'*

2.3.15 The Action Plan identifies four distinctive areas within the Town Centre, namely 'The Retail Core', 'The Promenade', 'The Commercial Quarter' and 'The Railway Quarter'. The Retail Core will be the focus of retail-led development and corresponds with the Primary Shopping Area. The Council's aim for the Retail Core is to create a concentrated, compact and legible retail centre for the town. New retail development will only be allowed elsewhere in the Town Centre in an ancillary role to assist in delivering greater vitality and vibrancy to the wider Town Centre area.

2.3.16 The Action Plan notes that the Council is keen to create a strong retail circuit that would travel along two primary loops (depicted by Figure 2-3 below).

Figure 2-3 Retail Circuit



Source: Swindon Central Area Action Plan Part II

2.3.17 The Action Plan also identifies three key retail development opportunities, one of which is Regent Place. As we go on to explain in Section 4, this area is now known as Regent Circus and it is an underperforming retail complex which is situated to the south east of The Brunel Centre.

2.4 Policy Response

2.4.1 Over the past decade or so, a considerable number of studies have been published assessing the future role and function of town centres, including:

- The Portas Review, Mary Portas (2011)
- The Grimsey Review, Bill Grimsey (2013)
- Beyond Retail: Redefining the Shape and Purpose of Town Centres, British Council of Shopping Centres (2013)
- 21st Century High Streets, British Retail Consortium (2013)

- The Future High Street, Future Spaces Foundation (2013)
- Accommodating Growth in Town Centres (2014), Greater London Authority
- Digital High Street 2020 Report, Digital High Street Advisory Board (2015)
- Grimsey Review 2: “It’s time to reshape our town centres” (2018)
- The Future High Streets Fund (2019)
- Towns Fund (2019)
- High Streets Heritage Action Zones (2019)
- Build Back Better High Streets (2021)

The Portas Review

- 2.4.2 In May 2011, retail expert Mary Portas was appointed by the former Coalition Government to lead an independent review into the future of the high street in response to the decline of town centres nationally, seen as a consequence of reduced spending on the high street. The report supported the call to strengthen planning policy in favour of ‘town centre first’ and included 27 separate recommendations to tackle the further decline of the high street.
- 2.4.3 The core recommendations included measures to strengthen the management of high streets, improvements to the business rates system, reducing car parking charges, placing greater onus on landlords to proactively manage their assets or face the use of compulsory purchase powers by local authorities, and to increase community involvement in town centres.
- 2.4.4 As well as 24 ‘Portas Pilot’ towns to trial the recommendations, the Coalition Government established the future High Street Forum to implement Portas’s recommendations and provided funding to establish business improvement districts and a ‘Future High Street X Fund’ (renamed the High Street Renewal Fund) to reward towns delivering innovative plans to promote their town centres.

The Grimsey Review and The Grimsey Review 2

- 2.4.5 Bill Grimsey, the former managing director of DIY chain Wickes and food retailer Iceland, published his report as an ‘alternative response’ to the recommendations of the Portas Review. The report made a total of 31 wide-ranging recommendations, including encouraging more people to live in town centres, appointing a High Streets Minister, and freezing car parking charges for a year.
- 2.4.6 Grimsey followed up his original report with a review that was published in July 2018, which was particularly influenced by the high-profile collapse of retailers and some food and drink operators. Grimsey asserted that town centres were facing their greatest challenge in history, and that towns must stop trying to compete with out-of-town shopping parks that are convenient and benefit from free parking. Instead, Grimsey argued that town centres must create their own unique reason for communities to gather there – being interesting, engaging and offering a compelling and great experience.
- 2.4.7 Whilst it is not appropriate to have a one-size-fits-all approach, Grimsey set out 25 recommendations to tackle the problems he identified. Key recommendations include:
- Replacement of business rates with a fairer and less complex system;
 - Creation of a digital commission to develop a 20-year strategy for local high streets;
 - Accelerating the digital transformation of smaller towns;
 - Appointment of high-quality designers to celebrate the local identity of town centres;
 - Free short-term parking; and

- Improved public realm and free wifi

Beyond Retail

- 2.4.8 Following the Portas Review, the Government supported the establishment of an industry task force to analyse retail property issues relating to town centres. The findings of the task force's report were presented in the 'Beyond Retail' report of 2013.
- 2.4.9 One of the report's key observations was that the trend towards market polarisation (discussed further below) has resulted in three broad types of town centre offer: strong centres with a wide retail and leisure offer; convenience food and service-based centres with an element of fashion and comparison goods; and localised convenience and everyday needs-focused centres. The report made a number of recommendations, including:
- Strong and dynamic leadership, led at the local authority level also including business and community involvement, to bring about long-term change in town centre function.
 - Undertake bold, strategic land assembly, to assemble redevelopment opportunities of scale and worth.
 - Provide greater flexibility in the planning system to enable vacant retail premises to be converted to 'more economically productive uses'.
 - Consider the mechanisms to address funding gaps to encourage local authorities to commit to long-term planning for town centres.
 - Town centres must take advantage of technology to assist in marketing, driving footfall, and assisting independents and SMEs.
 - A review of the business rate system and publishing of new retail valuation guidance.

21st Century High Streets

- 2.4.10 In 2013, the British Retail Consortium published the second '21st Century High Streets' report as an update to the original report published in 2009. The 2013 report set out various policy recommendations to help secure 'flourishing 21st Century high streets' under six key topics:
- A unique sense of place: local partnerships, authorities and retailers must create a brand for the town centre to engender consumer loyalty through differentiation.
 - An attractive public realm: local partnerships and authorities must actively manage the public realm creating attractive public space.
 - Planning for success: local authorities should develop a clear strategic vision focused on the role of the town centre and cooperate with neighbouring authorities to maintain viable and complementary retail destinations.
 - Accessibility: local authorities should manage accessibility holistically and responsively and should provide adequate parking to assist in driving footfall.
 - Safety and security: local police should work with retailers to better understand the impacts of retail crime to promote town centres as safe, secure and effectively managed.
 - Supportive regulatory and fiscal regimes: central government should reform the Business Rate Multiplier to reduce the cost of operating and investing in town centres.

The Future High Street

- 2.4.11 The Future Spaces Foundation was established in 2013, made up of a diverse independent panel of experts to generate new ideas about how to create social and economic opportunity through the transformation of the built environment.

- 2.4.12 The Future High Street report (2013) sought to examine the high street debate from a holistic stance; it assessed the full range of socio-economic, demographic and technological factors which affect how we interact with high streets, and it sought to challenge the traditional role of retail in town centre regeneration. The report made 14 specific recommendations under four key policy areas relating to public services and community cohesion, commercial drivers, transport and accessibility and health and well-being. The recommendations included:
- re-concentrating public services in and around the high street to harness agglomeration benefits;
 - diversifying community spaces beyond their traditional functions;
 - supporting a mobile-enabled high street;
 - flexible use of space to mix retail, leisure and work dynamically to suit modern lifestyles;
 - de-stigmatising bus travel, so that it provides a superior alternative to the car;
 - transport infrastructure design with multiple uses to give it a fluid role in the town centre;
 - providing housing, particularly assisted living, within easy access of high streets; and
 - providing health services in close proximity to the high street and plan high streets to promote good.

Digital High Street

- 2.4.13 The Digital High Street Advisory Board was established following the work of the Future High Streets Forum to consider the revolutionary impact of digital technologies on future success of high streets. The Advisory Board's report of 2015 made four principal inter-related recommendations, which sought to revitalise high streets in a digitally dominated world. The recommendations included raising connectivity standards and increasing the deployment of digital technology, improving digital skills, and adopting a digital health index to assess the competitiveness of high streets, to measure the economic value of digital developments and set goals for digital integration.

The Future High Streets Fund

- 2.4.14 In July 2019, the Secretary of State for Housing, Communities and Local Government asked Sir John Timpson to consider structural changes to high streets and make recommendations on how to support local areas to respond to those changes. In the run-up to the Budget, Sir John made two main recommendations to the Chancellor and the Secretary of State: to set up a High Streets Taskforce to support local leadership, and to establish a new fund to support the renewal and reshaping of high streets and town centres.
- 2.4.15 The Chancellor and the Secretary of State agreed with Sir John's diagnosis and recommendations. Therefore, to respond, a new £1 billion Future High Streets Fund ('FHSF') was set up to help local areas to respond to and adapt to the changes. The FHSF aimed to support local authorities to prepare long-term strategies for their high streets and town centres, including funding a new High Streets Taskforce to provide expertise and hands-on support to local areas.
- 2.4.16 Applicants were asked to provide proposals setting out the overall vision that they wish to achieve for their high street and town or city centre and specific, transformational interventions that would contribute to that overall vision.
- 2.4.17 Swindon was awarded £25 million from the FHSF, which was the highest amount to be awarded in England⁵. The money is being put towards the major upgrade and transformation

⁵ Sunderland was also awarded £25 million.

of Fleming Way. Fleming Way will become the main gateway to the town centre, improving connectivity between the train station and the town centre. The works include a new bus interchange, vastly improved public open spaces and new cycle lane facilities that link up the main cycling routes across the town. The Fleming Way subway will be removed to make the road the same level as the town centre shopping area and The Parade.

Towns Fund

2.4.18 In September 2019, the Government invited 100 places to develop proposals for a Town Deal, as part of the £3.6 billion Towns Fund, including the £1 billion fund designated as part of the FHSF. The objective of the Fund was to drive the economic regeneration of towns to deliver long term economic and productivity growth through urban regeneration, planning and land use; skills and enterprise infrastructure; and connectivity.

2.4.19 Swindon was awarded £19.5 million from the Towns Fund. The Swindon Town Investment Plan included the following vision:

'We're a town that changes with the times, preserving and celebrating the legacy of our past as the foundation for a prosperous, well connected, green and inclusive future. Booming with ideas and potential, a place of entrepreneurs, experimenters, dreamers and doers, primed to move forward and break away from the pack. Driven by technology, we're a home built on progress. An economic powerhouse creating great jobs, building an outstanding range of homes, and empowering people to live their lives to the full. We're setting the pace just as our forefathers did. A community that really cares about the future; a vibrant town centre with a strong heart and beating rhythm: connected, innovative and welcoming.'

2.4.20 To deliver the vision, the following strategic objectives were identified:

- 'To extend and develop a sustainable travel network, adaptable to technological change to meet community need.
- To enable the next generation of commercial genius in Swindon.
- Swindon is widely recognised as a happy, fulfilling place to live, work, grow and play.'

2.4.21 Some of the funding (£7.5 million) will unlock the regeneration of a 20-acre former industrial site known as Kimmerfields, next to Zurich's new offices.

High Streets Heritage Action Zones

2.4.22 In May 2019, Historic England launched a multi-million pound fund to enable it to work with partners to find new ways to champion and revive historic high streets through the High Streets Heritage Action Zones scheme. Some 68 high streets across England were selected to receive a share of the £95m fund.

2.4.23 In November 2022, Swindon was awarded Heritage Action Zone funding to enable repairs to the front elevation of Units 7, 9 and 11 of the Carriage Works which faces onto London Street. Work has begun to repair the external stonework and guttering and to repair, reglaze and redecorate the windows and doors.

Build Back Better High Streets

2.4.24 In July 2021, the then Ministry of Housing, Communities and Local Government published the Build Back Better High Streets Strategy which set out the Government's long-term plan to support the evolution of high streets into thriving places to work, visit and live. The Strategy called into question what the high street of the 21st century looks like following the onset of the COVID-19 pandemic in which existing trends – the shift online and the blurring of home and office working – have been magnified and accelerated, bringing about great change.

2.4.25 The Strategy set out how the Government will build on innovations seen over the pandemic and provide the regulatory flexibility that will enable high streets to be the hives of economic and social activity. Five key priorities were identified:

- i. Breathing new life into empty buildings;
- ii. Supporting high street businesses;
- iii. Improving the public realm;
- iv. Creating safe and clean spaces;
- v. Celebrating pride in local communities.

Our Long-Term Plan for Towns

2.4.26 In October 2023, the Department for Levelling Up, Housing and Communities published 'Our Long-Term Plan for Towns', a prospectus which sets out a new plan to put local people at the centre of their town's success and give them the long-term funding to achieve this. The Government identified 55 towns to benefit from Long-Term Plans, backed by £1.1 billion funding. Each town will:

- Develop a Long-Term Plan to invest in and regenerate their town, based on the priorities of local people, and put to local people for consultation.
- Receive £20 million in endowment-style funding and support over ten years to support the Town Plan, to be spent on issues that matter to local people, including regenerating high streets and securing public safety.
- Establish a Town Board to bring together community leaders, employers, local authorities, and the local MP to oversee and deliver the Long-Term Plan.
- Use a toolkit of powers, from tackling anti-social behaviour to auctioning empty high street shops, reforming licensing rules on shops and restaurants and supporting more housing in town centres.

2.5 Implications for Swindon Borough

2.5.1 The research and initiatives summarised above contain a number of recurring themes which will be important to consider in the context of future development for main town centre uses within Swindon Borough, including:

- The need for flexibility – town centre accommodation needs to be adaptable to a number of uses to address future needs. This presents both opportunities and challenges for Swindon Borough's defined centres. The previous orthodoxy of protecting former A1 retail uses within Primary Shopping Areas may unwittingly be restricting the ability of town centres to diversify and develop distinctive identities and associated offer to consumers.
- Vital and viable centres need a varied mix of uses – town centres are increasingly diverse with the emergence of a greater proportion of leisure, food and drink uses. There is also an identified need to concentrate multi-functional public services in town centre locations to realise agglomeration benefits (as per 'The Future High Street' report). However, town centres face growing competition from retail parks and higher order centres as well as online shopping.
- Increasing residential floorspace within town centres is important to their overall vibrancy, to encourage footfall within centres throughout the day.

- Encouraging workers to return to their town centre offices – the rise of hybrid working as a result the COVID-19 pandemic has led to reduced footfall within town centres, having a knock-on effect on spend in cafés, restaurants, bars and shops.
- Introducing a range of measures to bring vacant units back into productive use.
- The role of each defined centre needs to be clearly articulated to provide it with a distinct and recognisable identity appropriate to its role, as emphasised by the '21st Century High Streets' report as well as the Portas Review and, more recently, the FHSF and the Towns Fund Prospectus. It will be important to identify the unique attributes of each defined centre during the production of the new Local Plan.

2.6 General Permitted Development Order ('GDPO')

- 2.6.1 The Government announced in April 2021 that it would introduce a new permitted development right to the GPDO, known as Class MA, to allow properties within Use Class E ('Commercial, business and service uses') – which includes retail – to convert to residential use. The Class MA permitted development right was introduced on 1 August 2021 and applies to buildings which have been vacant for at least three continuous months prior to submission of the prior approval.
- 2.6.2 Class MA builds on the flexibility created by the Government's introduction of the new Use Class E in September 2020, which merged Use Classes A1, A2, A3, B1, B2, D1 and D2 into Use Class E. Under Class E, buildings could already change uses within the same Use Class without requiring planning permission, and Class MA extends that list of uses to include residential.
- 2.6.3 Since the introduction of the new permitted development rights, local planning authorities have had the opportunity to put in place a new set of Article 4 Directions if they want to limit the ability of owners to change the use of their properties without the need for planning permission.
- 2.6.4 Paragraph 53 of the NPPF states that:
- 'The use of Article 4 direction to remove national permitted development rights should, where they relate to change from non-residential use to residential use, be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre).'*
- 2.6.5 It is clear that the threshold for which Article 4 Directions should be proposed is high and that Article 4 Directions should only be used in exceptional circumstances.
- 2.6.6 Planning authorities are still required to understand and plan for their retail needs regardless of the amendments to the Use Classes Order and the GPDO referred to above. Nonetheless, the amendments to the Use Classes Order and the GPDO are likely to have some impact on retail floorspace given the flexibility now given to change between uses within Use Class E, and to residential.

3 Market and Economic Trends

3.1 Introduction

- 3.1.1 The study has been undertaken in the midst of a renewed focus on the changing role and function of town centres. It is widely accepted that the traditional role of town centres has been undermined by the continued attraction of out-of-centre retail locations, the growth in popularity of multi-channel shopping, recent socio-economic events and the associated decline in expenditure growth. In this section of our report, we highlight some of these challenges in order to set the context for the remainder of the report.
- 3.1.2 There has been ongoing restructuring in the retail and commercial leisure market for many years, accelerated by events such as the global financial crisis in 2009 and the more recent COVID-19 pandemic. Online sales have continued to rise, most developers are building less retail floorspace in line with reducing operator demand, and existing floorspace is being converted into alternative uses. After the Government declared a national emergency due to the onset of COVID-19, high streets in the UK were initially forced to close in March 2020, and again following several temporary easings of restrictions. Whilst high streets have now re-opened, some retailers have not returned, or have rationalised their store portfolio.
- 3.1.3 Previous rules on social distancing and Government guidance to work from home, the latter of which ended in late January 2022, led to reduced custom in town centres⁶. Many employers have moved to 'hybrid' working arrangements, with employees able to work from home for several days each week. These factors have created enormous challenges for town centres, although many employers have started to stipulate a minimum and increasing requirement for employees to be present in offices. Getting back to and then maintaining pre-COVID-19 levels of vitality and viability should be the objective for most town centres.
- 3.1.4 Below, we discuss the key trends of the last few years; we set out the main economic recovery scenarios; and we predict the likely implications of the COVID-19 pandemic.

Brexit

- 3.1.5 In 2019, the UK economy grew at its slowest rate in seven years, which was largely attributed to the uncertainty surrounding Brexit negotiations and a weaker global economy. The small growth in the UK economy was reflected in consumer spending, which only increased by 1.2 per cent, the smallest increase in eight years⁷. Low consumer confidence and lacklustre income growth was blamed for the disappointing growth in consumer spending.
- 3.1.6 Brexit-related uncertainty was expected to end in 2022; however, it still remains in some parts of the economy as new legislation and regulations are created.
- 3.1.7 Over the medium term, it is expected that the outlook for retail sales volumes will be more favourable with the removal of Brexit and COVID-19 related uncertainty. However, spending volumes will be around 5 per cent lower than those expected prior to the pandemic as households, businesses and Government face being in a weaker financial position⁸.
- 3.1.8 The long-term economic consequences of Brexit will depend on how the UK-EU's new trading relationship evolves.

⁶ In planning policy terms, 'town centre' is the catch-all phrase for defined centres of all scales including city centres, town centres, district centres and local centres.

⁷ Experian, Retail Planner Briefing Note 17, February 2020

⁸ Experian, Retail Planner Briefing Note 19, January 2022

Russia-Ukraine Conflict and Inflation

- 3.1.9 The Russian invasion of Ukraine early in 2022 sent shock waves through the business community, which had been in the early stages of recovery following the lifting of COVID-19 restrictions.
- 3.1.10 The direct consequences of the conflict are high inflation, low growth and supply chain disruptions resulting from the shortage and rising cost of raw materials, energy and transport. The economic consequences of the Russia-Ukraine conflict continue to reverberate in the form of high energy prices⁹.

Retail Sales

- 3.1.11 Retail sales volumes across Great Britain increased significantly upon the opening of non-essential retail in April 2021 and remained high during the first half of 2021 before diminishing as consumers spent less on durable goods and more in areas of the economy that had, up until that point, been 'locked down', such as travel and leisure.
- 3.1.12 More recently, price increases and the cost-of-living crisis have also affected retail sales volumes. Retail sales volumes are estimated to have decreased by 3.2 per cent in December 2023 following a rise of 1.4 per cent in November. This decrease was the largest monthly fall since January 2021, when COVID-19 restrictions affected sales. Non-food store sales volumes decreased by 3.9 per cent in December 2023, following a 2.7 per cent increase in November 2023 when earlier Black Friday sales, and wider discounting, increased sales. Non-store retailing (predominantly online retailers) sales volumes fell by 2.1 per cent in December 2023, following a fall of 1.1 per cent in November 2023¹⁰.

Store Closures

- 3.1.13 Table 3-1 below shows the net changes in Great Britain's retail units per year from over the 2013 to 2022 period (as well as the latest data for the first half of 2023, hereafter referred to as 'H1 2023'). The gap between store openings and closures in 2022 was the narrowest since 2016. In 2022 there was a net loss of 3,365 retail units across Great Britain¹¹. Whilst the net loss experienced in 2022 represents a 57 per cent year-on-year decrease from the 2021 figure of -7,902, it was the eighth consecutive year that the trend of a net loss of retail units had persisted. Data for H1 2023¹² show a greater net loss in retail units (4,000) than for 2022 as a whole (3,365) and this figure will undoubtedly increase when the full dataset for 2023 is published.
- 3.1.14 There was a significant decrease in the number of store openings in 2020 but there was also a significant decrease in the number of store closures, down 6.8 per cent on the previous year. There are two reasons for this. Firstly, Government support schemes including the business rates holiday and protection from evictions effectively froze the property sector. This enabled most retailers to survive as landlords were forced to forego rental payments in some instances. Secondly, the temporary closure of 'non-essential' retail depressed closures as well as openings with total activity (openings and closures) down by 9.6 per cent compared to 2019¹³.
- 3.1.15 The data below show that there were 48,694 store closures in 2022, which is an increase of 2.6 per cent when compared with the number of store closures in 2013. Between 2013 and

⁹ Experian, Retail Planner Briefing Note 20, February 2023

¹⁰ Retail sales, Great Britain: December 2023 (January 2024). Available online at: <https://www.ons.gov.uk/businessindustryandtrade/retailindustry/bulletins/retailsales/december2023>

¹¹ Local Data Company, FY 2022 Retail and Leisure Trends Analysis, March 2023

¹² Local Data Company, H1 2023 Retail and Leisure Trends Analysis, September 2023

¹³ Local Data Company, GB Retail and Leisure Market Analysis Full Year 2020

2022, the net change in GB retail units was minus 44,856, which is clearly a substantial loss of retail units and reflective of the general trend of decline in demand for physical floorspace as the market share of online shopping continues to rise. The data for H1 2023 shows a continuation of this trend.

- 3.1.16 The 2017 Retail and Leisure Needs Assessment commented that *'the underlying trend [in expenditure growth] over the medium and long term is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in home shopping'*. This quote demonstrates that the position regarding the demand for retail floorspace has changed within a short period of time, accelerated by the COVID-19 pandemic no doubt.

Table 3-1 Net change in GB retail units by year 2013-2022 plus data for H1 2023

Year	Store Openings	Store Closures	Net Change in GB Retail Units
2013	49,496	47,456	2,040
2014	47,624	47,514	110
2015	47,042	47,380	-338
2016	45,986	47,636	-1,650
2017	45,274	50,767	-5,493
2018	43,278	50,828	-7,550
2019	44,883	54,052	-9,169
2020	39,060	50,379	-11,319
2021	43,167	51,069	-7,902
2022	45,329	48,694	-3,365
2013-2022	451,139	495,775	-44,856
H1 2023	23,504	27,504	-4,000

- 3.1.17 Across all retail location types – high streets, retail parks and shopping centres – there has been a decrease in the vacancy rate between H1 2022 and H1 2023. The retail park vacancy rate dropped from 10.2 per cent in H1 2022 to its pre-pandemic level of 8.1 per cent in H1 2023, representing the largest year-on-year decline across all retail location types¹⁴. Occupiers including Lidl, The Food Warehouse, Five Guys, M&S Foodhall and PureGym continued to expand their retail park portfolio during 2023. As the vacancy rate continues to decline and some major retail parks become fully let, landlords will begin to see returns on their investments with average rents expected to increase given the limited supply of available units.
- 3.1.18 The vacancy rate in retail parks (8.1 per cent) is significantly lower than the high street and shopping centres (13.9 per cent and 17.8 per cent, respectively). The vacancy rate for shopping centres has continued to fall from its H1 2021 peak of 19.4 per cent to 17.8 per cent in H1 2023¹⁵. This has been fuelled by outlets and super regional centres, with the former benefitting from flexible, turnover-based rents and the resilience of luxury and outlet retail. Super regional centres have been supported by significant interest from major retailers who have been consolidating their estates to focus on larger stores in more prominent locations. Former department stores have also been repurposed for leisure or for existing tenants looking for larger premises.

¹⁴ Local Data Company, H1 2023 Retail and Leisure Trends Analysis, September 2023

¹⁵ Ibid.

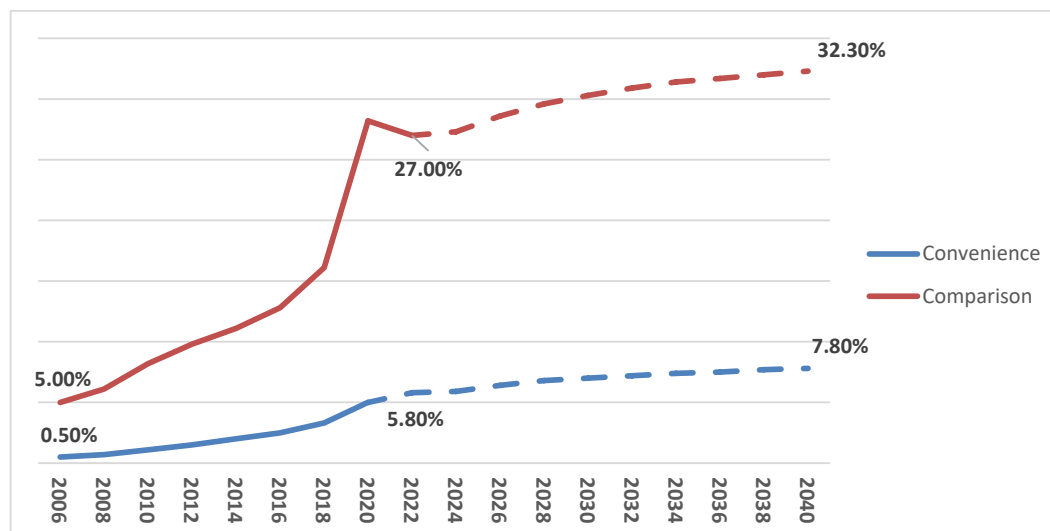
- 3.1.19 High streets have struggled to recover as much as the other retail location types. The high street vacancy rate experienced a year-on-year decrease of 0.1 per cent, the smallest improvement across all location types¹⁶.

Online Shopping/Special Forms of Trading

- 3.1.20 Figure 3-1 shows the market share of special forms of trading ('SFT', which includes online shopping) in both the convenience and comparison retail sectors up to 2021 and projected forward to 2040. Experian defines SFT as any non-store retailing including internet sales, mail order sales, market stalls, vending machines and door-to-door selling. Internet sales account for a large proportion of SFT.
- 3.1.21 The market share of SFT in both the comparison and convenience retail sectors has been increasing year on year and this trend accelerated in 2020 and 2021 as lockdowns and COVID-19 related fears made in-person shopping off limits or less desirable. The market share of SFT in the comparison retail sector peaked at an average of 28.2 per cent in 2021; however, as COVID-19 restrictions eased this dropped back to an average of 27 per cent in 2022. A further small decline was expected in 2023, with certain online users (particularly older, less digitally literate cohorts) reverting back to traditional shopping habits (albeit most of the increase in the market share of SFT seen during the pandemic remains).
- 3.1.22 The 2017 Retail and Leisure Needs Assessment noted that *'the latest available data suggests it [online shopping] remains an insignificant percentage of total retail expenditure'* and referred to the household survey results which showed that 4.6 per cent of households within the Swindon Study Area did their last main food and grocery shopping via the internet / delivery and 6.8 per cent of households do most of their non-food shopping at home via the internet, TV or catalogue. Experian's latest Retail Planner Briefing Note (13) at the time of writing the 2017 Retail and Leisure Needs Assessment noted that, *'internet sales' share of total retail sales stood at 11.7 per cent in mid-2015*. The Briefing Note also stated that *'the pace of e-commerce growth will moderate markedly after about 2020'* and *'our forecast has the SFT share of total retail sales reaching 17.8 per cent in 2020 rising to 19.6 per cent by the mid-2030s'*. Furthermore, the 2017 Study noted that *'the implications of these trends on the demand for retail space are unclear'* and that the *'growth in online sales may not always mean there is a reduction in the need for retail floorspace'*. Figure 3-1 therefore demonstrates that the existing and projected market share of SFT is greater than previous estimates.
- 3.1.23 Unsurprisingly, as Figure 3-1 shows, the market share of SFT in both the comparison and convenience retail sectors is forecast to increase significantly. SFT's market share is increasing more significantly within the comparison retail sector than in the convenience retail sector. One of the reasons is because foodstore operators find it difficult to make online shopping profitable. Experian predicts that, by 2040, SFT will account for nearly a third of the comparison goods retail sector as an average across the country. The obvious implication of this is that less comparison retail floorspace will be required and, as we go on to explain later in our report, SFT's market share across the study area defined for this study is already much higher than the national average.

¹⁶ Ibid.

Figure 3-1 Actual and projected market share of non-store retail sales/SFT (adjusted for SFT sales from stores)



Source: Experian Retail Planner Briefing Note 20 (February 2023). Figure 5, Appendix 3.

- 3.1.24 Generally speaking, the performance of the high street retail sector is weakening. Consequently, many local authorities will need to consider condensing and concentrating the defined retail area in their town centres, and to the best ways of introducing and expanding alternative uses, such as residential and office uses.

Commercial Retail Rents

- 3.1.25 Due to the supply of retail space massively outstripping demand and the impact of successive lockdowns, the retail market has experienced a significant decrease in rents, with some having fallen as much as 50 per cent since their peak in the 2000s¹⁷. This has given new operators the chance to open stores in locations that were previously too expensive. While this pressure on retail rents will continue, there are signs that rents in some stronger locations are stabilising as occupiers settle with the new terms available. In addition, turnover rents, where rents are aligned with an occupier's turnover, are becoming more prevalent throughout the retail sector.

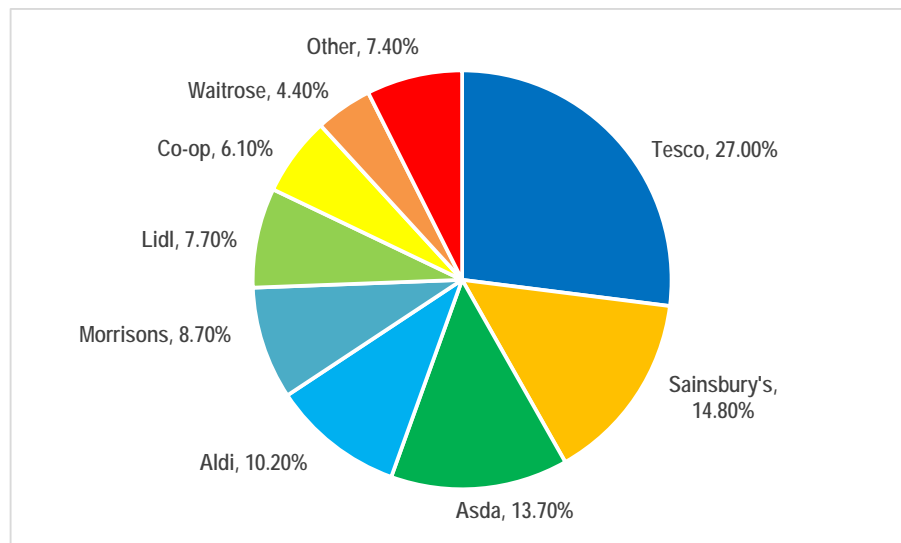
3.2 Convenience Retail Sector

- 3.2.1 Prior to the global financial crisis, the convenience goods retail sector was a key driver of growth in the retail sector. The original 'Big Four' supermarket operators (Asda, Morrisons, Tesco and Sainsbury's), which have traditionally dominated the market, were building and operating increasingly larger stores and expanding the range of services that they provide (particularly in terms of comparison retail goods). Whilst many of these larger stores were built outside of town centres, new large foodstores also often served to anchor re-development schemes within smaller town centres.
- 3.2.2 Since the global financial crisis, the market dominance of the 'Big Four' has been increasingly challenged, both by higher-end operators, such as Waitrose and Marks & Spencer (Simply Food and Foodhall formats), and retailers which previously focused on the value/discount end of the market, such as Aldi and Lidl, have posted significant year-on-year growth over recent years as they have emerged as important forces in the convenience goods retail sector. Expenditure on convenience retail goods had been falling in recent years due to increasing competition between operators (leading to a reduction in prices and low inflation).

¹⁷ Colliers International, Midsummer Retail Report 2021

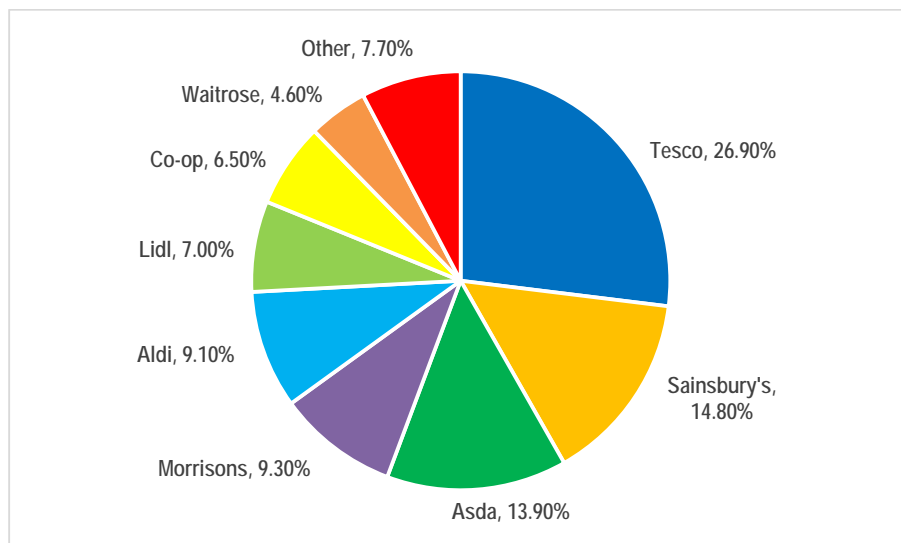
- 3.2.3 Figures 3-2 and 3-3 show the UK grocery market share as of August 2023 and August 2022, respectively. Aldi now has a greater proportion of the UK grocery market share than Morrisons – Aldi's market share increasing by 1.1 percentage points over that 12-month period alone, with Morrisons going in the opposite direction – and therefore the 'Big Four' is now an outdated concept. Aldi and the traditional 'Big Four' supermarket operators account for approximately three quarters of the convenience retail market share.

Figure 3-2 UK Grocery Market Share (6 August 2023)



Source: KANTAR

Figure 3-3 UK Grocery Market Share (7 August 2022)



Source: KANTAR

- 3.2.4 There has been an increasing move by the major convenience goods retail operators away from opening larger-format stores towards smaller supermarkets and establishing a network of 'top up' convenience goods shopping facilities. These smaller-format stores are often located

in town centres, or district/neighbourhood shopping parades. The shift has been driven by changing consumer behaviour; shoppers are undertaking an increasing number of smaller 'top-up shopping' or 'basket shopping' trips instead of a weekly food shop at a large out-of-centre foodstore.

- 3.2.5 One of the reasons which explains why retailers such as Aldi and Lidl have increased their market share over recent years is because they have successfully diversified their offers to include more premium products, thereby appealing to new categories of customers. Those retailers are no longer really 'discount operators' in the way they were 10 or more years ago, and they have effectively become mainstream foodstore operators. In contrast, Morrisons and Asda announced that they are competing on price, in light of high inflation in 2022. Asda launched its 'Just Essential' budget range in May 2022 and, following huge demand, had to temporarily limit the sale of products from the range, which was introduced to help shoppers cope with the cost-of-living crisis¹⁸.
- 3.2.6 Both Sainsbury's and Tesco now have more convenience stores than large supermarkets and superstores, and they have withdrawn proposals for new superstores and from town centre redevelopment projects in recent years. In the last few years both Tesco and Morrisons have closed dozens of 'unprofitable' foodstores (with Morrisons also disposing of its portfolio of convenience stores to concentrate on its core business, demonstrating the complexity of changes within the market).
- 3.2.7 By way of comparison, Aldi and Lidl have investment plans to open more than 100 stores on an annual basis. Store formats are also evolving with new Aldi and Lidl foodstores now providing more floorspace than previous formats, along with the introduction of new facilities such as in-store bakeries.
- 3.2.8 In its aim to become the UK's leading omnichannel retailer, Marks & Spencer announced a £480 million investment in its store rotation programme in January 2023¹⁹. The retailer has identified a pipeline of 20 new, bigger and better stores to be opened in the 2023/24 financial year which will fulfil its aim of creating a store estate fit for the future. The store rotation programme seeks to ensure the right stores in the right places, with the right space, and the company aims to rotate from the 247 stores it has today to 180 higher quality, higher productivity full line stores selling clothing, homewares and food whilst also opening over 100 bigger and better foodstores. Marks & Spencer's announcement is on the back of the success of recently relocated and renewed stores. Five new stores will open in former Debenhams sites in key city locations in 2023/24.

3.3 Comparison Retail Sector

- 3.3.1 Over the last few years there have been many notable failures and company restructurings within the comparison goods retail sector, including Dawsons Music, T M Lewin, Victoria's Secret, Jessops, Paperchase, Debenhams, Edinburgh Woollen Mill and Arcadia. Furthermore, the impacts of COVID-19 have led to some major operators not returning to the high street, such as Topshop. However, it is not just operators with physical store formats that have suffered the impacts of COVID-19; Missguided, the e-commerce fashion group, went into administration in May 2022. The company was particularly successful during the pandemic, when lockdown measures forced many clothing stores to temporarily close, but sales were affected upon the reopening of stores²⁰.
- 3.3.2 Whilst the circumstances impacting each of the retailers are specific to them, a couple of common themes have led to companies failing or needing to restructure, including:

¹⁸ Evening Standard, Asda limiting sales of budget Just Essentials range due to soaring demand, 14 September 2022. Available online at: [Asda limiting sales of budget Just Essentials range due to soaring demand | Evening Standard](#)

¹⁹ [M&S Sets Out C.£500m Investment in its Store Rotation Programme That Will Create Over 3400 Jobs Nationwide | Marks & Spencer \(marksandspencer.com\)](#)

²⁰ [Who's Gone Bust in Retail? The Centre For Retail Research](#)

- **Relevance** – the format of certain retailers is becoming less relevant, a good example of this being Toys R Us. Due to the size of the stores, Toys R Us found itself competing against larger retailers such as foodstores and the likes of Argos. As Toys R Us was a specialist retailer, it was unable to change the type of goods being sold within its stores (in the way that foodstores and catalogue retailers can) and therefore Toys R Us could not react to the market change as freely. Toys R Us also had to compete against large online retailers, such as Amazon, which can offer goods at cheaper prices due to lower overheads.
- **Over-expansion** – some retailers over-expanded in the early 2000s and have not been able to respond to the growth in online retailing and decline in high street retailing. A good example of this is Maplin, which experienced rapid growth but found that its specialist product was more tailored to an online audience.

3.3.3 Whilst it is a common view that the prevalence of online retailing will increase, it would be naïve to dismiss the role of the high street and multi-channel retailing. Often the most successful online brands are built from their reputation on the high street (a good example being John Lewis).

3.4 Commercial Leisure

- 3.4.1 Following the global financial crisis, the restaurant sector felt the effects of the 'casual dining crunch' due to an over-saturation of the market and increased competition as well as increasing food costs, staff costs, rents and business rates. Moreover, the sheer cost of multiple people dining out makes it a special event rather than a more regular 'casual dining' experience, and so consumers are eating out less often, particularly against the backdrop of recent inflationary pressures²¹.
- 3.4.2 Restaurants closed at their highest rate in a decade in the first three months of 2023²², which was the result of staff shortages and the cost-of-living crisis which has forced households to rein in their spending. The trend of closures follows a number of restaurant chains, including Byron, Gourmet Burger Kitchen, Strada and Carluccio's, being forced to close dozens of restaurants in the peak of the pandemic as they could not withstand the various lockdowns and other COVID-related restrictions. One commentator notes that those restaurants that were kept afloat during the pandemic due to government support schemes are now faced with rising inflation, a post-Brexit labour shortage and consumers who have less spending power²³. We envisage that there will be further restaurant closures, particularly amongst large chains.
- 3.4.3 The intermittent closure of the casual dining sector during the COVID-19 pandemic is partly responsible for the boost in fast-food takeaways, which is now the fastest growing category nationally. Many fast-food takeaways have expanded their estate to cater for increased demand and to take advantage of favourable trading conditions.
- 3.4.4 Many consider spending on leisure to be discretionary and therefore it is likely to be in line with the performance of the UK economy. Table 3-2 shows average weekly household spending on leisure between 2009 and 2022. It is worth noting that the 2009 data coincided with the start of the global financial crisis, 2014 was prior to the Brexit vote, data from the financial year ending 2020 relate to the period immediately prior to the COVID-19 pandemic and data from the financial year ending 2022 are the latest available figures.

²¹ The Guardian, The casual dining crunch: why are Jamie's Italian, Strada, Byron (and the rest) all struggling? 22 February 2022. Available online at: [The casual dining crunch: why are Jamie's Italian, Strada, Byron \(and the rest\) all struggling? | Restaurants | The Guardian](#)

²² The Caterer, Restaurant closures hit ten-year high, 6 July 2023. Available online at: [Restaurant closures hit ten-year high – The Caterer](#)

²³ Data from UHY Hacker Young sourced in The Guardian, UK restaurant insolvencies jump by more than 60 per cent in year, data shows, July 2022. Available online at: [UK restaurant insolvencies jump by more than 60% in year, data shows | Hospitality industry | The Guardian](#)

Table 3-2 Average Weekly Household Spending Data 2009-2022

Spending Category	2009 (£)	2014 (£)	2020 (£)	2022 (£)	% change (2009-2020)	% change (2009-2022)	% change (2020-2022)
Cinema, theatre and museums etc.	2.30	2.80	3.30	1.90	43.5	-17.4	-42.4
Admissions to clubs, dances, disco and bingo	0.50	0.50	0.80	0.40	60	-20	-50
Restaurant and café meals	13.30	16.60	20.20	12.60	51.9	-5.3	-37.6
Takeaway meals and other snack food	8.00	8.80	10.90	7.00	36.3	-12.5	-35.8
Gambling payments	4.10	2.90	2.40	1.10	-41.5	-73.2	-54.2
Sports admission, subscriptions, leisure class fees and equipment hire	5.00	6.90	7.80	5.60	56	12	-28.2

Source: ONS, Family Workbook Spending in the UK, March 2021 and May 2023

- 3.4.5 Between 2009 and 2020, the average weekly household spend increased across all of the sub-categories with the exception of gambling payments. There was a significant growth in spending on sports admission subscriptions and leisure class fees, largely led by a doubling of spending on subscriptions to sports and social clubs, which reflects the growth in the discount gym market.
- 3.4.6 There was also a significant increase (51.9 per cent) in spending on restaurant and café meals since the start of the global financial crisis. The decrease in gambling payments (-41.5 per cent) was largely led by a significant fall in spending at bookmakers. However online gambling has become much more prevalent in recent years. In 2020, almost one in four adults gambled in the last month compared to around one in six five years prior²⁴.
- 3.4.7 When compared with the data for 2020, the data for 2022 show a vastly significant reduction in average weekly household spending across all of the sub-categories. This could be due to the cost-of-living crisis which has led households to rein in their spending. The change in the average weekly household spending on sports admissions, takeaways and restaurants was less marked when compared to the other spending categories. This demonstrates which leisure activities households would rather spend their money on during difficult financial times.
- 3.4.8 Despite the average weekly household spend on takeaways decreasing between 2020 and 2022, many online food delivery operators witnessed sales soaring during the pandemic as restrictions were imposed on indoor and, to a lesser extent outdoor, seating in cafés and restaurants. Just Eat Takeaway experienced a 76 per cent increase in orders during the first six months of 2021, with the average customer ordering more than three times a month compared with 2.5 times in 2020²⁵. This follows an increase in the popularity of online food deliveries in the years prior to the COVID-19 pandemic.

3.5 Impacts of COVID-19

- 3.5.1 The retail property market was already challenging before the onset of the COVID-19 pandemic, with an increasing volume of activity shifting to online shopping. With three national lockdowns, local lockdown rules and some form of restrictions on economic life for almost two

²⁴ [Taking a more in-depth look at online gambling – Gambling Commission](#)

²⁵ The Guardian, Just Eat Takeaway orders soar 76% during six months of COVID restrictions, 17 August 2021. Available online at: [Just Eat Takeaway orders soar 76% during six months of COVID restrictions | Couriers/delivery industry | The Guardian](#)

years, the short-term impacts of the global pandemic on retail have been stark. In 2020, total retail sales volumes fell by 1.9 per cent in Great Britain compared with 2019, the largest annual fall on record²⁶. A number of national multiple retailers were forced to restructure or enter administration, including Clarks, Debenhams, Oasis, Warehouse, Cath Kidston and Brighthouse. In contrast, independent retailers performed better during the pandemic with 804 units opening in the first half of 2021²⁷. This growth can be attributed in part to government support measures, business rates relief and the moratorium on evictions for commercial tenants, all of which enabled them to remain operational.

3.6 Potential Economic Scenarios

- 3.6.1 As well as outlining 'the central forecast' scenario for the UK's macro-economic performance in the context of the ongoing Russia-Ukraine conflict, Experian puts forward three alternative scenarios, namely 'Optimistic scenario', 'Downside Brexit scenario' and 'Severe downside scenario'²⁸.
- 3.6.2 The central forecast assumes that government measures will be somewhat successful in preventing large swathes of businesses going bust and reducing the number of employees losing their jobs. The medium to long term damage to the economy is assumed to be mild. In relation to the Russia-Ukraine conflict, the central forecast assumes that current sanctions will remain, but that no new sanctions will be imposed. As such, the global oil price is likely to be relatively stable in the short term. Great uncertainty surrounds the assumptions underpinning the central forecast. The assumption that there will be a smooth transition to the new trading environment in which more rigorous customs checks will be in place remains unchanged. COVID-19 cases amongst populations in which the take-up of vaccines is low may continue to cause supply chain disruption and high inflation.
- 3.6.3 Experian identifies a number of risks relating to the central forecast, including:
- Downward pressure on wages resulting from pay disputes in the context of high inflation as well as older workers leaving the labour force and stricter post-Brexit immigration rules making it harder to employ those from Europe.
 - Delayed rise in unemployment (projected to peak at 5.7 per cent by the end of 2024) as high inflation and rising interest rates affect businesses' profitability and intentions to hire. At the same time, the rise in economic inactivity (due to long-covid and backlogs in the NHS) among older age groups could continue or intensify hindering potential growth.
 - The long-term economic consequences of Brexit will be dependent on the UK-EU's relationship going forward. The impact on external trade, foreign direct investment and migration are of considerable importance as they can directly affect labour supply and productivity.
- 3.6.4 A 40 per cent probability is attached to the central forecast, where annual growth in GDP is expected to average 1.8 per cent from 2021 to 2040.
- 3.6.5 In addition to the central forecast, Experian presents one upside and two downside scenarios. The alternative scenarios assess the different ways in which the Russia-Ukraine conflict could play out and the associated impacts on the UK economy. All of the scenarios assume that there will be no further COVID-19 restrictions and that Brexit will have an insignificant impact on trade. Moreover, it is assumed that the Energy Price Guarantee ('EPG') will cease to exist from April 2024.
- 3.6.6 A 30 per cent probability is attached to the optimistic scenario, in which it is assumed that the Russia-Ukraine conflict begins to subside, and sanctions are gradually lifted. Russian oil and

²⁶ ONS, Impact of the coronavirus (COVID-19) pandemic on retail sales in 2020, February 2021

²⁷ Local Data Company, Looking Beyond Lockdown: GB Retail and Leisure Market Analysis H1 2021, September 2021

²⁸ Experian, Retail Planner Briefing Note 20, February 2023

gas exports to Europe rise and prices slowly decrease. On the whole, global supply chain disruptions disappear quickly causing inflation to fall at a faster rate than in other scenarios, averaging less than 6 per cent in 2023. In this context, it is assumed that there are no further increases to the Bank Rate which, in turn, has a positive effect on business confidence and ultimately job hiring. The projected increase in the unemployment rate is capped at a peak of 4.4 per cent in 2024. The optimistic scenario assumes a better outlook for household finances which, in turn, results in a more robust economic recovery by the middle of 2023 (although it will not be until Q4 of 2023 that GDP returns to pre-pandemic levels).

- 3.6.7 A 25 per cent probability is attached to the downside scenario in which it is assumed that there is no foreseeable end to the Russia-Ukraine conflict, and Western sanctions on Russia continue and become more severe. Supply chain disruptions continue, and the global price of oil rises. In response, Russia cuts off gas supply to all of Europe and, when the EPG expires in April 2024, domestic energy prices rise and Consumer Price Index ('CPI') inflation takes longer to come back down than in the base case. The Bank Rate increases to 5.5 per cent in 2023, higher than the base case. As such, businesses have to make numerous cutbacks and the unemployment rate increases to a peak of 7.3 per cent in 2025. The decline in consumer spending is more pronounced than in the base case. The downside scenario assumes that it will not be until Q1 of 2027 when GDP returns to pre-pandemic levels.
- 3.6.8 A 5 per cent probability is attached to the severe downside scenario. As with the base and downside scenarios, the severe downside scenario assumes that the Russia-Ukraine conflict will continue indefinitely. This scenario assumes that Russia cuts off oil supply to all of Europe as well as gas, causing the prices of both commodities to increase sharply. Domestic energy prices spike following the expiration of the EPG in April 2024 and CPI remains higher for longer. Businesses are under more pressure to make cuts than in the downside scenario, which sees the unemployment rate peak at 9.6 per cent in H1 of 2025 and remaining above 8 per cent until 2028. This scenario assumes that the Bank Rate rises to 6.75 per cent in 2023. The cost-of-living crisis underpins a gradual decline in consumer spending, which lasts until the end of 2024. The severe downside scenario assumes that it will not be until Q4 of 2028 when GDP returns to pre-pandemic levels.

4 Performance Analyses

4.1 Introduction

- 4.1.1 We have undertaken performance analyses (otherwise known as ‘health checks’) of Swindon Town Centre, Swindon Old Town and Swindon Designer Outlet as well as audits of the remaining district centres (Cavendish Square, Gorse Hill, Orbital Retail Park and West Swindon Shopping Centre), the primary rural centres (Highworth Town Centre and Wroughton Village Centre) as well as three local centres (Clive Parade, Manchester Road and Rodbourne Road)²⁹. Our appraisals were informed by visits to the centres on 10th and 11th October 2023, together with desk-based research which draws on published information from national data-providers.
- 4.1.2 For the performance analyses, where possible, we describe the position in relation to key indicators of vitality and viability that are set out within Planning Practice Guidance (‘PPG’), summarised below in Table 4-1, but information for some of the indicators is not readily available (or useful) for certain centres. For instance, we do not provide an analysis of crime statistics as the boundaries that are used to report on the level of crime are different to the defined town and district centre boundaries and, in the absence of formal footfall surveys for all centres, we necessarily comment on pedestrian flows at a high level. Where relevant, we compare our findings with those from the Council’s previous retail and leisure study in order to track changes in the performance of the centres over the past six years.

Table 4-1 PPG Town Centre Vitality and Viability Indicators

Vitality and viability of town centres: key indicators
<p>Diversity of uses</p> <p>Proportion of vacant street level property</p> <p>Commercial yields on non-domestic property</p> <p>Customers’ experience and behaviour</p> <p>Retailer representation and intentions to change representation</p> <p>Commercial rents</p> <p>Pedestrian flows</p> <p>Accessibility – this includes transport accessibility and accessibility for people with different impairments or health conditions, as well as older people with mobility requirements</p> <p>Perception of safety and occurrence of crime</p> <p>State of town centre environmental quality</p> <p>Balance between independent and multiple stores</p> <p>Extent to which there is evidence of barriers to new businesses opening and existing businesses expanding</p> <p>Opening hours / availability / extent to which there is an evening and night-time economy offer</p>

²⁹ Our centre audits are provided within Appendix A of the Appendices Volume.

- 4.1.3 As well as providing the base position for the future monitoring of town centre vitality and viability, the performance analysis exercise identifies the key strengths of the centres as well as deficiencies and areas that would benefit from improvement. We then use this information to inform our recommendations in subsequent sections of our report.
- 4.1.4 For Swindon Town Centre and Swindon Designer Outlet, the diversity of uses audits are based on Experian Goad plans, updated by Stantec in October 2023. Swindon Borough Council undertook surveys of the district, local and primary rural centres between April and June 2023, which we updated during our visits in October 2023. We assigned the units within each of the centres an Experian Goad code so that they could be analysed in the same way as the town centre and the designer outlet. Floorspace data were not available for either of the primary rural centres and so their diversity of uses audits focus on the number and mix of units only.
- 4.1.5 It is worth highlighting that some town centre uses such as public houses, bars, nightclubs, cinemas, theatres, solicitors, betting offices and dentists are not listed within Experian's Centre Report and are therefore excluded from the diversity of uses analyses. This results in a discrepancy between the actual number of units within a defined centre and the number of units reported within the diversity of uses analysis (as well as within the individual retail categories). Where relevant, however, we have referred to these common town centre uses within our qualitative appraisal of the centres. Furthermore, Experian Goad only records uses within ground floor units, except for shopping centres, where the uses on each floor are recorded. For example, an entrance to a first-floor restaurant would not be assigned a Goad code.
- 4.1.6 The Goad definition of Swindon Town Centre broadly reflects the town centre boundary identified on the adopted Policies Map; however, it doesn't extend as far north as the railway line. The town centre Goad plan primarily focuses on the area south of Holbrook Way and Fleming Way. Swindon Designer Outlet is not a defined centre within the retail hierarchy; however, the Goad plan covers the full extent of the designer outlet.
- 4.1.7 The Council's survey of Swindon Old Town broadly reflects the district centre boundary identified on the Policies Map; however, it extends further north along Victoria Road (just beyond Stanley Street). Swindon Borough Council's survey of West Swindon Shopping Centre mirrors the district centre boundary identified on the Policies Map. The Council's survey of Orbital Retail Park is almost identical to the defined district centre boundary; however, it excludes the filling station in the northern part of the centre. The survey of Gorse Hill effectively mirrors the defined district centre boundary. Cavendish Square's defined district centre boundary extends further than the Council's survey of the centre; however, the latter focuses on the main retail area and excludes residential units. The Council's survey of Highworth Town Centre mirrors the defined primary rural centre identified on the Policies Map. Its survey of Wroughton Village Centre largely covers the defined primary rural centre boundary although excludes a couple of units along High Street (which we picked up in our diversity of uses analysis). The Council's survey of Manchester Road extends further east than the defined local centre boundary; however, its survey of Clive Parade is identical to that identified on the Policies Map. Swindon Borough Council's survey of Rodbourne Road is broadly similar to the defined local centre boundary.

4.2 Performance of Swindon Town Centre

- 4.2.1 Swindon Town Centre is situated within Swindon Central Area, which sits at the top of the hierarchy of centres. Swindon Town Centre is distinct from Swindon Old Town, the latter being the original area of Swindon.
- 4.2.2 The majority of retail activity within Swindon Town Centre is concentrated in the southern part of The Brunel Shopping Centre and the surrounding streets of Regent Street, The Parade, Canal Walk and Bridge Street.

Previous Findings

- 4.2.3 The 2017 Retail and Leisure Study found that, whilst Swindon Town Centre had a good range of comparison retail units, it did not have a strong fashion offer and fell short of Swindon Designer Outlet in this respect. The town centre had a good selection of national multiple retailers, but the proportion of vacant units was significantly higher than the UK average for all centres. Single land use areas detracted from the vitality and viability of the town centre, with some areas deserted after 6pm. The centre suffered from a lack of an evening economy and there was no clear hub. Pedestrian links between the town centre and both the railway station and Swindon Designer Outlet were poor.

Diversity of Uses

- 4.2.4 Swindon Town Centre contains a total of 453 retail/service units, with a combined floorspace of 109,690 sq.m gross. The diversity of uses present within the town centre in terms of the number of units and floorspace is set out in Table 4-2, compared with the Goad UK average for all of the c.1,950 centres and shopping locations covered by Experian³⁰. The full breakdown of uses can be found within Appendix B of the Appendices Volume. For all the centres that we have completed performance analyses and centre audits for, the reader must take care when comparing the centre's diversity of uses to the UK average for all centres, which does not necessarily represent a like-for-like comparison given that it is an average spanning the largest city centres through to much smaller centres.
- 4.2.5 Where possible, we make comparisons between this study and the last; however, the previous study categorises some of the uses differently, thereby precluding us from drawing comparisons in some instances. Whilst the previous study was published in January 2017, the town centre Goad plan is dated July 2015 and the UK averages for all centres are from June 2015.

³⁰ Hereafter referred to as 'the UK average for all centres'.

Table 4-2 Diversity of Uses, Swindon Town Centre (October 2023)

Swindon Town Centre – Diversity of Uses						
Category	No. of units	% of total units	UK (%)	Floorspace sq.m	Floorspace (%)	UK (%)
Retail Services ³¹	73	16.1	14.7	9,270	8.5	7.4
Leisure Services ³²	75	16.6	18.8	10,520	9.6	13.5
Comparison	125	27.6	33.8	38,290	34.9	38.5
Convenience	44	9.7	10.1	7,800	7.1	18.9
Financial and Business ³³	33	7.3	6.2	6,510	5.9	5.0
Miscellaneous ³⁴	9	2.0	1.0	820	0.8	0.7
Vacant ³⁵	94	20.8	15.3	36,480	33.3	16.1
Total	453	100	100	109,690	100	100

Source: Stantec update of Experian Goad plan (Experian Goad for UK averages, October 2023). Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

- 4.2.6 The proportion of retail services recorded in Swindon Town Centre (16.1 per cent) is slightly above the UK average for all centres (14.7 per cent), and higher than the 12.2 per cent recorded in the previous study³⁶. Similarly, retail services account for 8.5 per cent of floorspace in the town centre, which is greater than the UK average for all centres (7.4 per cent), reflecting the generally large nature of the units.
- 4.2.7 Leisure services account for 16.6 per cent of town centre units and 9.6 per cent of total floorspace, in both cases below the UK average for all centres. This reflects Swindon Town Centre's relatively poor food and beverage offer. The previous study reported that 'A3/A5' uses accounted for 10.9 per cent of the total units in Swindon Town Centre in July 2015. As such, there has been a substantial increase in the proportion of food and beverage outlets in the period since the previous study.
- 4.2.8 Comparison retail units account for 27.6 per cent of town centre units, and 34.9 per cent of the town centre's total floorspace is recorded s comparison retail floorspace. This is below the UK average for all centres, both in terms of the proportion of units and floorspace. The proportion of comparison retail units recorded at the time of the previous study (34.7 per cent in July 2015) was more akin to the UK average for all centres in June 2015 (35.8 per cent) and October 2023 (33.8 per cent). The strongest comparison goods sub-sectors are '*electrical, home entertainment, telephones and video*', '*charity shops, pets and other comparison*', '*mixed and general clothing*' and '*chemists, toiletries and opticians*'. The town centre has no representation in the '*men's & boys' wear*' sub-sector and the proportions of businesses failing

³¹ Retail services comprise hairdressers, beauty parlours and health centres (Experian GOAD code G3B), laundries and drycleaners (G3C) and travel agents (G3D).

³² Leisure services comprise restaurants, cafés, coffee bars, fast food and takeaways (Experian GOAD code G3A). As mentioned earlier in our report, numerous town centre uses are excluded from the Experian Goad based diversity of uses analysis, such as a number of leisure services including bars and wine bars; bingo and amusements; casinos and betting offices; cinemas, theatres and concert halls; clubs; disco, dance and nightclubs; hotels and guest houses; and public houses. As such, the proportion of leisure services within each of the study centres is higher than that recorded in the Diversity of Uses tables. However, we include qualitative descriptions of the excluded leisure services elsewhere in the health checks to ensure they are not overlooked.

³³ Financial and business services comprise banks and financial services (Experian GOAD code G3E), building societies (G3F) and estate agents and auctioneers (G3G).

³⁴ Miscellaneous uses include employment, careers, post offices and information (Experian GOAD code G4A).

³⁵ This includes all vacant retail / service units plus those under alteration (Experian GOAD code G4B).

³⁶ The 2017 Study refers to 'A1 Services' and states that this includes hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

with the *'furniture, carpets and textiles'*, *'DIY, hardware and household goods'* and *'gifts, china, glass and leather goods'* sub-sectors are considerably below the UK average for all centres.

- 4.2.9 Convenience goods retail provision is broadly similar to the UK average for all centres in terms of the proportion of total units. However, the proportion of floorspace (7.1 per cent) is less than half the UK average for all centres (18.9 per cent), suggesting that Swindon Town Centre has a greater proportion of smaller convenience stores as opposed to larger foodstores. We note the closure of a large Morrisons foodstore (4,670 sq.m) in November 2019.
- 4.2.10 The proportion of financial and business services is slightly above the UK average for all centres, both in terms of the number of units and floorspace. Swindon Town Centre has 20 *'banks & financial services'*, 2 *'building societies'* and 11 *'estate agents & auctioneers'*.
- 4.2.11 Swindon Town Centre has 9 units which fall within the miscellaneous sub-sector *'employment, careers, Post Offices & information'*, which equates to representation in line with the UK average for all centres, both in terms of the number of units and floorspace.
- 4.2.12 There were 94 vacant units within Swindon Town Centre in October 2023, equating to a vacancy rate above the UK average for all centres both in relation to the proportion of units and floorspace. We explore that key indicator in greater detail, below.

Proportion of Vacant Property

- 4.2.13 The proportion of vacant units across the town centre (20.8 per cent) is significantly above the UK average for all centres (15.3 per cent), as is the proportion of vacant floorspace (33.3 per cent versus 16.1 per cent). The quantum of vacant floorspace recorded in October 2023 (36,480 sq.m) is more than double that recorded at the time of the previous study (14,920 sq.m).
- 4.2.14 The Brunel Shopping Centre contains a high number of vacant units, particularly in the western section of the centre, which is largely unoccupied. The centre needs to be repurposed to enable it to adapt to the changing retail climate accelerated by the COVID-19 pandemic. Excluding vacant units within the western section of the shopping centre, the town centre's overall vacancy rate in terms of the number of units would be 15.5 per cent, almost identical to the UK average for all centres. The proportion of vacant floorspace would then be 24.1 per cent, however, which is still significantly higher than the UK average for all centres, reflecting the large nature of vacant units in Swindon Town Centre. Such units include the former Morrisons at Regent Circus Complex, the former Debenhams at The Parade, the former Tented Market, the vacant units around Fleet Street and some of the vacant units in the Brunel Shopping Centre.

Figure 4-1 Vacant town centre units (clockwise: former Morrisons, former Debenhams, vacant units on Fleet Street and former Tented Market)



Source: Stantec

Retailer Representation

- 4.2.15 The Brunel Shopping Centre was previously anchored by Marks & Spencer and Boots, which occupied a total of 4,120 sq.m of floorspace, but Marks & Spencer ceased trading in October 2023. Other national multiple retailers currently present within the shopping centre include Beaverbrooks, Bodycare, Card Factory, Claire's, EE, F. Hinds, Holland & Barrett, Lush, Pandora, The Perfume Shop and Vision Express. The shopping centre also contains some independent retailers.
- 4.2.16 The surrounding streets of Regent Street, The Parade and Canal Walk contain concentrations of national multiple comparison retailers including Deichmann, Flannels, H&M, JD, New Look, Peacocks, Primark, Sports Direct, Superdrug, Waterstones and W H Smith.
- 4.2.17 Convenience retail operators include Iceland, Londis and Tesco Express as well as a number of independent retailers.
- 4.2.18 The town centre's food and drink offer is limited, mainly comprising cafés and takeaways. There are very few national multiple restaurants, the notable exception being Nando's.

- 4.2.19 Swindon's Tented Market closed in 2017 and has lain in a state of disrepair since. Various proposals for the site have received planning permission but none have been taken forward yet³⁷.

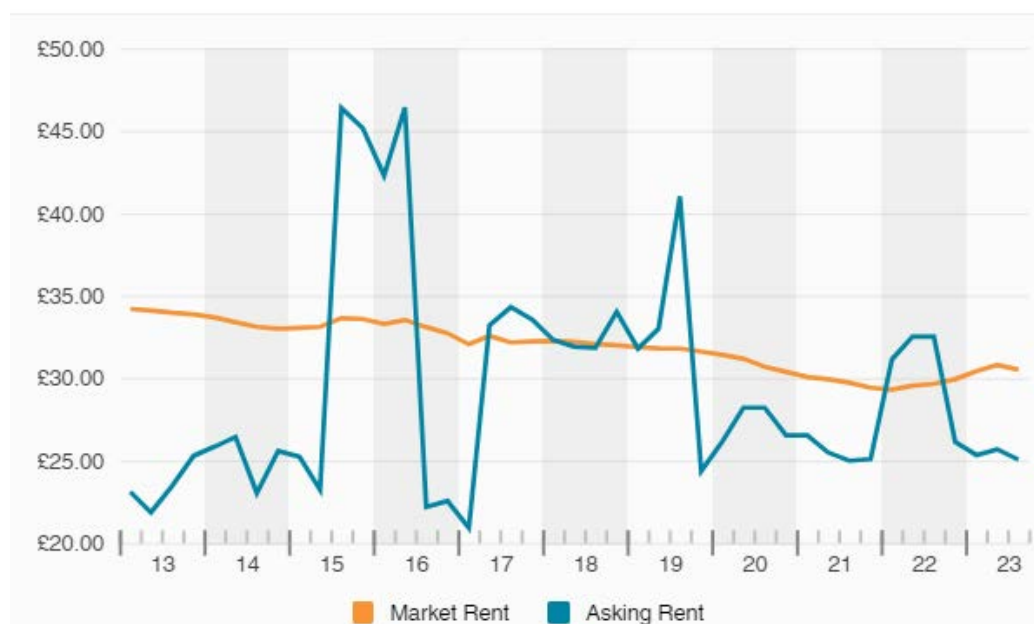
Balance between Independent Retailers and National Multiples

- 4.2.20 In other Retail and Leisure Studies where we have assessed the health of several centres, we have commented on the relative proportions of independent and national multiple stores. By its very nature, Swindon Designer Outlet will undoubtedly have a higher proportion of national multiple retailers than Swindon Town Centre and Swindon Old Town. As such, our professional view is that this indicator is less illuminating than other indicators of vitality and viability. Instead, we comment on concentrations of independent and national multiple stores across the town centre. As noted above, The Brunel Shopping Centre, Regent Street, The Parade and Canal Walk contain concentrations of national multiple comparison retailers. Concentrations of independent retail and service units can be found along Faringdon Road and the area to the south and east of The Brunel Shopping Centre.

Commercial Rents and Yields

- 4.2.21 We have sourced retail property data for Swindon Town Centre from CoStar UK. Figure 4-2 below shows market and asking rents for retail property within the town centre over the last ten years. Figure 4-2 shows that whilst market rents have remained broadly consistent since 2013, asking rents have fluctuated considerably (though the reason for this is unclear). Market rents range from a high of £34.20 in 2013 Q1 to a low of £29.31 in 2022 Q1. Asking rents peaked at £46.43 in 2016 Q2 but were also markedly higher in 2015 Q3 (£46.40) and 2019 Q3 (£41.03). CoStar has reported 214 lease transactions between 2013 Q1 and 2023 Q4 and leasing activity within the town centre appears to have been relatively high. This could suggest a high rate of turnover within the retail market.

Figure 4-2 Swindon Town Centre Market and Asking Rents 2013-23 (£ per sq. ft)

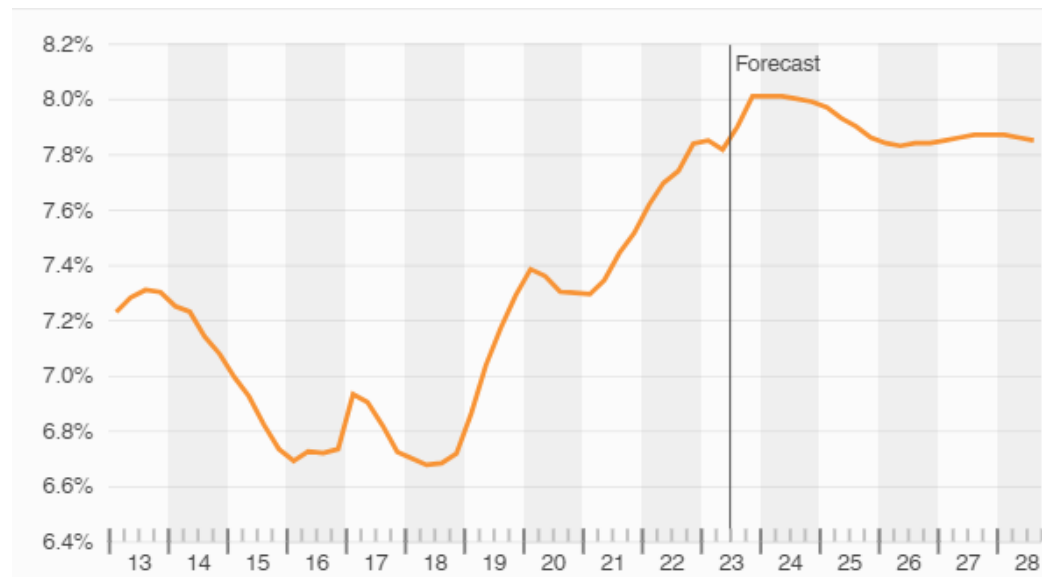


Source: CoStar UK

³⁷ Swindon Advertiser, 'What we know about future of Swindon's Tented Market', 2nd May 2023. Available online at: [What we know about future of Swindon's Tented Market | Swindon Advertiser](#)

- 4.2.22 Figure 4-3 shows historic and forecast market yields for retail property within the town centre over the last ten years. Figure 4-3 shows market yields dipped slightly between 2016 and 2018 before increasing to around 7.8 per cent recently. Forecast market yields were expected to increase to around 8 per cent in 2023 Q4 before gradually dropping back to around 7.8 per cent in 2028.

Figure 4-3 Swindon Town Centre Market Yields 2013-23 (%)



Source: CoStar UK

Accessibility and Pedestrian Flows

- 4.2.23 Swindon Town Centre is accessible by car and approximately 15 minutes' drive from Junction 15 or Junction 16 on the M4 motorway, and around the same time from the A419. There are a number of surface and multi-storey car parks located near to the main shopping area.
- 4.2.24 Swindon Bus Station is located to the north east of the town centre and provides 18 bays with services to other parts of Swindon Borough and more distant destinations such as Marlborough, Hungerford, Pewsey, Amesbury, Salisbury and Bath. The bus station is unattractive and dated in its current state. The Fleming Way underpass which provided easy access between The Parade and the bus station for many years closed in August 2023 as part of Swindon Borough Council's £33m project to improve Fleming Way³⁸. The plans include making Fleming Way the same level as the town centre shopping centre, replacing the underpass with a traffic light controlled pedestrian crossing and building a new bus interchange³⁹.
- 4.2.25 Swindon (Wilts) Railway Station is adjacent to the northern boundary of the town centre and serves as a major hub for trains to London, Wales and the south west. It is mainly served by Great Western Railway trains which connect London Paddington to Swindon and Bristol Temple Meads to Swindon. As noted in the 2017 Study, there is no clear route from the railway station to the main shopping area.

³⁸ Swindon Advertiser, 'Swindon shoppers concerned with Fleming Way underpass to close', 4 August 2023. Available online at: [Swindon shoppers concerned with Fleming Way underpass to close | Swindon Advertiser](#)

³⁹ BBC News, 'Fleming Way subway to be demolished in Swindon-centre revamp', 8 August 2023. Available online at: [Fleming Way subway to be demolished in Swindon-centre revamp - BBC News](#)

- 4.2.26 The railway line itself impedes pedestrian access to the town centre from the north. Similarly, Fleming Way impedes pedestrian access from the east. Pedestrian access from the residential streets to the west and south of the town centre is good, however.
- 4.2.27 In the absence of formal footfall surveys for Swindon Town Centre, we provide a high-level overview of pedestrian flows based on our visit to the centre. Pedestrian activity was highest along Regent Street and fairly high along The Parade. More peripheral areas of the town centre suffered from a lack of footfall, particularly around Fleet Street and Regent Circus. The western section of The Brunel Shopping Centre was almost devoid of any pedestrian activity.
- 4.2.28 Anecdotal evidence suggests that town centre footfall was significantly higher before the COVID-19 pandemic, particularly at lunch times, and the presence of Swindon Borough Council employees was apparent.

Perception of Safety and Occurrence of Crime

- 4.2.29 The majority of the centre felt safe during our visits in October 2023, with the exception of the northern part of the town centre around Fleet Street, Henry Street and Holbrook Way where there is a concentration of vacant units and a lack of pedestrian activity.
- 4.2.30 The visible security presence within The Brunel Shopping Centre limits the scope for crime and anti-social behaviour.
- 4.2.31 Given the lack of an evening economy and the concentration of vacant units along Fleet Street, we expect that this part of the town centre provides a more forbidding environment during the late hours.

Customer Views and Experience

- 4.2.32 To understand customers' views and experience, those household telephone survey respondents who indicated that they had visited Swindon Town Centre in the past year were asked what they liked most and least about Swindon Town Centre.
- 4.2.33 Table 4-3 shows the most popular responses to the question '*What do you like most about Swindon Town Centre?*'

Table 4-3 What respondents liked most about Swindon Town Centre

Response	Proportion of respondents within the study area who gave each response (%)
Nothing	42.1
Shops – good range of clothes shops	4.6
Parking – it's easy to find a space	4.4
Close to home	4.3
Good cafés / restaurants	3.7
Shops – good range of non-food shops generally	3.6
Shops – good range of 'high street' retailers	2.7
Shops – good range of affordable shops	2.3
Good leisure facilities (e.g., leisure centres, cinema, health and fitness clubs, etc.)	2.3
Familiar / know where everything is	2.2

Source: Household telephone survey (NEMS)

- 4.2.34 The overwhelming majority of the respondents liked nothing about Swindon Town Centre which is very alarming considering it is the largest centre within the Swindon Central Area, the main focus and first preference for retail, leisure and other main town centre uses within the

Borough. However, this finding provides further justification for the Council's emphasis on the importance of the regeneration of Swindon Town Centre.

- 4.2.35 Other popular responses included the centre's good range of clothes shops, the ease in which respondents can find parking spaces and the centre's proximity to respondents' homes.
- 4.2.36 Table 4-4 shows the most popular responses to the question 'What do you like least about Swindon Town Centre?'

Table 4-4 What respondents like least about Swindon Town Centre

Response	Proportion of respondents within the study area who gave each response (%)
Too many empty shops	25.2
Nothing	8.8
Dirty streets / poorly maintained	8.6
Lack of security / don't feel safe	6.7
Shops – need more / better range of non-food shops generally	4.9
Needs an update / revamp	4.7
Shops – need more / better clothes shops	4.3
Poor atmosphere / unfriendly people	3.8
Not attractive / poor environment	3.7
Parking – expensive parking	2.8
Shops – need more 'high street' retailers	2.6

Source: Household telephone survey (NEMS)

- 4.2.37 In terms of what respondents liked least about Swindon Town Centre, approximately a quarter thought there are too many empty shops. This corroborates our earlier findings that there has been a substantial increase in the level of vacant floorspace within Swindon Town Centre since the last study was undertaken and the proportion of vacant units within the town centre is significantly above the UK average for all centres, as is the proportion of vacant floorspace.
- 4.2.38 Other reasons included poor maintenance, feeling unsafe, a poor range of non-food shops generally and a lack of modernisation.

Environmental Quality

- 4.2.39 The town centre environment is poor. Except for some trees, the centre is dominated by hard landscaping, which gives it a decidedly downbeat character. Wharf Green, a large public square to the south west of The Brunel Shopping Centre, is particularly lacklustre given the complete absence of an active frontage along much of the perimeter of the square. The square is bordered to the north-west by the former House of Fraser Outlet Store, to the north-east by the former Argos Extra store, to the south by the former tented market which has been graffitied all over and to the west by a multi-storey car park.

Figure 4-4 Wharf Green



Source: Stantec

- 4.2.40 We suspect that the fountain and seating at the intersection of Regent Street, The Parade, Canal Walk and Bridge Street were installed to signify the focal point of the town centre; however, they have failed to achieve such an objective. The external appearance of the Brunel Centre is dated and unwelcoming and the vast majority of the shopping centre to the west of Canal Walk is vacant with some parts even cornered off. Regent Circus is a relatively recent development (c.9 years old) to the south of the main shopping centre, but it is lifeless following the closure of Morrisons and a couple of restaurants. The majority of the town centre is, however, pedestrianised.

Figure 4-5 Lack of a 'hub' at the intersection of the principal shopping streets



Source: Stantec

Evidence of Barriers to Business

- 4.2.41 Those national multiple retailers with outlet stores are more likely to locate within Swindon Designer Outlet as opposed to the town centre given its focus on outlet shopping. Some food and beverage outlets may also prefer the Designer Outlet.

Extent of Evening Economy Offer

- 4.2.42 The town centre has a poor evening economy offer, with a limited choice of restaurants, public houses, bars and nightclubs. The town centre has been described as a 'ghost town' in the evening.
- 4.2.43 Fleet Street used to accommodate a number of night time economy uses, almost all of which have since vacated leaving this area of the town centre in a particularly depressing state. It is not expected that this area will experience a resurgence in its night time economy offer and therefore the Council needs to focus on regenerating this area of the town centre in particular.
- 4.2.44 Swindon Town Centre does, however, have three theatres and a cinema which are concentrated in the south east of the town centre.

Summary

- 4.2.45 Overall, Swindon Town Centre is in need of fundamental intervention as it is performing very poorly against the key indicators of vitality and vibrancy. The town centre should be performing much better than it is currently, especially considering its position at the top of the retail hierarchy. As such, serious consideration should be given regarding how best to regenerate the centre.
- 4.2.46 There has been a substantial increase in the level of vacant floorspace across Swindon Town Centre, which has more than doubled since 2015. Even after excluding the vacant units in The Brunel Shopping Centre, the proportion of vacant floorspace is still significantly higher than the UK average for all centres, demonstrating the large nature of vacant units within Swindon Town Centre. These vacant units are a blight on the town centre, particularly around Fleet Street. Moreover, Regent Circus, a relatively recent development, is lifeless following the closure of Morrisons.
- 4.2.47 Despite the town centre having a reasonable range of national multiple retailers, the proportion of comparison retail units is below the UK average for all centre as is the proportion of floorspace. The town centre has a poor evening economy, and we expect parts of the town centre feel quite unsafe during the late hours.
- 4.2.48 The town centre environment is poor – there is no 'hub' within the town centre and there is no active frontage along some of the primary retail frontage particularly around Wharf Green. Poor pedestrian links exist between the town centre and both the railway station and Swindon Designer Outlet.
- 4.2.49 It was evident during our visits that there are a number of distinct areas within Swindon Town Centre. The majority of retail activity is concentrated within the pedestrianised areas of the town centre (i.e., Regent Street, The Parade, Canal Walk, Bridge Street, Havelock Street and the Brunel Shopping Centre). The eastern part of the town centre is home to Swindon's theatre district albeit this area did not appear to be very vibrant at the time of our visit. The Commercial Quarter is located in the north eastern part of the town centre where there appears to be a considerable amount of investment taking place particularly around Fleming Way. In general, footfall was highest within the retail core but there were significant variations within this area alone. Despite the slight nuances within the performance of these distinct areas, we consider Swindon Town Centre to be seriously struggling overall.

4.3 Performance of Swindon Old Town

- 4.3.1 Swindon Old Town is identified as a district centre by Policy EC3 in the Swindon Borough Local Plan 2026. The district centre is located to the south east of Swindon Town Centre and primarily comprises Victoria Road, Wood Street, Devizes Road, High Street, Newport Street and the eastern end of Bath Road. Swindon Old Town was the original town and sits on top of a hill.

Previous Findings

- 4.3.2 The 2017 Retail and Leisure Study found that Swindon Old Town primarily fulfilled a service centre role, with a particularly good selection of restaurants and cafés. The centre was said to function as a day-to-day shopping and service centre for local residents. The centre had a significantly lower proportion of comparison retail units compared with the UK average for all centres. The vacancy rate was also higher than the UK average for all centres. The town centre environment was generally attractive with the majority of the centre located within a Conservation Area. The pedestrian route between Swindon Old Town and Swindon Town Centre along Victoria Road was said to be unattractive.

Diversity of Uses

- 4.3.3 Swindon Old Town contains a total of 140 retail/service units, with a combined floorspace of 20,650 sq.m gross. The diversity of uses present within the district centre in terms of the number of units and floorspace is set out in Table 4-5, compared with the Goad UK average for all of the c.1,950 centres and shopping locations covered by Experian⁴⁰. The full breakdown of uses can be found in Appendix B of the Appendices Volume.
- 4.3.4 Where possible, we make comparisons between this study and the last; however, the previous study categorises some of the uses differently thereby precluding us from drawing comparisons in some instances. Whilst the previous study was published in January 2017, the district centre Goad plan is dated January 2015 and the UK averages for all centres are from June 2015.
- 4.3.5 Swindon Borough Council's survey of Swindon Old Town does not include all of the retail and service units at the centre (we noted seven additional units). We have included these units within our diversity of uses analysis but do not have details regarding their floorspace. As such, the floorspace figures quoted in Table 4-5 below are not wholly accurate.

⁴⁰ Hereafter referred to as 'the UK average for all centres'.

Table 4-5 Diversity of Uses, Swindon Old Town (October 2023)

Swindon Old Town – Diversity of Uses						
Category	No. of units	% of total units	UK (%)	Floorspace sq.m	Floorspace (%)	UK (%)
Retail Services ⁴¹	35	25.0	14.7	2,987	14.5	7.4
Leisure Services ⁴²	40	28.6	18.8	4,665	22.6	13.5
Comparison	30	21.4	33.8	5,738	27.8	38.5
Convenience	8	5.7	10.1	3,508	17.0	18.9
Financial and Business ⁴³	15	10.7	6.2	2,357	11.4	5.0
Miscellaneous ⁴⁴	2	1.4	1.0	163	0.8	0.7
Vacant ⁴⁵	10	7.1	15.3	1,232	6.0	16.1
Total	140	100	100	20,650	100	100

Source: Stantec update of Swindon Borough Council survey (Experian Goad for UK averages, October 2023). Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

- 4.3.6 The proportion of retail services (25.0 per cent) is significantly above the UK average for all centres (14.7 per cent), and an increase on the 15.5 per cent recorded by the previous study⁴⁶. Similarly, retail services account for 14.5 per cent of floorspace in the district centre, which is roughly double the UK average for all centres (7.4 per cent). Within the retail services category – which includes *‘hairdressers, beauty parlours & health centres’*, *‘laundries & drycleaners’* and *‘travel agents’* – all but one of the 35 units are within the *‘hairdressers, beauty parlours & health centres’* sub-category.
- 4.3.7 Over a quarter (28.6 per cent) of the district centre units are in leisure service use, equating to 22.6 per cent of floorspace. This is significantly above the UK average for all centres both in terms of the proportion of units and floorspace, which supports the Council’s view that Swindon Old Town has a strong food and beverage offer and is a focus for the evening economy. The previous study reported that ‘A3/A5’ uses accounted for 23.0 per cent of the total units within Swindon Old Town in January 2015, which is below the proportion recorded in October 2023. The previous study also reported that ‘A4 pubs/bars’ accounted for 6.1 per cent of the total units within the district centre. Whilst pubs and bars are excluded from the Experian Goad based diversity of uses analysis adopted in this study, it is further evidence that Swindon Old Town has a strong evening economy offer.
- 4.3.8 Comparison retail units account for 21.4 per cent of district centre units (broadly similar to the figure recorded at the time of the last study, of 19.6 per cent), equating to 27.8 per cent of floorspace. This is significantly below the UK average for all centres, both in terms of the proportion of units and the proportion of floorspace. Perhaps surprisingly, the strongest

⁴¹ Retail services comprise hairdressers, beauty parlours and health centres (Experian GOAD code G3B), laundries and drycleaners (G3C) and travel agents (G3D).

⁴² Leisure services comprise restaurants, cafés, coffee bars, fast food and takeaways (Experian GOAD code G3A). As mentioned earlier in our report, numerous town centre uses are excluded from the Experian Goad based diversity of uses analysis, such as a number of leisure services including bars and wine bars; bingo and amusements; casinos and betting offices; cinemas, theatres and concert halls; clubs; disco, dance and nightclubs; hotels and guest houses; and public houses. As such, the proportion of leisure services within each of the study centres is higher than that recorded in the Diversity of Uses tables. However, we include qualitative descriptions of the excluded leisure services elsewhere in the health checks to ensure they are not overlooked.

⁴³ Financial and business services comprise banks and financial services (Experian GOAD code G3E), building societies (G3F) and estate agents and auctioneers (G3G).

⁴⁴ Miscellaneous uses include employment, careers, post offices and information (Experian GOAD code G4A).

⁴⁵ This includes all vacant retail / service units plus those under alteration (Experian GOAD code G4B).

⁴⁶ The 2017 Study refers to ‘A1 Services’ and states that this includes hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

comparison retail sub-sector is *'furniture, carpets & textiles'*, accounting for 4.3 per cent of the total number of district centre units (compared with the UK average for all centres of 2.8 per cent). In comparison, *'men's & boys' wear'*, *'women's, girls and children's clothing'* and *'mixed and general clothing'* together only account for 0.71 per cent of the total number of units within Swindon Old Town. This is explained by Swindon Old Town's close proximity to Swindon Town Centre.

- 4.3.9 The proportion of convenience goods retailers (5.7 per cent) is roughly half the UK average for all centres (10.1 per cent). Swindon Old Town's convenience retail offer includes Co-op Food, Morrisons Daily and Premier. The proportion of convenience retail floorspace (17.0 per cent) is only slightly below the UK average for all centres (18.9 per cent), with Co-op Food accounting for the majority of this floorspace (at 2,508 sq.m).
- 4.3.10 The proportion of financial and business services (10.7 per cent) is significantly higher than the UK average for all centres (6.2 per cent). Swindon Old Town boasts seven *'banks & financial services'* and eight *'estate agents & auctioneers'*. The previous study reported that *'A2 services'* accounted for 14.2 per cent of the total units within the district centre, which is significantly higher than the 10.7 per cent recorded in October 2023.
- 4.3.11 Swindon Old Town has two units which fall into the miscellaneous sub-sector, *'employment, careers, Post Offices & information'*.
- 4.3.12 Overall, the amount of retail and service floorspace in the district centre (20,650 sq.m) is relatively small, reflecting the generally small nature of units. This could reflect the age of the district centre (previously Swindon's original town centre).

Proportion of Vacant Property

- 4.3.13 The proportion of vacant units is significantly below the UK average for all centres, both in terms of the proportion of units and the proportion of floorspace.
- 4.3.14 The previous study reported a vacancy rate of 14.2 per cent, double that recorded in October 2023 (7.1 per cent). This is a good indicator of the centre's recovery and its overall vitality and vibrancy.

Retailer Representation

- 4.3.15 The district centre boasts a range of independent retailers whilst national multiple comparison retailers are limited to Boots, Malvern Tyres, Minuteman Press, Prospect Hospice and Sue Ryder. Swindon Old Town has an appropriate range of convenience retailers for a centre of its size, including Morrisons, Premier, Co-op Food and Wood Street Foodhall. The overwhelming majority of the district centre's food and drink offer is independently owned with the notable exception of Pizza Express (as well as a number of hot food takeaways).

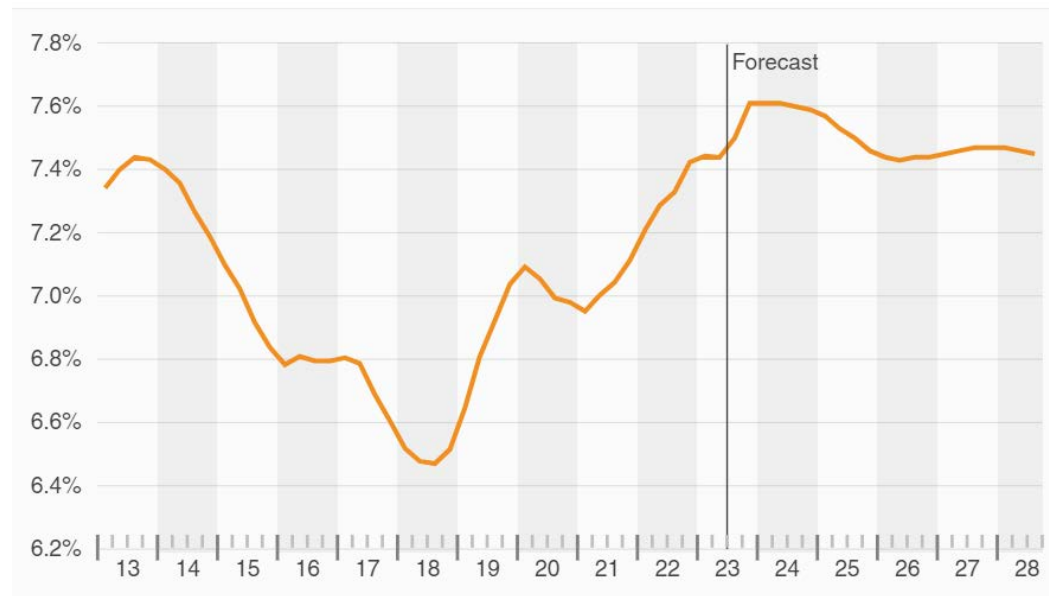
Balance between Independent Retailers and National Multiples

- 4.3.16 As noted above, Swindon Old Town primarily contains independent retailers with only a handful of national multiple retailers.

Commercial Rents and Yields

- 4.3.17 No lease transactions have been reported by CoStar since 2013. Figure 4-6 shows historic and forecast market yields for retail property within the district centre over the last ten years. Figure 4-6 shows market yields gradually decreased between 2013 and 2018 before recovering thereafter, with the market yield currently at 7.5 per cent in 2023 Q3. Forecast market yields are expected to increase to around 7.6 per cent in 2023 Q4 before gradually dropping back to around 7.5 per cent in 2028.

Figure 4-6 Swindon Old Town Market Yields 2013-23 (%)



Source: CoStar UK

Accessibility and Pedestrian Flows

- 4.3.18 Swindon Old Town is accessible by car, being sandwiched between the A4289 to the west and B4006 to the east. There are two pay and display car parks within the district centre itself and three further car parks just outside the district centre.
- 4.3.19 There are four bus stops in and around the district centre, with services to Swindon Town Centre, Orbital Retail Park, Oakhurst, Croft Campus, Great Western Hospital, Wichelstowe, Okus, Mannington and Ramlease.
- 4.3.20 The nearest train station is Swindon (Wilts) Railway Station, approximately a 25-minute walk from Wood Street.
- 4.3.21 Pedestrian access to the district centre is generally good although the roundabout at the southern end of Victoria Road impedes pedestrian movement across the A4289 to Wood Street. The pedestrian route between Swindon Town Centre and Swindon Old Town along Victoria Road is unattractive and could be greatly enhanced with more street planting, for example. Pedestrian activity within Swindon Old Town is concentrated along Wood Street.

Figure 4-7 Roundabout at the southern end of Victoria Road



Source: Stantec

Perception of Safety and Occurrence of Crime

- 4.3.22 The centre's thriving evening economy offer ensures that strong levels of natural surveillance continue into the evening; however, Michael's Way (a through route between Wood Street and Joiner Lane) has the potential to feel unsafe in the late hours especially if walking through alone.

Customer Views and Experience

- 4.3.23 Those household survey respondents who had said they had visited Swindon Town Centre in the past year were asked 'What is the single best thing that Swindon Town Centre offers visitors?', to which 0.4 per cent said Swindon Old Town. Whilst this finding is not very illuminating in its own right it is worth noting that 31.6 per cent of respondents answered 'Nothing' and 30.6 per cent answered 'Don't know'.

Environmental Quality

- 4.3.24 The environmental quality of Swindon Old Town is generally good, with much of the district centre located within Swindon (Old Town) Conservation Area. The vast majority of the building stock is well-maintained and many of the retail units have attractive facades. Wood Street is particularly pleasant and the terminating view of The Goddard Arms, an ivy-covered public house, serves to enhance the town centre environment in this location. The traffic restrictions along Wood Street make for a more positive pedestrian shopping experience. Conversely, the environmental quality of Victoria Road is poor with the regular flow of traffic and less attractive retail frontages.

Figure 4-8 Wood Street (left) and Victoria Road (right)



Source: Stantec

Evidence of Barriers to Business

- 4.3.25 The close proximity of Swindon Old Town to Swindon Town Centre is likely to be a barrier to attracting new national multiple outlets to the district centre.
- 4.3.26 Swindon Old Town primarily comprises independent retailers and service operators and is therefore less likely to be attractive to new national multiples.

Extent of Evening Economy Offer

- 4.3.27 The district centre has a strong evening economy offer with a number of restaurants (ranging from Caribbean to Nepalese to Thai), hot food takeaways, traditional pubs, wine and cocktail bars and nightclubs. Swindon Old Town also boasts Swindon Arts Centre, a 212-seater theatre.

Summary

- 4.3.28 Overall, we consider Swindon Old Town to be a relatively healthy centre. Whilst it has a significantly lower proportion of comparison retail units compared with the UK average for all centres, this is a function of its primarily service sector role. The district centre's vacancy rate has halved since the last retail study and is significantly below the UK average for all centres, which is a good sign of health. Swindon Old Town boasts a range of independent retailers which is a nice contrast from the nearby Swindon Town Centre and Swindon Designer Outlet which contain higher proportions of national multiple retailers.
- 4.3.29 The district centre is accessible via different modes of transport albeit the route from Swindon Town Centre to Swindon Old Town via Victoria Road is not pleasant and could be greatly enhanced. The remainder of the district centre, however, is generally attractive.
- 4.3.30 Swindon Old Town's greatest asset is its evening economy offer.

4.4 Performance of Swindon Designer Outlet

- 4.4.1 Swindon Designer Outlet is a large out of centre retail destination with a high-end fashion offer. It is not a defined centre within the Swindon Borough Local Plan 2026 as it does not fulfil the same functions as a town or district centre; rather, it is a specialised comparison retail

destination that draws visitors from a wide catchment. The Designer Outlet is located to the north west of Swindon Town Centre and is owned by McArthurGlen Group.

Previous Findings

- 4.4.2 The previous study found that Swindon Designer Outlet had a much higher proportion of comparison retail units compared to the UK average for all centres which reflected its niche offer as a designer fashion outlet. Despite the centre's service offer being limited there was a high level of customer satisfaction. Whilst the vacancy rate was much higher than the UK average for all centres, the designer outlet had just undergone conversion and extension which meant that some of the units had yet to be fitted out and let. The quality of the designer outlet and the public realm was high, and the centre provided a covered, easily navigable shopping experience. The pedestrian links between Swindon Designer Outlet and Swindon Town Centre were found to be poor.

Diversity of Uses

- 4.4.3 Swindon Designer Outlet contains a total of 119 retail/service units, with a combined floorspace of 27,780 sq.m gross. The diversity of uses present within the designer outlet in terms of the number of units and floorspace is set out in Table 4-6, compared with the Goad UK average for all of the c.1,950 centres and shopping locations covered by Experian⁴⁷. The full breakdown of uses can be found in Appendix B of the Appendices Volume.
- 4.4.4 Where possible, we make comparisons between this study and the last; however, the previous study categorises some of the uses differently, thereby precluding us from drawing comparisons in some instances. Furthermore, the referenced Goad plan (July 2015) and UK averages (June 2015) predate the January 2017 study, highlighting the need for a careful approach to their interpretation.

⁴⁷ Hereafter referred to as 'the UK average for all centres'.

Table 4-6 Diversity of Uses, Swindon Designer Outlet (October 2023)

Swindon Designer Outlet – Diversity of Uses						
Category	No. of units	% of total units	UK (%)	Floorspace sq.m	Floorspace (%)	UK (%)
Retail Services ⁴⁸	1	0.8	14.7	20	0.1	7.4
Leisure Services ⁴⁹	17	14.3	18.8	2,410	8.7	13.5
Comparison	80	67.2	33.8	21,570	77.7	38.5
Convenience	6	5.0	10.1	770	2.8	18.9
Financial and Business ⁵⁰	0	0	6.2	0	0	5.0
Miscellaneous ⁵¹	0	0	1.0	0	0	0.7
Vacant ⁵²	15	12.6	15.3	3,010	10.8	16.1
Total	119	100	100	27,780	100	100

Source: Stantec update of Experian Goad plan (Experian Goad for UK averages, October 2023). Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

- 4.4.5 Unsurprisingly, just over two-thirds of the units within Swindon Designer Outlet are comparison retail units (of which 22.7 per cent are in the *'mixed and general clothing'* sub-sector). This is approximately double the UK average for all centres, reflecting the nature of the centre as a designer outlet. The previous study reported that comparison retail accounted for 71.1 per cent of the total units in Swindon Designer Outlet in July 2015, 3.9 percentage points higher than that recorded in October 2023. Similarly, the proportion of comparison retail floorspace is approximately double the UK average for all centres.
- 4.4.6 Swindon Designer Outlet's representation by leisure services businesses is significantly below the UK average for all centres both in terms of the proportion of total units (14.3 per cent versus 18.8 per cent) and total floorspace (8.7 per cent versus 13.5 per cent), which is expected given that the designer outlet predominantly focuses on the sale of comparison retail goods. The previous study recorded that 8.3 per cent of the total units fell within the 'A3/A5' category. The increased representation of leisure services uses demonstrates that the food and beverage offer within the Designer Outlet is much better now compared to 2015; however, it is still significantly below the UK average for all centres. Most of the leisure services within the designer outlet are coffee bars and restaurants.
- 4.4.7 The proportion of convenience goods retail provision is significantly below the UK average for all centres, both in terms of the proportion of total units and the proportion of floorspace. The designer outlet's convenience goods retail provision does not comprise typical foodstores but instead bakers and confectioners (Cadbury, Haribo, Lindt and Patisserie Valerie), tea and coffee merchants (Whittard of Chelsea) and health foods (Holland & Barrett Outlet), which typically have smaller floor areas.

⁴⁸ Retail services comprise hairdressers, beauty parlours and health centres (Experian GOAD code G3B), laundries and drycleaners (G3C) and travel agents (G3D).

⁴⁹ Leisure services comprise restaurants, cafés, coffee bars, fast food and takeaways (Experian GOAD code G3A). As mentioned earlier in our report, numerous town centre uses are excluded from the Experian Goad based diversity of uses analysis, such as a number of leisure services including bars and wine bars; bingo and amusements; casinos and betting offices; cinemas, theatres and concert halls; clubs; disco, dance and nightclubs; hotels and guest houses; and public houses. As such, the proportion of leisure services within each of the study centres is higher than that recorded in the Diversity of Uses tables. However, we include qualitative descriptions of the excluded leisure services elsewhere in the health checks to ensure they are not overlooked.

⁵⁰ Financial and business services comprise banks and financial services (Experian GOAD code G3E), building societies (G3F) and estate agents and auctioneers (G3G).

⁵¹ Miscellaneous uses include employment, careers, post offices and information (Experian GOAD code G4A).

⁵² This includes all vacant retail / service units plus those under alteration (Experian GOAD code G4B).

- 4.4.8 The proportion of retail services is significantly below the UK average for all centres, both in terms of the number of units and floorspace. Again, this is expected given that the designer outlet predominantly focuses on the sale of comparison goods.
- 4.4.9 Swindon Designer Outlet has no representation in the *'financial and business'* and *'miscellaneous'* use categories. The designer outlet is not disadvantaged in this respect as its primary purpose is the sale of comparison goods.

Proportion of Vacant Property

- 4.4.10 The proportion of vacant units (12.6 per cent) is below the UK average for all centres (15.3 per cent). The proportion of vacant floorspace (10.8 per cent) is significantly below the UK average for all centres (16.1 per cent), reflecting the generally small size of units. The vacant units are dispersed throughout the designer outlet meaning that no one section is more vibrant than the rest.
- 4.4.11 When updating the Goad plan on our site visit, it was apparent that units sometimes relocate within the designer outlet itself. For example, Puma is now vacant and has relocated into the former Jack Wills unit and Jack Wills has relocated into a former vacant unit. One of the vacant units has now been expended into by Levi's (which already occupied the adjacent unit). Similarly, another vacant unit has been expended into by Costa (which already occupied a kiosk opposite).

Retailer Representation

- 4.4.12 Swindon Designer Outlet is currently anchored by Adidas, John Lewis Home Outlet, Marks & Spencer Outlet and Nike. Other national multiple retailers include fashion and footwear operators (such as Clarks, Guess, Monsoon, Next Outlet and Vans), health and beauty operators (for instance, The Body Shop, Molton Brown and The Fragrance Shop), and homeware shops (Bedeck and Lakeland).
- 4.4.13 The designer outlet also includes national multiple convenience retailers such as confectioners Cadbury's, Haribo and Lindt.
- 4.4.14 The food and drink offer includes coffee bars (Costa Coffee, SOHO Coffee Co. and Starbucks), fast-food restaurants (Five Guys, KFC and Subway), dessert restaurants (Don Churro, Krispy Kreme Doughnuts and The Best Ever Brownie Company) and restaurants (El Mexicana, Pizza Express, Wagamama and YO! Sushi).

Balance between Independent Retailers and National Multiples

- 4.4.15 The overwhelming majority of the retail and service operators within the designer outlet are national multiples⁵³. Exceptions include Yumi and The Best Ever Brownie Company (which operates online besides its outlet shop within Swindon Designer Outlet).

Commercial Rents and Yields

- 4.4.16 Commercial rental data are not available for Swindon Designer Outlet.

⁵³ Experian define multiple retailers as those being part of a network of nine or more outlets.

Accessibility and Pedestrian Flows

- 4.4.17 Swindon Designer Outlet is accessible by car, located off the B4829. The designer outlet benefits from two surface level car parks.
- 4.4.18 There are several bus stops located outside of the designer outlet with services to Swindon Town Centre, Great Western Hospital, Barnfield, Sparcells, Ramleaze, Middleleaze, Ridge Green, Park North and Orbital Retail Park.
- 4.4.19 Swindon Designer Outlet is approximately a 15-minute walk from Swindon (Wilts) Railway Station. There is an underpass at Bridge Street to enable access under the railway line.
- 4.4.20 Pedestrian links between Swindon Town Centre and Swindon Designer Outlet are poor although Swindon Borough Council received funding from the Government's Towns Fund in June 2022⁵⁴ to improve the underpass at Bristol Street which provides the most direct route to the designer outlet from the town centre.
- 4.4.21 The designer outlet itself provides a covered, easily navigable shopping experience. It was not particularly busy during our mid-week visit; however, we expect it is busier at the weekends, with some visitors travelling a fair distance to shop.

Perception of Safety and Occurrence of Crime

- 4.4.22 During the daytime the designer outlet seems very safe, with a management office on-site, which will limit the scope for crime and antisocial behaviour.

Environmental Quality

- 4.4.23 The environmental quality of Swindon Designer Outlet is excellent, providing an attractive and welcoming shopping experience. The outdoor space between the designer outlet and National Trust's Heelis office is very pleasant, with high-quality street furniture including raised garden beds, trees, plenty of seating, ample lighting, cycle parking, litter bins and bollards. The pelican crossings facilitate easy movement between the designer outlet and the surface level car parks.
- 4.4.24 The designer outlet occupies the former Great Western railway works and has been sensitively restored using lots of glass. The designer outlet is great for families as it has a large indoor play space for children. The indoor retail destination provides an attractive shopping experience all year-round.

Evidence of Barriers to Business

- 4.4.25 Unsurprisingly, Swindon Designer Outlet is much less attractive to operators without outlet stores. Given its niche offer as a designer fashion outlet, there is limited scope for additional food and beverage operators to locate within Swindon Designer Outlet. Whilst the units within the designer outlet could be reconfigured, there is limited scope for Swindon Designer Outlet to be extended further. This may deter those operators with large formats.

Extent of Evening Economy Offer

- 4.4.26 Swindon Designer Outlet is open between 10am and 8pm every day. Its evening economy offer is limited to the food and drink operators mentioned above.

⁵⁴ Swindon Advertiser, 'Bristol Street and Station Road underpasses in Swindon to be revamped', 17 June 2022. Accessed online at: [Bristol Street and Station Road underpasses in Swindon to be revamped | Swindon Advertiser](#)

Summary

- 4.4.27 Overall, we consider Swindon Designer Outlet to be a healthy out of centre retail destination. Unsurprisingly, the designer outlet contains a great range of national multiple comparison retailers, and its vacancy rate is below the UK average for all centres. The designer outlet is very accessible via motorised forms of transport and recent investment will ensure pedestrian links between the designer outlet and Swindon Town Centre are significantly improved. The designer outlet provides an easily navigable shopping experience and is attractive to families given its enclosed nature, security presence and play provision.

5 Current Retail and Leisure Expenditure Patterns

5.1 Introduction

- 5.1.1 In this section, we utilise the results from the household telephone survey to identify the current patterns of comparison and convenience retail spending, as well as leisure spending, by residents across the defined study area.

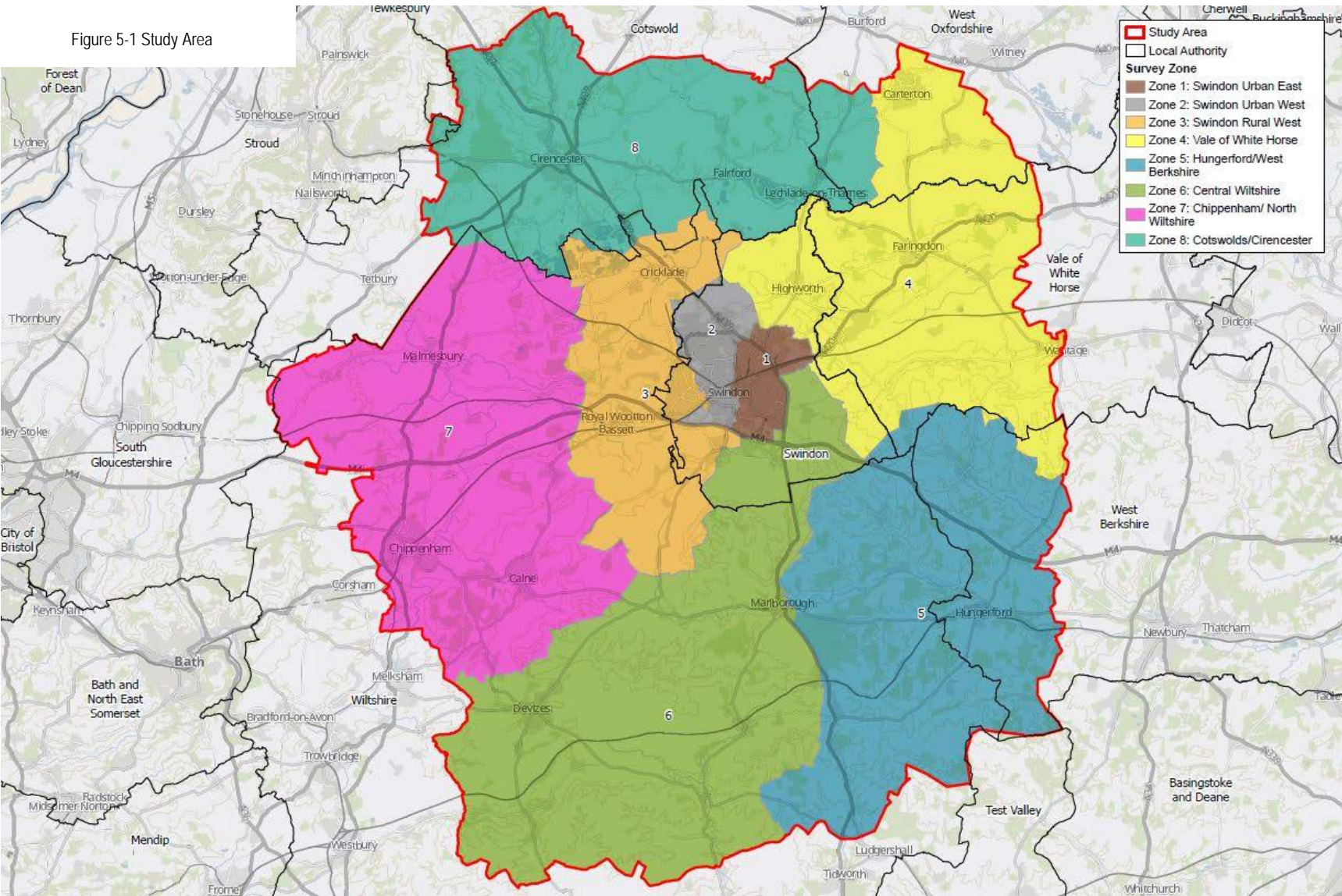
5.2 Household Survey Methodology

- 5.2.1 The last comprehensive Borough-wide survey of shopping and leisure patterns was undertaken some eight years ago, in January 2016, to inform the Swindon Retail and Leisure Needs Assessment which was published in January 2017. A new household telephone survey has therefore been undertaken as part of this study – conducted between October and November 2023 – to provide up-to-date evidence of current shopping and leisure patterns.

5.3 Study Area

- 5.3.1 The study area used for this Retail and Main Town Centre Uses Needs Study is shown on the plan within Appendix C of the Appendices Volume and by Figure 5-1 overleaf. The study area comprises eight study zones. Only one of the study zones is wholly within Swindon Borough Council's administrative boundary (Zone 1), with a further five zones being partially within the Borough's boundary and partially within neighbouring local authority areas (Zones 2, 3, 4, 5 and 6). The remaining two study zones are wholly within neighbouring local authority areas (Zones 7 and 8). The relatively extensive study area has been adopted to establish the role performed by Swindon and each of the seven district and primary rural centres within the Borough's boundary and further afield.

Figure 5-1 Study Area



Survey Questionnaire

5.3.2 The questionnaire used for the telephone household survey, which is reproduced within Appendix D of the Appendices Volume, sought to establish:

- Patterns of convenience goods spending, based on the location of:
 - the store where the household last undertook a main food and grocery shop, the store visited the time before that, and the amount spent per week and the frequency of visits to convenience stores;
 - the shop where the household last undertook a 'top-up' food and grocery shop, the shop visited the time before that, the amount spent per week and the frequency of visits; and
 - spending on food and groceries in small shops and markets.
- Patterns of comparison goods spending, based on the locations of the last purchase of:
 - clothes and shoes;
 - furniture, furnishings, carpets or other floor coverings, or household textiles;
 - DIY, decorating or gardening goods;
 - domestic appliances, such as washing machines, fridges, cookers, kettles or toasters;
 - electrical items, such as televisions, audio equipment, photographic equipment, mobile phones or tablets, or computer equipment;
 - personal care items, such as soaps or shower gel, health and beauty products or medicine;
 - recreational goods, such as toys and games, pets and pet products, books or stationery, sports equipment, bicycles or musical instruments; and
 - other non-food items, such as jewellery and watches, tableware and household utensils and other personal items such as travel goods.

5.4 Composite Patterns of Comparison Retail Goods Spending

5.4.1 The composite pattern of spending for comparison retail goods, as shown in Spreadsheet 4 of Appendix E of the Appendices Volume, was achieved on the basis of expenditure data supplied by Experian. Table 5-1 below provides the weightings of each comparison retail category used to achieve the composite comparison figure.

Table 5-1 Composite Patterns of Comparison Goods Spend

Category	Percentage Weighting
Clothes and footwear	21.53
Furniture, floorcoverings, household textiles	14.95
Hardware, DIY	8.63
Domestic appliances	12.14
TV, AV, phones & computers	9.96
Chemist, health & beauty goods	4.94
Recreational goods	20.04
Other non-food	7.80

- 5.4.2 The resident population of the study area in 2023, disaggregated by zone, is shown by the first row of figures in Spreadsheet 1 of Appendix E within the Appendices Volume . The overall population in the 2023 base year amounts to 551,834 persons, which is ONS based. Future year population projections to 2041 (also shown within Spreadsheet 1) are sourced from Experian Micromarketer App Library.
- 5.4.3 The per capita spend on comparison goods in 2023 (in 2021 prices) (Spreadsheet 2 of Appendix E) varies from a low of £3,609 in Zone 1 to a high of £4,695 in Zone 5. The total amount of comparison goods expenditure available to residents of the whole of the study area in 2023 is £2,362m (Spreadsheet 3 of Appendix E), of which £978m, or 41.4 per cent, is spent on special forms of trading (internet, catalogue and TV shopping, which we subsequently abbreviate as SFT), based on the findings of the household survey.
- 5.4.4 Spreadsheet 4 of Appendix E shows the market shares that each zone of the study area achieves in terms of the total spend on comparison retail goods by residents of each zone within the study area, and Spreadsheet 5 of Appendix E sets out the pattern of expenditure flows for the comparison retail goods sector as a whole, as revealed by the household survey.
- 5.4.5 Table 5-2, which is derived from the final two columns of Spreadsheet 5 of Appendix E, summarises the top seven main destinations for comparison goods expenditure within the study area. Greenbridge Retail Park in Swindon is the dominant destination for comparison shopping within the study area, attracting £195.3m (14.1 per cent of total available expenditure) in the 2023 base year. The second most popular destination for comparison shopping within the study area – as revealed by the household survey – is Swindon Town Centre, which attracts £92.1m, or 6.6 per cent. Additionally, when taken together, Orbital Shopping Park and Asda at Orbital Shopping Centre cumulatively attract £94m (6.8 per cent) of the comparison retail expenditure available to study area residents.
- 5.4.6 Four other destinations within the study area (McArthurGlen Designer Outlet, Saint Margarets Retail Park, Chippenham Town Centre and Cirencester Town Centre) collectively account for a further £220.4m of comparison goods spending in 2023, equating to 15.9 per cent of the comparison goods expenditure available to residents of the study area. Overall, some 81.7 per cent of expenditure on comparison goods available to the study area's residents is spent within the study area. This is known as the aggregate retention rate.

Table 5-2 Comparison Goods Expenditure Retained Within the Study Area in 2023

Destination	Expenditure (£m)	Expenditure (%)
Greenbridge Retail Park, Swindon	195.3	14.1
Swindon Town Centre	92.1	6.6
McArthurGlen, Swindon Designer Outlet	64.8	4.7
Orbital Shopping Park, Swindon ⁵⁵	55.5	4.0
Saint Margarets Retail Park, Swindon	53.6	3.9
Chippenham Town Centre	52.3	3.8
Cirencester Town Centre	49.7	3.6
Total Retained Expenditure	1,135.3	81.7
Total Leakage outside of the Study Area	254.2	18.3
Total	1,389.5	100.0

⁵⁵ This destination does not include Asda at Thamesdown Drive, Orbital Shopping Centre which comprises £38.5m comparison goods expenditure and a 2.8% market share.

- 5.4.7 Table 5-2 confirms that 18.3 per cent or £254.2m of the comparison retail expenditure available to residents within the study area in 2023 'leaks' to destinations outside of the study area. The market shares and estimated comparison goods turnovers of the main centres and retail parks/freestanding stores outside of the study area are also set out in the last two columns of Spreadsheet 5 of Appendix E and are summarised in Table 5-3 below.

Table 5-3 Main Destinations for Comparison Goods Expenditure Leakage in 2023

Destinations outside the Study Area	Expenditure (£m)	Expenditure (%)
Cribbs Causeway, Bristol	26.6	1.9
Newbury Town Centre	15.4	1.1
Bath City Centre	14.9	1.1
Witney Town Centre	14.8	1.1
Wantage Town Centre	12.7	0.9
Cheltenham Town Centre	10.6	0.8
Oxford City Centre	9.5	0.7
Spitfire Retail Park, Bradley Road, Trowbridge, BA14 0AZ	9.4	0.7

- 5.4.8 The following destinations (listed in descending order of magnitude) each account for £10m or more of comparison goods expenditure leakage: Cribbs Causeway in Bristol (£26.6m), Newbury Town Centre (£15.4m), Bath City Centre (£14.9m), Witney Town Centre (£14.8m), Wantage Town Centre (£12.7m), and Cheltenham Town Centre (£10.6m). The remaining comparison goods expenditure leakage is accounted for by a combination of destinations including Bristol City Centre, Central London/West End, Oxford City Centre and Spitfire Retail Park in Trowbridge, as well as many other smaller retail centres. In aggregate, destinations outside of the study area account for 18.3 per cent of the study area's available comparison retail expenditure.

Summary of influence within the Study Area

- 5.4.9 Spreadsheets 4 and 5 of Appendix E reveal that:
- Greenbridge Retail Park, which enjoys the largest expenditure share, attracts more than 20 per cent of available comparison retail expenditure in three zones:
 - Zone 1: 28.9 per cent
 - Zone 2: 22.1 per cent
 - Zone 3: 20.6 per cent
 - Greenbridge Retail Park attracts between 10 and 20 per cent of available comparison retail expenditure in two zones:
 - Zone 4: 14.7 per cent
 - Zone 8: 10.3 per cent
 - Greenbridge Retail Park attracts less than 10 per cent of available comparison retail expenditure in the remaining three zones:
 - Zone 5: 8.7 per cent
 - Zone 6: 6.2 per cent
 - Zone 7: 2.1 per cent

- Swindon Town Centre does not attract more than 20 per cent of available comparison retail expenditure in any zones, but it attracts more than 10 per cent of available comparison retail expenditure in three zones:
 - Zone 1: 12.2 per cent
 - Zone 2: 10.5 per cent
 - Zone 3: 10.2 per cent
- Swindon Town Centre attracts less than 10 per cent of available comparison retail in the remainder of the zones:
 - Zone 4: 4.3 per cent
 - Zone 5: 5.4 per cent
 - Zone 6: 8.2 per cent
 - Zone 7: 1.1 per cent
 - Zone 8: 1.8 per cent
- Greenbridge Retail Park clearly exerts a significant influence across a large part of the study area. The Retail Park does not, however, attract the greatest proportion of comparison retail expenditure in all zones:
 - Marlborough Town Centre is the dominant comparison retail destination in Zone 5 (11.9 per cent), ahead of both Greenbridge Retail Park and Swindon Town Centre which achieve market shares of 8.7 per cent and 5.4 per cent in this zone, respectively.
 - Devizes Town Centre is the dominant comparison retail destination in Zone 6 (16.2 per cent), ahead of both Greenbridge Retail Park and Swindon Town Centre which achieve market shares of 6.2 per cent and 8.2 per cent in this zone, respectively.
 - Chippenham Town Centre is the dominant comparison retail destination in Zone 7 (18 per cent), ahead of Greenbridge Retail Park and Swindon Town Centre which achieve market shares of 2.1 per cent and 1.1 per cent in this zone, respectively.
 - Cirencester Town Centre is the dominant comparison retail destination in Zone 8 (29.6 per cent), ahead of Greenbridge Retail Park and Swindon Town Centre which achieve market shares of 10.3 per cent and 1.8 per cent in this zone, respectively.

5.5 Composite Patterns of Convenience Retail Goods Spending

- 5.5.1 Per capita expenditure on convenience retail goods in 2023, based on Experian Micromarketer App Library data, varies across the study area from a low of £2,234 in Zone 1 to a high of £2,906 in Zone 5. The total amount of convenience goods expenditure available to residents of the whole study area in the 2023 base year is £1,393.9m (Spreadsheet 3 of Appendix F within the Appendices Volume), of which £154.2m is spent on SFT. The pattern of expenditure flows for the convenience goods sector as a whole, as revealed by the survey of households, is set out in Spreadsheets 4 and 5 of Appendix F.
- 5.5.2 Table 5-4 – which is derived from the final column of Spreadsheet 5 of Appendix F – reveals that, overall, some £1,165.1m of the expenditure on convenience retail goods available to residents of the study area is spent in defined centres and in freestanding stores which are located within the study area. The resultant aggregate retention rate is 93.8 per cent (see Spreadsheet 5, final two columns, 'Total Inside Study Area' row).

Table 5-4 Broad Destinations for Convenience Goods Expenditure

Destination	Expenditure (£m)	Expenditure (%)
Total retained expenditure within the Study Area	1,165.1	93.8
Total expenditure leakage	77.3	6.2
Total Expenditure	1,242.4	100.0

Main destinations for food and grocery shopping

- 5.5.3 Table 5-5 shows that the most popular destination for food and grocery shopping within the study area is Asda on Thamesdown Drive at Orbital Shopping Park in Swindon, which has a survey-derived convenience retail goods turnover of around £67.6m, equating to a market share of 5.4 per cent. The next most popular destinations for convenience shopping within the study area are the Tesco Extra on Ocotal Way in Swindon and Asda at West Swindon Shopping Centre, with convenience retail turnovers of £60.8m and £57.1m, respectively, equating to market shares of 4.9 per cent and 4.6 per cent. Whilst all of the foodstores identified in Table 5-5 have a relatively low share of total expenditure on convenience goods across the study area – of 5.4 per cent market share or below – the absolute value of that expenditure is high, with the lowest survey-derived turnover of the nine foodstores with a market share of 2.0 per cent or greater being £24.9m.

Table 5-5 Main Destinations for Convenience Goods Expenditure Retained within the Study Area in 2023

Foodstores within the Study Area	Expenditure (£m)	Expenditure (%)
Asda, Thamesdown Drive, Orbital Shopping Park, Swindon	67.6	5.4
Tesco Extra, Ocotal Way, Swindon	60.8	4.9
Asda, West Swindon Shopping Centre, Swindon	57.1	4.6
Tesco Extra, Cricklade Road, Kings Meadow, Cirencester	44.8	3.6
Sainsbury's Superstore, Oxford Road, Swindon	41.8	3.4
Sainsbury's Superstore, Bath Road, Chippenham	39.9	3.2
Aldi, Coped Hall, Royal Wootton Bassett, Wiltshire	30.0	2.4
Sainsbury's Superstore, Paddington Drive, Bridgmead, Swindon	29.8	2.4
Tesco Superstore, Beversbrook Lane, Calne	24.9	2.0

- 5.5.1 The 'leakage' destinations which account for the remaining convenience goods expenditure that is not spent at centres/stores within the study area are set out in Table 5-6 in descending order in order of magnitude, each accounting for £5m or more of convenience goods expenditure leakage.

Table 5-6 Main Destinations for Convenience Goods Expenditure Leakage

Foodstores outside of the Study Area	Expenditure (£m)	Expenditure (%)
Sainsbury's Superstore, Witan Way, Witney	6.6	0.5
Waitrose, Wallingford Street, Wantage	5.5	0.4
Waitrose, The Woolgate Centre, Witan Way, Witney	5.4	0.4
Aldi, Beanacre Road, Melksham	5.0	0.4
Other	60.0	4.4

- 5.5.2 The localised convenience goods retention rate – the proportion of expenditure on convenience retail goods available to residents in a specific zone which is spent in centres and stores located within that zone – is highest for Zones 7 and 8, each of which achieves a localised retention rate of over 70 per cent (see Spreadsheet 4 of Appendix F, and Table 5-7). Only one zone achieves a localised convenience goods retention of below 50 per cent, namely Zone 5 which has a localised retention rate of 24.9 per cent. That finding is perhaps not surprising given that Zone 5 contains only one large-format foodstore (Tesco Superstore at Everland Road in Hungerford).

Table 5-7 Localised Convenience Goods Retention Rates

Zone	Zonal retention rate (%)
1	68.7
2	51.6
3	64.7
4	60.1
5	24.9
6	62.0
7	81.5
8	77.9

Convenience Goods Market Shares

- 5.5.1 Table 5-8 shows, for each zone, the main convenience shopping destinations with a zonal market share of more than 10 per cent, and destinations with shares between 5 and 10 per cent.

Table 5-8 Convenience Goods Stores with Zonal Market Shares over 5 Per Cent

Zone	Expenditure (%) (greater than 10% market share)	Expenditure (%) (market share between 5% and 10%)
1	<ul style="list-style-type: none"> Tesco Extra, Ocotal Way, Swindon (20.7%) 	<ul style="list-style-type: none"> Aldi, Hobley Drive, Swindon (8.4%) Other, Zone 1 (8.4%) Sainsbury's Superstore, Oxford Road, Swindon (8.2%) Morrisons Superstore, Dorcan House Site, Eldene Drive, Swindon (6.3%) Lidl, Bright Street, Swindon (5.7%)
2	<ul style="list-style-type: none"> Asda, Thamesdown Drive, Orbital Shopping Park, Swindon (21%) 	<ul style="list-style-type: none"> Other, Zone 2 (8.5%)
3	<ul style="list-style-type: none"> Asda, West Swindon Shopping Centre, Swindon (25.1%) Aldi, Coped Hall, Royal Wootton Bassett, Wiltshire (12.1%) 	<ul style="list-style-type: none"> Aldi, Shaw Road, Swindon (8.4%) Sainsbury's Superstore, Paddington Drive, Bridgmead, Swindon (8.3%) Other, Zone 3 (6.1%)
4		<ul style="list-style-type: none"> Other, Zone 4 (8.8%) Tesco Superstore, Park Road, Faringdon (8.6%) Aldi, Highworth Industrial Estate, Highworth, Swindon (8.4%) Sainsbury's Superstore, Limborough Road, Wantage (7.0%)

Zone	Expenditure (%) (greater than 10% market share)	Expenditure (%) (market share between 5% and 10%)
		<ul style="list-style-type: none"> Asda, Black Bourton Road, Carterton (6.4%) Morrisons Superstore, Black Bourton Road, Carterton (6.4%) Waitrose, Henry Blake Way, Faringdon (5.4%) Aldi, Alvescot Road, Carterton (5.0%)
5	<ul style="list-style-type: none"> Tesco Superstore, Everland Road, Hungerford (17.4%) 	<ul style="list-style-type: none"> Other, Zone 5 (7.5%)
6	<ul style="list-style-type: none"> Other, Zone 6 (62%) 	
7	<ul style="list-style-type: none"> Other, Zone 7 (26%) Sainsbury's Superstore, Bath Road, Chippenham (14.4%) 	<ul style="list-style-type: none"> Lidl, Hungerdown Lane, Chippenham (6.8%) Morrisons Superstore, Stainers Way, Cepen Park North, Chippenham (6.3%) Tesco Superstore, Beversbrook Lane, Calne (8.6%) Tesco Superstore, Emery Lane, Chippenham (5.2%)
8	<ul style="list-style-type: none"> Tesco Extra, Cricklade Road, Kings Meadow, Cirencester (32.3%) Waitrose, Sheep Street, Cirencester (14.3%) Other, Zone 8 (12.8%) Aldi, Cricklade Road, Cirencester (12%) 	<ul style="list-style-type: none"> Lidl, Love Lane Industrial Estate, Cirencester (6.6%)

5.5.2 Table 5-8 shows that:

- Zones 3 and 8 contain two or more foodstores which each achieves a zonal market share of 10 per cent or greater.
- There are two zones where no individual retail destination achieves a zonal market share of 10 per cent or greater (Zones 4 and 6).

5.5.3 In summary, the survey findings confirm that most convenience shopping is undertaken on a highly localised basis.

5.6 Current Patterns of Spending on Leisure Services and Cultural Activities

5.6.1 As noted at the beginning of this section, the household survey questionnaire also sought to identify patterns of spending on various types of leisure and cultural services. The most popular destinations for these different activities for residents of each survey zone are set out in Table 5-9 and are described below in order to provide an insight into whether any centres within the study area potentially have greater roles to play in the provision of leisure and cultural services.

Table 5-9 Most Popular Destinations for Expenditure on Leisure Services and Culture

Zone	Restaurants	Pubs, bars, nightclubs and social clubs	Cinemas	Ten-Pin Bowling	Bingo	Casino	Theatres / concerts / museums / art galleries & other cultural facilities	Indoor sports or health and fitness centres
1	Swindon Town Centre	Swindon Town Centre	Cineworld, Shaw Ridge Leisure Park, Swindon	Tenpin, Shaw Ridge Leisure Park, Swindon	Buzz Bingo, Greenbridge Retail Park, Swindon	Rodbourne Local Centre and Cribbs Causeway, Bristol	Wyvern Theatre, Theatre Square, Swindon	Grange Leisure & Community Centre, Grange Drive, Swindon
2	Swindon Town Centre	Swindon Town Centre	Cineworld, Shaw Ridge Leisure Park, Swindon	Tenpin, Shaw Ridge Leisure Park, Swindon	Buzz Bingo, Greenbridge Retail Park, Swindon	Grosvenor Casino, Rose Kiln Lane, Reading	Wyvern Theatre, Theatre Square, Swindon	Link Centre, Whitehill Way, Westlea, Swindon
3	Swindon Town Centre	Swindon Town Centre	Cineworld, Shaw Ridge Leisure Park, Swindon	Tenpin, Shaw Ridge Leisure Park, Swindon	Buzz Bingo, Greenbridge Retail Park, Swindon	Bristol City Centre	Wyvern Theatre, Theatre Square, Swindon	Link Centre, Whitehill Way, Westlea, Swindon
4	Swindon Town Centre	Highworth Town Centre	Empire Cinemas, Greenbridge Retail & Leisure Park, Drakes Way, Swindon	Tenpin, Shaw Ridge Leisure Park, Swindon	Swindon Town Centre	The Casino MK, Xscape, Milton Keynes	Central London / West End	Carterton Leisure Centre, Broadshires Way, Carterton
5	Marlborough Town Centre	Hungerford Town Centre	The Parade Cinema, The Parade, Marlborough	Tenpin, Shaw Ridge Leisure Park, Swindon	Buzz Bingo, Greenbridge Retail Park, Swindon	-	Central London / West End	Newbury Town Centre
6	Marlborough Town Centre	Devizes Town Centre	Vue Cinema, Pioneer The Parade Cinema, The Parade, Marlborough	Tenpin, Shaw Ridge Leisure Park, Swindon	Buzz Bingo, Greenbridge Retail Park, Swindon	-	Wyvern Theatre, Theatre Square, Swindon	Marlborough Leisure Centre, Barton Dene, Marlborough
7	Chippenham Town Centre	Chippenham Town Centre	Reel Cinema, Marshfield Road, Chippenham, SN15 1JR	Tenpin, Shaw Ridge Leisure Park, Swindon	Buzz Bingo, Greenbridge Retail Park, Swindon	Bath City Centre	Bristol Hippodrome, St Augustine's Parade, Bristol	The Olympiad Leisure Centre, Sadlers Mead, Chippenham
8	Cirencester Town Centre	Cirencester Town Centre	Cineworld, Shaw Ridge Leisure Park, Swindon	Hollywood Bowl, Ozone Leisure Park and Tenpin, Centre Severn, Barnwood, Gloucester	Buzz Bingo, Greenbridge Retail Park, Swindon	Rainbow Casino, Explore Lane, Bristol	Barn Theatre, Beeches Road, Cirencester	Cirencester Leisure Centre, Old Tetbury Road, Cirencester

Leisure Services and Cultural Activities Sub-Sectors

Restaurants

- 5.6.1 More than two thirds (71.1 per cent) of all respondents answered that their household participate in restaurant visits. The most popular destinations for visits to restaurants were Swindon Town Centre (14.4 per cent), Chippenham Town Centre (4.7 per cent) and McArthurGlen Designer Outlet (4.5 per cent).

Pubs, bars, nightclubs and social clubs

- 5.6.2 Almost half (49.7 per cent) of all respondents answered that their household visits pubs, bars, nightclubs and social clubs. The most popular destinations for visits to this category of leisure spend were Swindon Town Centre (14.5 per cent), Cirencester Town Centre (4.6 per cent) and Chippenham Town Centre (4.1 per cent).

Cinemas

- 5.6.3 More than a half (52.8 per cent) of all respondents answered that their household participates in cinema visits. The most popular destinations for visits to a cinema were Cineworld, Shaw Ridge Leisure Park (34.9 per cent), Reel Cinema, Marshfield Road, Chippenham (12.6 per cent) and Empire Cinemas, Greenbridge Retail & Leisure Park, Drakes Way, Swindon (10.5 per cent).

Ten-Pin Bowling

- 5.6.4 Approximately 25.9 per cent of respondents answered that their household visits ten-pin bowling venues. Of those that do, the most popular destinations for visits to a ten-pin bowling alley are Tenpin, Whitehill Way, Shaw Ridge Leisure Park, Swindon (75.2 per cent), Hollywood Bowl, Aspects Leisure Park, Longwell Green, Bristol (3.4 per cent) and Hollywood Bowl, Ozone Leisure Park, Grenoble Road, Littlemore, Oxford (3.2 per cent).

Bingo

- 5.6.5 Only 6 per cent of respondents answered that they visit a bingo hall. The most popular destinations for visits to a bingo hall were Buzz Bingo, Greenbridge Retail Park, Garrard Way, Swindon (52.8 per cent), Swindon Town Centre (11.6 per cent) and MECA, Regent Circus, Swindon (3.2 per cent).

Casino

- 5.6.6 Only 2 per cent of respondents answered that they visit a casino. The most popular destinations for visits to a bingo hall were Rodbourne Local Centre and Cribbs Causeway, Bristol (both at 9.9 per cent) and Bath City Centre (9.8 per cent).

Theatres/concerts/museums/art galleries & other cultural facilities

- 5.6.7 Almost half of all respondents (49 per cent) answered that their household participates in visits to cultural facilities such as art galleries, theatres, concerts or museums. The most popular destinations for visits to a cultural facility were Wyvern Theatre, Theatre Square, Swindon (22.8 per cent), Central London / West End (14.2 per cent) and Bristol Hippodrome, St Augustine's Parade, Bristol (6.5 per cent).

Indoor sports or health and fitness centres

- 5.6.8 More than a third (34.8 per cent) of all respondents answered that they visit indoor sports or health and fitness centres. The most popular destinations for visits to an indoor sports or health and fitness centre were Link Centre, Whitehill Way, Westlea, Swindon (6.9 per cent), The Olympiad Leisure Centre, Sadlers Mead, Chippenham (5.8 per cent) and Calne Leisure Centre, White Horse Way, Calne (3.6 per cent). The low market shares achieved by the destinations cited most often during the survey and the large share of respondents visiting suggests that the indoor sports or health and fitness centres typically have localised catchments, as would be expected for this activity.

6 Assessment of Retail Needs

6.1 Introduction

- 6.1.1 Based on the retail spending patterns identified in the previous section, and forecasts of future population and retail expenditure growth, this section of the report provides the findings from our assessment of the quantitative need for additional retail floorspace over the study period. The section also outlines the findings from the qualitative questions that respondents were asked during the telephone household survey.

6.2 Quantitative Assessment

Methodology

- 6.2.1 The key inputs and assumptions that have been applied as part of our quantitative assessment of retail needs are explained below.
- 6.2.2 At the outset, we emphasise that capacity forecasts should, in line with national guidance, be subject to regular review throughout the plan period, in order to ensure an up-to-date evidence base which is based on accurate economic and market trends. Related to that general point, we advise that the longer-term quantitative forecasts identified by this assessment should be treated as indicative given the inherent uncertainties in respect of longer-term economic and demographic trends. Furthermore, we explained in earlier sections, the current study is based on forecasts of expenditure/population growth published by Experian, which run until 2041.

Population and Expenditure Growth

- 6.2.3 Spreadsheets 1, 2 and 3 within Appendices E and F set out details of predicted population and retail expenditure growth in the study area over the period to 2041. The population and expenditure figures are derived from Experian, and the former are based on ONS subnational population projections⁵⁶.
- 6.2.4 The total population figures for the study area are presented below in Table 6-1, which shows that the study area is predicted to experience only modest population growth over the 18-year study period. The predicted population growth is just over 43,315 persons, from the 551,834 base population across the study area in 2023.

Table 6-1 Summary of Population Growth

Year	Population	Population growth relative to 2023	Population growth relative to 2023 (%)
2023	551,834	-	-
2028	566,431	14,597	2.7
2033	578,542	26,708	4.8
2038	590,147	38,313	6.9
2041	597,149	45,315	8.2

⁵⁶ Population projections are based on the ONS 2018 subnational population projections (released March 2020) and published by Experian Ltd in 2022. Retail expenditure estimates are based on the revised population, household estimates and Living Costs and Food Survey for 2020 and 2021, supplied by the ONS © Crown Copyright 2012 Published with the permission of the Office of Public Sector Information. Experian's Retail Planner expenditure data uses this information to produce variables which match the COICOPS categories (Classification of Individual Consumption by Purpose), the industry standard for consumer classifications. These postal sector and output area estimates are then scaled to ensure that the total expenditure figures match those stated in the official National Accounts (released October 2022).

- 6.2.5 Table 6-2 provides a summary of overall levels of convenience retail goods spending growth across the study period. An allowance is made for special forms of trading ('SFT'), taken from Experian's Retail Planner Briefing Note 20 ('RPBN') of February 2023. Expenditure on SFT is excluded from our assessment as it is not considered to be available to support the future development of retail floorspace. Figures are provided to one decimal place. Localised rates of SFT were captured by the household survey (see Spreadsheet 3 within Appendices E and F).
- 6.2.6 The localised rates vary for convenience and comparison goods. For convenience goods, the SFT market share identified by the household survey was 11.1 per cent across the study area. We have applied the market share identified by the household survey without making any further adjustments in the base year and have grown this market share over the study period according to the growth rates implied by Experian's forecasts of market shares for SFT (RPBN, Figure 5). Experian's forecasts cover the period to 2040 and we have carried forward the 2040 growth forecast into 2041, reflecting the decreasing rate of SFT growth anticipated in the convenience retail sector from the early-2030s.

Table 6-2 Convenience Goods Expenditure Growth Summary

Year	Convenience goods expenditure inc. SFT (£m)	SFT (£m)	Convenience goods expenditure exc. SFT (£m)
2023	1,393.9	154.2	1,242.4
2028	1,431.1	191.5	1,242.8
2033	1,475.1	214.1	1,266.6
2038	1,519.9	230.5	1,293.3
2041	1,544.8	239.2	1,309.6

- 6.2.7 Table 6-3 provides an equivalent summary for comparison goods expenditure. We have adopted a market share for SFT of 41.4 per cent in the base year of 2023 across the study area based on the findings of the household telephone survey. The high SFT market share is not unique to this particular study area; it reflects a more general shift in consumer preferences, which was accelerated by the COVID-19 pandemic.
- 6.2.8 The SFT market share figure has been increased over the study period, based on Experian's predicted levels of growth in SFT's market shares (RPBN, Figure 5).

Table 6-3 Comparison Goods Expenditure Growth Summary

Year	Comparison goods expenditure inc. SFT (£m)	SFT (£m)	Comparison goods expenditure exc. SFT (£m)
2023	2,362.3	977.6	1,389.5
2028	2,685.0	1,239.8	1,451.5
2033	3,148.8	1,527.6	1,629.2
2038	3,723.9	1,858.9	1,875.1
2041	4,009.8	2,029.7	1,943.1

Retained Expenditure

- 6.2.9 The quantitative forecasts of retail need take account of the total amount of comparison and convenience goods expenditure which is retained within the study area. Table 6-4 sets out the total amount of expenditure retained within the study area in 2023.

Table 6-4 Summary of Retail Expenditure Retention in the Study Area at 2023 (excl. SFT)

Retail category	Available expenditure within study area (£m)	% of expenditure retained within study area	Expenditure retained within study area (£m)
Comparison goods	1,389.5	81.7	1,135.3
Convenience goods	1,242.4	93.8	1,165.1

- 6.2.10 In total, 81.7 per cent of study area residents' expenditure on comparison retail goods is currently retained within the study area, and 93.8 per cent of study area residents' expenditure on convenience retail goods is retained within the study area.

Claims on Expenditure

- 6.2.11 As set out in the previous section, spending on SFT (such as online shopping) has been removed from the expenditure forecasts. The total expenditure figures summarised above in Tables 6-2 to 6-3 make an allowance for this.
- 6.2.12 In addition to SFT, it is necessary to take into account commitments for new retail floorspace (schemes implemented but not yet trading at the time of the household survey, extant planning permissions which would result in additional retail floorspace, and planned development); and sales density growth (which is the expected growth in turnover of existing retailers within the study area).

Sales Density Growth

- 6.2.13 Sales density growth relates to the improved productivity or efficiency of retail floorspace over time. In assessing the amount of expenditure that is available to support the development of new retail floorspace, we make an allowance for sales density growth associated with existing retail floorspace within the study area. For both convenience and comparison retail floorspace, we have used the retail sales density growth outlined in Figures 4a and 4b of the Experian's RPN.

Planning Commitments

- 6.2.14 The planning commitments – which were identified by Swindon Borough Council, supplemented by a planning history search – have been taken account of in the quantitative need assessment and are identified in Table 6-5 below.

Table 6-5 Retail Commitments

	Sales Area Floorspace (sq.m)	Convenience Retail Sales Area Floorspace (sq.m)	Comparison Retail Sales Area Floorspace (sq.m)
Lotmead Site New Eastern Villages	12,000	6,000	6,000
Unit 103 Warehouse Unit E Cheney Manor Industrial Estate, Cheney Manor	3,136	1,568	1,568
South Marston Extension and Rowborough	1,500	750	750
Phase 3 Land At Cavendish Square Park, South Swindon Wilts	760		760
Units 3, 5, 7 & 17 Carriage Works, London Street	525		525
Kingsdown Local Centre	500		500

	Sales Area Floorspace (sq.m)	Convenience Retail Sales Area Floorspace (sq.m)	Comparison Retail Sales Area Floorspace (sq.m)
84 - 86 Cricklade Road, Swindon	181		181
Former 22 - 23 Victoria Road, Old Town	147		147
The Cricketers Arms, 14 Emlyn Square, Railway Village, Swindon	72		72
26 Manchester Road, Swindon	44		44
Total	18,865	8,318	10,547

- 6.2.15 We estimate that the committed retail floorspace referred to above will generate a convenience goods turnover of £9.6 million in 2041, and a comparison goods turnover of £36.7 million in the same year. Further details of the assumptions applied in estimating the turnover of committed retail floorspace are contained within Spreadsheet 6 of Appendices E (comparison) and F (convenience).

Need for Convenience Retail Floorspace

- 6.2.16 Spreadsheet 7 of Appendix F provides our forecasts of convenience retail floorspace requirements arising within the study area. Floorspace requirements have been calculated to the end of the study period and for the interval years of 2023, 2028, 2033, 2038 and 2041. The spreadsheet is structured as set out below in Table 6-6, where we explain some of the other assumptions that we have applied in calculating the quantitative floorspace requirements.

Table 6-6 Methodology for Convenience Retail Assessment

Row	Explanation/Description
A&B	Total population and convenience retail expenditure available in the study area. These figures are taken from Spreadsheets 1 and 3.
C&D	Proportion of convenience retail goods expenditure which is retained within the study area (£m & %) based on the findings of the household telephone survey in 2023 (as detailed in Spreadsheet 5).
E&F	Assumed inflow of convenience retail expenditure to destinations within the study area from residents outside the study area.
G	Total convenience retail turnover of destinations within the study area (£m).
H	Residual growth in convenience retail expenditure (£m), which is calculated by deducting the baseline convenience retail turnover of existing stores within the study area from the total sum of available convenience retail expenditure and inflow.
I&J	Claims on residual growth in convenience retail expenditure including sales density growth in existing stores within the study area and turnover from committed convenience retail floorspace. Commitments are expected to be implemented and trading by 2028 and 2033, respectively, and the total turnover figure from commitments is taken from Spreadsheet 6. A constant sales density was applied to both existing stores and committed convenience retail floorspace.
K	Total claims on expenditure (£m) in existing stores and committed convenience retail floorspace.

Row	Explanation/Description
L	Final residual convenience retail expenditure (£m), calculated by deducting total claims on expenditure from residual growth in retained convenience goods expenditure.
M-0	Final residual convenience retail expenditure converted into floorspace requirements by applying an average convenience retail sales density of £11,500 per sq.m in 2023 (held constant throughout the study period). This produces a sales area floorspace requirement, which is converted to a gross convenience retail floorspace figure on the basis of an assumed net:gross floorspace ratio of 65:35.

- 6.2.17 Our findings in respect of quantitative need for convenience retail floorspace are summarised below in Table 6-7 (figures are cumulative and relate to sales area floorspace only).

Table 6-7 Summary of Convenience Retail Floorspace Requirements

Floorspace Requirement	2028	2033	2038	2023-2041
Floorspace requirement (sales area floorspace sq.m)	-196	1,161	3,730	5,197
Floorspace requirement (gross sq.m)	-301	1,786	5,738	7,995

- 6.2.18 We have identified a positive convenience retail floorspace requirement arising over the entire study period 2023 to 2041, of 5,197 sq.m (sales area). It is important to note, however, that the positive floorspace requirement only arises from 2033 onwards, and is relatively modest.
- 6.2.19 Accordingly, there is some scope to support proposals which include an appropriate level of convenience retail provision that responds to an identified need, such as to complement new residential development. Such floorspace could potentially be accommodated at a single site or at a cluster of smaller sites where cumulatively there would be a requirement for some small-scale convenience retail floorspace.

Need for Comparison Retail Floorspace

- 6.2.20 Spreadsheet 7 of Appendix E calculates requirements for comparison retail floorspace over the study period. Table 6-8 below explains the structure of this assessment, which is similar to the approach used for convenience retail floorspace, albeit the assumptions differ in terms of sales densities and net:gross floorspace ratios.

Table 6-8 Methodology for Comparison Retail Assessment

Row	Explanation/Description
A&B	Total population and comparison retail expenditure available in the study area. These figures are taken from Spreadsheets 1 and 3.
C&D	Proportion of comparison retail expenditure which is retained within the study area (£m & %) based on the findings of the household telephone survey in 2023 (as detailed in Spreadsheet 5).
E&F	Assumed inflow of comparison retail expenditure to destinations within the study area from residents outside the study area.
G	Total comparison retail turnover of destinations within the study area (£m).
H	Residual growth in comparison retail expenditure (£m), which is calculated by deducting the baseline comparison retail turnover of existing stores within the

Row	Explanation/Description
	study area from the total sum of available comparison retail expenditure and inflow.
I&J	Claims on residual growth in comparison retail expenditure including sales density growth in existing stores within the study area and turnover from committed comparison retail floorspace. Commitments are expected to be implemented and trading by 2028 and 2033, respectively, and the total turnover figure is taken from Spreadsheet 6. An annual sales density growth rate of 1.5% is applied to both existing stores and committed comparison retail floorspace.
K	Total claims on expenditure (£m) from sales density growth in existing stores and committed comparison retail floorspace.
L	Final residual comparison retail expenditure (£m), calculated by deducting total claims on expenditure from residual growth in retained convenience goods expenditure
M-0	Final residual comparison retail expenditure converted into floorspace requirements by applying an average comparison retail sales density of £3,780 per sq.m in 2023 (grown over the study period to allow for sales density growth). This produces a sales area floorspace requirement, which is converted to a gross comparison retail floorspace figure on the basis of an assumed net:gross floorspace ratio of 70:30.

6.2.21 Our findings in respect of quantitative need for comparison retail floorspace are summarised below in Table 6-9 (figures are cumulative).

Table 6-9 Summary of Comparison Retail Floorspace Requirements

Floorspace Requirement	2028	2033	2038	2041
Floorspace requirement (sales area floorspace, sq.m)	-41,092	-31,329	-9,648	-24,937
Floorspace requirement (gross sq.m)	-58,703	-44,755	-13,782	-35,625

6.2.22 We have identified a negative comparison retail floorspace requirement arising over the entire study period 2023-41, of approximately minus 25,000 sq.m (retail sales area). Furthermore, we have identified negative floorspace requirements at each 'interval' year (2028, 2033, 2038 and 2041).

6.2.23 Our findings indicate that the Council may wish to adopt a positive and flexible approach towards the loss of some comparison retail floorspace in favour of mixed use developments or changes of use to other uses, such as residential.

Customer Views

6.2.24 In this section we set out the key responses from the telephone household survey undertaken by NEMS and consider whether they suggest a qualitative need for additional comparison and/or convenience retail provision in Swindon Town Centre. Some of the household survey questions refer to both retail and leisure and so we have included both in this section. Figures are provided to one decimal place.

6.2.25 Respondents were asked 'Where did your household last make a purchase of clothes, shoes or other fashion items?'. Respondents were not prompted and could only provide one answer. The most popular responses to this question were 'internet/delivery/app – collection at store' (35.7 per cent), followed by Orbital Shopping Park (7.4 per cent), McArthurGlen, Swindon Designer Outlet (6.3 per cent) and 'don't know/can't remember' (6.3 per cent). Given that the

majority of respondents last purchased clothes, shoes or other fashion items on the internet suggests a weakening of demand for additional comparison retail floorspace in the study area.

- 6.2.26 Those respondents that did not answer 'don't know/can't remember', 'don't do this type of shopping' or 'abroad' were asked how often their household shops at the store/location they mentioned in response to the question above. The most popular response was 'once a month' (21.6 per cent), closely followed by '3 or 4 times a year' (19.0 per cent) and 'once every two months' (18.3 per cent). These respondents were also asked how their household normally travels to the store/location and the overwhelming majority (71.9 per cent) said car/van in which they were the driver. The second most popular response was car/van in which they were the passenger (9.9 per cent), and the third was walk (9.3 per cent). Only 5.7 per cent said bus.
- 6.2.27 Respondents were asked *'Have you visited Swindon Town Centre the past year/12 months? Just to be clear, by Swindon Town Centre we are excluding the designer outlet – although you could have visited both.'* More than half (55.4 per cent) of respondents answered 'yes' while the remaining 44.6 per cent answered 'no'. Those respondents who answered 'yes' to the question above were asked what time of day they normally visit the town centre. The most popular response was 'after 12pm to 3pm (early afternoon)' (46.9 per cent), followed by '6am to 12pm (morning)' (39.1 per cent) and 'after 3pm to 7pm (late afternoon)' (8.1 per cent). Only 2 per cent of respondents answered 'after 7pm to 2am (evening)', which provides further evidence that the town centre has a poor evening economy offer. The other 3.9 per cent replied 'don't know/varies'. The same respondents were also asked how often they usually visit Swindon Town Centre. Around a fifth (21.2 per cent) of respondents answered '3 or 4 times a year', while 14.8 per cent answered 'once every two months', 14.1 per cent answered 'once a month' and 13.5 per cent answered 'twice a year'.
- 6.2.28 When asked 'When you visit Swindon Town Centre, what do you usually come to do?', the majority (56.3 per cent) said 'non-food shopping'. The second most popular response was 'visiting café/pub/restaurant' (24.0 per cent) and the third was 'visiting services such as banks and other financial institutions' (21.2 per cent). Other popular responses were 'food shopping' (14.4 per cent), 'visiting health service such as doctor, dentist, hospital' (10.2 per cent), 'visiting other service such as hairdressers, beautician, laundrettes etc.' (9.6 per cent) and 'leisure activity' (8.2 per cent). The majority of respondents who had visited Swindon Town Centre in the last 12 months typically travelled by car/van in which they were the driver (62.4 per cent), followed by bus (15.4 per cent), car/van in which they were the passenger (10.0 per cent) and walk (7.7 per cent).
- 6.2.29 Respondents were asked what they liked most about Swindon Town Centre. The overwhelming majority (42.1 per cent) said 'nothing', which is obviously an alarming result. The second most popular response was 'shops – good range of clothes shops' (4.6 per cent), third was 'parking – it's easy to find a space' (4.4 per cent) and fourth was 'close to home' (4.3 per cent). Respondents were also asked what they liked least about Swindon Town Centre. Approximately a quarter (25.2 per cent) said 'too many empty shops', which reflects our finding in the performance analysis that there is too much vacant floorspace in the town centre. The second most popular answer was 'nothing' (8.8 per cent), followed by 'dirty streets/poorly maintained' (8.6 per cent) and 'lack of security/don't feel safe' (6.7 per cent).
- 6.2.30 Those respondents who had visited Swindon Town Centre in the past year were also asked if there are any measures or changes that would encourage them to visit Swindon Town Centre more often and/or stay in the town centre for longer. The most popular response was 'shops – more 'high street' retailers' (18.9 per cent), followed by 'shops – more/better range of non-food shops generally' (16.3 per cent), 'shops – more/better clothes shops' (14.7 per cent), 'make it more attractive/nicer environment' (11.1 per cent) and 'fewer empty shops' (10.6 per cent). There was a plethora of other measures that would encourage respondents to visit the town centre more often/for longer, but these were less commonly cited. Whilst the overwhelming majority of respondents consider that more shops (in a variety of forms) would encourage them to visit the Swindon Town Centre more often/for longer, this should be viewed in the

context that there is a general trend of decline in demand for physical floorspace as the market share of online shopping continues to rise. As such, the Council should not necessarily seek to expand the retail provision in the town centre, and should focus on improving the quality of the existing offer and bringing vacant units back into productive use – whether that be retail use or another main town centre use.

- 6.2.31 In terms of leisure, respondents were asked 'Which of these leisure activities does your household participate in?'. The interviewers read out a list of activities and the respondents could pick more than one answer. The most popular activity was 'restaurants' (71.1 per cent), followed by 'cinema' (52.8 per cent), 'pubs/bars/nightclubs/social clubs' (49.7 per cent), 'theatres/concert halls/museums/art galleries and other cultural facilities' (48.9 per cent), 'indoor sports or health and fitness activity e.g., gyms, leisure centres etc.' (34.8 per cent) and 'ten pin bowling' (25.9 per cent). Less popular activities were 'bingo' (6.0 per cent) and 'casino' (2.0 per cent), with 12.0 per cent of respondents reporting that they did not partake in any of the activities referred to above.

7 Summary of Findings, and Recommendations

7.1 Introduction

- 7.1.1 In this concluding section we summarise the findings of this study and set out our recommendations for the formulation of future planning policy within Swindon Borough.

7.2 The Performance of Swindon's 'Main' Centres

- 7.2.1 In Section 4 of this report, we considered the performance of Swindon's 'main' centres – Swindon Town Centre, Swindon Old Town and Swindon Designer Outlet – in terms of the indicators of vitality and viability set out within national Planning Policy Guidance. We summarise the findings in respect of the individual centres below and make recommendations on how each centre could be improved.

Swindon Town Centre

- 7.2.2 We consider that Swindon Town Centre is in need of fundamental intervention. The proportion of vacant units is significantly above the UK average for all centres, as is the proportion of vacant floorspace. In fact, the level of vacant floorspace across the town centre has more than doubled since 2015 so much so that 28.6 per cent of the household survey respondents, in answer to the question 'What do you like least about Swindon Town Centre?', responded with 'Too many empty shops'.
- 7.2.3 Despite the town centre having a reasonable range of national multiple retailers, the proportion of comparison retail units is below the UK average for all centres as is the proportion of floorspace. The town centre has a poor evening economy and has been described as a 'ghost town' after 6pm. The town centre environment is poor and there is no 'focal point' where people can meet and interact.
- 7.2.4 It is clear that there is too much vacant floorspace in the town centre. To prevent further decline in the health of the town centre the Council should focus on bringing this vacant floorspace back into productive use (the proposals for The Brunel Shopping Centre are a good example of this). The Council should be receptive to proposals for uses other than former A1 retail uses to enable the town centre to diversify and adapt to current trends within the retail and leisure market. Proposals for residential uses should be considered favourably given that they would increase footfall within the town centre, helping to improve its vitality and vibrancy.
- 7.2.5 We make the following recommendations in terms of Swindon Town Centre (in addition to those made above):
- Given that there is a concentration of vacant units within The Brunel Shopping Centre, we advise that the Council should carefully consider the most appropriate mix of uses in the shopping centre and look favourably upon redevelopment proposals which contain a reduced retail component together with complementary uses. The applicant would need to demonstrate that such proposals would not have a significant adverse impact on the vitality and vibrancy of the centre, either on its own or cumulatively with other approved developments.
 - Finding an occupier for the former Morrisons unit at Regent Circus should be a priority and will encourage food and beverage operators to occupy the other vacant units at the site.
 - The Council should help to bring Swindon's Tented Market back into productive use given that it previously supported a number of independent businesses and was important to the town centre's overall vitality and vibrancy. The Council could encourage 'meanwhile'

uses in the market, which would support an active frontage approach and help to improve the centre's physical environment. Meanwhile spaces also allow for experimentation and, as they are not purpose-built, they often provide affordable space to occupiers who would typically be priced out. Whilst meanwhile uses would help to improve people's perceptions of Swindon Town Centre, the Council should not lose sight of the overall aim of attracting long-term occupiers to vacant units.

- Given that the Council wants to promote the regeneration of Swindon Town Centre, it should not seek to expand the town centre; instead, the Council should focus on consolidating the retail core and bringing vacant floorspace back into productive use.
- Improving the public realm at the intersection of the principal shopping streets would help to boost the town centre environment. The Council should focus on creating a 'hub' in this area where people can meet and interact thereby improving the overall vibrancy of the town centre.
- The Council should maximise the potential of Wharf Green to become a significant civic space by introducing more soft landscaping measures to create a more interactive public square. At present, the square is a vast underutilised area in the heart of the town centre.
- We welcome the plans for Fleming Way which are currently being implemented, specifically in terms of providing a main gateway into the town centre and improving the public realm around The Parade.
- Opportunities should be sought to improve the leisure offer within Swindon Town Centre, particularly in terms of food and beverage uses.
- Investment in cultural and entertainment facilities should also be encouraged to diversify the town centre offer and strengthen the evening economy.
- To be successful, areas of Swindon Town Centre that are struggling should be considered for uses other than large retail units occupied by national multiples, which are unlikely to return to the town centre. Successful high streets need to have a mix of independent shops, markets, well-known retail chains, leisure & entertainment, community facilities and key services.
- The Council should focus retail development in the primary shopping area and other new development within the town centre boundary, whilst assisting with re-developing vacant units, the proportion of which, is far too high currently.
- The Council should incentivise the conversion of vacant upper floor units into residential accommodation to increase footfall and improve the centre's overall vitality and vibrancy throughout the day and into the evening. One way of doing this is by creating a fund that would allow developers to seek subsidy for these types of conversions. This would help to address the shortfall of residential accommodation within the town centre and increase demand and spend for local retailers and businesses. Encouraging the conversion of vacant upper floor units into hospitality, office and co-working space would have a similar effect.
- The Council could consider cladding the windows of town centre vacant units with reflective material to give the appearance of an active frontage. This does not address the root problem but helps to improve the town centre environment and visitors' perceptions especially in the light of the household survey finding that some respondents think the centre is poorly maintained and not attractive.
- Against the general backdrop of there being too much retail floorspace in Swindon Town Centre, the Council should focus on good quality retail floorspace – with peripheral/weaker parts of the centre allowed to change their role to a mix of uses – as opposed to trying to retain a larger quantum of retail floorspace that is of varied quality.

- The Council should not only direct its attention to those units which are already vacant but also concentrations of lower grade town centre uses and areas where there is risk of further occupier decline (for example, those units on Morley Street). Proactively targeting such areas will help to limit the number of vacant units rising further.
- We are supportive of the campaign which seeks to encourage Swindon Borough Council employees back into the office as this will have significant benefits for town centre footfall and consumer spending.
- We have reviewed the existing town centre boundary and primary shopping area for Swindon Town Centre and consider that they remain largely appropriate. However, without a full appreciation of the impacts of recent and proposed investment in the town centre, the potential future rise in the town centre office population and the demand for other main town centre uses, we consider that it is premature to propose amendments to the existing town centre boundary and primary shopping area. It would be better to undertake a comprehensive review of the existing boundaries as part of a town centre regeneration framework exercise to ensure that any changes are optimal.

Swindon Old Town

- 7.2.6 We consider Swindon Old Town to be a relatively healthy centre. Whilst it has a significantly lower proportion of comparison retail units compared with the UK average for all centres, this is a function of its primarily service sector role. The district centre's vacancy rate has halved since the last retail study and is significantly below the UK average for all centres, which is a sign of good health.
- 7.2.7 Whilst the district centre has a limited number of national multiple retailers, that is more than made up for by the centre's strong evening economy offer. The town centre environment is mixed: the vast majority of retail and service units along Wood Street have attractive façades and the street contains a mix of architectural styles which provides interest; however, in contrast, Victoria Road is dominated by vehicles and has narrow pavements which provide for a relatively unpleasant shopping experience. The town centre environment could be made more attractive by reconfiguring the junction at the southern end of Victoria Road and introducing some soft landscaping measures.
- 7.2.8 Given that Swindon Old Town is not a focus for national multiple retailers, the Council should seek to attract more independent retailers to occupy vacant units by striving to achieve the correct conditions in which independent retailers can flourish. Examples include small financial incentives to encourage independent retailers to take up vacant ground floor units, campaigns to promote independent retailers, business rates relief and splitting large vacant units to create opportunities for smaller independent retailers.

Swindon Designer Outlet

- 7.2.9 We consider Swindon Designer Outlet to be a healthy out-of-centre retail destination. Unsurprisingly, it contains a much higher proportion of comparison retail units compared to the UK average for all centres, which reflects its niche offer as a designer fashion outlet. The designer outlet is primarily occupied by national multiple retailers and has a good range of food and beverage outlets. The designer outlet's vacancy rate is below the UK average for all centres, which is a good sign of health. Swindon Designer Outlet is an attractive shopping destination that is easily accessible via different modes of transport and is great for families.
- 7.2.10 Given that the designer outlet is privately owned, there is limited scope for the Council to improve the outlet itself; however, the Council should continue to seek opportunities to improve pedestrian links between Swindon Town Centre and the outlet.

7.3 Retail Needs over the Study Period

- 7.3.1 Based on the findings of our quantitative assessment of retail needs, set out in Section 6, we forecast that there is no requirement for additional comparison retail floorspace within the study area. It is important to emphasise that the negative comparison retail floorspace 'requirement' relates to the entire study area, as opposed to Swindon Town Centre only, or Swindon Borough Council's administrative area. That finding is a consequence of the claims on the expenditure growth (sales density growth in existing stores, and commitments) exceeding expenditure growth, leaving a negative residual. The result is a negative floorspace 'requirement' of approx. 25,000 sq.m sales area over the 2023-41 study period, and at each interval year (2028, 2033, 2038 and 2041). A negative 'requirement' means there is effectively a surplus of retail floorspace. The large vacant units in Swindon Town Centre (such as the former Morrisons, Debenhams and Tented Market and those vacant units in the Brunel Shopping Centre) – most of which realistically will not return to retail use – effectively account for a lot of the surplus retail floorspace.
- 7.3.2 We identify a modest requirement for 5,197 sq.m of additional convenience retail sales area floorspace across the study area over the period to 2041, all of which arises after 2033. It should be emphasised that this requirement covers a c.20-year study period and relates to the whole of the extensive study area. In the first instance, new retail floorspace should be directed to Swindon Town Centre, which should remain the priority for retail investment.

7.4 Meeting Needs and Other Recommendations

- 7.4.1 In view of our findings in respect of the current performance of the Borough's main centres, current expenditure patterns and the capacity for additional retail development over the study period, we set out below our recommendations to inform the formulation of future planning policy in Swindon and supporting town centre regeneration.

Retail Hierarchy

- 7.4.2 We consider that the Swindon Borough Local Plan 2026 could be clearer in terms of defining the Borough's retail hierarchy. Policy SD2 states that the Swindon Central Area will be the main focus and first preference for the location of retail and leisure (as well as other main town centre uses). Policy EC3 states that proposals for main town centre uses outside Swindon Central Area shall be permitted:
- 'where they do not harm or undermine the regeneration of Swindon's Central Area; and,
 - where they do not undermine the vitality and viability of existing District, Primary Rural Centres and Local Centres; and
 - where a proposal's delivery is not dependent on location at a specific site because its use is tied to that location, a sequential approach to site selection has been undertaken in order of preference and priority as follows:
 - i. *Within Swindon Town Centre*
 - ii. *At edge of Town Centre*
 - iii. *At District and Primary Rural Centres: Cavendish Square, Gorse Hill, Highworth Town Centre, Orbital Retail Park, Old Town, West Swindon, Wroughton Village Centre and the Eastern Villages District Centre.*
 - iv. *At Local Centres: as shown on the Policies Map including those at Wichelstowe, Commonhead, Tadpole Farm and Kingsdown developments.'*
- 7.4.3 Policy EC3 provides an indication of the Borough's retail hierarchy but it is written in the context of applying a sequential test to planning applications for main town centre uses which

are outside Swindon Central Area. We understand that Swindon Central Area (which includes Swindon Town Centre) sits at the top of the hierarchy, followed by the District Centres (albeit Swindon Old Town is also located within Swindon Central Area), the Primary Rural Centres and then the Local Centres. We make the following comments in respect of the retail hierarchy:

- The New Swindon Local Plan should be more explicit in terms of defining the Borough's retail hierarchy;
- As the largest retail centre within the Borough, more emphasis should be placed on the location of Swindon Town Centre within Swindon Central Area;
- Swindon Town Centre should at least maintain, and if possible, enhance its existing role as the Borough's principal centre by consolidating and improving the quality of its retail offer;
- Swindon Old Town is more of a traditional district centre in the sense that it is not an out-of-centre retail park like some of the Borough's other district centres and its size is more akin to a district centre. Swindon Old Town could be described as the 'Primary District Centre' to differentiate it from the other district centres;
- We note that Swindon Designer Outlet is not a defined centre within the Borough's retail hierarchy. We consider this to be appropriate given that it does not fulfil the same functions as a town or district centre and has a niche retail offer. The Designer Outlet should continue to be considered a large out-of-centre/edge-of-centre retail destination;
- Notwithstanding our comment above, we do not object to out-of-centre retail parks (such as West Swindon Shopping Centre and Orbital Retail Park) being defined district centres within the Borough's retail hierarchy given their strong performance compared to other retail location types;
- We consider that Cavendish Square is more akin to a local centre given that it primarily serves the immediate residential catchment, has the fewest number of retail and service units among Swindon's district centres, is smaller than some of the Borough's local centres and contains a number of community uses;
- Turning to the local centres, we note that Manchester Road and Rodbourne Road are considerably larger than Clive Parade in terms of the number of retail and service units; and
- We consider that Highworth Town Centre and Wroughton Town Centre should remain the Borough's Primary Rural Centres.

7.5 Local Impact Floorspace Threshold

7.5.1 The PPG states that the impact test only applies to proposals exceeding 2,500 sq.m gross of floorspace unless a different locally appropriate threshold is set by the local planning authority. In setting a locally appropriate threshold it will be important to consider the:

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

- 7.5.2 As a guiding principle, impact should be assessed on a like-for-like basis in respect of that particular sector (for example, it may not be appropriate to compare the impact of an out-of-centre DIY store with small scale town-centre stores as they would normally not compete directly). Retail uses tend to compete with their most comparable competitive facilities. Conditions may be attached to appropriately control the impact of a particular use.
- 7.5.3 Policy EC3 of the Swindon Borough Local Plan 2026 states that, outside the defined hierarchy of centres, proposals for new single shop units (former Class A1) will be permitted where it can be demonstrated that they provide only for the daily shopping needs of the local population, are within walking distance of the community they serve and do not harm the vitality and viability of existing centres and existing single shop units (former Class A1) will be protected from changes of use to non-A1 uses, where the proposed use is not compatible with the local area in which it is set.
- 7.5.4 Policy EC3 also states that all retail development proposals with a floorspace exceeding 600 sq.m should be accompanied by a Retail Impact Assessment to ensure they would not have an adverse impact on Swindon Town Centre or the hierarchy of centres. In other words, the impact threshold of 600 sq.m gross applies to all developments across the Borough, whether they are located within town centres, edge-of-centre locations or out-of-centre sites. Any proposals above this threshold will be assessed in terms of their impact on any existing and future investment in the surrounding area and on the vitality and viability of the town centre. Policy EC3 is unusual; typically, locally set impact thresholds just relate to proposals outside of centres.
- 7.5.5 We consider that the current locally set impact threshold should not apply to proposals within the town centre given that it should be the main focus and first preference for retail development in the Borough. Developers considering whether to locate their retail scheme within the town centre could be deterred by the requirement to submit a Retail Impact Assessment. The Council may be inadvertently hampering the growth of the retail sector within the town centre which is alarming especially considering the current poor health of the centre.
- 7.5.6 We note that the current figure of 600 sq.m was based on the average gross unit size in existing centres. We do not consider this to be the most appropriate method to determine the locally set impact threshold given that these units are already in retail use and located within existing centres. A more suitable method to calculate the current locally set impact threshold is to review recent retail proposals within the Borough. In order to determine whether the current locally set impact threshold continues to be appropriate, we reviewed the details of those retail applications which were submitted across the Borough within the last 5 years. Our research identified just one retail application (ref. S/22/1243)⁵⁷ which sought permission for ≥2,500 sq.m of gross floorspace and therefore we consider that the locally set impact threshold should continue to be below the national threshold. When application ref. S/22/1243 is included, we calculate that, on average, permission was sought for 647 sq.m of gross floorspace. However, when this application is excluded, we calculate that, on average, permission was sought for 502 sq.m of gross floorspace. As such, we consider that the current locally set impact threshold of 600 sq.m remains appropriate.

7.6 Monitoring and Review

- 7.6.1 There are a number of indicators that should be monitored by the Council to determine possible changes to retail floorspace requirements over the development plan period, which include:

⁵⁷ As well as a coffee-shop drive thru, planning permission was sought for a non-food bulky goods retail unit (2,327.5 sq.m) and an external garden centre (929 sq.m).

- The implementation of existing retail commitments. Non-implementation of commitments or the expiry of existing planning permissions will slightly reduce the negative comparison floorspace 'requirement'.
 - Expenditure growth rates, reflect general economic conditions and therefore an acceleration in economic growth is likely to reduce the negative comparison floorspace 'requirement' as a result of increased expenditure growth rates. Conversely, any future economic downturn is likely to increase the negative comparison floorspace 'requirement' as a result of lower or negative expenditure growth rates.
 - The market share of non-store retail sales (special forms of trading). Such market shares have increased considerably in recent years, but it remains to be seen whether this growth will be maintained.
- 7.6.2 In addition to monitoring, we recommend that the Council should maintain an up-to-date picture of the performance of Swindon's centres as well as any qualitative retail needs by continuing to review the composition of the centres and their vacancy rates.
- 7.6.3 Any sustained and significant changes in any of the key indicators should prompt a review and update of this assessment to ensure that the Council is meeting objectively assessed retail and leisure needs, encouraging sustainable shopping patterns and implementing the most appropriate strategy to support the vitality and viability of Swindon's centres.