Nathaniel Lichfield & Partners
Planning. Design. Economics.

Swindon Retail and Leisure Needs Assessment

Final Report

Swindon Borough Council

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1.0 # Introduction

1.1 Nathaniel Lichfield & Partners (NLP) has been commissioned by Swindon Borough Council to prepare a Retail and Leisure Needs Assessment. NLP has also prepared an Employment Land Review Study for the Council. This report sets out the findings of the Retail and Leisure Needs Assessment.

Objectives

1.2 The key objective of the Swindon Retail and Leisure Needs Assessment is to provide a robust and credible evidence base to inform the Council's work on emerging policy documents, taking into account changes since previous evidence was prepared. The assessment provides a qualitative analysis of the existing retail and leisure facilities within Swindon Borough, including identification of the role of each centre, catchment areas and the relationship between the centres. It also provides a quantitative and qualitative assessment of the need for new retail facilities within Swindon Borough, and the need for leisure and other main town centre uses. This assessment examines the need for both food and non-food retailing, including a qualitative analysis for different forms of facilities such as retail warehousing, local shops, large food stores and traditional high street comparison shopping.

1.3 The study includes an assessment of:

1. changes in circumstances and shopping patterns since the previous studies were undertaken, not least the effects of the recession and the availability of 2011 Census data;
2. the future need and (residual) capacity for retail, food and beverage and leisure floorspace for the period up to 2036;
3. the potential implications of emerging developments both within and outside the Swindon, in terms of impact on town centres and potential changes to shopping patterns;
4. the existing retail hierarchy and network of centres and whether any changes are required; and
5. development plan policies, allocations and recommendations on how each centre can develop its role.

Report Structure

1.4 Section 2 of this report describes the shopping hierarchy. Section 3 outlines retail and leisure trends and provides a retail capacity and need assessment. Section 4 assesses the scope for food and beverage and commercial leisure uses. Section 5 explores opportunities for accommodating growth and an overview of town centre frontage policies. Section 6 provides the recommendations and conclusions.

2.0 The Hierarchy of Centres

Introduction

2.1 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Local Plans are expected to define a network and hierarchy of centres that is resilient to anticipated future economic changes.

2.2 The Planning Practice Guidance (PPG) places emphasis on developing strategies for town centres that are appropriate and realistic to the role of centres in the hierarchy. Town centre strategies should be based on the current state of a centre and opportunities to meet development needs (in full). These town centre strategies should seek to support the town centre vitality and viability, and should assess if changes to the role and hierarchy of centres are appropriate.

2.3 This section provides an overview of the shopping hierarchy in Swindon Borough and the surrounding sub-region.

Centres in Swindon and the Surrounding Area

2.4 Swindon Borough is located in the South West of the Country, bounded by Wiltshire, Cotswold and Vale of White Horse local authorities. The Borough contains Swindon Town Centre, which is supported by district/primary rural centres at Swindon Old Town, Highworth, Wroughton, Gorse Hill, Cavendish Square, West Swindon Shopping Centre and Orbital Retail Park, plus a number of smaller local centres catering for local needs. Outside of the town centre, the Swindon Designer Outlet (McArthurGlen) provides a specialist out-of-centre shopping experience, and Swindon contains a number of retail parks.

2.5 The Swindon Borough Local Plan (adopted March 2015) sets out policies on retail and town centres, which seek to protect the shopping function and role of Swindon and other defined centres, in order to enhance the town centre, maintain the vitality and viability of centres, and protect the role of the smaller centres as local service centres providing services for the local population.

2.6 Venuescore ranks the UK's top 3,500 retail destinations including town centres, malls, retail warehouse parks and factory outlet centres. Each destination is given a weighted score for the number of multiple retailers present, and the score attached to each retailer is weighted depending on their overall impact on shopping patterns.

2.7 The results for the destinations and other relevant centres outside of the Borough are shown in Table 2.1. Swindon Town Centre achieves the highest Venuescore in the Borough, and is ranked significantly higher than any other centre in the Borough, reflecting its position in the retail hierarchy. The next highest scores are achieved by Swindon Designer Outlet and Orbital Retail

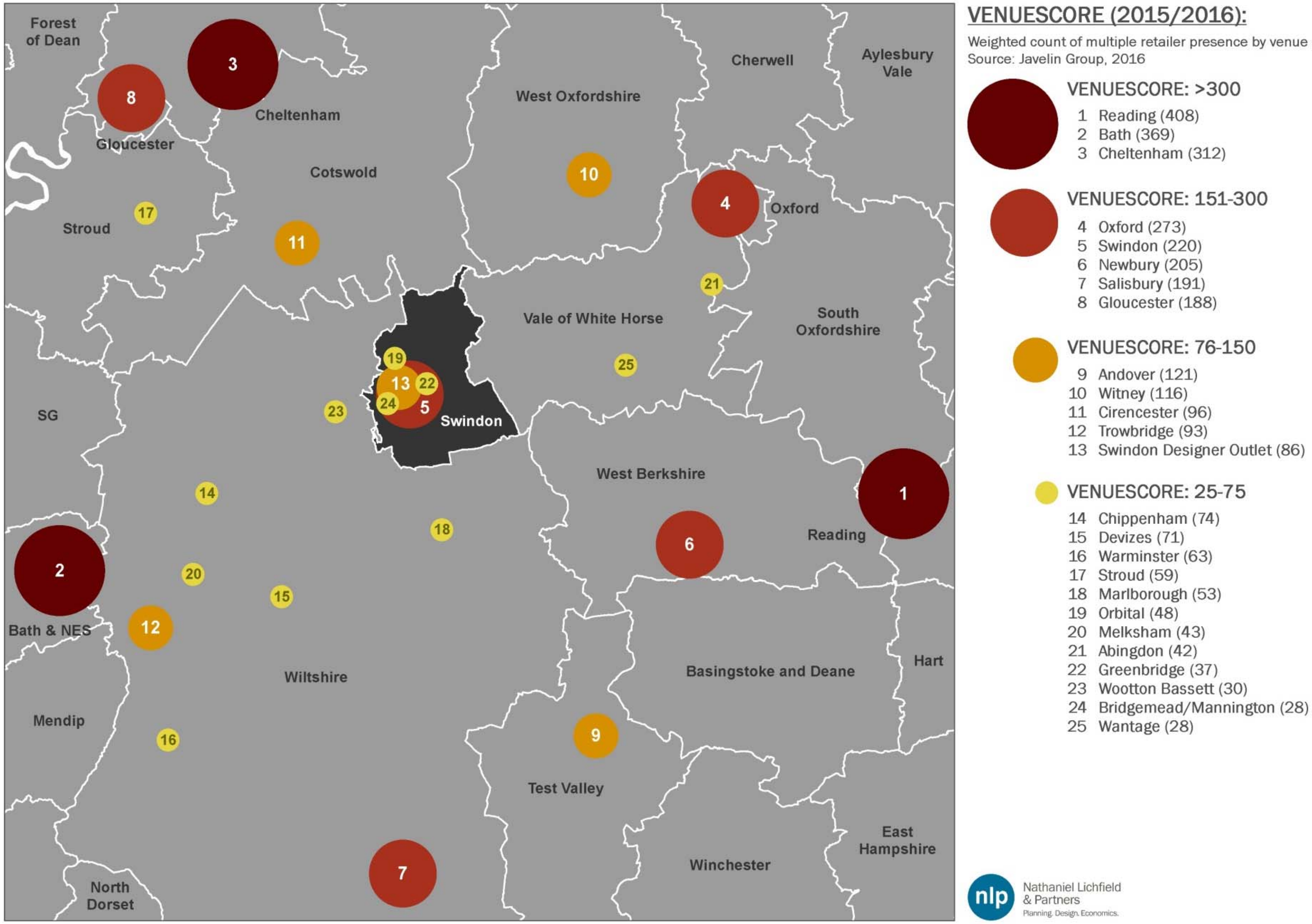
Park, and notably other retail parks in the Swindon area achieve a Venuescore ranking. Smaller centres in the Borough have few multiple retailers and are not included within Venuescore's analysis. The location of these Venuescore centres is shown in Figure 2.1 overleaf.

Table 2.1 Venuescore UK Shopping Index

Centre	Venuescore	UK Rank	Market Position
Bristol	419	13	Upper Middle
Reading	408	15	Upper Middle
Bath	369	19	Upper Middle
Cheltenham	312	31	Upper Middle
Oxford	273	42	Upper Middle
Swindon	220	72	Middle
Newbury	205	85	Upper Middle
Salisbury	191	97	Upper Middle
Gloucester	188	100	Middle
Andover	121	204	Middle
Witney	116	219	Upper Middle
Cirencester	96	276	Upper Middle
Trowbridge	93	288	Middle
Swindon Designer Outlet	86	326	Upscale
Chippenham	74	384	Middle
Devizes	71	405	Middle
Warminster	63	460	Middle
Stroud	59	503	Lower Middle
Marlborough	53	574	Upper Middle
Orbital Retail Park	48	643	Middle
Melksham	43	716	Lower Middle
Abingdon	42	735	Middle
Greenbridge Retail Park	37	858	Middle
Wootton Bassett	30	1,081	Middle
Bridgemead/Mannington Retail Park	28	1,151	Middle
Wantage	28	1,151	Middle
Bridgemead, Swindon	19	1,618	Lower Middle
Wood Street, Swindon	16	1,908	Middle
Hungerford	16	1,908	Middle
Ocotal Way, Swindon	15	2,034	Middle
Oxford Road, Swindon	14	2,193	Middle
Paddington Drive, Swindon	14	2,193	Middle
Malmesbury	13	2,394	Middle
Calne	11	2,827	Middle
Haydon Wick, Swindon	10	3,152	Middle

Source: Venuescore, Javelin Group 2015/16

Figure 2.1 Venuescore Shopping Hierarchy



2.8 Figure 2.1 indicates that residents in Swindon Borough have good access to regional centres as well as having a choice of smaller centres for day to day shopping needs. Figure 2.1 also highlights the importance of Swindon town centre as a retail destination. It is the dominant location within the immediately surrounding area, with larger, higher order centres in the sub-region, and there is some leakage of comparison goods expenditure to these centres.

2.9 In general, the Venuescore data closely correlates to the actual market size of the shopping destination in terms of consumer expenditure. Venuescore also assesses the market position of centres based on the retailers present and the centre's relative position along a spectrum running from discount to luxury or down-market to aspirational (ie. lower, middle to upscale), as shown in Table 2.1.

2.10 Swindon Designer Outlet is the only "upscale" centre in the sub-region, suggesting that it has an excellent and high quality comparison retail offer. The higher order centres of Bristol, Reading, Bath, Cheltenham and Oxford in the wider area are all classified as "upper-middle" centres, while other centres within Swindon Borough, including Swindon Town Centre, are classed as "middle", suggesting that the retail offer is more mid-market.

2.11 In addition to its market position and Venuescore, each destination is also assessed in terms of a range of other attributes, as follows:

1 Age focus (is the offer targeting younger or older consumers?)

2 Fashionability of its offer (is the clothing offer traditional or progressive?)

3 Food/service bias (how strong is the food and beverage offer?)

2.12 The results for centres within Swindon and the surrounding area are shown in Table 2.2 below.

Table 2.2 Centre Attributes

Swindon	Mid	Fashion Moderate	85
Swindon Designer Outlet	Old	Fashion Moderate	70

Orbital Retail Park	Mid	Fashion Forward	25
Greenbridge Retail Park	Old	Traditional	82
Bridgemead/Mannington Retail Park	Old	Updated Classic	0
Bridgemead, Swindon	Old	Fashion Moderate	159
Wood Street, Swindon	Old	Traditional	38
	Old	n/a	341
Ocotal Way, Swindon	Old	Fashion Moderate	0
Oxford Road, Swindon	Old	n/a	0
Paddington Drive, Swindon	Old	Fashion Moderate	0
Haydon Wick, Swindon	Old	n/a	0

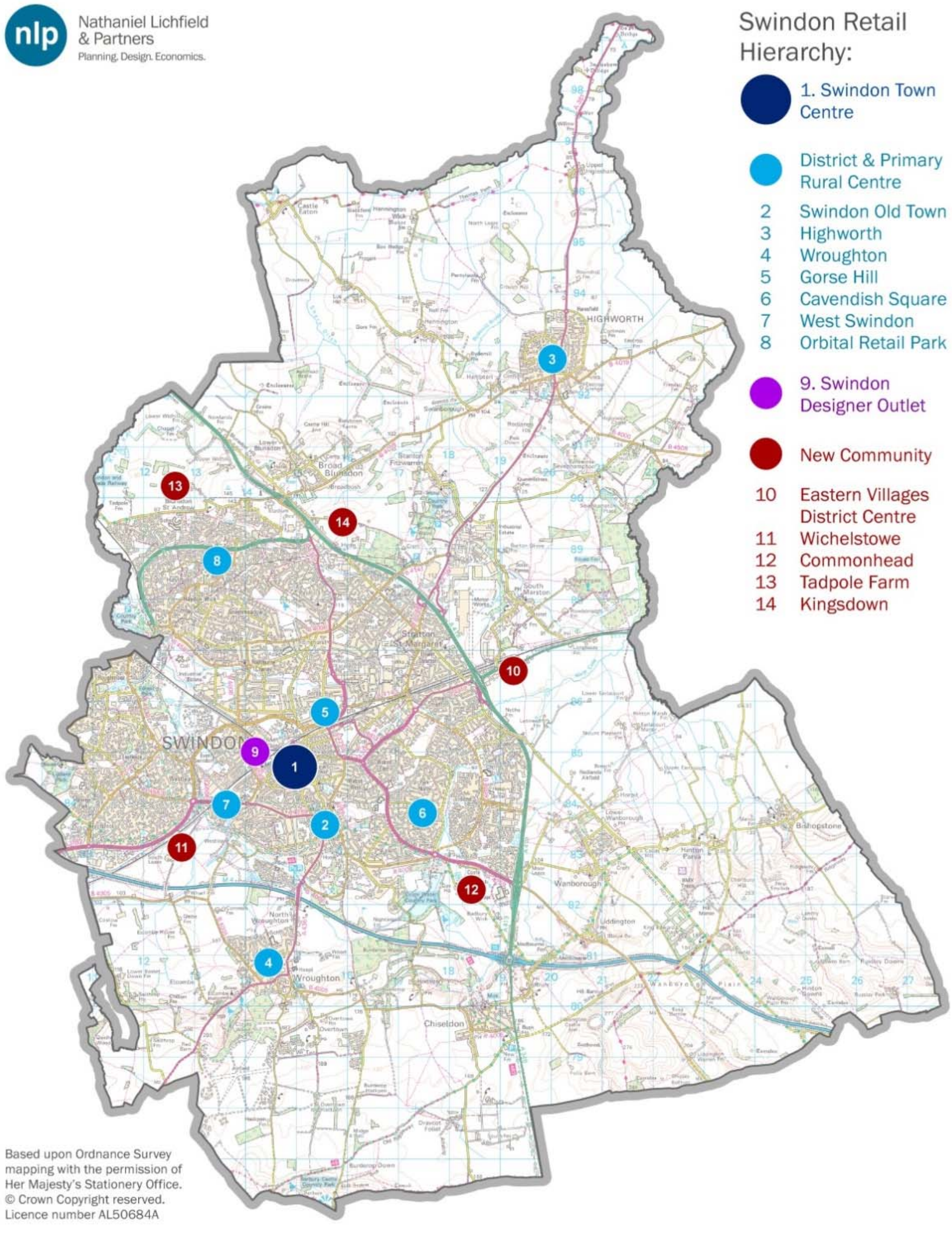
Source: Venuescore, Javelin Group 2015/16

2.13 The centres within the sub-region tend to cater for older customers, with moderate or traditional tastes, while Swindon Town Centre appeals to a younger customer. Orbital Retail Park has a more fashion forward offer attracting a younger age group. Bridgemead is the only centre in the Borough with an above average food/service offer. Swindon Town Centre achieves an index of 85, ie. 15 points below the index average of 100, and this is generally lower than nearby comparable centres. This suggests there is scope to improve Swindon Town Centre's food and beverage/leisure offer.

Existing Retail Provision in Swindon Borough

2.14 Figure 2.2 below shows the location of the existing and emerging retail centres in Swindon Borough.

Figure 2.2: Swindon Retail Hierarchy



2.15 An assessment of the existing retail and service provision in the main centres is provided in the health check of Swindon Town Centre and centre audits of the district and primary rural centres included at Appendix 6. A summary of existing retail provision is provided in Table 2.3 below.

Table 2.3 Existing Retail Shop Provision

Centre	Centre Class A1 Shop Units	Convenience Goods Floorspace (sq.m gross)	Comparison Goods Floorspace (sq.m gross)
Swindon Town Centre	266	17,960	75,390
Swindon Old Town	63	4,427	3,890
Swindon Designer Outlet	90	413	19,700
Orbital Retail Park	10	13,935	17,007
West Swindon Shopping Centre	16	8,515	213
Highworth	22	1,572	995
Gorse Hill	49	2,859	4,436
Cavendish Square	9	1,476	931
Wroughton	10	1,254	269

Source: Goad, VOA, StorePoint and NLP site surveys 2016

2.16 The audit of centres in Appendix 6 confirms that Swindon Town Centre, Swindon Old Town and Swindon Designer Outlet are the main shopping destinations within the Borough. Swindon Town Centre is by far the biggest centre in terms of number of shop units and the amount of retail sales floorspace.

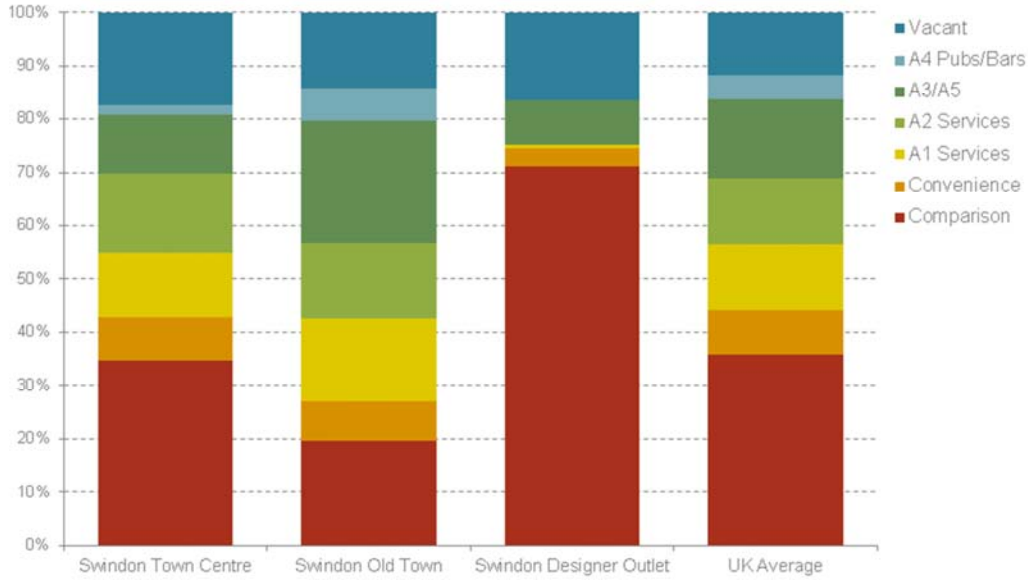
2.17 Swindon Town Centre provides a good range of shops and facilities that serve residents within its relatively wide catchment area, with a critical mass of convenience and comparison shopping floorspace and a good range of non-retail services.

2.18 Swindon Old Town is a smaller centre that serves a more localised retail catchment, providing a limited range of retail uses. The centre has a borough wide catchment area for food and beverage and the evening economy.

2.19 Swindon Designer Outlet is primarily a comparison retail destination. It does not function as a “town centre” as it offers limited ancillary service uses. Nevertheless, Swindon Designer Outlet is a major and popular shopping attraction.

2.20 Figure 2.3 shows the mix of “town centre” uses within the main centres of Swindon town centre, Swindon Old Town and Swindon Designer Outlet, compared to the UK average. Swindon Town Centre is closest to the national average, with a reasonable mix of uses within the Class A categories. As expected for a lower order centre, Swindon Old Town has a lower proportion of comparison goods retailers, but a good range of service uses. Conversely, Swindon Designer Outlet has a much higher proportion of comparison units, but less of an ancillary service offer. All three of the main centres have a higher proportion of vacant units than the national average.

Figure 2.3: Main Centres Mix of Uses



2.21 West Swindon Shopping Centre, Orbital Retail Park, Gorse Hill and Cavendish Square are identified in the Local Plan as district centres, while Highworth and Wroughton are identified as Primary Rural Centres. These are generally much smaller centres that serve their respective smaller catchment areas, providing a limited range of shops and non-retail services. West Swindon Shopping Centre and Orbital Retail Park are anchored by large Asda superstores.

2.22 In addition, there are a number of local centres that generally include a small range of shops of a local nature, serving a small catchment. They can include a small supermarket, newsagent, post office, takeaways and pharmacy.

2.23 National and local policy indicates that it is important for Swindon to maintain and strengthen its role in the retail hierarchy. The smaller centres should continue to perform a more local function meeting day to day shopping and service needs. Development should be focused on the existing centres rather than further expansion in out of centre locations.

Response to the Mary Portas Review

2.24 The Mary Portas Review (2011) into the future of the High Streets suggested recommendations for government, local authorities and businesses to prevent further decline of town centres. The report advocated a strengthening of planning policy in favour of town centres. The recommendations included measures to strengthen the management of high streets, improvements to the business rates system, CPO power to tackle inactive landlords, reducing car parking charges and increased community involvement in town centres.

2.25 The Government formal response to the Portas Review accepted most of the recommendations and secured funding for ‘Portas Pilot’ towns. The future High Street Forum was established to implement Portas’s recommendations, by providing funding to establish business improvement districts (BIDs).

2.26 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. A key observation of the report was that polarisation of centres, which had resulted in three types of centre i.e. strong centres with a wide retail and leisure facilities; convenience/service-based centres with some comparison retailing and more localised convenience/everyday needs-focused centres.

2.27 The report's recommendations suggested a partnership approach led by local authorities with business and community involvement. Other recommendations included strategic land assembly to bring forward redevelopment opportunities and greater flexibility in the planning system to enable redundant premises back into productive use.

3.0 Assessment of Retail Need

Introduction

3.1 The National Planning Policy Framework (NPPF) indicates (paragraph 14) that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs.

3.2 The Planning Practice Guidance (PPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses.

3.3 The PPG also introduces the requirement to consider a range of plausible scenarios, including a 'no development' scenario, which should not assume that all centres are likely to benefit from expenditure growth.

3.4 This section objectively assesses the quantitative and qualitative scope for new retail floorspace in Swindon Borough in the period from 2016 to 2036. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the centre audits in Appendix 6.

Study Area

3.5 The quantitative analysis is based on a defined Study Area that covers the catchment areas of the main shopping destinations in the Borough. The extent of the previous (2004) household survey study area has been retained. We have reviewed the shopping patterns derived from the 2004 survey, and adapted the zones in order to better reflect the catchment areas of the centres within Swindon.

3.6 The Study Area has been sub-divided into eight zones as shown in Appendix 1 and Figure 3.1 overleaf. The survey zones are based on postcode sectors and take into consideration the extent of the primary catchment areas of Swindon and the surrounding area.

3.7 The catchment areas are the area where each centre will attract the vast majority of its retail trade. There will be retail expenditure leakage from the study area zones to centres outside, but conversely expenditure inflow from surrounding areas.

3.8 The methodology is summarised in Figure 3.2 overleaf and set out in more detail in Appendix 1.

Figure 3.1: Swindon Study Area

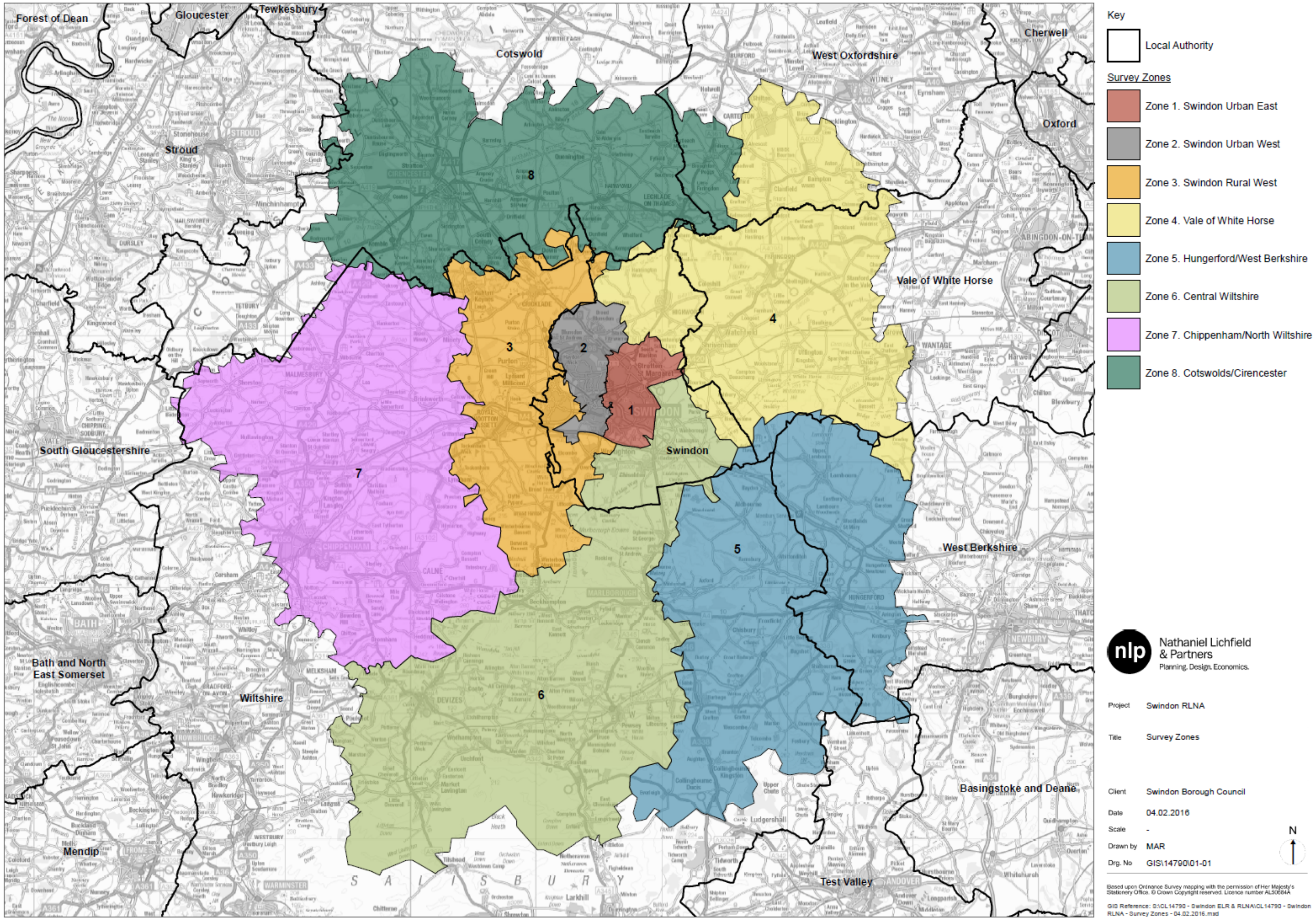
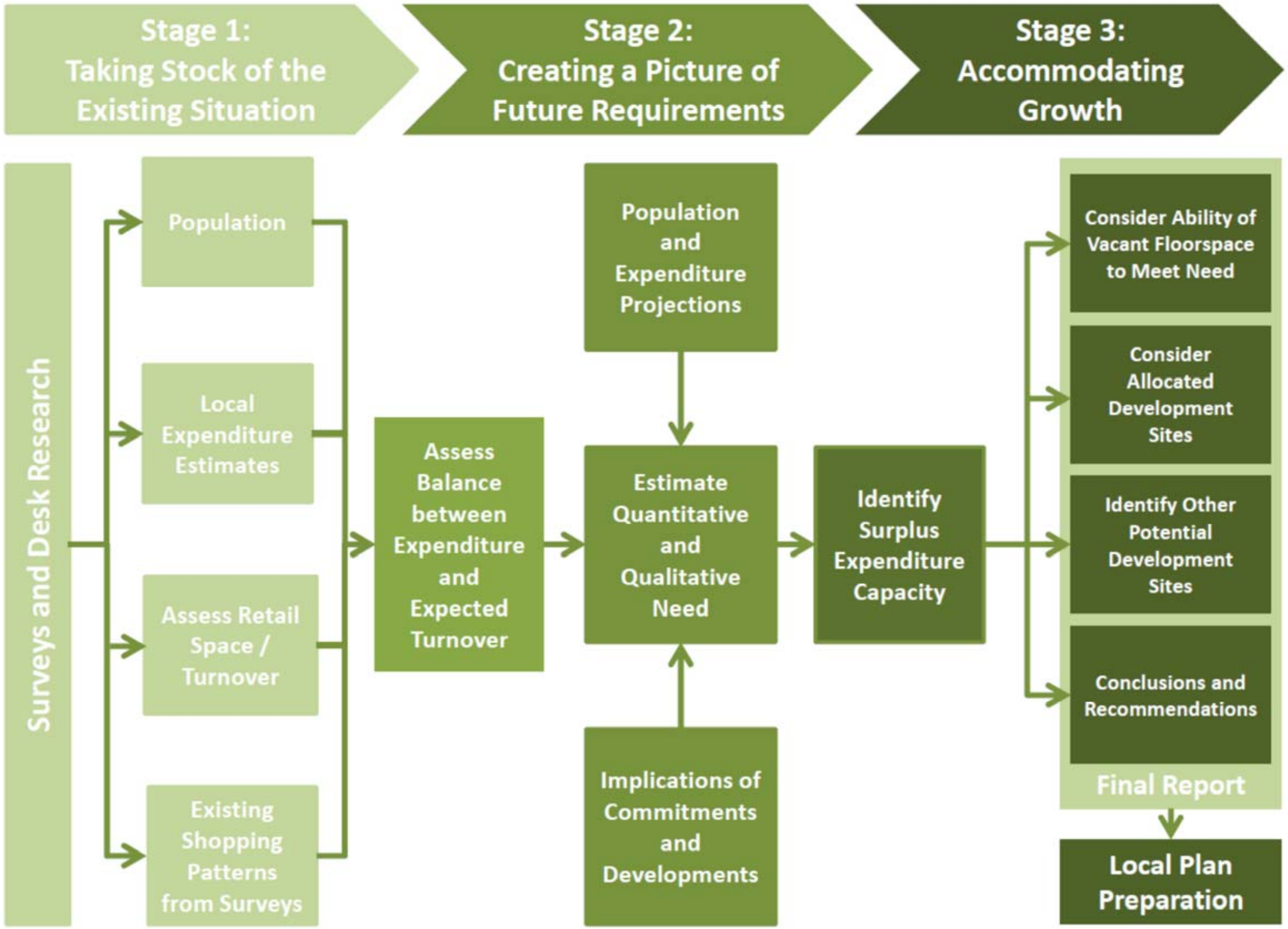


Figure 3.2: Methodology for Estimating Future Requirements for Retail Floorspace



Retail Trends

3.9 This section considers the changes in the retail sector nationally and the potential implications for Swindon Borough.

3.10 The economic downturn had a significant impact on the retail sector. A large number of national operators failed (e.g. Blockbuster, Comet, HMV, JJB Sports, Jessops, Phones 4U, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Brantano, Peacocks, Jane Norman, La Senza, Past Times, Barratts and Habitat), leaving major voids within centres and retail parks. The retail sector is still experiencing difficult trading conditions, highlighted by recent problems for BHS and Austin Reed.

3.11 Many town centre development schemes were delayed and the demand for traditional bulky goods retail warehouse operators was, and continues to be, affected. The main food store operators have seen a reduction in growth, with proposed new stores cancelled, and discount operators taking market share from the main operators.

3.12 Assessing future expenditure levels within this study needs to take into account the likely speed of the economic recovery, particularly in the short term (2016-2020). Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the development plan period. This Study takes a long term view for the Plan period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken. An overview of national tends within the retail sector is set out below.

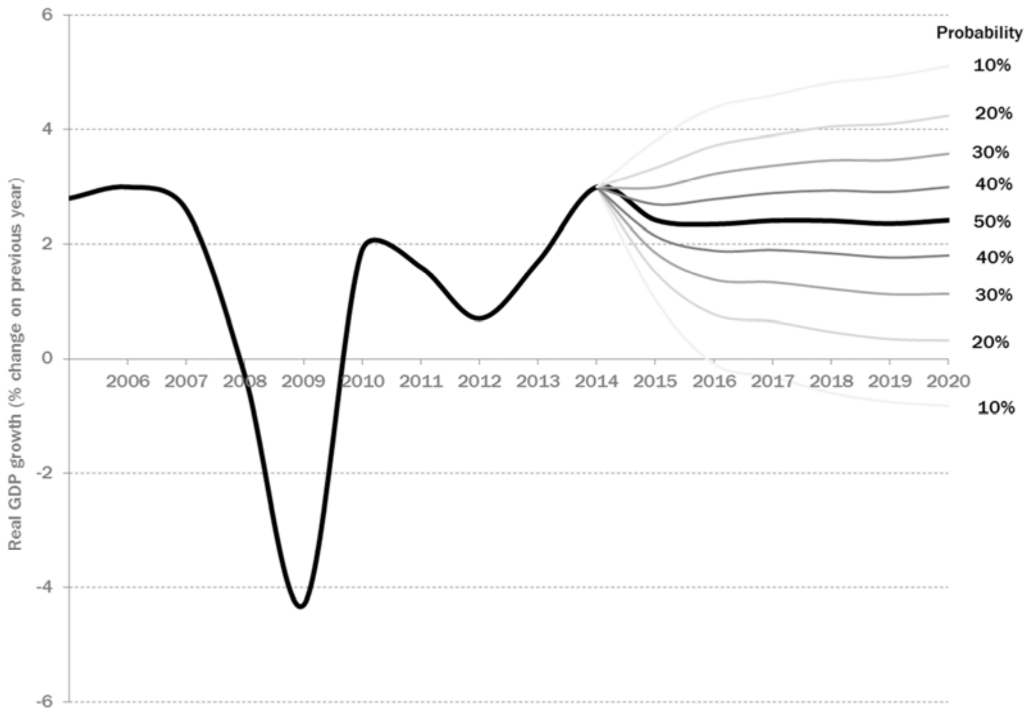
Expenditure Growth

3.13 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However the recovery from the economic downturn has resulted in slower growth.

3.14 Figure 3.3 shows the Office for Budget Responsibility's (OBR) forecast for GDP up to 2020. After the recession in 2008, growth rebounded and from 2012 grew to the high of 3% in 2014. The OBR forecasts that growth will be slightly above 2% per year from 2015 onwards.

3.15 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the economic downturn and the growth of multi-channel shopping suggests that high past rates of growth are unlikely to be achieved, but the underlying trend over the medium and long terms is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in home shopping. These national trends are anticipated to be mirrored in Swindon.

Figure 3.3: Forecast GDP Growth to 2020



Source: ONS, OBR

3.16 For convenience goods, Experian anticipates limited growth (0.1% per annum). For comparison goods, higher levels of growth are expected in the future (2.9% per annum), still at a lower rate than previous pre-recession trends. Historically comparison goods expenditure has growth significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

3.17 Low expenditure growth and deflationary pressures (ie. price cutting) in the non-food sector have had an impact on the high street in the last few years. As a result of these trends, the national average shop vacancy rate (based on Goad Plan data) increased from below 9% before the recession began in 2008 to around 14% in 2012. Vacancy rates have recovered to the current figure of just under 12% (source: Experian Goad Plans, 2015).

3.18 The current vacancy rate recorded in the three main centres in Swindon is 16.6%, which is higher than the national average. This high vacant rate is in part due to the closure of closure of clubs/night clubs in the Fleet Street/Bridge Street area following anti-social behaviour concerns. Nevertheless the figures suggest that during the recession, Swindon's centres experienced an increase in vacancy levels, and Swindon is recovering at a slightly slower rate than the national average.

New Forms of Retailing

3.19 New forms of retailing have emerged as an alternative to more traditional shopping facilities. Home/electronic shopping has grown with the increasing ownership of personal computers, smart phones and the internet. Trends within this sector will have implications for retailing within Swindon. The continued growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street and in Swindon.

3.20 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure.

3.21 The household survey results suggest 4.6% of households in the Swindon Study Area did their last main food and grocery shopping via the internet/ delivery, and 6.8% of households do most of their non-food shopping at home via the internet, TV or catalogue.

3.22 Recent trends suggest continued strong growth in this sector. Experian's Retail Planning Note 13 (October 2015) states:

"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for well over a tenth of total retail sales…

The rising share of internet sales in total retail transactions dominates the picture of SFT. Internet sales' share of total retail sales stood at 11.7% in mid-2015 against 4.7% in June 2008...

In our forecasts, non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 57.3 million internet users in the UK (representing 88.4% of the population) in mid-year 2014 according to Internet World Stats. So growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect the SFT market share to continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2020. Our forecast has the SFT share of total retail sales reaching 17.8% by 2020 rising to 19.6% by the mid-2030s."

3.23 This Study makes an allowance for future growth in e-tailing based on Experian's recommended projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

3.24 The implications of these trends on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators and click and collect operations, therefore growth in on-line sales may not always mean there is a reduction in the need for retail floorspace.

3.25 Given the likelihood that multi-channel shopping will to grow at a faster pace than total retail expenditure, this assessment has adopted relatively cautious growth projections for retail expenditure (as set out in the retail capacity methodology, Appendix 1), and allowance has been made for retailers to increase their turnover density, due to growth in home shopping and click and collect.

3.26 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Convenience goods retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town centres (such as the Tesco Metro, Sainsbury Central/Local store and Marks & Spencer's Simply Food formats). The number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly over the last decade. This trend has been evident in Swindon Borough e.g. Tesco Metro in Swindon Town Centre, M Local (Morrisons) in Wroughton and Marks & Spencer Simply Food at Mannington Retail Park. The main food store operators have also increasingly sought representation in small towns in predominantly rural areas.

3.27 The expansion of European discount food operators Aldi and Lidl has also been rapid during the last decade. Swindon currently has a Lidl store in Gorse Hill and on Barnfield Road, and four Aldi stores in the urban area. The discount sector is actively expanding and may look for opportunities in Swindon, such as the proposed expansion of the Aldi store at Hobley Drive, Stratton St Margaret.

3.28 Food store operators had a programme of store extensions prior to the recession, particularly Tesco, Sainsbury and Asda, in order to increase the sale of non-food products such as clothing and electrical goods. The recession halted this trend and a number of proposed new stores have not been implemented.

3.29 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.

3.30 The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will halt. In many centres, charity shops have occupied vacated shop premises during the recession. In some cases, charity shops can afford higher rents than small independent occupiers because of business rate discounts, therefore it does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary frontages. Charity shops account for 8.3% of all comparison shops within

Swindon Town Centre, which compares to the national average (8.4%). The discount comparison sector has also grown significantly in recent years e.g. pound shops.

3.31 The growth of money lending/pay day loan shops and betting shops has also raised concerns amongst planning authorities, and has resulted in a change to permitted development rights in order to control the growth of these uses in town centres. Whilst represented, this growth trend is not particularly evident in Swindon.

3.32 Within town centres, many high street multiple comparison retailers have changed their format. For over a decade, high street national multiples have sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger regional and sub-regional centres, e.g. Cheltenham, Bristol and Reading. In general, operator demand for space has decreased during the recession and, of those national multiples looking for space, many prefer to locate in larger centres.

3.33 The demand for premises within the bulky goods sector, ie. furniture, carpets, electrical and DIY goods, was particularly weak during and after the recession. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods.

3.34 The continuation of national trends will influence future operator requirements across Swindon, with smaller vacant units becoming less attractive for new occupiers and existing retailers looking to relocate into larger units in higher order centres. However, smaller vacant units could still be attractive to independent traders and non-retail services.

High Street Retail Trends

3.35 The number of shop units within town centres has declined consistently since the early 1970s. The Centre for Retail Research's "Retail In 2018" (CRR) figures show a decline from over 300,000 units in 2001 to 282,000 in 2012. The CRR "Retail In 2018" report predicts nearly 62,000 high street stores across Great Britain (22% in total) will close between 2012 and 2018.

3.36 Online/multi-channel shopping and increasing retail operating costs are cited as the main culprits. Similar predictions of the High Street's decline were made during previous recessions in the early 1980s and 1990s, which subsequently proved to be exaggerated. On this basis, it is important to examine these predictions within the context of longer terms structural trends.

3.37 There is an underlying trend towards fewer but larger retail stores. Valuation Office data indicates the amount of retail floorspace in England and Wales has grown by over 3% during the economic downturn (2008 to 2012), despite a period of poor expenditure growth and an increase in on-line shopping.

3.38 Recent and proposed changes to the General Permitted Development Order (GPDO) may also have an impact on town centres. These measures allow for greater flexibility for changes of use from retail to non-retail uses e.g. Class A uses to C3 residential use and Class A1 to A2 use. These measures could change the composition of town centres, in particular the amount of Class A1 space could reduce. The measures may lead to a reduction in vacant shop premises, particularly in peripheral shop frontages, but this could have an impact on the ability of operators to find space, in areas where demand is high.

3.39 It is unlikely these changes will have a significant impact on Swindon Town Centre, because the centre already has a broad mix of retail and non-retail uses. These permitted development rights relate to units where the cumulative floorspace of the existing building changing use does not exceed 150 sq.m, and the majority of the units within the prime retail area of the town centre are larger than this threshold. In addition, the commercial value of the retail properties in the prime retail area are generally in excess of £10,000 per sq.m, which is significantly higher than the values that would be achieved from residential use, and conversion to residential in these areas would not be a viable option.

3.40 These trends are not new and have been affecting the High Street for many years. In response to these trends, town centres have changed and diversified. The food and beverage, leisure and non-retail service sectors have been successful in occupying space no longer suitable for shopping. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases town centres recovered during periods of stronger growth. The High Street is more resilient than many commentators give it credit.

3.41 In May 2011, Mary Portas was appointed to lead an independent review into the future of the high street, as a response to the trends outlined in this Section and the effects of the recession. The report recognised that town centres need to improve their wider appeal. The report suggested measures to tackle the decline of the high street, including a strengthening of planning policy in favour of ‘town centres first’. Other recommendations included improving the management of centres (e.g. BIDs), changes to the business rate system could better support small businesses, affordable car parking and disincentives for landlords to leave properties vacant.

3.42 Shopping behaviour will continue to change and the High Street will need to continue to respond. All town centres will need to focus on the advantages they have over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience. There will always be demand for a day out and customers cannot eat or drink on-line.

3.43 Experian data indicates that retail expenditure reduced by 3.9% during 2009 to 2011, with the food/grocery and bulky comparison goods sectors hardest hit. These expenditure trends explain why the High Street performed better than out-of-centre retail parks during the recession. During this period the proportion of expenditure attributed to non-store trading (including home shopping) increased from 8.2% to 10.8%.

3.44 Experian's most recent forecasts suggest comparison goods expenditure per person will increase on average by around 3% per annum, in real terms over and above inflation. Taking into account ONS population projections, comparison goods expenditure in England will double over the next 20 years.

3.45 Not all projected expenditure growth will be available to support new retail floorspace. Non-store expenditure (special forms of trading) is expected to grow at a faster rate than expenditure and in proportional terms will absorb more growth. Continuing trends towards more modern and higher density stores, and the replacement of inefficient space will result in growth in turnover efficiency – Experian suggests a growth rate of 2% per annum for comparison floorspace.

3.46 The challenge for town centres generally, and centres within Swindon Borough specifically, will be to capitalise on this growth by securing much needed investment. There will be continued scope for centres to diversify, for example the evening economy, leisure and entertainment and more focus on convenience and service, but comparison retail will still be the driver of growth in many centres.

3.47 The delivery of town centre redevelopment opportunities will be the priority. There will be a requirement to build more retail floorspace if Swindon is to maintain its market share of expenditure, not only to boost its retail offer and compete effectively with other centres, but also to secure investment in the centre.

Population and Expenditure

3.48 The study area's projected population for 2011 to 2036 is set out in Table 1 in Appendix 2. Population data has been obtained from Experian for each zone based on the 2011 census. The 2011 base year population has been projected to 2036 using the ONS SNPP 2012 projections.

3.49 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2036. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 3.

3.50 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 12% from £1,099.45 million in 2016 to £1,227.53 million in 2036, as shown in Table 3 (Appendix 2). Comparison goods spending is forecast to more than double between 2016 and 2036, increasing from £1,791.61 million in 2016 to £3,712.69 million in 2036, as shown in Table 3 (Appendix 3).

3.51 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on food and drink does not increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income. These figures relate to real growth and exclude inflation.

Existing Retail Floorspace 2016

3.52 Existing convenience goods retail sales floorspace within Swindon Borough is around 52,200 sq.m, as set out in Table 11 in Appendix 2. This floorspace figure excludes comparison sales floorspace within food stores. Comparison goods retail floorspace (including comparison sales in large food stores) within Swindon Borough is estimated to be around 172,500 sq.m net, as shown in Table 10 in Appendix 3. Figures 3.4 and 3.5 below show the distribution of retail and leisure floorspace within Swindon Borough.

Figure 3.4: Retail and Leisure Floorspace in Swindon Borough

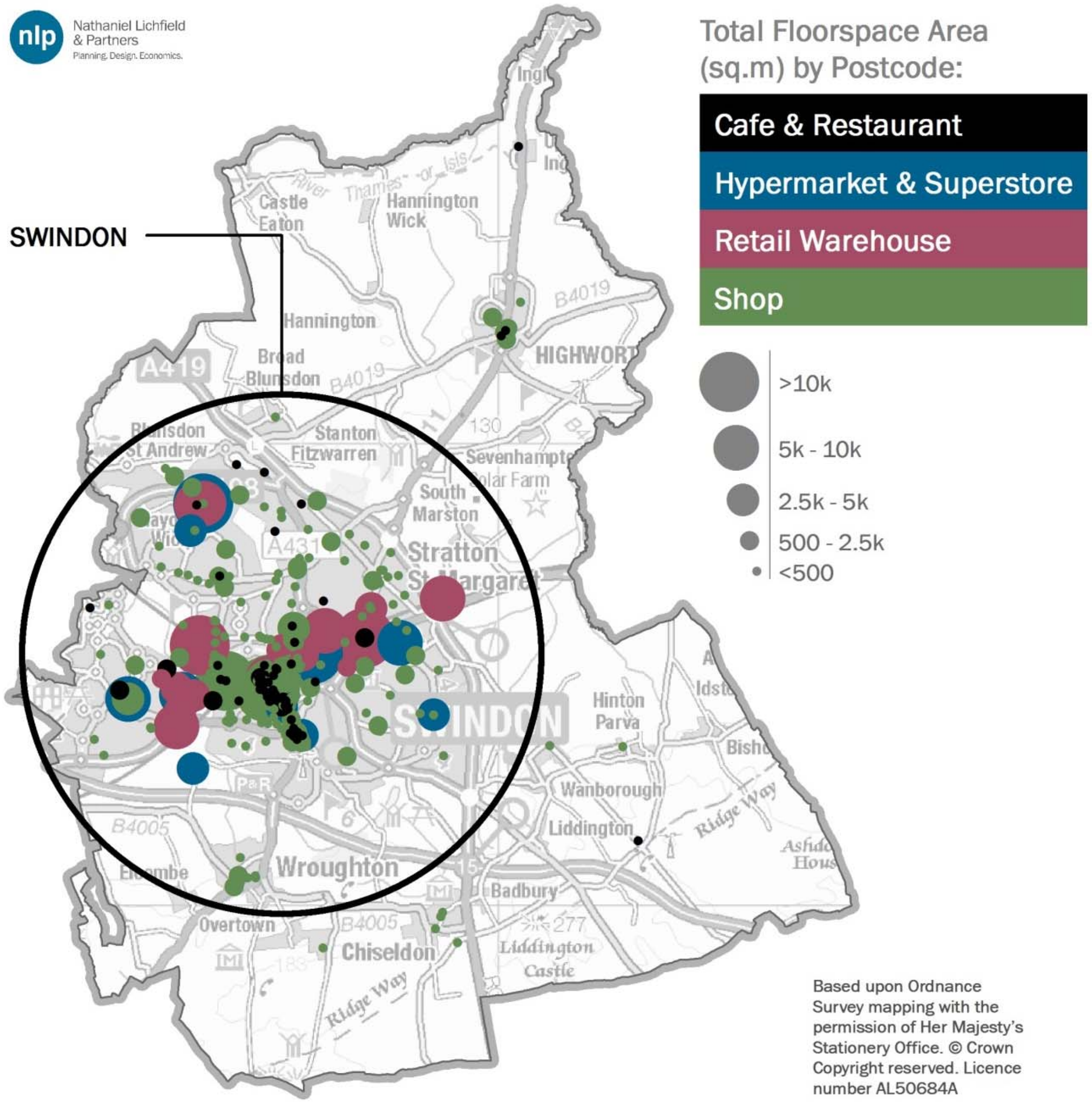
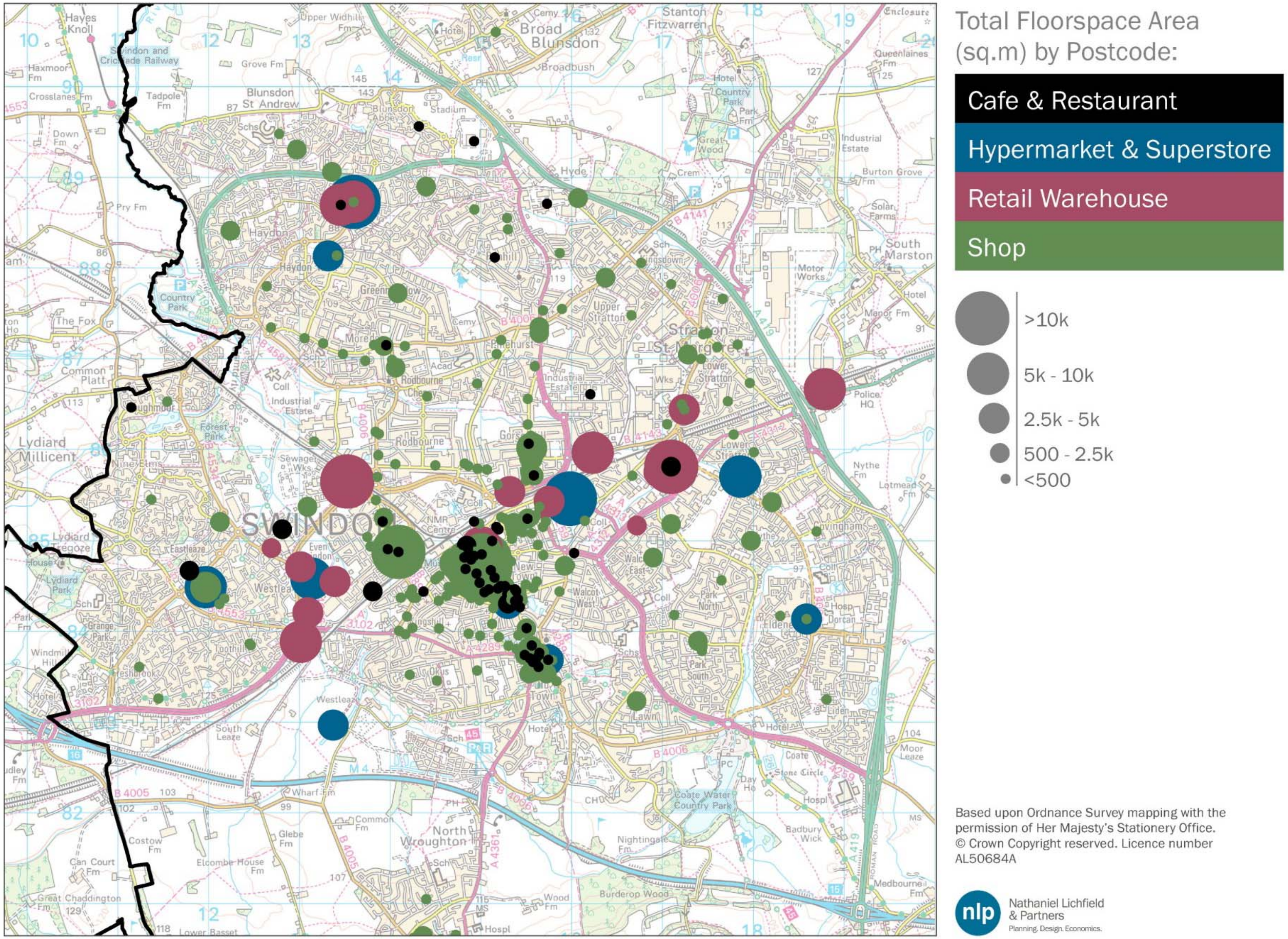


Figure 3.5: Retail and Leisure Floorspace in Swindon



Existing Spending Patterns 2016

3.53 The results of the household shopper questionnaire survey undertaken by NEMS in January 2016 have been used to estimate existing shopping patterns within the study area zones. The results are shown in Appendix 7.

Convenience Shopping

3.54 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2. The market shares in Table 4 are a combined rate for both main and top up shopping based on a 70:30 split between main and top up shopping.

3.55 A summary of food and grocery shopping patterns for main food shopping trips only to individual stores in Swindon is shown in Table 3.1.

Table 3.1 Main Food and Grocery Last Trip (main destinations mentioned by respondents)

Destination	% Market Share in each zone							
	1	2	3	4	5	6	7	8
Asda, Orbital Retail Park	5.9	31.5	1.8	3.6	1.0	0.0	0.6	3.0
Sainsbury's, Oxford Road	26.7	1.8	0.9	10.0	2.0	2.7	0.6	2.0
Asda, West Swindon SC	0.7	3.6	36.4	0.0	0.0	0.0	1.2	2.0
Tesco Extra, Ocotal Way	18.5	5.5	2.7	0.9	4.0	1.8	0.6	1.0
Sainsbury's, Paddington Drive	1.5	7.9	17.3	0.0	0.0	0.9	0.6	0.0
Morrisons, Thames Avenue	2.2	12.7	1.8	0.0	0.0	0.0	0.0	0.0
Aldi, Hobley Drive	10.4	1.8	0.0	4.5	0.0	2.7	0.0	0.0
Aldi, Latham Road	2.2	9.1	0.9	0.9	0.0	0.0	0.0	0.0
Waitrose, Mill Lane	2.2	3.0	2.7	0.0	1.0	1.8	1.2	0.0
Aldi, Drove Road	3.7	2.4	0.9	1.8	0.0	0.0	0.0	1.0
Sainsbury's, Brunel Plaza	4.4	1.8	0.0	0.0	0.0	0.0	0.0	0.0
Morrisons, Eldene Drive	4.4	1.2	0.9	0.0	0.0	0.0	0.0	0.0

Source: NEMS Household Survey January 2016

3.56 The survey results (Table 4, Appendix 2) indicate there is a high retention of main food and grocery shopping trips within Swindon Urban East (Zone 1, 99.6% retention), Swindon Urban West (Zone 2, 96.5%) and Swindon Rural West (Zone 3, 77.9%), although it is noted that a high proportion of this is directed to "other Swindon", ie. stores outside of the defined centres. Figures A8.1 and A8.2 in Appendix 8 show the convenience goods market shares for Swindon Borough and Swindon Town Centre respectively.

3.57 There are reasonable levels of retention with the Vale of White Horse zone (Zone 4, 21.9%) and Central Wiltshire zone (Zone 6, 13.4%), and low retention rates in the remaining zones (between 4.4% and 6.2%). The influence of stores outside the Borough is clearly evident, particularly stores in Cirencester, Devizes, Chippenham and Marlborough.

3.58 The level of convenience goods expenditure attracted to shops/stores in Swindon Borough in 2016 is estimated to be £527.54 million as shown in Table 5, Appendix 2. This includes estimates of inflow from beyond the study area, applying the market shares set out in Table 4.

3.59 The total benchmark turnover of identified existing convenience sales floorspace within Swindon Borough is £554.82 million (Table 11, Appendix 2).

3.60 These figures suggest that convenience goods retail sales floorspace in the Borough is collectively trading marginally (5%) below average. Facilities in Swindon Town Centre in particular, Swindon Old Town and Highworth appear to be trading below average, whilst facilities in Wroughton and "other Swindon" are trading above average levels.

3.61 On balance, the estimate of global expenditure deficit (£27.28 million) within Swindon Borough as a whole, ie. the difference between the actual spending at retail facilities in the Borough and the benchmark turnover of the facilities, is relatively small.

Comparison Shopping

3.62 A summary of comparison goods shopping patterns is shown in Table 3.2.

Table 3.2 Non-Food Shopping (main destination used by respondents)

Destination	% Market Share in each zone							
	1	2	3	4	5	6	7	8
Swindon Town Centre	47.4	41.2	44.5	27.3	15.0	26.4	19.4	18.0
Orbital Retail Park	10.4	23.6	9.1	2.7	1.0	0.9	1.2	2.0
Internet/home delivery	3.7	6.1	5.5	7.3	11.0	10.0	8.2	3.0
Bath	3.7	3.0	2.7	0.0	0.0	7.3	25.9	0.0
Cirencester	1.5	1.2	9.1	1.8	0.0	0.0	1.8	38.0
Newbury	0.7	0.0	0.0	7.3	46.0	1.8	0.0	0.0
Chippenham	0.0	0.6	0.9	0.0	0.0	0.9	25.9	0.0
Greenbridge Retail Park	11.9	4.8	0.9	5.5	1.0	2.7	0.6	2.0
Cheltenham	0.7	0.6	0.9	0.9	0.0	0.0	1.8	26.0
Swindon Designer Outlet	3.7	4.8	3.6	0.9	0.0	3.6	1.8	2.0
Witney	0.0	0.0	0.0	22.7	0.0	0.0	0.0	2.0
Marlborough	1.5	0.6	0.9	0.0	9.0	5.5	0.6	0.0

Source: NEMS Household Survey January 2016

3.63 Table 4 (Appendix 3) indicates the proportion of comparison goods expenditure within each zone that is spent within Swindon Borough ranges from 89.5% in Zone 1 (Swindon Urban East) and 88.9% in Zone 2 (Swindon Urban West) to 22.9% in Zone 7 (Chippenham/North Wiltshire). Figures A8.3 and A8.4 in

Appendix 8 show the comparison goods market shares for Swindon Borough and Swindon Town Centre respectively.

3.64 The retention of comparison goods expenditure reflects the propensity of customers to shop around and/or travel longer distances to visit larger centres that have more choice. The ability to increase comparison goods market share will be constrained by larger centres in the sub-region. Expenditure outflow will also be affected by out-commuting from the Borough.

3.65 The estimated comparison goods expenditure currently attracted by shopping facilities within Swindon Borough is £1,034.71 million in 2016, as shown in Table 5, Appendix 3. This includes estimates of inflow from beyond the study area.

3.66 Based on this expenditure estimate, the average sales density for existing comparison goods sales floorspace in the Borough (172,473 sq.m net) is £5,999 per sq.m net. The analysis of existing comparison shopping patterns in 2016 suggests the following average sales density figures for Swindon Town Centre is higher than the Borough average at £7,261 per sq.m net, which reflects the stronger presence of national multiples.

3.67 Existing floorspace appears to be trading satisfactorily in difficult market conditions.

Capacity for Convenience Goods Floorspace

3.68 As a minimum, it is appropriate and realistic to plan to maintain the Borough's market share of convenience goods expenditure in the future. Planning for a decline in market share would not be sustainable and would not address the needs of local residents. It should be noted that as the forecast increase in internet spending is taken into account in projecting available expenditure in the future, this will have the effect of reducing the actual requirement for additional floorspace.

3.69 An adjustment to the future market shares for Swindon Town Centre, in order to reflect the build-up of trade generated by the Morrison’s supermarket at Regent Circus and the implementation of further town centre masterplan improvements and developments. The Morrison’s store only opened for trading in late 2014, and had not yet achieved settled shopping patterns, as reflected in its low market share within the results of the household survey results. Table 6 in Appendix 2 shows the adjusted future market shares, which redistributes market share from other parts of Swindon to the town centre based NLP’s judgements.

3.70 Based on these redistributed market shares and baseline population projections, the future level of available convenience goods expenditure at 2021, 2026, 2031 and 2036 is shown at Tables 7, 8, 9 and 10 in Appendix 2.

3.71 The total level of convenience goods expenditure available for shops in the Borough between 2016 and 2036 is summarised in Table 13 (Appendix 2).

Convenience expenditure available to shopping facilities in the Borough is expected to increase from £527.54 million in 2016 to £612.07 million in 2036.

3.72 Table 13 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development. Retail commitments (as at April 2016) are added in at 2021 (set out in Table 12 of Appendix 2).

3.73 In terms of convenience goods commitments in Swindon Borough, planning permission has been granted for a new Aldi at Hobley Drive, Stratton St Margaret, to replace the existing store (LPA ref. S/15/1028). This will result in an increase of 454 sq.m net (363 sq.m of convenience goods floorspace).

3.74 In addition, it has been assumed that an element of the Kimmerfields development within Swindon Town Centre will be occupied by convenience goods retailers (LPA ref. S/11/0614). Kimmerfields is an office-led development that will provide a new central business district. The approved scheme includes a total of 13,471 sq.m gross of Class A1-A5 floorspace, and for the purposes of this assessment we have estimated that an indicative figure of 500 sq.m net could be convenience goods floorspace.

3.75 Within the Borough as a whole, there is an expenditure deficit of -£27.28 million convenience goods expenditure in 2016, i.e. supply exceeds demand. This is as a result of the benchmark turnover of existing floorspace being greater than the actual turnover achieved by stores, particularly in Swindon Town Centre and Swindon Old Town. This deficit will decrease to -£11.68 million in 2021. Future growth produces a surplus of £6.27 million in 2026, increasing to £29.91 million in 2031 and £47.56 million in 2036.

3.76 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 14. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £11,000 per sq.m. This figure is based on the average turnover of the main food supermarket operators (Asda, Morrisons, Sainsbury's, Tesco and Waitrose) as new floorspace is likely to be provided by these operators rather than small independent convenience shops.

3.77 The short to medium term capacity figures up to 2026 suggest surplus of available convenience goods expenditure can only support a limited amount of additional floorspace in the Borough as a whole (570 sq.m net or 815 sq.m gross) over and above commitments. This represents a store of a similar size to Iceland in the Brunel Centre. In the period 2026 to 2036 continued growth could support further development in the Borough. The projection to 2036 is 4,324 sq.m net (6,176 sq.m gross). The appropriate distribution of development is assessed in Section 5.0 of this Report.

3.78 Table 3.3 summarises the convenience goods floorspace requirements.

Table 3.3 New Convenience Goods Floorspace Floorspace Needed to Meet Growth Projections – Over and Above Commitments

	Floorspace (sq.m gross)			
	By 2021	By 2026	By 2031	By 2036
		51	526	881
	0	354	2,875	4,757
		0	0	0
	581	622	675	714
	581	**1,027**	**4,076**	**6,352**

Source: Table 14, Appendix 2

Note: Negative floorspace requirement excluded.

3.79 These figures can be compared to the 2007 Retail and Leisure Study Update, which forecast a need for 1,100 sq.m net convenience goods floorspace in Swindon Town Centre in 2021, after making an adjustment for the market shares following the implementation of the Regent Circus scheme. For "Swindon non-central", there was a requirement for 7,800 sq.m net by 2021, and a limited requirement for Highworth (200 sq.m net) and Wroughton (100 sq.m net).

3.80 Overall, there is a much lower requirement for convenience goods floorspace in Swindon Borough since the 2007 study was undertaken. This is probably due to the effects of the recession, which reduced the overall forecast expenditure growth rates, and changes to the market shares/shopping patterns.

3.81 In addition to the convenience goods commitments referred to above, there are a number of proposals that include additional convenience goods floorspace, either within Local Plan allocations for new communities, or development briefs, as detailed in Table 12, Appendix 2. The proposals all fall within the "other Swindon" area.

3.82 It has been estimated that the Wichelstowe allocation will include an additional 1,000 sq.m net of convenience goods floorspace within a new district/local centre, in addition to the recently opened Waitrose store. Within the Eastern Villages allocation, it has been assumed that around 2,000 sq.m net of convenience goods floorspace will be accommodated within new district and local centres, in addition to the existing Sainsbury's store at Oxford Road. Smaller local centres are proposed within the Commonhead (375 sq.m net), Tadpole Farm (375 sq.m net) and Kingsdown (425 sq.m net) allocations.

3.83 In addition, the development briefs for sites on Rodbourne Road could potentially include a food store of around 1,400 sq.m net and a small element of "roadside" retail floorspace (150 sq.m net).

3.84 While the details of these proposals have yet to be determined through planning applications, and are not commitments that need to be taken into account in assessing retail capacity, their inclusion within the adopted Local

Plan and development briefs suggests an intention for these to come forward. Table 15 of Appendix 2 provides a summary of the surplus or deficit of expenditure available for further development, once all of the commitments and proposals have been taken into account, converted into potential new floorspace estimates in Table 16.

3.85 These proposals absorb a significant proportion of the surplus expenditure within "other Swindon". There is limited surplus expenditure or floorspace requirements for the Borough as a whole over the period to 2036.

3.86 Table 3.4 summarises the amended floorspace requirements, as a result of taking into account all of the proposals outlined above. This is the additional floorspace that would be required over and above all commitments (as at April 2016) and proposals, assuming that all of these schemes have come forward.

Table 3.4 New Convenience Goods Floorspace Floorspace Needed to Meet Growth Projections – Over and Above Commitments and Proposals

	Floorspace (sq.m gross)			
	By 2021	By 2026	By 2031	By 2036
		51	526	881
	0	0	0	0
		0	0	0
	581	622	675	714
	581	**673**	**1,201**	**1,595**

Source: Table 16, Appendix 2 Note: Negative floorspace requirement excluded.

Capacity for Comparison Goods Floorspace

3.87 The household survey suggests that the Borough's retention of comparison goods expenditure is generally higher than for convenience goods. As set out in Section 2, the higher level of comparison expenditure retention reflects the dominance of Swindon within the immediately surrounding area. The survey results also show the influence of the larger, higher order centres in the sub-region, and there is some leakage of comparison goods expenditure to these centres, including Cirencester, Chippenham and Bath.

3.88 Future improvements to comparison retail provision within the Borough could help to claw back some additional expenditure leakage. However, major developments in neighbouring authorities could limit the ability of shopping facilities in the Borough to increase their market share of expenditure.

3.89 Some retail development will be necessary in Swindon in order to prevent market shares falling significantly in the future. An appropriate strategy for Swindon should be to seek to prevent market shares falling significantly, in the face of increasing future competition in nearby centres, whilst maintaining the vitality and viability of centres.

3.90 Based on the baseline population projections, available comparison goods expenditure has been projected forward to 2021, 2026, 2031 and 2036 in Appendix 3, and summarised in Table 13. Available comparison expenditure to facilities within the Borough is expected to increase from £1,034.71 million in 2016 to £1,224.71 million in 2021. Available expenditure is expected to increase to £1,484.06 million in 2026, £1,814.33 million in 2031 and to £2,188.27 million in 2036.

3.91 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2016 (ie. satisfactory levels), as shown in Table 13 (Appendix 3). Table 13 assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of 2% per annum is adopted, and this growth is required to maintain the health and viability of town centres, as recommended by Experian. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

3.92 Retail commitments (as at April 2016) are added in at 2021, as set out in Table 11 of Appendix 3 and summarised below.

3.93 In terms of comparison goods commitments in Swindon Borough, the Kimmerfields development within Swindon Town Centre will include a significant amount of Class A1 comparison floorspace (LPA ref. S/11/0614). Kimmerfields is an office-led development that will provide a new central business district. The approved scheme includes a total of 13,471 sq.m gross of Class A1-A5 floorspace, and for the purposes of this assessment we have estimated that an indicative figure of 7,500 sq.m net could be comparison goods floorspace.

3.94 Additional comparison goods commitments include planning permission for new bulky goods retail units at Barnfield Road (LPA ref. S/08/2385) which will provide 2,654 sq.m net of floorspace. Permission has also been granted for the change of use to allow a bulky goods unit of 2,470 sq.m net at Bridgemead Industrial Estate (LPA ref. S/14/0024/RM). There is also a small amount of comparison floorspace proposed in the convenience store commitment to expand the Aldi at Hobley Drive totalling 251 sq.m net.

3.95 Within Swindon Borough as a whole, by 2021 there will be a small surplus of £6.85 million, taking into account the above commitments. This surplus increases to £139.45 million in 2026. By 2031, future expenditure growth generates an expenditure surplus of £329.77 million, which will grow to £549.2 million by 2036. Surplus comparison expenditure has been converted into net comparison sales floorspace projections at Table 14 in Appendix 3, adopting an average sales density of £7,000 per sq.m in 2016, which is projected to grow by 2% per annum in the future due to improved turnover efficiency.

3.96 The short to medium term capacity figures up to 2026 suggest surplus of available comparison goods expenditure could support up to 16,343 sq.m net sales floorspace (21,790 sq.m gross) in the Borough as a whole. The appropriate distribution of development is assessed in Section 5.0 of this Report. In the long term, surplus expenditure at 2036 could support 52,800 sq.m net sales floorspace (70,399 sq.m gross) in the Borough as a whole, as shown in Table 14, Appendix 3. Table 3.5 summarises the comparison goods floorspace projections.

Table 3.5 New Comparison Goods Floorspace Need to Meet Growth Projections – Over and Above Commitments

	Floorspace (sq.m gross)			
	By 2021	**By 2026**	**By 2031**	**By 2036**
		20,853	33,479	45,537
	0	746	12,862	24,397
		91	157	219
	37	99	174	245
	10,409	**21,790**	**46,672**	**70,399**

Source: Table 14, Appendix 3 Note: Negative floorspace requirement excluded.

3.97 These figures can be compared to the 2007 Retail and Leisure Study Update, which forecasted a need for 40,350 sq.m net comparison goods floorspace in Swindon Town Centre in 2021, after making an adjustment for the market shares following the implementation of the Regent Circus scheme. For “Swindon non-central”, there was a requirement for 25,200 sq.m net by 2021.

3.98 While there is a lower requirement for comparison goods floorspace in Swindon since the 2007 study was undertaken, this in part is due to the allowance for the retail commitments, particularly at Kimmerfields. Again, the effects of the recession significantly reduced the overall forecast expenditure growth rates, and there will have been some changes to market shares/ shopping patterns.

3.99 In addition to the comparison goods commitments referred to above, there are a number of proposals that include additional comparison goods floorspace, either within planning applications, Local Plan allocations for new communities, or development briefs, as detailed in Table 11, Appendix 3. The proposals all fall within the “other Swindon” area.

3.100 An outline planning application has been submitted for development of the North Star site (LPA ref. S/OUT/15/0943). The site is allocated for regional leisure uses. The application includes 12,000 sq.m gross (9,000 sq.m net) of comparison goods floorspace, of which a minimum of 9,000 sq.m gross is “sports” retailing. Although 3,000 sq.m gross could include an element of other A1 uses, for the purposes of this assessment, we have assumed that all of the floorspace would be comparison goods floorspace.

3.101 It has been estimated that the Wichelstowe allocation will include an additional 1,000 sq.m net of comparison goods floorspace within a new district/local centre, in addition to the recently opened Waitrose store. Within the Eastern

Villages allocation, it has been assumed that around 1,500 sq.m net of convenience goods floorspace will be accommodated within new district and local centres, in addition to the existing Sainsbury's store at Oxford Road. Smaller local centres are proposed within the Commonhead (200 sq.m net), Tadpole Farm (200 sq.m net) and Kingsdown (150 sq.m net) allocations. In addition, the development brief for the Former School site on Rodbourne Road could potentially include a food store, of which around 280 sq.m net could be comparison goods floorspace.

3.102 While the details of these proposals have yet to be determined through planning applications, and are not commitments that need to be taken into account in assessing retail capacity, their inclusion within the adopted Local Plan and development briefs suggests an intention for these to come forward. Table 15 of Appendix 3 provides a summary of the surplus or deficit of expenditure available for further development, once all of the commitments and proposals have been taken into account, converted into potential new floorspace estimates in Table 16.

3.103 These proposals absorb a significant proportion of the surplus expenditure, and there is no identified surplus expenditure or floorspace requirements for the Borough as a whole until 2026. Table 3.6 summarises the amended floorspace requirements, as a result of taking into account all of the proposals outlined above.

Table 3.6 New Comparison Goods Floorspace Need to Meet Growth Projections – Over and Above Commitments and Proposals

	Floorspace (sq.m gross)			
	By 2021	By 2026	By 2031	By 2036
		20,853	33,479	45,537
	0	0	0	10,306
		91	157	219
	37	99	174	245
	10,409	**21,043**	**33,810**	**56,307**

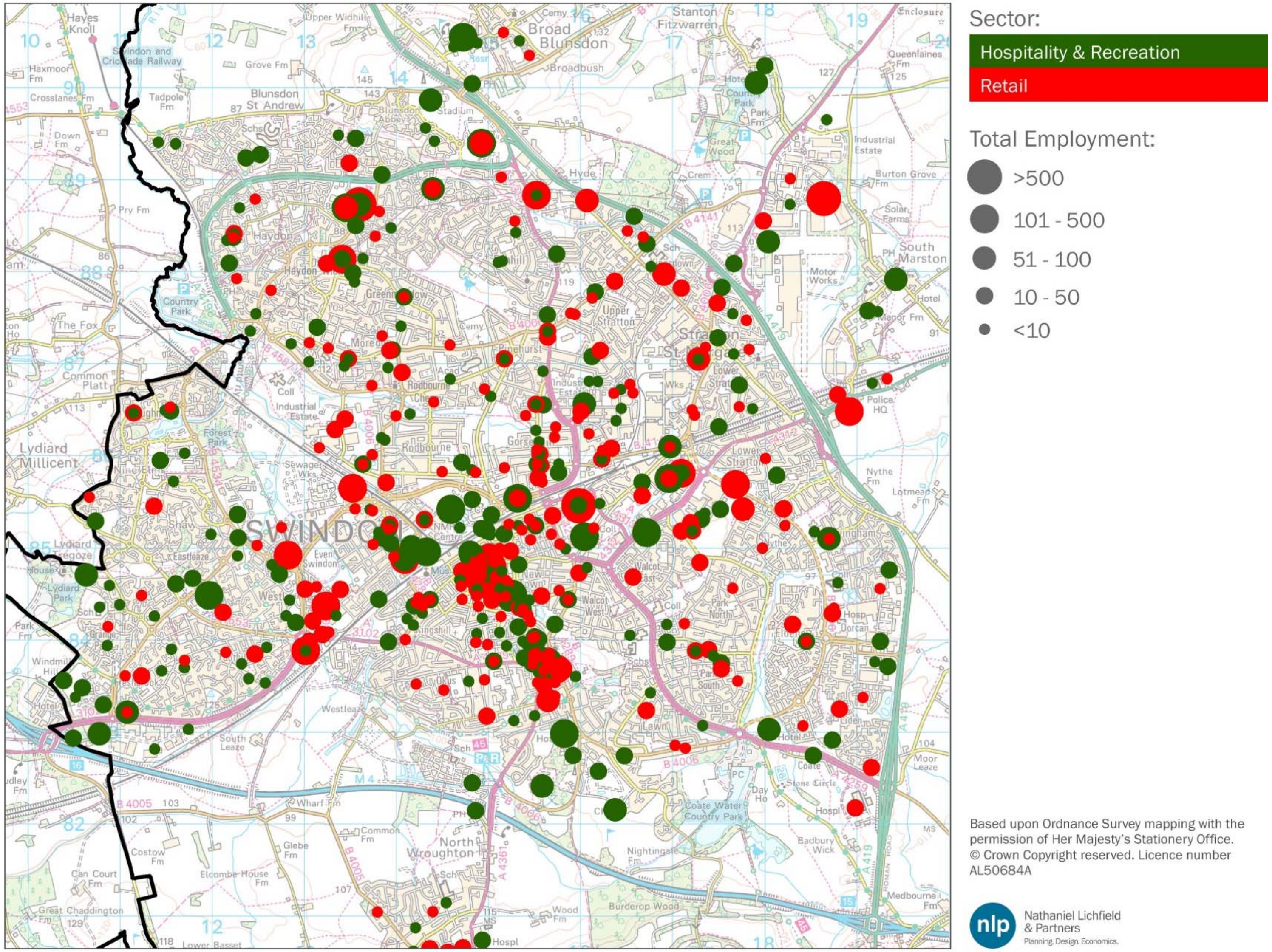
Source: Table 16, Appendix 3 Note: Negative floorspace requirement excluded for other Swindon

3.104 As a result of the inclusion of these proposals, surplus expenditure at 2036 could support 42,231 sq.m net sales floorspace (56,307 sq.m gross) in the Borough as a whole. This projection is over and above commitments and proposals as listed in Table 11 in Appendix 3. Given that the implementation of proposals is uncertain the projections in Table 3.5 should be adopted for plan making purposes.

Qualitative Need for Retail Floorspace

3.105 Figure 3.6 shows the distribution of retail/food and beverage businesses within Swindon Borough.

Figure 3.6: Location of Retail/Food and Beverage Businesses within Swindon Borough



3.106 Qualitative need can be assessed through consideration of the following factors:

- deficiencies or 'gaps' in existing provision;
- consumer choice and competition;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs such as underserved markets; and
- the quality of existing provision.

Convenience Goods Shopping

3.107 The household survey results indicate that most residents in the study area undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often, and the household survey identified that 87% of respondents travel to do their main food shopping by car (both driver and passenger). The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores are the usual destination for these types of shopping trip.

3.108 There are seven large food stores of over 2,000 sq.m net within Swindon Borough, ie. Morrisons, Regent Circus (3,038 sq.m net), Asda, Orbital Retail Park (10,625 sq.m net), Asda, West Swindon District Centre (5,758 sq.m net), Morrisons, Eldene Drive (2,549 sq.m net), Sainsbury's, Oxford Road (4,116 sq.m net), Sainsbury's, Paddington Drive (5,261 sq.m net) and Tesco Extra, Ocotal Way (8,444 sq.m net).

3.109 The capacity projections in this section suggest there is a limited requirement for additional convenience goods retail floorspace within Swindon Borough in the short to medium term, which suggests that the existing provision in these centres is sufficient, and there is no qualitative need for additional floorspace.

Swindon Town Centre

3.110 The range and choice of goods available within the Morrisons at Regent Circus in Swindon Town Centre is good. This large store is supported by a range of smaller supermarkets and convenience stores, comprising Sainsbury's at Brunel Plaza (1,554 sq.m net), Marks & Spencer Food Hall (1,347 sq.m net), Iceland (508 sq.m net), Tesco Metro (899 sq.m net) and Co-op (294 sq.m net), with a range of smaller, independent convenience stores.

3.111 None of the respondents to the household shopper survey stated that more food supermarkets would make them shop more often in Swindon Town Centre, although one respondent suggested opening a Waitrose supermarket. This suggests that the current provision in the centre is satisfactory.

3.112 Residents in Swindon Town Centre also have a good access to food stores throughout the Swindon urban area, and the results of the household survey support this, demonstrating the popularity of the large stores referred to above.

3.113 There is no obvious qualitative deficiency in food store provision in Swindon Town Centre, although the quantitative assessment suggests that the existing stores are trading at a level below company average.

Swindon Old Town

3.114 The main food store in Swindon Old Town is a Co-op (1,603 sq.m net), which provides a limited convenience goods offer for the centre. Again, none of the respondents to the household survey suggested that the provision of more food supermarkets would make them shop more often in Swindon Old Town, although one respondent suggested improvements to the existing Co-op store.

3.115 There is no surplus expenditure identified in Swindon Old Town over the period to 2036, which suggests that the existing provision is sufficient. In qualitative terms, food store provision could be improved in Swindon Old Town through increased competition and choice, however residents have good access to food stores in Swindon Town Centre and the wider urban area.

Wroughton

3.116 Wroughton has a reasonable range of smaller food stores, and contains a Co-op (143 sq.m net), M Local (143 sq.m net) and Tesco Express (409 sq.m net). The capacity projections suggest there is surplus convenience goods expenditure in Wroughton at 2016 (£4.11 million), increasing to £5.50 million by 2036. This surplus is only sufficient to support a medium sized convenience store (500 sq.m net), and it is unlikely Wroughton's catchment area is of sufficient size to support a large food store.

Highworth

3.117 Highworth has a limited convenience goods offer, with a medium sized Co-op store (677 sq.m net) and a Tesco Express (230 sq.m net). There is no surplus expenditure identified in Highworth over the period to 2036, which suggests that the existing provision in the centre is sufficient, and there is no qualitative need for additional floorspace.

Other Swindon

3.118 The remaining district and primary rural centres in the Borough do not contain any large (+ 2,000 sq.m net) food stores suitable for bulk food shopping. Gorse Hill has a Lidl store (1,640 sq.m net), Co-op (630 sq.m net) and Iceland (450 sq.m net), and Cavendish Hill contains a Co-op (689 sq.m net). There is no qualitative deficiency in provision, nor are there any particular parts of the Borough that are considered to suffer from a lack of access to large food stores

3.119 There is emerging capacity for "other Swindon" at 2026. Up to 5,395 sq. m gross could be provided by 2036, allowing for under trading in Old Town. The qualitative and quantitative assessment suggests the development of the new communities at Wichelstowe, Commonhead, Eastern Villages, Tadpole Farm and Kingsdown, and the retail floorspace that will be incorporated within the new communities to serve the local residents, will be the priority for new convenience goods provision within Swindon Borough.

3.120 If commitments and proposals are taken into account there is no additional requirement for convenience goods floorspace up to 2036, as shown in Table 16 in Appendix 2.

High Street Comparison Shopping

3.121 An assessment of the shopping hierarchy is shown in Section 2 and an audit of the shopping facilities within the main centres in the Borough is shown in Appendix 6.

Swindon Town Centre

3.122 Swindon Town Centre is the dominant high street comparison shopping destination in terms of the number of outlets, sales floorspace and representation of multiple retailers. It has a reasonable range of comparison shops including many national multiples and independent specialists. However, Swindon is positioned below other centres in the shopping hierarchy, and is ranked below Bath, Bristol, Cheltenham, Oxford and Reading in terms of multiple retailer representation. These competing centres are accessible to residents within Swindon's catchment area and have a more extensive range of multiple retailers than Swindon Town City Centre. In addition to these larger centres Swindon also competes with other reasonably strong shopping destinations e.g. Cirencester, Chippenham, Newbury and Salisbury. Many residents within Swindon's catchment area are likely to continue to shop in these competing centres.

3.123 Swindon Town Centre has representation in most comparison goods categories and there is generally a choice of outlets within each category (168 comparison shops in total). The clothing and footwear sector is well represented with 43 shops. Swindon has a reasonable mix of lower and higher order comparison goods. Lower order comparison goods are items bought on a regular basis, where customers are less likely to shop around or travel long distances to shop. Higher order goods tend to be higher value items bought occasionally, where customers window shop and compare prices and goods. Healthy town centres usually have a good mix of higher and lower order comparison goods shops.

3.124 The household survey results (included at Appendix 7) indicate that are number of respondents suggested the shopping offer in Swindon Town Centre could be improved, as follows:

- 13.5% of respondents wanted a better choice of shops in general;
- 6.5% were looking for better quality shops;
- 4.7% wanted a better range of independent stores/specialist shops; and
- 4.5% wanted a better choice of clothing shops.

3.125 Although these percentages show dissatisfaction amongst a minority of customers, the result demonstrate there is scope to improve the shopping offer in Swindon town centre to meet the needs of all residents.

Swindon Designer Outlet

3.126 Swindon Designer Outlet is a popular and successful comparison shopping destination, predominantly orientated around fashion shopping. The SDO has a critical mass of outlets, including 86 comparison goods operators, and it draws from a wide catchment area. The household survey results indicate a high level of customer satisfaction with the SDO.

Other Centres

3.127 Swindon Town Centre is supported by a network of smaller centres including Swindon Old Town district centre, West Swindon Shopping Centre, Orbital Retail Park district centre, Cavendish Square district centre, Gorse Hill district centre, Highworth rural centre and Wroughton rural centre.

3.128 There is a reasonable range and choice of comparison shops in Swindon Old Town (29 in total), but with limited choice within each goods category. The number of comparison goods shops in Swindon Old Town has fallen significantly since 2010.

3.129 The household survey results (included at Appendix 7) indicate that are number of respondents suggested the shopping offer in Swindon Old Town could be improved, as follows:

- 7.5% stated a better choice of shops in general;
- 1.7% wanted a better range of independent stores/specialist shops;
- 1.3% wanted a better choice of clothing shops; and
- 1.1% were looking for better quality shops.

3.130 These levels of dissatisfaction are lower than those recorded for Swindon Town Centre, which suggest customers don't expect to find an extension range and choice of comparison good shopping in Old Town. Old Town's role is predominantly local shops, services and the evening economy.

3.131 Comparison retailers in these supporting smaller centres are predominantly small independent traders selling lower order comparison goods, such as pharmaceutical goods, flowers and other day to day items.

Retail Warehouses

3.132 Swindon has an excellent provision of retail parks and retail warehouses, with around 70,000 sq.m gross of comparison retail floorspace. The retail warehouses provide a mix of bulky and non-bulky comparison goods.

3.133 The bulky goods sector includes: B&Q, Wickes, Homebase, DFS, John Lewis at Home, PC World, The Range, Oak Furnitureland, Carpetright, Pets at

Home, Dunelm, Carpetright, Currys, Dreams Beds, Harveys, Maplin and Staples

3.134 The non-bulky sector includes: Argos, Boots, Brantano, TK Maxx, Toys R Us, Mamas & Papas, Hobbycraft, Poundstretcher, Family Bargains, Mothercare, Laura Ashley and Next.

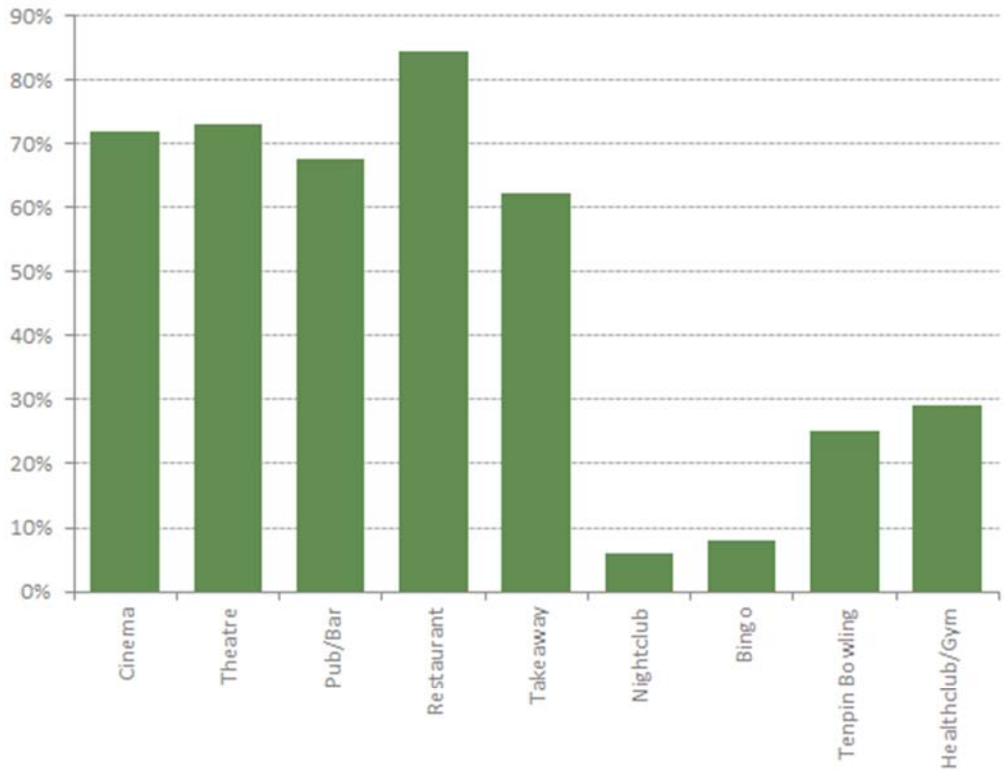
4.0 # The Need for Other Town Centre Uses

Introduction

4.1 This section assesses the potential for commercial leisure and other town centre uses in Swindon Borough, including cinemas, tenpin bowling, bingo, theatres, nightclubs, private health/fitness suites and catering, pubs and bars.

4.2 Household survey respondents were asked about their family's leisure activities. The participation rates (ie. whether respondents undertake the activity or not) within the study area are shown in Figure 4.1. An assessment of these sectors is set out in this section.

Figure 4.1: Leisure Participation (% of Households)



Source: NEMS Household Survey, January 2016

Commercial Leisure Uses

4.3 Residents in Swindon have good access to a range of commercial leisure and entertainment facilities both within the Borough, where most of the key sectors are represented, and in the surrounding area.

4.4 Based on NLP's experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres and family entertainment centres require a large catchment population, and often benefit from locating together or on large out of centre leisure parks.

Cinemas

4.5 Swindon Borough contains three multiplex cinemas – Cineworld at Regent Circus (6 screens, 950 seats), Cineworld at Shaw Ridge Leisure Park (7 screens, 1,874 seats) and the Empire at Greenbridge Retail and Leisure Park (12 screens, 2,048 seats).

4.6 The household survey results indicate that 72% of households within the study area visit the cinema. The main destinations visited by these participating households are set out in Table 4.1 below.

Table 4.1: Main Cinema Trip Destinations

Destination of Last Trip	% of Participating Households
Empire Cinema, Swindon	36.7%
Cineworld, Shaw Ridge Leisure Park, Swindon	18.6%
Cineworld, Regent Circus, Swindon	8.5%
Cineworld, Marriotts Walk, Witney	4.9%
The Palace Cinema, Devizes	3.9%
Vue, Newbury	3.2%
Odeon, St Stephen's Place Leisure Park, St Stephen's Place, Trowbridge	3.2%

Source: NEMS Household Survey January 2016

4.7 The capacity for cinema seats within Swindon Borough is calculated in Appendix 4. The study area population in 2016 (519,810 people) will generate 1,455,468 cinema trips per annum, based on the national average visitation rate (2.8 trips per annum). The market shares estimated from the household survey suggests about 969,651 of these cinema trips will be attracted to the cinemas in Swindon, or 1,212,063 trips allowing for 20% inflow (see Tables 2 to 4 in Appendix 4).

4.8 Based on the national average population per cinema screen (47,000 people per screen) and per cinema seat (232 people per seat), 1,212,063 trips generates demand for 26 cinema screens or 5,224 cinema seats. The existing cinemas in Swindon have a total of 25 screens and 4,872 seats. These figures suggest that there is an existing under-supply of one screen or 352 seats in Swindon Borough (see Tables 9 and 10 in Appendix 4).

4.9 The number of trips generated by the study area population at 2021, 2026, 2031 and 2036 is shown in Tables 5 to 8 in Appendix 4. The number of trips attracted to Swindon Borough is expected to increase from 1,212,063 in 2016 to 1,391,135 in 2036.

4.10 Based on the national average visitation rate, the study area population at 2036 could generate demand for 30 cinema screens or 5,996 cinema seats within Swindon Borough. This suggests that there is potentially a need for five additional cinema screens or 1,124 additional cinema seats over the study period.

4.11 The current outline planning application for development of the North Star site (LPA ref. S/OUT/15/0943) includes a cinema with seven screens as part of the wider leisure proposals. If approved and implemented, this would meet the identified need for additional cinema screens in the Borough. The implications of the North Star proposals are that a higher proportion of cinema trips could be attracted to Swindon Borough, ie. the market share would increase, or that some trips could be diverted from existing facilities. Overall, the delivery of an additional two cinema screens more than the identified need over the study period is not considered to represent overprovision.

Theatres

4.12 In total 73% of respondents to the household survey indicated that they visit the theatre. When asked where they had last visited the theatre, the following main destinations were mentioned:

Table 4.2: Main Theatre Trip Destinations

Destination of Last Trip	% of Participating Households
Wyvern Theatre, Swindon	31.9%
London / West End	23.4%
Bristol	8.4%
Oxford	7.9%
Bath	7.1%
The Arts Centre, Swindon	2.3%
Cheltenham	2.2%

Source: NEMS Household Survey January 2016

4.13 Theatres in Swindon attract around 34% of theatre trips within the study area, and a higher proportion than London/West End.

4.14 Data from the British Theatre Consortium, UK Theatre and the Society of London Theatre (2013) estimates annual theatre attendance in the South West Region was 31.4 per 100 people. Based on this average, the population of the study area in 2016 (around 519,800) will generate 163,200 theatre trips per annum. The household survey results suggest that around 34% of these trips (or 55,500) will be retained in Swindon. The study area population at 2036 (around 589,300) could generate 185,000, an increase of 21,800 trips. Based on current market shares, around 7,400 of these additional trips are likely to be retained in Swindon.

4.15 The existing theatre provision in Swindon is good in quantitative terms, and should be able to accommodate this increase in demand. There is not considered to be a clear need for additional theatre provision in the Borough, but in qualitative facilities can be improved.

Private Health and Fitness Clubs

4.16 The household survey indicates that 31.4% of respondents or their families visit health/fitness clubs. Of the participating households, the main destinations mentioned are summarised in Table 4.3. Swindon Borough attracts around 39% of health and fitness facilities trips within the study area, with 61% of trips to destinations in neighbouring authorities including Wiltshire, Cotswold and Vale of White Horse, suggesting that people tend to use more local facilities.

Table 4.3: Main Health and Fitness Destinations

Destination of Last Trip	% of Participating Households
David Lloyd, Swindon	4.8%
The Olympiad Leisure Centre, Chippenham	4.8%
Nuffield Health, Swindon	4.4%
Devizes	4.1%
DW Sports Fitness, Swindon	3.8%
Link Centre, Swindon	3.8%
Cirencester	3.8%
Devizes Leisure Centre, Devizes	3.8%
Swindon Town Centre	3.4%

Source: NEMS Household Survey January 2016

4.17 The Sport England/Active Places data indicates there are 30 health and fitness suites in the Borough, of which seven are for school's private use only. These private use facilities are relatively small, with 89 fitness stations in total. The 23 suites open to the general public (including registered members) have 1,482 fitness stations in total, as shown below.

Table 4.4: Swindon Health and Fitness Clubs (Sport England/Active Places Data 2016)

Name	Type	No. Stations
24 Hour Gym	Pay and Play	140
Battleground Fitness	Pay and Play	20
Blunsdon Fitness +	Pay and Play	40
Broome Manor Golf Gym Complex	Pay and Play	23
Grange Leisure Centre	Pay and Play	40
Haydon Wick Community Leisure Centre	Pay and Play	25
Health Hydro	Pay and Play	15
Highworth Recreation Centre (The Rec)	Pay and Play	26
Link Centre	Pay and Play	85
New College Swindon Sports Centre	Pay and Play	24

Name	Type	No. Stations
Nuffield Health (Swindon)	Pay and Play	76
Oasis Leisure Centre (Swindon)	Pay and Play	100
Phoenix Gymnasium	Pay and Play	50
Pro Strength And Fitness	Pay and Play	70
Simply Gym Swindon	Pay and Play	135
South Marston Hotel	Pay and Play	55
David Lloyd Club (Swindon)	Members	100
DW Sports Fitness (Swindon)	Members	144
Kiss Gyms (Swindon)	Members	180
Marriott Leisure Club (Swindon)	Members	32
Ridgeway Leisure Centre	Members	17
Spirit Health Club (Swindon)	Members	13
Velocity Health & Fitness (Swindon)	Members	72
Total		**1,482**

4.18 The ONS SNPP 2012 projections estimate that Swindon Borough's population is around 222,300 in 2016, and is forecast to grow to around 265,200 in 2036. Swindon Borough currently has 7.07 fitness stations per 1,000 people (1,571 stations in total, including private use school facilities).

4.19 The South West region has 816 Sport England registered health and fitness suites (148 private, 152 members only, 18 sports club/community association and 498 pay and play) with 30,567 fitness stations (average of 37 stations per suite). This existing provision equates to 5.58 fitness stations per 1,000 people, based on an estimated population of around 5.48 million in 2016.

4.20 This suggests that Swindon Borough has a good provision of fitness suites per head of population, around 27% higher than the South West average. We understand that the Brunel Centre is intending to include a gym in their investment plans for the centre, and this would further improve access to health and fitness facilities for residents and visitors to Swindon Town Centre.

4.21 The adult (over 14) population of the study area (around 424,700 in 2016) could generate demand for about 51,000 public and private gym membership places, based on the national average membership rate (12%).

4.22 Assuming 39% of members are retained within Swindon, this suggests around 19,900 members use facilities in Swindon Borough. This estimate implies that the 23 facilities in the Borough (excluding private school facilities) have an average number of users of around 865 per facility. The national average for private fitness clubs is 1,375 members per club. These figures indicate that there is an adequate supply of gyms and health clubs within Swindon Borough, and there does not appear to be a requirement to increase the provision of facilities over the study period.

Tenpin Bowling

4.23 There is a tenpin bowling facility at Tenpin, Shaw Ridge Leisure Park (32 lanes). The household survey results suggest that 25.2% of households in the study area visit tenpin bowling facilities. 69.8% of these respondents visit Tenpin Swindon, and this was the most popular tenpin bowling destination in the study area as a whole. The main destinations are set out in Table 4.5.

Table 4.5: Main Tenpin Bowling Destinations

Destination of Last Trip	% of Participating Households
Tenpin, Swindon	69.8%
MFA Bowl, Newbury	5.9%
Bowlplex Bowling, Oxford	2.4%
Christie Miller Sports Centre, Melksham	2.0%
Swindon Town Centre	2.0%
Tenpin, Gloucester	1.6%

Source: NEMS Household Survey January 2016

4.24 Swindon Borough's population (around 222,300 in 2016) as a whole can theoretically support 19 lanes, based on one lane per 12,000 people (national average). Population growth in Swindon Borough (around 42,900 between 2016 and 2036) suggests that a further four lanes could be supported by 2036.

4.25 Given the existing provision at Tenpin, Shaw Ridge Leisure Park (32 lanes), these figures suggest that the existing tenpin bowling facility adequately meets the needs of Swindon for the foreseeable future, and that the facility is also likely to benefit from inflow of residents from the surrounding area. There is no need for additional tenpin bowling facilities within the Borough.

Bingo, Games of Chance and Gambling

4.26 There is a Gala Bingo at Greenbridge Retail Park. There are a number of betting shops within the Borough, and there is representation in all of the main centres. The household survey results indicated that 8% of households in the study area visit bingo facilities. The main destinations are shown in Table 4.6.

Table 4.6: Main Bingo Destinations

Destination of Last Trip	% of Participating Households
Gala Bingo, Swindon	48.7%
Devizes	3.7%
Gala Bingo, Oxford	2.5%
Calne	2.5%
Caterton	2.5%
Swindon Town Centre	2.5%
Lambourn	2.5%

Rodbourne	2.5%

Source: NEMS Household Survey January 2016

4.27 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators require buildings of between 2,000 - 3,000 sq.m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 within freestanding towns (source: Business In Sport and Leisure BISL).

4.28 The adult (over 18) population of Swindon Borough (estimated around 172,500 in 2016) would generate about 301,875 admissions based on the national participation rate (1.75 trips per adult). Based on national average figures (113,000 admissions per club), the Borough population could in theory support two or three bingo facilities, if all trips were retained within the Borough. The existing facilities in Swindon appear to cater adequately to meet existing demand, however there may be scope to provide an additional bingo facility within Swindon Borough to meet the existing and likely future demand.

Nightclubs

4.29 The household survey results indicated that 6.1% of households in the study area visit nightclubs, of which 29.5% of these households attended a nightclub event in the Borough. The main destinations are shown in Table 4.7.

Table 4.7: Main Nightclub Destinations

Destination of Last Trip	% of Participating Households
Swindon Town Centre	19.7%
Bath	16.4%
Swindon Old Town	9.8%
Bristol	8.2%
Devizes	4.9%
London	4.9%

Source: NEMS Household Survey January 2016

4.30 Large nightclubs (capacity up to 2,000 people) are generally located in large towns with a population of over 100,000 people. Legislation that has extended licensing hours for other drinking establishments and banned smoking indoors in public buildings has removed the industry's main competitive advantage. Customers can now visit pubs or bars who hold late night events. Nightclubs also came under pressure during the economic downturn.

4.31 There is no clear need for additional nightclub facilities in Swindon Borough.

Other Services, Restaurants, Bars and Takeaways

4.32 Service uses perform an important role in the overall offer of a centre, and encourage customers to shop locally. The service uses are categorised as follows:

- **Class A1 services** cover a range of uses, including hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as Class A3), funeral parlours and post offices.
- **Class A2 services** include banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
- **Class A3/A5** includes restaurants, cafés (A3) and takeaways (A5).
- **Class A4** pubs/bars (Class A4).

4.33 Food and beverages is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains. These national chains have sought to increase their geographical coverage. These types of food and drink operators (Class A3 and A4) i.e. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. Within town centres, the demand has increased, including a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly.

4.34 The key categories for food and beverage offers are:

- **impulse:** characterised by their produce range that is typically highly visual and hand-held so that it can be eaten “on the go”;
- **speed eating fast food:** food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- **refuel and relax:** a drink and snacks and a short break in a pleasant environment rather than focusing on eating a main meal; and
- **casual dining/leisure dining:** incorporating a number of food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

4.35 Food and beverage establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks and are important services within town and local centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly. A balance between Class A1 and Class A3 to A5 uses needs to be maintained.

Food and Beverage Expenditure

4.36 Experian's latest 2014 local expenditure figures have been adopted. Food and beverage expenditure per capita projections are shown in Table 2, Appendix 5. These figures indicate that the average expenditure in the study area for food and beverages consumed away from the home plus takeaways eaten at home is £1,195 per capita in 2016. The total food and beverage expenditure in the study area is £621.34 million in 2016 (Table 3, Appendix 5).

4.37 Food and beverage expenditure per capita is expected to increase in real terms (excluding inflation) by 31% between 2016 and 2036. Taking into account population growth, total food and drink expenditure within the study area is expected to increase from £621.34 million in 2016 to £925.09 million in 2036, an increase of about 49% (Table 3, Appendix 5).

Food and Beverage Expenditure Patterns

4.38 Existing food and beverage expenditure patterns have been modelled based on the household survey results within the study area zones. Base year (2016) penetration rates are shown in Table 4, Appendix 5 and expenditure patterns are shown in Table 5. The estimated expenditure currently attracted to facilities within Swindon Borough is £275.62 million in 2016.

4.39 Figures A8.5 and A8.6 in Appendix 8 show the food and beverage market shares for Swindon Borough and Swindon Town Centre respectively.

4.40 The retention rate in Swindon Borough is reasonable, with around 41% of all food and beverage spending in the study area attracted directed to facilities in Swindon. An appropriate strategy for Swindon Borough should be to maintain this existing market share. The capacity projections in Appendix 5 are based on this approach.

4.41 An adjustment to the future market shares for Swindon Town Centre reflect the build-up of trade generated by the Regent Circus and the implementation of further town centre masterplan improvements and developments. Table 6 in Appendix 5 shows the adjusted future market shares, which redistributes market share from other parts of Swindon to the town centre based NLP's judgements. Available food and beverage expenditure has been projected forward to 2036 in Tables 7 to 11.

4.42 Food and beverage commitments are identified in Table 11. These comprise an estimate of the potential food and beverage floorspace within the Kimmerfields development (3,000 sq.m gross), and proposed roadside facilities at Highworth Road (1,750 sq.m gross).

4.43 Existing facilities are expected to increase their turnover by 1% per annum. Future available expenditure is compared with the projected turnover of existing facilities in Table 13 in Appendix 5. The commitments are taken into account in 2021. Surplus expenditure has been converted into floorspace projections in Table 14, Appendix 5, using an average sales density of £5,000 per sq.m, inflated by 1% per annum. The floorspace projections are broken down in Table 4.8.

Table 4.8 New Food and Beverage Floorspace Needed to Meet Growth Projections – over and above commitments

	Floorspace (sq.m gross)			
	By 2021	By 2026	By 2031	By 2036
Swindon Central	1,670	3,224	5,165	6,816
Other Swindon	0	0	538	2,109
Highworth	92	173	269	351
Wroughton	74	146	235	311
Total	**1,836**	**3,543**	**6,207**	**9,587**

Source: Table 14, Appendix 5 Note: Negative floorspace requirement excluded.

4.44 In addition to the food and beverage commitments referred to above, there are number of proposals that include additional food and beverage floorspace, either within Local Plan allocations for new communities, planning applications or development briefs, as detailed in Table 12, Appendix 5.

4.45 These proposals comprise a total of 13,850 sq.m gross, of which the majority is proposed within the planning application for the North Star site (12,000 sq.m gross). The revised floorspace projections are shown in Table 4.9.

Table 4.9 New Food and Beverage Floorspace Needed to Meet Growth Projections – over and above commitments and proposals

	Floorspace (sq.m gross)			
	By 2021	By 2026	By 2031	By 2036
Swindon Central	1,670	3,224	5,165	6,816
Other Swindon	0	0	0	0
Highworth	92	173	269	351
Wroughton	74	146	235	311
Total	**1,836**	**3,543**	**5,669**	**7,478**

Source: Table 15, Appendix 5 Note: Negative floorspace requirement excluded.

4.46 The effect of implementing the significant proposals at North Star would be to increase the deficit of available expenditure in “other Swindon”. The projections suggest there will be an “oversupply” of additional food and beverage floorspace within Swindon Borough of -2,513 sq.m gross at 2036.

Conclusions

4.47 The commercial leisure assessment in this section suggests:

1 the cinema capacity assessment suggests that there is potentially a need for five additional cinema screens or 1,124 additional cinema seats within Swindon Borough over the study period, which would be met by the North Star proposals;

2 the provision of health and fitness station is higher per population than the regional average, and the current retention of trips to use health and fitness facilities within the Borough suggests that there is no need for any further provision over the study period to meet future demand;

3 there is no need for additional tenpin bowling, bingo or nightclubs in Swindon Borough over the study period as existing provision is sufficient to meet likely future needs;

4 there is a qualitative need to improve theatre and cultural facilities; and

5 there is a requirement for around an additional 2,200 sq.m gross of food and beverage floorspace in Swindon Borough at 2026, increasing to 9,600 sq.m gross by 2036.

5.0 Accommodating Growth and Policy Review

Introduction

5.1 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. The need for development should be met in full and should not be compromised by limited site supply. In order to accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites. The NPPF (paragraphs 23 and 24) indicates local planning authorities should apply a sequential approach for development.

5.2 The National Planning Policy Guidance indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through expanding centres, with the sequential test to be followed.

5.3 The PPG acknowledges that not all successful town centre regeneration projects are retail-led, or will involve significant new developments. Public realm, transport and accessibility improvements can play important roles. Town centre car parking strategies, in a move away from resisting parking in town centres, are to encourage improvements to both the quality and quantity of car parking provision, where required to enhance the performance of town centres.

5.4 This section assesses the scope to accommodate growth within Swindon's main centres.

Floorspace Projections

5.5 The floorspace projections set out in the previous sections assume that other competing centres will improve in the future. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres e.g. Chippenham and Cirencester;
- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections;
- the effect of internet/home shopping on the demand for retail property;
- the level of operator demand for floorspace in Swindon Borough;
- the ability of Swindon Borough to maintain its existing market share of expenditure in the future in the face of increasing competition;

- the potential impact new development may have on existing centres.

5.6 The PPG suggests town centre strategies should plan for a 3-5 year period, but the longer term plan period should be considered. Projections up to 2021 are realistic and are based on up to date forecasts, which take into account the effects of the recession. The long term floorspace projections (up to 2026 and beyond) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review.

5.7 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. The impact of internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and internet services utilise existing stores rather than warehouses, for example Tesco Direct. Growth in internet sales will not always reduce the demand for shop floorspace. In addition, some of the growth in internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.

5.8 The quantitative and qualitative assessment of the potential for new Class A retail floorspace within the previous sections suggests there is scope for new development within Swindon Borough during the Plan period (to 2036). This section examines the opportunities for accommodating this projected growth and assesses potential to accommodate this floorspace.

5.9 Table 5.1 below summarises the floorspace projections in 2036, over and above the retail commitments.

Table 5.1: Summary of New Floorspace Needed to Meet Growth Projections to 2036 (sq.m gross)

Area	Convenience	Comparison	Food/Beverage	Total
Swindon Central	881	45,537	6,816	53,234
Other Swindon	4,757	24,397	2,109	31,263
Highworth	0	219	351	570
Wroughton	714	245	311	1,270
Total	**6,352**	**70,399**	**9,587**	**86,338**

Source: Table 14 in Appendix 2, Table 14 in Appendix 3 and Table 14 in Appendix 5

5.10 The projections up to 2036 suggest there is scope for over 86,000 sq.m gross of Class A1 retail and Class A3-A5 food and beverage floorspace in Swindon Borough up to 2036. The floorspace figures in Table 5.1 are indicative. There may be potential to focus more development in Swindon Town Centre than the projections suggest.

5.11 The sequential approach suggests that designated centres should be the first choice for retail and leisure development. Development should be appropriate in terms of scale and nature to the centre in which it is located. In accommodating future growth, the following issues should be taken into consideration:

- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
- Is the nature and scale of development likely to serve a wide catchment area?
- Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
- If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?

5.12 The existing stock of premises will have a role to play in accommodating projected growth, during the economic recovery. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. For comparison goods, a growth rate of 2% per annum is assumed and a growth rate of 1% per annum is assumed for food and beverage floorspace. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

5.13 There are currently 125 vacant shop units within the three main shopping centres in the Borough, which equates to an overall vacancy rate of 16.6%, which is above the Goad national average (11.8%). Existing vacant floorspace amounts to around 20,480 sq.m gross (giving an average unit size of 164 sq.m gross).

5.14 Vacant premises should help to accommodate future growth in Swindon Town Centre, Swindon Old Town and Swindon Designer Outlet. As a target, the current vacancy level in the centres could fall to 8%, ie. around the pre-recession national average, recognising there will always be some level of vacant space due to the churn of occupiers in centres. If this reduction in vacancy rate is achieved then the number of reoccupied units would be 65 re-occupied units in the Borough. Applying the average unit size above, the reoccupation of these 65 vacant units could accommodate about 10,500 sq.m gross of Class A1 to A5 floorspace.

5.15 The reoccupied units could be broken down as follows:

1. Swindon Town Centre: 45 units (7,400 sq.m gross);
2. Swindon Old Town: 9 units (1,500 sq.m gross);
3. Swindon Designer Outlet: 10 units (1,600 sq.m gross).

5.16 If this reduction in vacant units is achieved, i.e. around 10,500 sq.m gross of vacant floorspace is reoccupied, then the overall Class A1 to A5 floorspace projection up to 2036 would reduce from 86,300 sq.m gross (Table 5.1 above) to 75,800 sq.m gross. One way in which the Council could assist with realising a reduction in the vacant units, particularly in areas of low demand, could be to provide more affordable accommodation for independent retailers, e.g. through reduced or subsidised business rates.

5.17 Within town centres, many high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger regional and sub-regional centres. Operator demand for space has decreased during the recession and, of those national multiples looking for space, many prefer to locate in larger centres.

5.18 NLP sent out a canvas of operators to over 300 national retail, leisure and service operators in January 2016. Only 16 of these responded, and the comments are summarised in Appendix 10. Of these responses, only six had a requirement for new or expanded premises in Swindon Borough. The reasons given for what has prevented them securing these requirements to date included not being able to find suitable, affordable premises, finding the right shop for their requirements, unsuitable existing units and no new development.

5.19 The continuation of these trends will influence future operator requirements in Swindon Borough, with smaller vacant units becoming less attractive for new multiple occupiers, and retailers increasingly looking to relocate into larger units in higher order centres. However, smaller vacant units could still be attractive to independent traders and non-retail services.

5.20 The existing vacant units in the centres are generally small or in secondary locations. These units may not be attractive to retailers seeking modern units. It may be more likely that the vacant units would be reoccupied for non-A1 retail uses, and the Council should take a flexible approach to applications for the change of use of vacant retail units in secondary areas where this could improve activity and investment in the centres.

Policy Background

5.21 The Swindon Borough Local Plan 2026 was adopted in March 2015. The Local Plan was formerly known as the Swindon Borough Core Strategy and the Development Management Policies Planning Documents, and is the main planning policy document for Swindon Borough, providing the planning policy framework to deliver sustainable growth up to the year 2026 and beyond.

5.22 The Local Plan identifies that Swindon Town Centre is the only designated town centre within the Borough. Swindon Old Town, Cavendish Square, Gorse Hill, Orbital Retail Park and West Swindon are classified as district centres, and Highworth and Wroughton are identified as primary rural centres. Local centres are identified on the proposals map. The Local Plan states that retail development is to be focused at existing centres, with the priority being Swindon Town Centre.

5.23 Policy EC3 of the Local Plan confirms that Swindon Town Centre is the primary location for main town centre uses and is the most sequentially preferable location for retail development, followed by the edge of town centre, district/ primary rural centres, and local centres.

5.24 The Local Plan provides policy guidance on uses within the defined centres, and policy EC3 states that to protect the shopping function of the Town Centre and other centres:

- in Swindon Town Centre, Class A1 uses should occupy at least 75% of the primary frontage and 60% of the secondary frontage;
- in District and Primary Rural Centres, Class A1 uses should occupy at least 70% of the street frontage; and
- in Local Centres, Class A1 uses should be predominant.

5.25 Policy EC3 sets criteria for assessing retail proposals, as follows:

"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 hierarchy of centres.

Within Swindon Town Centre, or any District or Primary Rural centre, where the percentage of the street frontage is already at or below the threshold of the desired Class A1 Uses (retail) identified above, proposals for non-A1 uses will normally be permitted where they demonstrate that

- *at least 12 consecutive months active marketing of the premises for Class A1 Use (retail) has been undertaken; and*
- *the proposed use is appropriate for its location."*

5.26 This section reviews the approach of the Local Plan policies in the light of the findings of this report.

5.27 Annex 2 of the NPPF provides definitions of retail designations, as follows:

Town centre*: Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.*

Primary shopping area (PSA)*: Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).*

Primary and secondary frontages*: Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.*

5.28 The NPPF indicates four separate designations within town centres can be considered and each has a different policy objective, as follows:

- town centre boundaries - vitality and viability protection and application of the sequential approach;
- primary shopping area - application of the sequential approach;
- primary shopping frontages - maintaining the predominance of Class A1 retail use; and
- secondary shopping frontages - maintaining the mix of retail/non-retail uses.

5.29 The NPPF suggests that in drawing up development plans, local authorities should, in addition to defining the extent of town centres and primary shopping areas, define primary and secondary frontages within designated centres, and set policies that make clear which uses will be permitted in such locations. The NPPF provides limited guidance on the approach policies should adopt. The NPPF glossary indicates that primary frontages are likely to include a high proportion of retail uses which may include food and drink, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

5.30 The NPPF (paragraph 23) also suggests competitive town centres should be promoted that provide customer choice and a diverse retail offer reflecting the individuality of town centres. This implies the most appropriate approach is likely to vary from centre to centre.

5.31 The NPPF provides limited guidance on how these areas, particularly shopping frontages should be identified. Traditionally, key factors that can be adopted to identify the extent of the primary shopping area, and primary and secondary frontages include:

- composition of uses: the proportion of retail uses within the frontage based upon the GOAD surveys of the town centres. Primary shopping frontages would comprise higher proportions of A1 retail uses than secondary shopping frontages;
- prime rental levels: analysis of Zone A rental levels of units within the centres sourced from Valuation Office (VOA) website, with primary shopping frontages expected to achieve higher rental levels than the secondary frontages;
- pedestrian flows: level of pedestrian flows within particular areas/ frontages of the centre identified from visits to the centre, with the highest pedestrian flows in the primary shopping frontage;
- key anchor stores: the presence of key anchor stores such as department stores or food stores can also identify the extent of the Primary Shopping Area and key frontages.

5.32 Centre boundaries are shown on the Proposals Map accompanying the Local Plan. The Proposals Map also shows primary and secondary shopping frontages within Swindon Town Centre. Within the Local Plan, the retail core is defined within Figure 8, and this is referred to in policy SC1 as the Primary Shopping Area (PSA) separate from the town centre boundary. A PSA is usually the area where retail uses/development should be focused in line with the sequential approach, and it would appear reasonable to define the PSA as the area containing the defined shopping frontages.

5.33 The Swindon Town Centre boundary covers a wider area than the primary and secondary shopping frontages, and includes other non-retail town centre uses, such as churches, car parks, cultural facilities, leisure and employment uses. This is the area where other main town centre uses should be focused.

5.34 For the district and local centres within Swindon Borough, only the centre boundaries are defined.

5.35 The PPG sets out that emerging development plan policies should continue to include boundaries. A clear definition of each boundaries and policies the designation relates to should be provided, in order to ensure policies are not open to misinterpretation.

5.36 When considering emerging town and local centre policies, the Council needs to consider the following issues:

1. Is it necessary to designate separate town centre boundaries and shopping areas, or will one boundary be sufficient?
2. Is it necessary to define separate primary and secondary shopping frontages or will one designated frontage be appropriate?
3. Should the designated shopping frontages relate to the same area as the shopping area or town centre boundary?

5.37 The NPPF requires planning policies to be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. This approach includes defining the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres and allocating suitable sites for retail and other main town centre uses.

Impact Thresholds

5.38 The NPPG states that if setting a locally appropriate impact threshold for out of centre developments, it is 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
- the impact on any other planned investment.

5.39 If the NPPF threshold (2,500 sq.m gross) was adopted, then a single development proposal could exceed the entire development plan floorspace projection in some centres without the need for a retail impact assessment.

5.40 Proposals that significantly exceed the floorspace projections are likely to significantly reduce the turnover of existing floorspace, and this impact should be carefully tested on a case by case basis.

5.41 The NPPF threshold of 2,500 sq.m gross is considered to be inappropriate as a blanket threshold for all out of centre developments within Swindon Borough, as this scale of development would represent a significant proportion of the overall retail projections in the Borough in the short to medium term. Out of centre development smaller than 2,500 sq.m gross could have a significant adverse impact on Swindon Town Centre and other centres in the Borough.

5.42 The Local Plan states that the threshold applied in policy EC3 of 600 sq.m has been set using evidence on average gross unit size in existing centres. The Plan indicates that any development proposals greater than this threshold will be assessed in terms of the proposal's impact on any existing and future investment in the surrounding area and its impact on the vitality and viability of the town centre. This impact threshold applies to development in all locations within Swindon Borough, whether they are situated in the town centre, on the edge of centre or out of town. This is not consistent with the NPPF, which indicates that impact assessments are only required for development located outside of designated town centres. Criterion (d) in Policy EC3 could be amended to require impact assessments only for development located outside the Swindon Town Centre boundary and outside other designated centres.

5.43 A locally set threshold should apply to all edge and out of centre retail development proposals. There could be scope for some flexibility and range of thresholds adopted for different locations and type of development within the Borough. Based on the estimated retail floorspace requirements, the following thresholds could be considered for development located outside of town centres:

- 500 sq.m gross for convenience goods floorspace anywhere within the Borough;
- 2,000 sq.m gross for comparison goods and leisure floorspace for Swindon; and
- 1,000 sq.m gross for comparison goods floorspace for district centres and primary rural centres.

5.44 As indicated above, it should not be a requirement to produce a retail impact assessment for proposals within the existing centres.

5.45 The suggested threshold recommendations are consistent with the current scale of each centre and the projected floorspace capacity estimates.

The Sequential Approach

5.46 The level of guidance relating to the sequential approach to site selection has reduced within the NPPF. The NPPF gives preference to accessible edge and out-of-centre sites that are well-connected to the town centre; this applies to both plan-making and considering applications.

5.47 As indicated above, in order to apply the sequential approach, it is necessary to define town and local centre boundaries. The Primary Shopping Areas or centre boundaries are important when applying the sequential approach and directing town centre uses to appropriate locations.

5.48 The scale and area of search that will apply to retail and leisure development needs to be considered. A large development that will attract trade from across much of the Borough should consider sites within Swindon town centre. A smaller scale development with a more localised catchment may only be required to search for sites within the nearest centre. Development plan policies should provide guidance on the area of search for sequential sites.

Swindon Central

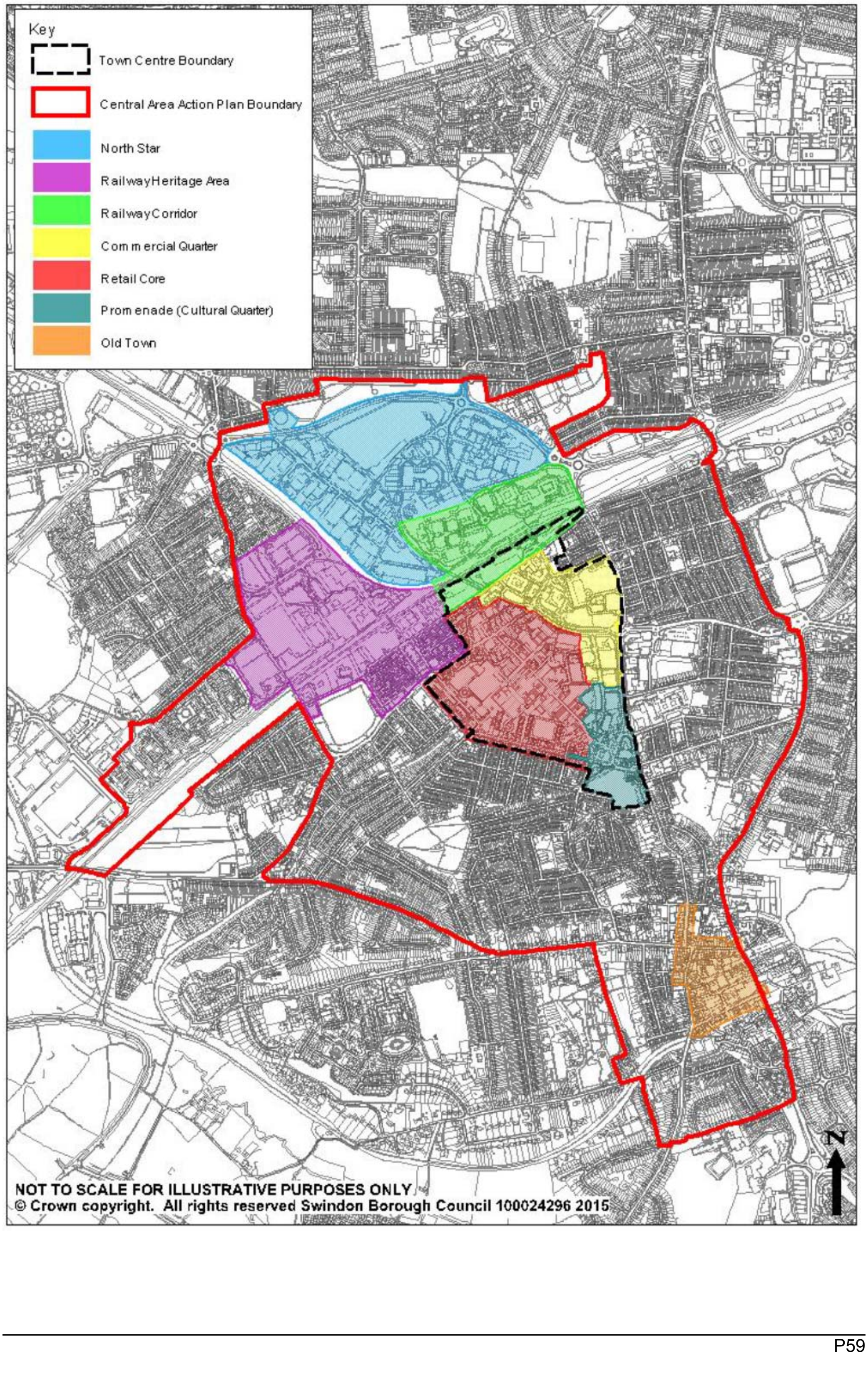
5.49 The definition of Swindon as a town centre is consistent with the NPPF. The Town Centre Boundary is correctly drawn around the around the core retail and commercial area. Swindon Town Centre is the dominant location in the immediately surrounding area, with larger, higher order centres in the sub-region. The strategy for Swindon should seek to consolidate the town centre's role within the wider shopping hierarchy. The area within the Swindon town centre boundary should be the main focus for large-scale retail and leisure development (for example over 2,000 sq.m gross) in the Borough.

5.50 As the main centre in the Borough, Swindon has the best prospects for attracting investment, and the town centre should be the main focus for future town centre uses, particularly comparison retail floorspace and restaurant uses.

5.51 As set out in Table 5.1, the capacity assessment identifies that there is a projection for around 53,200 sq.m gross of A1-A5 floorspace in Swindon Central by 2036, the majority of which should be comparison goods floorspace (45,500 sq.m) and most of the remainder food and beverage floorspace (6,800 sq.m). There is limited need for additional convenience goods floorspace over the period to 2036. These floorspace projections are over and above the Kimmerfields commitment, which includes a total of 13,471 sq.m gross of Class A1-A5 floorspace.

5.52 The Local Plan (policy SC1) identifies areas within Swindon town centre that will have their own specific role, including the retail core, which should be the focus of retail-led development, as shown on Figure 5.1 overleaf. Other areas that are immediately adjacent to the retail core include the Promenade (Cultural Quarter), which is the focus for cultural activities but will also provide civic and leisure facilities, the Commercial Quarter which is the focus for a flagship new office area, the Railway Corridor which is the focus for a vibrant, high density, mixed-use development scheme, and the Railway Heritage Area, which is the focus of visitor activities that are sympathetic to the historic character of the area, would not adversely impact on the amenity of Railway Village residents, and would complement and not undermine the town centre offer.

Figure 5.1: Extract from Swindon Local Plan – Swindon Central Area Diagram



5.53 The Local Plan (policy SC1) states that provision should be made for at least 53,700 sq.m net of comparison retail floorspace in the town centre primary shopping area (the retail core), based on the previous retail capacity assessment. This figure is broadly unchanged based on the latest quantitative retail needs assessment set out in Section 3. The retail core should remain the focus for retail development in Swindon Borough.

5.54 Within the Cultural Quarter, the Local Plan promotes complementary uses, including leisure, food and drink facilities. The Plan notes that the current cultural facilities in the town centre do not meet the needs or aspirations of the town, as highlighted in the Big Arts Plan and Cultural & Leisure Strategy for Swindon. It would therefore be appropriate to direct some of the food and beverage floorspace requirements identified for Swindon town centre to the Cultural Quarter, to assist with the overall strategy of improving the evening economy and making the town centre a more attractive destination for a range of cultural and leisure activities.

5.55 The Swindon Central Area Action Plan (CAAP) was adopted in February 2009 and identified development opportunities within the town centre. The CAAP identifies guiding principles in relation to retail and culture/leisure as:

- **retail** - 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;
- **culture/leisure** - facilitate improvements and access to cultural and leisure facilities in Central Swindon. Such facilities will be expected to broaden the appeal of Central Swindon as a leisure destination.

5.56 The CAAP recognises that successful regeneration of the town centre depends on broadening the mix of uses and moving away from concentrations of single land uses. The CAAP identifies that the Council’s aim is to create a concentrated, compact and legible retail centre, and is keen to create a strong retail circuit within the retail core.

5.57 In conjunction with the Local Plan and the CAAP, a Masterplan for the Town Centre was produced in 2013, and the Council has recently commissioned a new Masterplan for Swindon Town Centre, and these documents have been reviewed in undertaking this assessment of development opportunities.

5.58 The CAAP defined key areas and opportunities within the retail core to accommodate the comparison goods floorspace capacity that was identified in the previous retail study (65,000 sq.m net by 2021). While the updated quantitative assessment indicates a much lower requirement for the town centre, the intention should be to maximise additional floorspace, and incorporate the majority of the surplus requirements for comparison goods floorspace in “other Swindon”, as discussed below. The CAAP development options comprise:

- Regent Place;

- The Sanford Street Area;
- Upper Bridge Street/Fleet Street Area;
- Swindon Market Hall.

5.59 The Regent Place site comprises the land to the east of the Brunel Centre, including the Granville Street car park and Morley Street. The CAAP envisaged that the comprehensive development of this area could deliver approximately 35,000 sq.m net additional retail floorspace. There have been previous applications and proposals for this site, showing ambitious developments that would create a new shopping mall extending from the Brunel Centre through to Regent Street, providing a mixture of retail and leisure uses. The redevelopment of this area would assist in achieving the Council's ambitions for the town centre regeneration and improve the retail circuit.

5.60 While the most recent proposal for the site (application ref. S/07/0603) was not determined, it gives an indication of the capacity of this site, providing 85,945 sq.m gross in total. This comprised Class A retail uses (41,786 sq.m), leisure (2,215 sq.m), residential (30,793 sq.m) and "other", including a hotel (11,151 sq.m). The retail floorspace included around 30,000 sq.m gross of comparison goods floorspace, and a food store of around 1,800 sq.m gross. These proposals pre-date the development of Regent Circus, which has provided a new food store and multiplex cinema within the town centre. It is therefore unlikely that redevelopment of the Regent Place site would incorporate such a significant leisure element, but it remains a key opportunity site to improve the comparison goods retail offer of the town centre, and it would be appropriate to include a mix of uses within any schemes for the site, including residential accommodation.

5.61 The redevelopment of this area could be delivered through a phased development, with early phases on publically owned land. Longer term phases may require land acquisition and assembly. The Council could consider the use of CPO powers in order to acquire longer term phases. The site could deliver around 30,000 sq.m gross of Class A1-A5 floorspace, which would meet the identified floorspace requirement for Swindon town centre over the period to 2036. Any development should incorporate food and beverage uses, particularly family restaurants, as well as comparison goods retail, with residential, leisure or commercial office uses above the retail floorspace, to add interest and activity, create an evening economy and extend the dwell time in the centre. The development of this area would also be complemented by improvements to the food and drink offer within the Brunel Centre and potential future options for the tented market.

5.62 The draft 2015 Masterplan for Swindon suggests that there may be opportunities to explore a phased approach to the delivery of improvements to this area. Proposals for the site would create an enhanced retail loop supported by active ground floors with residential above, and improve permeability.

5.63 The CAAP identifies the Sanford Street Area as comprising the properties on the east side of the Parade, Edgeware Road, Sanford Street and Islington Street. The CAAP suggests that this area could deliver approximately 12,000 sq.m of new retail floorspace. This area contains a range of different uses, including civic buildings that would need to be relocated or re-provided within a redevelopment. The potential redevelopment site presents an opportunity to open up to this area on to the existing primary shopping frontages on the Parade and Regent Street, and would help to create a more cohesive and connected central retail area that will link through to the commercial quarter. The complications of site assembly mean that the site is unlikely to come forward in the short to medium term, however the CAAP acknowledges that development schemes for this area could come forward as individual development parcels.

5.64 In the northern part of the retail core, the CAAP identifies the Upper Bridge Street and Fleet Street area, which encompasses the properties on the western side of the Parade, Fleet Street, John Street and the upper end of Bridge Street. The CAAP considers that this area could deliver approximately 7,500 sq.m of retail floorspace. The CAAP noted that this area is home to a number of unattractive buildings, has become dominated by bars and clubs, and detracts from the overall image of the town centre. This is a secondary area of the town centre, and it would seem most appropriate for a mixed use, leisure led scheme, focused on family friendly restaurants and entertainment, to complement the retail offer of the centre and promote a livelier evening economy, rather than late night entertainment. Residential uses at upper floors should also be encouraged. This area would also require land assembly, and again is unlikely to come forward in the short to medium term.

5.65 This area is away from the main retail core, but there is potentially scope to improve the range and choice of smaller independent shops, which if achieved could help to attract more customers during the daytime, and could complement the more mainstream offer of the retail core. Including residential uses above shops could add variety and activity to this area.

5.66 The draft 2015 Masterplan for Swindon highlights the area around Fleet Street and Bridge Street as an area in need of public realm improvements and shop refurbishments, to assist with the long term physical and economic regeneration of the area. The draft Masterplan highlights that this is a key area that links the railway heritage quarter to the town centre that has the potential to offer an alternative retail offer to the high street offer of Canal Street.

5.67 Finally within the retail core, the CAAP identified an opportunity to redevelop the existing market hall on Market Street. While the market hall serves an important purpose, the quality of the environment is poor and is an inefficient utilisation of a key central site. The CAAP anticipated that redevelopment would provide small scale retail units, with a mix of A1 and A3 uses, together with public realm improvements. An application has been submitted for the demolition of existing tented market and erection of a two storey building comprising five Class A3 (Restaurants and Cafes) units and associated works (ref. S/15/2017), providing 1,500 sq.m gross. The existing market floorspace is approximately 850 sq.m gross. This site could be redeveloped in the short to medium term.

5.68 The draft 2015 Masterplan also identifies the existing market as having potential for redevelopment and improvements to the public realm. The draft Masterplan suggests that the area could include around 2,000 sq.m of retail floorspace, potentially with residential uses above, and create a more positive relationship with the surrounding buildings and spaces.

5.69 Outside of the retail core, the CAAP identified other development opportunities that could also incorporate retail and leisure floorspace, including:

- the cultural quarter – up to 25,000 sq.m (predominantly leisure) – this incorporates the area that has since been developed at Regent Circus to provide a Morrisons store, multiplex cinema and restaurant uses. Ancillary retail and food and beverage uses would also be appropriate within the cultural quarter to support improved facilities around the Wyvern Theatre complex. Enhancing the cultural offer of the town centre, including providing a new home for Swindon Museum and Art Gallery (SMAG), will attract more visitors to the centre, and in turn contribute towards the regeneration of the retail core;
- the commercial quarter – up to 15,000 sq.m – this area includes the Kimmerfields commitment (13,471 sq.m gross of Class A1-A5 floorspace); and
- the railway corridor/Swindon Central – up to 5,000 sq.m – any improvements to linkages between the railway station and the retail core that could be implemented through additional retail/leisure floorspace within this area should be welcomed, provide it would not detract from the town centre offer.

5.70 In economic terms, the centres with the greatest proportion of multiple retailers are invariably the most successful. The development of a more diverse multiple retailer base would benefit Swindon's overall retail position. This is likely to be the next step in the centre's evolution, particularly if it is to remain competitive with other centres.

5.71 As set out in the health check of the centre at Appendix 6, Swindon has a reasonable proportion of comparison goods units (42%) occupied by independent retailers and it is important that the centre retains a good selection of independent retailers to add to the diversity and character of a centre. Maintaining and improving the overall range of multiple retailers within a centre should have wider benefits for independent retailers in increasing the volume of customers in the centre.

5.72 Swindon could seek to identify particular pockets within the Town Centre and brand these as individual character areas, each with distinct identities and attractions. This could, for example, involve the creation of speciality retail clusters that will enhance the overall retail offer.

5.73 Swindon should also aspire to improve its retail offer to compete more effectively with other centres that have a superior retail offer that Swindon can realistically seek to emulate. For example, in terms of Venuescore rankings, Cheltenham is placed 41 places higher than Swindon, and is classified as having an “Upper Middle” offer, rather than Swindon’s “Middle” offer.

5.74 Within Cheltenham, 127 (or 44%) of the 286 comparison goods retailers are national multiples. This compares to 58% of comparison retailers in Swindon, which suggests that Swindon has a good proportion of national multiple retailers, but that the type of retailer is of poorer quality. This also suggests that independent retailers have a key role to play in the overall attraction of a centre. While Cheltenham is a much larger centre, it is useful to compare the type of national multiple retailers that are present in Cheltenham but missing from Swindon, to identify aspirational or target retailers. These include:

Animal	Hobbs	Molton Brown	Space NK
Bathstore	Jack Wills	Moss	Sunglass Hut
Blacks	Jigsaw	Mothercare	Superdry
Blue Cross	Jojo Maman Bebe	Mountain W’house	T K Maxx
Cath Kidston	Jones Bootmaker	Multiyork	T M Lewin
Crew Clothing Co	Joules	Oasis	The Body Shop
Currys Digital	Karen Millen	Perfume Shop	The Kooples
East	L.K.Bennett	Phase Eight	The White Company
Fat Face	L’Occitane	Phones 4u	The Works
Feather & Black	Lakeland	Radley	Triumph
Fired Earth	Laura Ashley	Reiss	Whistles
French Connection	Long Tall Sally	Richer Sounds	White Stuff
Gap	Maplin	Russell & Bromley	
Goldsmiths	Millets	Ryman	

5.75 Many of these retailers, particularly the fashion operators, are located within Swindon Designer Outlet, therefore some of them may not consider a second location within the Town Centre. However, the future aspirations for Swindon Town Centre should be to seek to attract upper/middle tier operators that are not currently represented, and future developments should provide appropriate units to accommodate this type of retailer.

5.76 Swindon Town Centre needs to provide more than just shops to remain an attractive retail destination, as there is increasingly a need to create more of an all-round experience. With a higher proportion of disposable income spent on entertainment, people increasingly expect the shopping experience to include retail, leisure and catering options. For centres to compete with the ease of home/internet shopping, every effort has to be made to make people want to go shopping, and getting the mix and balance of uses right will make shopping centres more attractive and successful. People’s behaviour and their expectations of what constitutes a “shopping experience” has changed. Embracing this change seems to be key to delivering schemes that align with what people want and create successful destinations.

5.77 Moving forward, the strategy for Swindon could involve creating leisure “hubs” within the City Centre, providing food and drink options and/or family entertainment to enhance the shopping experience and extend the length of customers’ visits to the centre.

5.78 The development opportunity sites demonstrate that there are opportunities within Swindon Town Centre to accommodate all of the floorspace requirements identified over the Plan period, however many of the key sites are unlikely to be delivered in the short to medium term. The long term aspirations for the town centre regeneration are ambitious, but would bring about the transformation necessary to consolidate and strengthen Swindon’s position in the retail hierarchy.

5.79 Delivery of the Council’s aspirations for Swindon Central, both in terms of pipeline schemes such as Kimmerfields, and the longer term ambitions within the masterplan will significantly increase and strengthen the retail and wider offer of Swindon Town Centre. As set out above, it is essential that additional floorspace is developed within the town centre just to maintain the existing market share.

5.80 If even more floorspace than this is brought forward in Swindon Town Centre, bringing more people into the town centre, and increasing the daytime population, then it is likely that there will be some redistribution of market share, with the market share for the town centre increasing in the future. In our view, it is most likely that this would reallocate some of the market share currently going to “other Swindon” and Swindon Designer Outlet towards the town centre, and Swindon Town Centre would absorb some of the identified floorspace requirements in Table 5.1 for these areas.

Town Centre Boundary and Primary Shopping Area

5.81 Future planning policies for Swindon town centre should continue to define a separate Primary Shopping Area (PSA) and Town Centre boundary, because the centre has concentrations of other town centre uses adjoining the main shopping area, e.g. the cultural quarter and commercial quarter. A separate PSA is necessary for applying the sequential approach for Class A1 retail uses.

5.82 The distinction between the PSA and the Town Centre boundary provides guidance on the appropriate location for different town centre uses, ie. retail uses should first be directed to the PSA, while other town centre uses such as offices, hotels and leisure can be located within the wider town centre area ie. the area between the PSA and the town centre boundary.

5.83 The Town Centre boundary includes all areas occupied by main town centre uses. The retail core area comprises Swindon’s PSA. This approach is consistent with the NPPF and no changes to the Town Centre and PSA boundary in Swindon are considered necessary.

Primary and Secondary Shopping Frontages

5.84 The Local Plan distinguishes between primary and secondary frontages in Swindon. Policy EC3 of the Local Plan requires that Class A1 uses should occupy at least 75% of the primary frontage and 60% of the secondary frontage. However, it is not clear whether this policy relates to units or lengths of frontage, and any similar future policies should provide clarification on this.

5.85 The capacity projections within this study indicate there is a need to retain a mix of Class A1 to A5 uses within Swindon in order to meet the needs of the community. There is no need to change the current primary and secondary frontage designations from those within the Local Plan. Defining separate primary and secondary frontages provides more flexibility, recognising frontages within the town centre perform different roles. If new developments come forward within the development opportunities identified above, then these should be designated as primary and/or secondary retail frontages, as applicable.

5.86 In areas of the centre where there is a high level of vacant units/low demand for retail uses, the Council could consider providing more affordable accommodation that could attract independent retailers, e.g. through reduced or subsidised business rates.

Swindon Old Town

5.87 Swindon Old Town is defined as a district centre in the Local Plan, which is consistent with the NPPF definition. The Local Plan identifies that Swindon Old Town should be the focus of niche shopping and leisure uses that complement the shopping and leisure offer of the town centre. The Plan also states that development proposals within or near the Old Town will be required to contribute towards public realm and wider environmental improvements to the area.

5.88 As a secondary retail centre in the Borough, Swindon Old Town will not attract large scale investment, however the centre should be a main focus for future town centre uses, particularly comparison retail floorspace and restaurant uses.

5.89 Old Town is a vibrant centre with low vacancy rates. There are a number of longer term redevelopment opportunities in Old Town to meet the demand from operators who want to have a presence in Old Town.

5.90 The 2013 Swindon Masterplan identifies a number of areas where mixed retail and residential development would be appropriate e.g. Prospect Place, Hoopers Place and Joiners Lane.

5.91 Planning permission has previously been granted for the partial demolition, change of use and restoration of The Locarno and Old Town Hall buildings, together with extensions and new buildings, primarily for residential use, but including units for Class A3/Class A4 use. The 2013 Swindon Masterplan also identified this site for mixed use refurbishment of the listed buildings for residential or hotel use with ground floor retail/restaurant/café uses and improved public space. This site remains a key opportunity, and although located just outside of the defined retail area of Swindon Old Town, food and beverage uses in this location would be appropriate development that would enhance the overall offer of the centre.

5.92 A further development option is the petrol filling station/garage site at the corner of Newport Street and Hoopers Place, at the southern end of the centre, which could potentially be redeveloped for a mix of retail and residential uses, however the site is not well connected to the existing retail focus of the centre.

5.93 One of the key objectives of the CAAP is to improve the synergy between Swindon Town Centre, Swindon Old Town and Swindon Designer Outlet, recognising that delivering better linkages between these centres will enable them to work in unison to attract visitors and investment to central Swindon. Development opportunities that arise along Victoria Road that could improve links with Swindon Town Centre and increase the attractiveness of this route for pedestrians should be encouraged.

Centre Boundary and Primary Shopping Area

5.94 The Local Plan currently defines the district centre boundary for Swindon Old Town, and does not define a separate PSA. As currently defined, the existing centre boundary incorporates the main concentration of retail and service uses in the centre, however this could be extended to include the Locarno site referred to above, as this site is likely to include a mix of town centre uses in the future.

5.95 Although not considered essential due to its relatively compact nature, it may be appropriate to define a separate PSA and centre boundary for Swindon Old Town. The distinction between the PSA and the centre boundary would provide guidance on the appropriate location for different town centre uses.

Primary and Secondary Shopping Frontages

5.96 The Local Plan does not define retail frontages within Swindon Old Town. Policy EC3 states that in district centres, Class A1 uses should occupy at least 70% of the street frontage. As noted above, it is not clear whether this relates to unit numbers of length of frontage. Providing a clear definition of primary and secondary retail frontages within the centre (or a PSA) would assist in providing clarity for the application of the restrictions within policy EC3. The primary retail frontages would include Wood Street and High Street, with secondary frontages at Victoria Road, Devizes Road and Bath Road. This could allow for a concentrated retention of A1 uses in the primary area, with a more relaxed approach to mixed town centre uses in the secondary areas, rather than the current blanket policy approach.

5.97 The capacity projections within this study indicate there is a need to retain a mix of Class A1 to A5 uses within Swindon Old Town in order to meet the needs of the community. The floorspace requirement for additional comparison goods and food and beverage floorspace should be located within the core of the centre.

Swindon Designer Outlet

5.98 Swindon Designer Outlet is located to the north of the railway line from the town centre, and is a significant, established out of centre comparison goods retail destination. It is not defined as a centre within the retail hierarchy of the Local Plan, as it does not provide the same function as a town or district centre, rather it functions as a specialised comparison shopping destination that attracts visitors from a wide area. As noted above, the CAAP identifies the importance of improving linkages between Swindon Town Centre and Swindon Designer Outlet.

5.99 A scheme for the alteration, conversion and extension of the Outlet Centre has recently been implemented, which provided new and reconfigured retail floorspace. This recent development is primarily the reason that the Outlet Centre has a relatively high number of vacant units for such a successful retail destination, as some of the units have yet to be fitted out and let, and it is anticipated that the majority of these units will be occupied in the short term, absorbing some of the identified capacity for Swindon Designer Outlet.

5.100 The draft 2015 Masterplan for Swindon suggests that there is scope for redevelopment of the areas of open space between the Swindon Designer Outlet and the STEAM museum. This refers to a potential building of around 3,000 sq.m gross that could deliver additional retail units to meet the floorspace requirements, plus improvements to the public realm.

5.101 Although Swindon Designer Outlet is included within Swindon Town Centre Central Area in the Central Area Action Plan and other policy documents, but in retail terms, it is an out of centre location. There is a need to control future development at Swindon Designer Outlet, in order to protect Swindon Town Centre and ensure that the main focus of retail development and growth is not directed away from the town centre. It would not be appropriate to define Swindon Designer Outlet as a centre within the retail hierarchy. In line with NPPF guidance, any future proposals for retail development in this location would need to demonstrate that there would not be a significant adverse impact on the town centre.

Other Swindon

5.102 The capacity assessment identifies a floorspace requirement for “other Swindon”. This includes the remainder of the Swindon urban area, i.e. Old Town and the district centres of Cavendish Square, Gorse Hill, Orbital Retail Park, West Swindon, local centres and the various out of centre retail destinations that are not within a defined centre.

5.103 The quantitative assessment identifies a total Class A1-A5 floorspace projection of around 31,300 sq.m gross for "other Swindon", however most of this projection emerges during the end of the plan period (2026 to 2031). Implementation of development/masterplan proposals within Swindon Town Centre will redirect expenditure growth and the capacity projections reflect this assumption. There is no need for additional Class A1-A5 floorspace in "other Swindon" until after 2026.

5.104 However some growth will be absorbed through the development of new district and local centres within the planned new communities at Wichelstowe, Commonhead, Eastern Villages, Tadpole Farm and Kingsdown.

5.105 Policy NC1 of the Local Plan states that within Wichelstowe, the development will include a total of four local centres, one of which includes a food store. This has been developed as the new Waitrose store (3,765 sq.m gross). In addition to this, our assessment has estimated that the local centres within Wichelstowe could provide around 3,200 sq.m gross of convenience, comparison and food and beverage floorspace.

5.106 For Commonhead, policy NC2 states that a local centre within the development should have a maximum of 1,000 sq.m gross, which again has been assumed to include a mix of convenience, comparison and food and beverage floorspace.

5.107 The Eastern Villages allocation (policy NC3) refers to the provision of around 12,000 sq.m gross of retail floorspace within the new development, including a high quality district centre comprising an anchor food store and complementary uses, and a network of local centres that offer retail provision of a scale that meets the daily shopping needs of the communities they serve. This 12,000 sq.m gross includes the existing floorspace at the Sainsbury's store on Oxford Road, and our assessment has estimated that approximately 5,200 sq.m gross of additional convenience, comparison and food and beverage floorspace will be provided within the new district and local centres within the Eastern Villages allocation.

5.108 For Tadpole Farm, policy NC4 states that a mixed use local centre within the development should have a maximum of 1,000 sq.m gross, which has been assumed to include a mix of convenience, comparison and food and beverage floorspace.

5.109 Similarly, in Kingsdown, policy NC5 states that the development will provide a mixed use local centre of not more than 1,000 sq.m gross retail floorspace, with no more than 20% of this as comparison goods floorspace.

5.110 Together, these new communities would provide around 11,400 sq.m gross of A1-A5 floorspace, of which around 5,850 sq.m gross will be convenience goods floorspace and 4,000 sq.m gross will be comparison goods floorspace.

5.111 In addition, the North Star proposals could include a total of 24,000 sq.m gross, of which 12,000 sq.m gross is comparison goods. The Local Plan identifies that North Star will be the location for a new regional leisure facility, and there is therefore a desire to improve facilities in this location. If these proposals for convenience and comparison goods floorspace within the new communities and North Star are taken into account, these developments will significantly exceed the projections for “other Swindon” up to and beyond 2026. The implications of this potential over-supply of floorspace on the vitality and viability of Swindon Town Centre will need to be carefully considered as and when planning applications are determined.

5.112 The policy approach should priorities Swindon Town Centre to accommodate the floorspace requirement up to 2026, particularly comparison goods and food/beverage floorspace, to strengthen and consolidate the position of Swindon at the top of the retail hierarchy and improve the overall offer of the centre as a destination. Taking a positive policy approach should help to achieve the desired improvements to the town centre, rather than depending on organic development and growth.

5.113 The longer term additional floorspace capacity identified for “other Swindon” could be directed towards the district centres of Old Town, Cavendish Square and Gorse Hill, or to the smaller local centres within the wider Swindon urban area. Options for development within these centres are limited, and it is more likely that small scale intensification and extensions could come forward in the future. While there may be more scope to physically accommodate additional floorspace at Orbital Retail Park and West Swindon district centres, it is not considered necessary to plan for further growth of any significant scale at these centres.

Highworth

5.114 The definition of Highworth as a primary rural centre, at the same level in the retail hierarchy as district centres elsewhere in the Borough, is consistent with the NPPF. Highworth provides an important retail and leisure focus in the northern part of the Borough. As a secondary centre in the Borough, Highworth will not attract large scale investment, however the centre should be the main focus for future town centre uses in this part of the Borough.

5.115 There are limited opportunities for development in Highworth, which is constrained by the conservation area and historic built up fabric of the centre. The Local Plan notes that Highworth suffers from a lack of “critical mass” of shops sufficient to attract shoppers in significant numbers, and suggests that there is a need to improve the pedestrian link between the Co-op store and the centre, and that the High Street should remain primarily for Class A1 retail use.

5.116 As set out in Table 5.1 above, the capacity assessment indicates around 600 sq.m gross of Class A1-A5 floorspace should be provided in Highworth by 2036. For this small amount of floorspace, there is not considered to be a need to identify development opportunities. Options for development are likely to be limited to windfall opportunities and the future focus is likely to be small scale intensification and extensions. This accords with policy RA1 of the Local Plan, which sets out local priorities for Highworth and seeks to rejuvenate

Highworth through, among other things, focusing shops, services and facilities within the centre, and support the expansion of existing businesses and encouraging economic development opportunities.

Centre Boundary and Primary Shopping Area

5.117 The adopted Local Plan defines the centre boundary for Highworth, but does not define a separate PSA or primary and secondary shopping frontages.

5.118 It would not be necessary to define a separate PSA for Highworth. However, in order to enforce the requirements of policy EC3 of the Local Plan to protect the retail function of the centre, consideration should be given to defining primary and secondary shopping frontages with the centre.

Wroughton

5.119 As set out in Table 5.1 above, the capacity assessment indicates around 1,300 sq.m gross of Class A1-A5 floorspace should be provided in Wroughton by 2036, and the majority of this relates to convenience goods floorspace (around 700 sq.m gross).

5.120 Policy RA2 of the Local Plan sets out local priorities for Wroughton and seeks to strengthen the role of the centre as a focus for the village through improving links between Wroughton High Street and the Ellendune Shopping Centre, focus shops and facilities at the centre, and maintain and enhance the character of Wroughton High Street. The Plan notes that there is currently a narrow range of services within the settlement. The Plan confirms that the village centre functions well and contains most of the main services that a village of this size requires, however notes that the Ellendune Shopping Centre is in need of rejuvenation.

Centre Boundary and Primary Shopping Area

5.121 The adopted Local Plan defines the centre boundary for Wroughton, but does not define a separate PSA or primary and secondary shopping frontages.

5.122 It would not be necessary to define a separate PSA nor to define primary or secondary shopping frontages for Wroughton, given the relatively small scale of retail and service provision.

6.0 Conclusions and Recommendations

6.1 This report provides an update of the Borough wide needs assessment for retail and leisure development in Swindon. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in Swindon Borough

6.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period up to 2036.

6.3 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

6.4 Long term forecasts up to and beyond 2026 may be more susceptible to change, due to unforeseen circumstances and not least the impact of development within surrounding authorities. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding the Borough should be monitored along with the effect proposals may have on the demand for additional development in Swindon.

6.5 The quantitative assessment of the potential capacity for retail floorspace suggests that there is scope for new development within Swindon Borough. The convenience goods projections suggest new floorspace, over and above commitments, could be distributed as shown in Table 6.1.

Table 6.1: New Convenience Goods Retail Floorspace Required to Meet Growth Projections (Gross)

Location	Additional Convenience Retail Floorspace (sq.m gross)				
	2016 - 2021	2021 - 2026	2026 - 2031	2031 - 2036	Total 2016 - 2036
Swindon Central	0	51	475	355	**881**
Other Swindon	0	354	2,521	1,882	**4,757**
Highworth	0	0	0	0	**0**
Wroughton	581	41	53	39	**714**
Total	**581**	**446**	**3,049**	**2,276**	**6,352**

Source: Table 14, Appendix 2 Note: Negative floorspace requirement excluded.

6.6 The comparison goods projections suggest new floorspace, over and above commitments, could be distributed as shown in Table 6.2.

Table 6.2: New Comparison Goods Retail Floorspace Required to Meet Growth Projections (Gross)

Location	Additional Comparison Retail Floorspace (sq.m gross)				
	2016 - 2021	2021 - 2026	2026 - 2031	2031 - 2036	Total 2016 - 2036

Source: Table 14, Appendix 3 Note: Negative floorspace requirement excluded.

6.7 The Class A3/A4/A5 food/beverage projections, suggest new floorspace, over and above commitments, could be distributed as shown in Table 6.3.

Table 6.3: New Food and Beverage Floorspace Required to Meet Growth Projections (Gross)

Location	Additional Food and Beverage Floorspace (sq.m gross)				
	2016 - 2021	2021 - 2026	2026 - 2031	2031 - 2036	Total 2016 - 2036
Swindon Central	1,670	1,554	1,941	1,651	**6,816**
Other Swindon	0	0	538	1,571	**2,109**
Highworth	92	81	96	82	**351**
Wroughton	74	72	89	76	**311**
Total	**1,836**	**1,707**	**2,664**	**3,380**	**9,587**

Source: Table 13, Appendix 5 Note: Negative floorspace requirement excluded.

6.8 In total up to 86,300 sq.m gross of Class A1 to A5 floorspace could be required over the plan period. Around 10,500 sq.m gross of this could be accommodated within vacant shop units. This would leave a residual projection of around 75,800 sq.m gross.

6.9 The tables above set out floorspace projections over and above the identified commitments, i.e. schemes that benefit from planning permission, but not proposals as these may not obtain consent and there is therefore less certainty that the schemes will come forward, e.g. the North Star development.

6.10 As set out in the previous section, the planned new communities within Swindon Borough will need to provide district and local centres to serve the day to day needs of the new residential areas, and it is estimated that around 11,400 sq.m gross of A1-A5 floorspace will be provided, of which around 5,850 sq.m gross will be convenience goods floorspace and 4,000 sq.m gross will be comparison goods floorspace. These schemes, together with the other identified proposals, once implemented, will absorb a significant proportion of the projected capacity figures above.

6.11 The commercial leisure assessment suggests Swindon Borough could in theory support up to five additional cinema screens. There is no need for additional health and fitness facilities, theatres, tenpin bowling, bingo or nightclubs in Swindon over the study period.

Strategy Recommendations

6.12 Development that serves more than a local catchment area should be concentrated in Swindon town centre. Development of more than local significance should consider sequential sites within and on the edge of the defined centres.

6.13 Retail and other main town centre uses developments located outside the town, district and local centres should be required to prepare a retail impact assessment if they exceed the following suggested thresholds for the centres:

- 500 sq.m gross for convenience goods floorspace anywhere within the Borough;
- 2,000 sq.m gross for comparison goods floorspace for Swindon;
- 1,000 sq.m gross for comparison goods floorspace for district centres and primary rural centres; and
- 500 sq.m gross for comparison goods floorspace for local centres (existing and planned).

6.14 Reduced locally set thresholds are appropriate based on the retail floorspace projections within this study.

6.15 Future plan policies should continue to define separate Primary Shopping Areas and Town Centre boundaries for Swindon Town Centre. A separate Primary Shopping Area is necessary for applying the sequential approach for Class A1 retail uses.

6.16 The Town Centre and District/Primary Rural Centre boundaries as currently drawn in the Local Plan are considered to be appropriate. The centre boundary for Swindon Old Town could be extended to include the Locarno site. No other changes are considered necessary.

6.17 The development plan should continue to distinguish between primary and secondary frontages in Swindon Town Centre. The proportion of Class A1 uses within the defined primary frontages remains high and there are significant concentrations of non-Class A1 use. There is no need to change the current primary and secondary frontage designations. Future policies should consider defining primary and secondary retail frontages in Swindon Old Town and Highworth.

6.18 The floorspace capacity projection is around 53,200 sq.m gross of additional Class A1 to A5 floorspace in Swindon Central up to 2036, over and above commitments including proposals at Kimmerfields (about 13,500 sq.m gross). The development sites and vacant shop units within Swindon town centre would be capable of accommodating this floorspace projection, and possibly a proportion of the floorspace requirement for "other Swindon" that is not absorbed through the development of new district and local centres to serve the new communities.

6.19 The aspirations for Swindon Town Centre should be to significantly enhance the retail and leisure offer of the centre, building on the existing foundation of core retail and complementary uses, extending the evening offer and increasing the overall attraction and draw of the centre, to the benefit those living, working and visiting the centre.

6.20 There are also development opportunities in Swindon Old Town some of the projected growth, as envisaged by the Swindon Masterplan.

6.21 The floorspace requirement for the primary rural centres of Highworth and Wroughton is limited. For Highworth, there is a projection for just 570 sq.m gross of additional Class A1 to A5 floorspace up to 2036, while in Wroughton the capacity projection is 1,270 sq.m gross of Class A1 to A5 floorspace up to 2036. There is no need to identify specific development opportunities, and these projections should be met through small scale intensification or extensions.

6.22 An indicative distribution for new Class A1 to A5 uses within Swindon Borough up to 2036 is shown in Table 6.3, based on the capacity projections, development opportunities and vacant shop premises.

Table 6.3: Accommodating Retail Growth in Swindon up to 2036

Area/Location	Floorspace Sq.M Gross	Comment
Reoccupation of vacant space	10,500	Reoccupation of vacant units in the short term, predominantly in Swindon town centre (about 7,400 sq.m gross); Swindon Designer Outlet
Regent's Place Area, Swindon Town Centre	30,000	Phased redevelopment of land to the east of the Brunel Centre, including the Granville Street car
Sanford Street Area, Swindon Town Centre	12,000	Redevelopment of land east side of the Parade, Edgeware Road, Sanford Street and Islington Street, as envisaged in the CAAP.
Upper Bridge Street and Fleet Street area, Swindon Town Centre	7,500	Secondary area in the town centre suitable for mixed use including leisure, restaurants and
The Market, Swindon Town Centre	2,000	Redevelopment of the Market for retail floorspace, potentially with residential uses above.
Railway Corridor, Edge of Swindon Town Centre	5,000	Improvements to linkages between the railway station and the retail core through additional retail/leisure floorspace.
Old Town	2,500	Delivery of Swindon master Plan opportunities at Locarno, Prospect Place, Hoppers Place and Joiner Lane.
Other Centres/local parades	5,000	Small scale in-fill and extensions.
New Centres Local Plan Allocations	11,500	Delivery of Local Plan allocations for new district and local centres including Wichelstowe and Eastern Villages.
Total	**86,000**	

Implementation and Monitoring

6.23 There are a number of broad areas of possible action the Council could pursue in order to maintain and enhance the role of shopping centres within Swindon Borough, as follows:

- application of guidance within the NPPF, particularly relating to the sequential approach and impact tests for locally set thresholds in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres;
- maintaining the generally high quality environment within each centre; and
- bring forward development opportunities through the Local Plan process to improve the availability of modern premises suitable for new occupiers.

6.24 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development up to 2036. Projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections up to 2036 should be treated with caution.

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

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

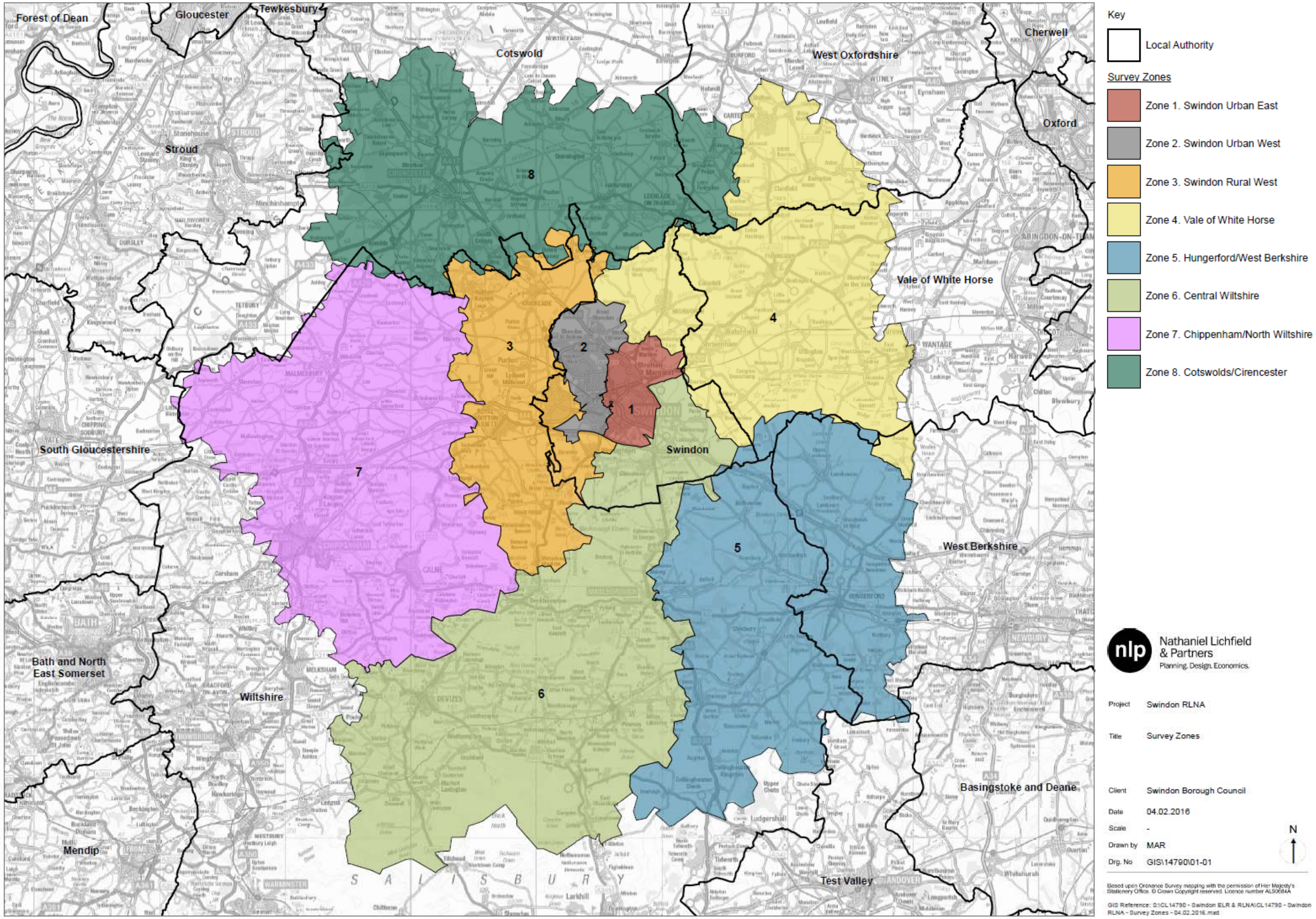
6.26 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections.

Appendix 1 Methodology

Swindon Study Area Zones

Zone	Postcode Sector	
Zone 1 - Swindon Urban East	SN1 2 SN2 7 SN2 8 SN25 6 SN3 1	SN3 2 SN3 3 SN3 4 SN3 5 SN3 6
Zone 2 - Swindon Urban West	SN1 1 SN1 3 SN1 4 SN1 5 SN1 7 SN2 1 SN2 2 SN2 5	SN25 1 SN25 2 SN25 3 SN25 4 SN25 5 SN26 7 SN26 8
Zone 3 - Swindon Rural West	SN4 7 SN4 8 SN4 9 SN5 0 SN5 3 SN5 4	SN5 5 SN5 6 SN5 7 SN5 8 SN6 6
Zone 4 - Vale of White Horse	OX12 9 OX18 1 OX18 2 OX18 3	SN6 7 SN6 8 SN7 7 SN7 8
Zone 5 - Hungerford/West Berkshire	RG17 0 RG17 7 RG17 8	RG17 9 SN8 2 SN8 3
Zone 6 - Central Wiltshire	SN4 0 SN8 1 SN8 4 SN9 5 SN9 6 SN10 1	SN10 2 SN10 3 SN10 4 SN10 5 SN10 4 SN10 5
Zone 7 - Chippenham/North Wiltshire	SN11 0 SN11 8 SN11 9 SN14 0 SN14 6 SN15 1	SN15 2 SN15 3 SN15 4 SN15 5 SN16 0 SN16 9
Zone 8 - Cotswolds/Cirencester	GL7 1 GL7 2 GL7 3 GL7 4	GL7 5 GL7 6 GL7 7

Swindon Study Area



Retail Capacity Assessment – Methodology and Data

Price Base

1 All monetary values expressed in this study are at 2014 prices, consistent with Experian's base year expenditure figures for 2014 (Retail Planner Briefing Note 13, October 2015) which is the most up to date information available.

Retail Expenditure

2 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2014 have been obtained.

3 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 13) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

4 Experian's EBS growth forecast rates for 2014 to 2017 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.2% for 2014 to 2015, +0.1% for 2015 to 2016 and +0.3% for 2017; for comparison goods: +5.3% for 2014-2015, +3.2% for 2015-2016 and +2.9% for 2017).

5 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0.1% per annum for convenience goods after 2017 and 3.0% per annum growth for comparison goods. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

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

trading and e-tailing. This Experian information suggests that non-store retail sales in 2014 is:

- 8.3% of convenience goods expenditure; and
- 14.9% of comparison goods expenditure.

7 Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2014 are:

- 2.5% of convenience goods expenditure; and
- 11.2% of comparison goods expenditure.

8 The projections provided by Experian suggest that these percentages could increase to 4.4% and 15.0% by 2021 respectively. In the longer term, the growth is predicted to fall or reverse slightly for comparison goods. The long term projections are 5.8% and 14.6% by 2031. These figures have been adopted in this assessment.

9 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

10 On-line shopping has experienced rapid growth over the last 20 years, but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Experian state that they expect that the SFT market share will continue to grow, however the pace of e-commerce growth will moderate markedly after about 2021. Experian's forecasts suggest that the SFT share of total retail sales will reach 18.3% by 2021, rising to 19.6% by 2034.

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

Household Survey

12 A telephone survey of 1,000 households within the study area was undertaken by NEMS Market Research in January 2016. The results are provided at Appendix 7.

13 The household survey results are used to establish the proportion of available expenditure that is attracted to each shopping destination within each zone.

14 The household survey is not a representative sample of the population profile of the study area, but is a shopping survey that is specifically designed to target the main shoppers in a sample of households. Shopping surveys of this kind interview the person responsible for most of the household shopping, and the results are generally biased towards females and older adults. NEMS provide both weighted and un-weighted survey results, and the weighted results are re-balanced to reflect the age structure and profile of the study area.

Market Shares/Penetration Rates

15 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the January 2016 household survey.

16 The total turnover of shops within Swindon Borough is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Mintel's Retail Rankings and Supermarkets UK Report (November 2015), which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark Turnover Levels

17 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Mintel. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

18 The estimated convenience goods sales areas have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database, GOAD plans, Valuation Office data and NLP estimates based on site visits. Estimates for comparison sales floorspace

within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

19 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within Swindon and our experience of trading levels of small independent shops informed by household shopper surveys elsewhere, we have adopted an average sales density of £5,000 per sq.m net for convenience shops/stores in the study area. The total benchmark turnover of identified convenience sales floorspace within Swindon Borough is £554.82 million (Table 11, Appendix 2).

20 Mintel's Retail Rankings provides company average sales density information for a selection of national comparison retailers. Based on NLP's experience, the average sales density for high street comparison retailers usually ranges between £5,000 to £8,000 per sq.m net.

Appendix 2 Convenience Goods Capacity

Table 1: Study Area Population

Zone	2011	2016	2021	2026	2031	2036
Zone 1 - Swindon Urban East	71,140	75,595	79,879	83,008	87,123	90,183
Zone 2 - Swindon Urban West	88,045	93,558	98,861	102,733	107,826	111,613
Zone 3 - Swindon Rural West	59,838	63,028	65,119	67,017	69,469	71,268
Zone 4 - Vale of White Horse	58,529	60,754	62,689	64,140	65,785	66,946
Zone 5 - Hungerford/West Berkshire	28,262	29,051	29,987	30,666	31,437	31,987
Zone 6 - Central Wiltshire	57,963	59,957	61,741	63,107	64,830	66,073
Zone 7 - Chippenham/North Wiltshire	91,183	94,319	97,126	99,275	101,986	103,941
Zone 8 - Cotswolds/Cirencester	42,673	43,548	44,475	45,298	46,482	47,306
Total	**497,633**	**519,810**	**539,877**	**555,245**	**574,936**	**589,318**

Sources: *Experian 2011 Census of Population and ONS - SNPP 2012 projections*

Table 2: Convenience Goods Expenditure per person (£)

Zone	2016	2021	2026	2031	2036
Zone 1 - Swindon Urban East	2,019	2,004	2,000	1,995	1,992
Zone 2 - Swindon Urban West	1,962	1,948	1,943	1,938	1,936
Zone 3 - Swindon Rural West	2,149	2,133	2,128	2,123	2,120
Zone 4 - Vale of White Horse	2,221	2,204	2,199	2,194	2,191
Zone 5 - Hungerford/West Berkshire	2,321	2,303	2,298	2,292	2,289
Zone 6 - Central Wiltshire	2,149	2,133	2,128	2,123	2,120
Zone 7 - Chippenham/North Wiltshire	2,094	2,078	2,073	2,068	2,066
Zone 8 - Cotswolds/Cirencester	2,273	2,256	2,251	2,246	2,242

Sources:

Experian Local Expenditure 2014 (2014 prices)

Growth Rates: -0.2% 2014-2015, 0.1% 2015-2016, 0.3% 2016-2017 and 0.1% p.a. from 2017

Excludes Special Forms of Trading

Table 3: Total Convenience Goods Expenditure (£m)

Zone	2016	2021	2026	2031	2036
Zone 1 - Swindon Urban East	152.66	160.10	165.98	173.79	179.64
Zone 2 - Swindon Urban West	183.59	192.54	199.61	209.00	216.04
Zone 3 - Swindon Rural West	135.47	138.91	142.62	147.48	151.09
Zone 4 - Vale of White Horse	134.94	138.19	141.05	144.32	146.66
Zone 5 - Hungerford/West Berkshire	67.42	69.07	70.47	72.07	73.23
Zone 6 - Central Wiltshire	128.87	131.70	134.30	137.64	140.08
Zone 7 - Chippenham/North Wiltshire	197.51	201.86	205.84	210.95	214.70
Zone 8 - Cotswolds/Cirencester	99.00	100.35	101.96	104.38	106.08
Total	**1,099.45**	**1,132.71**	**1,161.84**	**1,199.63**	**1,227.53**

Source: Tables 1 and 2

Table 4: Base Year 2016 Convenience Goods Market Shares (%)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Swindon Town Centre (incl. Morrisons Regent Circus)	9.1%	3.0%	2.2%	0.1%	0.3%	0.1%	0.0%	0.3%	10.0%
Old Town Swindon	0.7%	0.6%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	5.0%
Gorse Hill	3.3%	2.2%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	5.0%
Orbital Retail Park	6.9%	29.5%	2.2%	1.8%	0.5%	0.0%	0.6%	1.3%	5.0%
West Swindon District Centre	0.8%	2.0%	27.8%	0.9%	0.2%	2.3%	1.1%	1.0%	5.0%
Highworth	0.0%	0.2%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Wroughton	0.0%	0.0%	6.6%	0.0%	0.1%	1.9%	0.0%	0.0%	5.0%
Other Swindon	78.8%	59.0%	39.1%	14.3%	5.1%	8.9%	2.7%	2.9%	5.0%
Swindon Borough Total	**99.6%**	**96.5%**	**77.9%**	**21.9%**	**6.2%**	**13.4%**	**4.4%**	**5.5%**	
Calne	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.9%	0.0%	n/a
Chippenham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	48.9%	0.4%	n/a
Cirencester	0.0%	0.8%	7.2%	0.0%	1.0%	0.0%	3.0%	79.1%	n/a
Devizes	0.0%	0.0%	0.2%	0.0%	0.3%	63.2%	4.8%	0.0%	n/a
Farringdon	0.0%	0.0%	0.0%	6.0%	0.0%	0.0%	0.0%	2.1%	n/a
Marlborough	0.3%	0.0%	0.0%	0.0%	23.6%	8.3%	0.7%	0.5%	n/a
Malmesbury	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	8.1%	0.0%	n/a
Wantage	0.0%	0.0%	0.0%	19.6%	3.5%	0.0%	0.0%	0.0%	n/a
Wootton Bassett	0.0%	2.5%	8.6%	0.0%	0.0%	0.0%	0.3%	0.0%	n/a
Other	0.1%	0.2%	6.1%	52.5%	64.8%	15.1%	9.9%	12.4%	n/a
Other Sub-Total	**0.4%**	**3.5%**	**22.1%**	**78.1%**	**93.8%**	**86.6%**	**95.6%**	**94.5%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey January 2016

Table 5: Base Year 2016 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2016	**152.66**	**183.59**	**135.47**	**134.94**	**67.42**	**128.87**	**197.51**	**99.00**		
Swindon Town Centre	13.89	5.51	2.98	0.13	0.20	0.13	0.00	0.30	2.57	25.71
Old Town Swindon	1.07	1.10	0.00	1.08	0.00	0.00	0.00	0.00	0.17	3.42
Gorse Hill	5.04	4.04	0.00	0.00	0.00	0.26	0.00	0.00	0.49	9.83
Orbital Retail Park	10.53	54.16	2.98	2.43	0.34	0.00	1.19	1.29	3.84	76.75
West Swindon District Centre	1.22	3.67	37.66	1.21	0.13	2.96	2.17	0.99	2.63	52.66
Highworth	0.00	0.37	0.00	5.40	0.00	0.00	0.00	0.00	0.30	6.07
Wroughton	0.00	0.00	8.94	0.00	0.07	2.45	0.00	0.00	0.60	12.06
Other Swindon	120.30	108.32	52.97	19.30	3.44	11.47	5.33	2.87	17.05	341.04
Swindon Total	**152.05**	**177.16**	**105.53**	**29.55**	**4.18**	**17.27**	**8.69**	**5.44**	**27.66**	**527.54**
Calne	0.00	0.00	0.00	0.00	0.00	0.00	39.30	0.00	n/a	39.30
Chippenham	0.00	0.00	0.00	0.00	0.00	0.00	96.58	0.40	n/a	96.98
Cirencester	0.00	1.47	9.75	0.00	0.67	0.00	5.93	78.31	n/a	96.13
Devizes	0.00	0.00	0.27	0.00	0.20	81.44	9.48	0.00	n/a	91.40
Farringdon	0.00	0.00	0.00	8.10	0.00	0.00	0.00	2.08	n/a	10.18
Marlborough	0.46	0.00	0.00	0.00	15.91	10.70	1.38	0.49	n/a	28.94
Malmesbury	0.00	0.00	0.00	0.00	0.40	0.00	16.00	0.00	n/a	16.40
Wantage	0.00	0.00	0.00	26.45	2.36	0.00	0.00	0.00	n/a	28.81
Wootton Bassett	0.00	4.59	11.65	0.00	0.00	0.00	0.59	0.00	n/a	16.83
Other	0.15	0.37	8.26	70.84	43.69	19.46	19.55	12.28	n/a	174.60
Other Sub-Total	**0.61**	**6.43**	**29.94**	**105.38**	**63.24**	**111.60**	**188.82**	**93.55**	**n/a**	**599.57**
TOTAL	**152.66**	**183.59**	**135.47**	**134.94**	**67.42**	**128.87**	**197.51**	**99.00**		**1,127.11**

Source: Table 3 and 4

Table 6: Future Convenience Goods Market Shares (%)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Swindon Town Centre (incl. Morrisons Regent Circus)	25.0%	10.0%	5.0%	1.0%	1.0%	1.0%	1.0%	1.0%	10.0%
Other Swindon	74.6%	86.3%	66.1%	16.6%	5.0%	11.6%	3.5%	4.5%	5.0%
Highworth	0.0%	0.2%	0.0%	4.1%	0.0%	0.0%	0.0%	0.0%	5.0%
Wroughton	0.0%	0.0%	6.6%	0.0%	0.2%	1.9%	0.0%	0.0%	5.0%
Swindon Borough Total	**99.6%**	**96.5%**	**77.7%**	**21.7%**	**6.2%**	**14.5%**	**4.5%**	**5.5%**	
Calne	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.4%	0.0%	n/a
Chippenham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	48.6%	0.4%	n/a
Cirencester	0.0%	0.8%	6.8%	0.0%	1.0%	0.0%	2.9%	78.8%	n/a
Devizes	0.0%	0.0%	0.3%	0.0%	0.4%	62.0%	4.6%	0.0%	n/a
Farringdon	0.0%	0.0%	0.0%	5.9%	0.0%	0.0%	0.0%	1.9%	n/a
Marlborough	0.3%	0.0%	0.0%	0.0%	23.5%	8.1%	0.7%	0.5%	n/a
Malmesbury	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	8.1%	0.0%	n/a
Wantage	0.0%	0.0%	0.0%	19.0%	3.4%	0.0%	0.0%	0.0%	n/a
Wootton Bassett	0.0%	2.5%	8.8%	0.0%	0.0%	0.0%	0.3%	0.0%	n/a
Other	0.1%	0.2%	6.4%	53.4%	64.9%	15.4%	9.9%	12.9%	n/a
Other Sub-Total	**0.4%**	**3.5%**	**22.3%**	**78.3%**	**93.8%**	**85.5%**	**95.5%**	**94.5%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey January 2016 with NLP adjustments

Table 7: Convenience Goods Expenditure 2021 (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2021	**160.10**	**192.54**	**138.91**	**138.19**	**69.07**	**131.70**	**201.86**	**100.35**		
Swindon Town Centre	40.03	19.25	6.95	1.38	0.69	1.32	2.02	1.00	8.07	80.71
Other Swindon	119.43	166.16	91.82	22.94	3.45	15.28	7.07	4.52	22.67	453.33
Highworth	0.00	0.39	0.00	5.67	0.00	0.00	0.00	0.00	0.32	6.37
Wroughton	0.00	0.00	9.17	0.00	0.14	2.50	0.00	0.00	0.62	12.43
Swindon Total	**159.46**	**185.80**	**107.93**	**29.99**	**4.28**	**19.10**	**9.08**	**5.52**	**31.68**	**552.83**
Calne	0.00	0.00	0.00	0.00	0.00	0.00	41.18	0.00	n/a	41.18
Chippenham	0.00	0.00	0.00	0.00	0.00	0.00	98.10	0.40	n/a	98.51
Cirencester	0.00	1.54	9.45	0.00	0.69	0.00	5.85	79.07	n/a	96.60
Devizes	0.00	0.00	0.42	0.00	0.28	81.66	9.29	0.00	n/a	91.63
Farringdon	0.00	0.00	0.00	8.15	0.00	0.00	0.00	1.91	n/a	10.06
Marlborough	0.48	0.00	0.00	0.00	16.23	10.67	1.41	0.50	n/a	29.29
Malmesbury	0.00	0.00	0.00	0.00	0.41	0.00	16.35	0.00	n/a	16.77
Wantage	0.00	0.00	0.00	26.26	2.35	0.00	0.00	0.00	n/a	28.60
Wootton Bassett	0.00	4.81	12.22	0.00	0.00	0.00	0.61	0.00	n/a	17.64
Other	0.16	0.39	8.89	73.79	44.83	20.28	19.98	12.94	n/a	181.27
Other Sub-Total	**0.64**	**6.74**	**30.98**	**108.20**	**64.79**	**112.61**	**192.78**	**94.83**	**n/a**	**611.55**
TOTAL	**160.10**	**192.54**	**138.91**	**138.19**	**69.07**	**131.70**	**201.86**	**100.35**		**1,164.39**

Source: Table 3 and 6

Table 8: Convenience Goods Expenditure 2026 (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	**165.98**	**199.61**	**142.62**	**141.05**	**70.47**	**134.30**	**205.84**	**101.96**		
Swindon Town Centre	41.50	19.96	7.13	1.41	0.70	1.34	2.06	1.02	8.35	83.47
Other Swindon	123.82	172.26	94.27	23.41	3.52	15.58	7.20	4.59	23.40	468.07
Highworth	0.00	0.40	0.00	5.78	0.00	0.00	0.00	0.00	0.33	6.51
Wroughton	0.00	0.00	9.41	0.00	0.14	2.55	0.00	0.00	0.64	12.74
Swindon Total	**165.32**	**192.62**	**110.82**	**30.61**	**4.37**	**19.47**	**9.26**	**5.61**	**32.71**	**570.79**
Calne	0.00	0.00	0.00	0.00	0.00	0.00	41.99	0.00	n/a	41.99
Chippenham	0.00	0.00	0.00	0.00	0.00	0.00	100.04	0.41	n/a	100.45
Cirencester	0.00	1.60	9.70	0.00	0.70	0.00	5.97	80.35	n/a	98.32
Devizes	0.00	0.00	0.43	0.00	0.28	83.27	9.47	0.00	n/a	93.44
Farringdon	0.00	0.00	0.00	8.32	0.00	0.00	0.00	1.94	n/a	10.26
Marlborough	0.50	0.00	0.00	0.00	16.56	10.88	1.44	0.51	n/a	29.89
Malmesbury	0.00	0.00	0.00	0.00	0.42	0.00	16.67	0.00	n/a	17.10
Wantage	0.00	0.00	0.00	26.80	2.40	0.00	0.00	0.00	n/a	29.20
Wootton Bassett	0.00	4.99	12.55	0.00	0.00	0.00	0.62	0.00	n/a	18.16
Other	0.17	0.40	9.13	75.32	45.73	20.68	20.38	13.15	n/a	184.96
Other Sub-Total	**0.66**	**6.99**	**31.80**	**110.44**	**66.10**	**114.83**	**196.58**	**96.36**	**n/a**	**623.76**
TOTAL	**165.98**	**199.61**	**142.62**	**141.05**	**70.47**	**134.30**	**205.84**	**101.96**		**1,194.55**

Source: Table 3 and 6

Table 9: Convenience Goods Expenditure 2031 (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	**173.79**	**209.00**	**147.48**	**144.32**	**72.07**	**137.64**	**210.95**	**104.38**		
Swindon Town Centre	43.45	20.90	7.37	1.44	0.72	1.38	2.11	1.04	8.71	87.13
Other Swindon	129.65	180.36	97.49	23.96	3.60	15.97	7.38	4.70	24.37	487.48
Highworth	0.00	0.42	0.00	5.92	0.00	0.00	0.00	0.00	0.33	6.67
Wroughton	0.00	0.00	9.73	0.00	0.14	2.62	0.00	0.00	0.66	13.15
Swindon Total	**173.09**	**201.68**	**114.60**	**31.32**	**4.47**	**19.96**	**9.49**	**5.74**	**34.08**	**594.43**
Calne	0.00	0.00	0.00	0.00	0.00	0.00	43.03	0.00	n/a	43.03
Chippenham	0.00	0.00	0.00	0.00	0.00	0.00	102.52	0.42	n/a	102.94
Cirencester	0.00	1.67	10.03	0.00	0.72	0.00	6.12	82.25	n/a	100.79
Devizes	0.00	0.00	0.44	0.00	0.29	85.33	9.70	0.00	n/a	95.77
Farringdon	0.00	0.00	0.00	8.52	0.00	0.00	0.00	1.98	n/a	10.50
Marlborough	0.52	0.00	0.00	0.00	16.94	11.15	1.48	0.52	n/a	30.60
Malmesbury	0.00	0.00	0.00	0.00	0.43	0.00	17.09	0.00	n/a	17.52
Wantage	0.00	0.00	0.00	27.42	2.45	0.00	0.00	0.00	n/a	29.87
Wootton Bassett	0.00	5.22	12.98	0.00	0.00	0.00	0.63	0.00	n/a	18.84
Other	0.17	0.42	9.44	77.07	46.77	21.20	20.88	13.46	n/a	189.42
Other Sub-Total	**0.70**	**7.31**	**32.89**	**113.00**	**67.60**	**117.68**	**201.46**	**98.64**	**n/a**	**639.28**
TOTAL	**173.79**	**209.00**	**147.48**	**144.32**	**72.07**	**137.64**	**210.95**	**104.38**		**1,233.70**

Source: Table 3 and 6

Table 10: Convenience Goods Expenditure 2036 (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2036	**179.64**	**216.04**	**151.09**	**146.66**	**73.23**	**140.08**	**214.70**	**106.08**		
Swindon Town Centre	44.91	21.60	7.55	1.47	0.73	1.40	2.15	1.06	8.99	89.86
Other Swindon	134.01	186.44	99.87	24.35	3.66	16.25	7.51	4.77	25.10	501.97
Highworth	0.00	0.43	0.00	6.01	0.00	0.00	0.00	0.00	0.34	6.78
Wroughton	0.00	0.00	9.97	0.00	0.15	2.66	0.00	0.00	0.67	13.45
Swindon Total	**178.93**	**208.48**	**117.40**	**31.83**	**4.54**	**20.31**	**9.66**	**5.83**	**35.10**	**612.07**
Calne	0.00	0.00	0.00	0.00	0.00	0.00	43.80	0.00	n/a	43.80
Chippenham	0.00	0.00	0.00	0.00	0.00	0.00	104.34	0.42	n/a	104.77
Cirencester	0.00	1.73	10.27	0.00	0.73	0.00	6.23	83.59	n/a	102.55
Devizes	0.00	0.00	0.45	0.00	0.29	86.85	9.88	0.00	n/a	97.47
Farringdon	0.00	0.00	0.00	8.65	0.00	0.00	0.00	2.02	n/a	10.67
Marlborough	0.54	0.00	0.00	0.00	17.21	11.35	1.50	0.53	n/a	31.13
Malmesbury	0.00	0.00	0.00	0.00	0.44	0.00	17.39	0.00	n/a	17.83
Wantage	0.00	0.00	0.00	27.87	2.49	0.00	0.00	0.00	n/a	30.36
Wootton Bassett	0.00	5.40	13.30	0.00	0.00	0.00	0.64	0.00	n/a	19.34
Other	0.18	0.43	9.67	78.32	47.52	21.57	21.26	13.68	n/a	192.64
Other Sub-Total	**0.72**	**7.56**	**33.69**	**114.84**	**68.69**	**119.77**	**205.04**	**100.25**	**n/a**	**650.55**
TOTAL	**179.64**	**216.04**	**151.09**	**146.66**	**73.23**	**140.08**	**214.70**	**106.08**		**1,262.62**

Source: Table 3 and 6

Table 11: Convenience Goods Floorspace and Benchmark Turnover 2016

Store	Gross Floorspace (sq.m)	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Swindon Town Centre						
Tesco Metro, The Parade	2,343	899	90%	809	£11,058	£8.95
Co-op, Regent Street	547	294	90%	265	£8,903	£2.36
Marks & Spencer Food Hall	2,245	1,347	95%	1,280	£10,329	£13.22
Iceland, Brunel Centre	953	508	95%	483	£7,933	£3.83
Sainsbury's Brunel Plaza	3,249	1,554	80%	1,243	£11,690	£14.53
Morrisons, Regent Circus	5,383	3,038	75%	2,279	£10,849	£24.72
Other Swindon Town Centre	3,240	2,100	95%	1,995	£5,000	£9.98
Old Town Swindon						
Co-op, High Street	3,217	1,603	90%	1,443	£8,903	£12.84
Other Old Town	1,210	700	95%	665	£5,000	£3.33
Cavendish Square						
Co-op	1,297	689	95%	655	£8,903	£5.83
Gorse Hill						
Iceland, Cricklade Road	843	450	95%	428	£7,933	£3.39
Co-op, Cricklade Road	1,188	630	95%	599	£8,903	£5.33
Lidl, Bright Street	2,235	1,640	85%	1,394	£7,723	£10.77
Orbital Retail Park						
Asda, Thamesdown Drive	16,524	10,625	50%	5,313	£15,213	£80.82
Marks & Spencer Food Hall	1,913	1,147	95%	1,090	£10,329	£11.25
West Swindon District Centre						
Asda	9,862	5,758	50%	2,879	£15,213	£43.80
Other Swindon						
Aldi, Drove Road	1,516	1,028	80%	822	£11,557	£9.50
Aldi, Hobley Drive	1,171	768	85%	653	£11,557	£7.54
Aldi, Latham Road	1,438	975	80%	780	£11,557	£9.01
Aldi, Shaw Road, Westlea	1,530	1,019	80%	815	£11,557	£9.42
Co-op, Beachcroft Road	260	140	95%	133	£8,903	£1.18
Co-op, Rodbourne Road	347	187	95%	178	£8,903	£1.58
Co-op, 533 Cricklade Road	398	214	95%	203	£8,903	£1.81
Co-op, Aiken Road	409	220	95%	209	£8,903	£1.86
Co-op, Cheney Manor Road	975	518	95%	492	£8,903	£4.38
Co-op, Covingham Square	448	241	95%	229	£8,903	£2.04
Co-op, Groundwell Road	259	139	95%	132	£8,903	£1.18
Co-op, Hyde Road	1,256	667	95%	634	£8,903	£5.64
Co-op, Moredon Road	428	230	95%	219	£8,903	£1.95
Co-op, Roughmoor Village, Swinley Drive	240	129	95%	123	£8,903	£1.09
Co-op, Sussex Square	130	70	95%	67	£8,903	£0.59
Co-op, Windbrook Meadow	188	101	95%	96	£8,903	£0.85
Farmfoods, Cheney Manor Road	682	443	95%	421	£7,000	£2.95
Lidl, Barnfield Road	1,387	981	85%	834	£7,723	£6.44
Marks & Spencer Simply Food, Mannington RP	1,125	517	95%	491	£10,329	£5.07
Morrisons, Eldene Drive	4,464	2,549	85%	2,167	£10,849	£23.51
Morrisons, Thames Avenue, Haydon Centre	3,274	1,962	85%	1,668	£10,849	£18.09
Sainsbury's, Oxford Road	7,136	4,116	65%	2,675	£11,690	£31.28
Sainsbury's, Paddington Drive	7,769	5,261	60%	3,157	£11,690	£36.90
Tesco Express, Elstree Way	370	259	95%	246	£11,058	£2.72
Tesco Express, Freshbrook Village Centre	411	287	95%	273	£11,058	£3.01
Tesco Express, Liden Centre	357	249	95%	237	£11,058	£2.62
Tesco Express, Redhouse Way	366	256	95%	243	£11,058	£2.69
Tesco Express, Shaw Village, Ramleaze Drive	244	170	95%	162	£11,058	£1.79
Tesco Extra, Ocotal Way	11,414	8,444	55%	4,644	£11,058	£51.36
Waitrose, Mill Lane, Wichelstowe	3,765	1,975	90%	1,778	£11,665	£20.73
Highworth						
Tesco Express, Newburgh Place	330	230	95%	219	£11,058	£2.42
Co-op, Brewery Street	1,276	677	95%	643	£8,903	£5.73
Wroughton						
M Local, Devizes Road	318	143	95%	136	£10,849	£1.47
Co-op, High Street	480	258	95%	245	£8,903	£2.18
Tesco Express, Elendune Centre	586	409	95%	389	£11,058	£4.30
Local Shops, Swindon Borough	4,500	3,000	100%	3,000	£5,000	£15.00
	117,496	**71,814**	**73%**	**52,225**		**£554.82**

Source: Goad 2015 and ORC StorePoint 2016

Table 12: Convenience Goods Commitments/Proposals, 2016

Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Proposed Aldi, Land At Hobley Drive, Stratton St Margaret [1]	454	80%	363	£11,557	£4.20
Kimmerfields (estimated potential convenience goods floorspace) [2]	500	100%	500	£11,000	£5.50
Commitments Total	**954**		**863**		**£9.70**
Wichelstowe [3]	1,000	100%	1,000	£11,000	£11.00
Commonhead [4]	375	100%	375	£11,000	£4.13
Eastern Villages [5]	2,000	100%	2,000	£11,000	£22.00
Tadpole Farm [6]	375	100%	375	£11,000	£4.13
Kingsdown [7]	425	100%	425	£11,000	£4.68
Former School site, Rodbourne Road [8]	1,400	80%	1,120	£11,000	£12.32
Former Allotment site, Rodbourne Road [9]	150	100%	150	£11,000	£1.65
Proposals Total	**5,725**		**5,445**		**£59.90**

Source: Swindon Council and Mintel

Notes:

[1] LPA Ref. S/15/1028 - net increase in floorspace over existing store only

[2] LPA Ref. S/11/0614

[3] Local Plan allocation NC1 - estimated potential convenience goods floorspace, excludes existing Waitrose store (3,765 sq.m gross)

[4] Local Plan allocation NC2 - estimated potential convenience goods floorspace

[5] Local Plan allocation NC3 - estimated potential convenience goods floorspace in district and local centres, excludes existing Sainsbury's, Oxford Road (7,136 sq.m gross)

[6] Local Plan allocation NC4 - estimated potential convenience goods floorspace

[7] Local Plan allocation NC5 - estimated potential convenience goods floorspace

[8] Development Brief for site includes potential food store

[9] Development Brief for site includes potential "roadside" retail

Table 13: Summary of Convenience Goods Expenditure 2016 to 2036 - With Commitments

Area	2016	2021	2026	2031	2036
Available Expenditure in Swindon (£m)					
Swindon Town Centre	25.71	80.71	83.47	87.13	89.86
Other Swindon	483.69	453.33	468.07	487.48	501.97
Highworth	6.07	6.37	6.51	6.67	6.78
Wroughton	12.06	12.43	12.74	13.15	13.45
Total	**527.54**	**552.83**	**570.79**	**594.43**	**612.07**
Benchmark Turnover of Existing Facilities (£m)					
Swindon Town Centre	77.58	83.08	83.08	83.08	83.08
Other Swindon	461.15	465.34	465.34	465.34	465.34
Highworth	8.14	8.14	8.14	8.14	8.14
Wroughton	7.95	7.95	7.95	7.95	7.95
Total	**554.82**	**564.51**	**564.51**	**564.51**	**564.51**
Surplus/Deficit Expenditure (£m)					
Swindon Town Centre	-51.86	-2.37	0.39	4.05	6.79
Other Swindon	22.55	-12.01	2.72	22.14	36.63
Highworth	-2.07	-1.77	-1.63	-1.47	-1.36
Wroughton	4.11	4.48	4.79	5.20	5.50
Total	**-27.28**	**-11.68**	**6.27**	**29.91**	**47.56**

Source: Tables 5 to 12

Commitments added in at 2021: *Proposed Aldi, Land At Hobley Drive, Stratton St Margaret*
Kimmerfields (estimated potential convenience goods floorspace)

Table 14: Convenience Goods Floorspace Expenditure Capacity 2016 to 2036 - With Commitments

Area	2016	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£11,000	£11,000	£11,000	£11,000	£11,000
Floorspace Requirement (sq.m net)					
Swindon Town Centre	-4,715	-215	36	368	617
Other Swindon	2,050	-1,092	248	2,012	3,330
Highworth	-189	-161	-149	-134	-123
Wroughton	373	407	435	473	500
Total	**-2,480**	**-1,062**	**570**	**2,719**	**4,324**
Floorspace Requirement (sq.m gross)					
Swindon Town Centre	-6,735	-308	51	526	881
Other Swindon	2,928	-1,560	354	2,875	4,757
Highworth	-269	-230	-212	-191	-176
Wroughton	533	581	622	675	714
Total	**-3,543**	**-1,517**	**815**	**3,885**	**6,176**

Table 15: Summary of Convenience Goods Expenditure 2016 to 2036 - With Commitments and Proposals

Area	2016	2021	2026	2031	2036
Available Expenditure in Swindon (£m)					
Swindon Town Centre	25.71	80.71	83.47	87.13	89.86
Other Swindon	483.69	453.33	468.07	487.48	501.97
Highworth	6.07	6.37	6.51	6.67	6.78
Wroughton	12.06	12.43	12.74	13.15	13.45
Total	**527.54**	**552.83**	**570.79**	**594.43**	**612.07**
Benchmark Turnover of Existing Facilities (£m)					
Swindon Town Centre	77.58	83.08	83.08	83.08	83.08
Other Swindon	461.15	525.24	525.24	525.24	525.24
Highworth	8.14	8.14	8.14	8.14	8.14
Wroughton	7.95	7.95	7.95	7.95	7.95
Total	**554.82**	**624.41**	**624.41**	**624.41**	**624.41**
Surplus/Deficit Expenditure (£m)					
Swindon Town Centre	-51.86	-2.37	0.39	4.05	6.79
Other Swindon	22.55	-71.91	-57.17	-37.76	-23.27
Highworth	-2.07	-1.77	-1.63	-1.47	-1.36
Wroughton	4.11	4.48	4.79	5.20	5.50
Total	**-27.28**	**-71.58**	**-53.62**	**-29.98**	**-12.34**

Source: Tables 5 to 12

Commitments added in at 2021:
Proposed Aldi, Land At Hobley Drive, Stratton St Margaret
Kimmerfields (estimated potential convenience goods floorspace)

Proposals added in at 2021:
Wichelstowe
Commonhead
Eastern Villages
Tadpole Farm
Kingsdown
Former School site, Rodbourne Road
Former Allotment site, Rodbourne Road

Table 16: Convenience Goods Floorspace Expenditure Capacity 2016 to 2036 - With Commitments and Proposals

Area	2016	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£11,000	£11,000	£11,000	£11,000	£11,000
Floorspace Requirement (sq.m net)					
Swindon Town Centre	-4,715	-215	36	368	617
Other Swindon	2,050	-6,537	-5,197	-3,433	-2,115
Highworth	-189	-161	-149	-134	-123
Wroughton	373	407	435	473	500
Total	**-2,480**	**-6,507**	**-4,875**	**-2,726**	**-1,121**
Floorspace Requirement (sq.m gross)					
Swindon Town Centre	-6,735	-308	51	526	881
Other Swindon	2,928	-9,339	-7,425	-4,904	-3,022
Highworth	-269	-230	-212	-191	-176
Wroughton	533	581	622	675	714
Total	**-3,543**	**-9,296**	**-6,964**	**-3,894**	**-1,602**

Appendix 3 Comparison Goods Capacity

Table 1: Study Area Population

Zone	2011	2016	2021	2026	2031	2036
Zone 1 - Swindon Urban East	71,140	75,595	79,879	83,008	87,123	90,183
Zone 2 - Swindon Urban West	88,045	93,558	98,861	102,733	107,826	111,613
Zone 3 - Swindon Rural West	59,838	63,028	65,119	67,017	69,469	71,268
Zone 4 - Vale of White Horse	58,529	60,754	62,689	64,140	65,785	66,946
Zone 5 - Hungerford/West Berkshire	28,262	29,051	29,987	30,666	31,437	31,987
Zone 6 - Central Wiltshire	57,963	59,957	61,741	63,107	64,830	66,073
Zone 7 - Chippenham/North Wiltshire	91,183	94,319	97,126	99,275	101,986	103,941
Zone 8 - Cotswolds/Cirencester	42,673	43,548	44,475	45,298	46,482	47,306
Total	**497,633**	**519,810**	**539,877**	**555,245**	**574,936**	**589,318**

Sources: *Experian 2011 Census of Population and ONS - SNPP 2012 projections*

Table 2: Comparison Goods Expenditure per person (£)

Zone	2016	2021	2026	2031	2036
Zone 1 - Swindon Urban East	2,921	3,304	3,882	4,565	5,356
Zone 2 - Swindon Urban West	3,110	3,518	4,132	4,860	5,702
Zone 3 - Swindon Rural West	3,560	4,028	4,731	5,565	6,529
Zone 4 - Vale of White Horse	3,743	4,234	4,974	5,850	6,864
Zone 5 - Hungerford/West Berkshire	3,910	4,423	5,196	6,111	7,170
Zone 6 - Central Wiltshire	3,588	4,059	4,768	5,607	6,579
Zone 7 - Chippenham/North Wiltshire	3,531	3,995	4,693	5,519	6,475
Zone 8 - Cotswolds/Cirencester	3,819	4,320	5,075	5,969	7,003

Sources:

Experian Local Expenditure 2014 (2014 prices)

Growth Rates: 5.3% 2014-2015, 3.2% 2015-2016, 2.9% 2016-2017, 3.0% p.a. 2017 to 2022 and 3.2% from 2022

Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£m)

Zone	2016	2021	2026	2031	2036
Zone 1 - Swindon Urban East	220.81	263.95	322.22	397.73	483.06
Zone 2 - Swindon Urban West	290.92	347.76	424.52	524.02	636.43
Zone 3 - Swindon Rural West	224.40	262.28	317.09	386.56	465.31
Zone 4 - Vale of White Horse	227.41	265.45	319.05	384.84	459.51
Zone 5 - Hungerford/West Berkshire	113.60	132.65	159.35	192.12	229.36
Zone 6 - Central Wiltshire	215.10	250.58	300.87	363.50	434.68
Zone 7 - Chippenham/North Wiltshire	333.06	388.00	465.87	562.85	673.07
Zone 8 - Cotwolds/Cirencester	166.30	192.14	229.89	277.43	331.28
Total	**1,791.61**	**2,102.80**	**2,538.84**	**3,089.06**	**3,712.69**

Source: Tables 1 and 2

Table 4: Base Year 2016 Comparison Goods Market Shares (%)

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Swindon Town Centre	35.7%	27.4%	27.1%	15.0%	15.8%	19.2%	12.2%	9.7%	10.0%
Swindon Designer Outlet	1.8%	2.9%	3.3%	1.6%	3.8%	3.4%	2.8%	1.5%	20.0%
Swindon Old Town	1.2%	1.6%	1.4%	0.1%	0.2%	0.1%	0.1%	0.1%	5.0%
Orbital Shopping Park, Swindon	8.4%	23.6%	8.5%	1.6%	0.5%	0.3%	1.9%	4.2%	5.0%
West Swindon Shopping Centre	1.1%	2.3%	8.6%	1.1%	0.4%	0.2%	0.5%	0.8%	5.0%
Swindon Retail Parks	33.1%	27.1%	23.8%	15.3%	10.1%	10.1%	5.0%	13.2%	5.0%
Swindon Other	8.1%	3.9%	4.7%	1.5%	0.5%	1.1%	0.3%	0.8%	5.0%
Highworth Town Centre	0.1%	0.1%	0.0%	0.8%	0.0%	0.1%	0.1%	0.0%	5.0%
Wroughton Village Centre	0.0%	0.0%	1.2%	0.1%	0.0%	0.1%	0.0%	0.0%	5.0%
Swindon Total	**89.5%**	**88.9%**	**78.6%**	**37.1%**	**31.3%**	**34.6%**	**22.9%**	**30.3%**	
Bath	2.6%	1.0%	1.8%	0.1%	0.2%	8.3%	12.1%	0.1%	n/a
Bristol	3.0%	4.6%	3.2%	0.5%	0.3%	3.7%	6.8%	5.4%	n/a
Calne	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	n/a
Carterton	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.2%	n/a
Chippenham	0.0%	0.1%	0.2%	0.0%	0.1%	6.2%	45.9%	0.0%	n/a
Cirencester	0.1%	1.7%	6.0%	0.5%	0.3%	0.1%	1.9%	46.3%	n/a
Devizes	0.0%	0.0%	0.4%	0.0%	0.4%	25.2%	0.8%	0.0%	n/a
Faringdon	0.1%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	n/a
Hungerford	0.0%	0.0%	0.0%	0.0%	8.1%	0.1%	0.0%	0.0%	n/a
Malmesbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	2.7%	0.0%	n/a
Marlborough	0.5%	0.2%	0.9%	0.0%	11.0%	3.5%	0.3%	0.0%	n/a
Newbury	0.2%	0.0%	0.0%	5.0%	36.0%	0.5%	0.0%	0.0%	n/a
Oxford	0.7%	0.5%	0.2%	14.2%	0.1%	0.0%	0.0%	0.0%	n/a
Reading	0.3%	0.5%	0.3%	0.8%	1.8%	0.3%	0.0%	0.1%	n/a
Salisbury	0.0%	0.0%	0.1%	0.0%	1.1%	4.1%	0.0%	0.0%	n/a
Wootton Bassett	0.0%	0.5%	2.7%	0.0%	0.4%	0.0%	0.3%	0.0%	n/a
Other	3.0%	2.0%	5.6%	38.9%	8.9%	13.3%	4.3%	17.6%	n/a
Other Sub-Total	**10.5%**	**11.1%**	**21.4%**	**62.9%**	**68.7%**	**65.4%**	**77.1%**	**69.7%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey January 2016

Table 5: Base Year 2016 Comparison Goods Expenditure (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow	Total
Expenditure 2016	**220.81**	**290.92**	**224.40**	**227.41**	**113.60**	**215.10**	**333.06**	**166.30**		
Swindon Town Centre	78.83	79.71	60.81	34.11	17.95	41.30	40.63	16.13	41.05	410.53
Swindon Designer Outlet	3.97	8.44	7.41	3.64	4.32	7.31	9.33	2.49	11.73	58.63
Swindon Old Town	2.65	4.65	3.14	0.23	0.23	0.22	0.33	0.17	0.61	12.23
Orbital Shopping Park, Swindon	18.55	68.66	19.07	3.64	0.57	0.65	6.33	6.98	6.55	130.99
West Swindon Shopping Centre	2.43	6.69	19.30	2.50	0.45	0.43	1.67	1.33	1.83	36.63
Swindon Retail Parks	73.09	78.84	53.41	34.79	11.47	21.73	16.65	21.95	16.42	328.35
Swindon Other	17.89	11.35	10.55	3.41	0.57	2.37	1.00	1.33	2.55	51.00
Highworth Town Centre	0.22	0.29	0.00	1.82	0.00	0.22	0.33	0.00	0.15	3.03
Wroughton Village Centre	0.00	0.00	2.69	0.23	0.00	0.22	0.00	0.00	0.17	3.30
Swindon Borough Total	**197.63**	**258.63**	**176.38**	**84.37**	**35.56**	**74.42**	**76.27**	**50.39**	**81.06**	**1,034.71**
Bath	5.74	2.91	4.04	0.23	0.23	17.85	40.30	0.17	n/a	71.46
Bristol	6.62	13.38	7.18	1.14	0.34	7.96	22.65	8.98	n/a	68.25
Calne	0.00	0.00	0.00	0.00	0.00	0.00	6.66	0.00	n/a	6.66
Carterton	0.00	0.00	0.00	6.14	0.00	0.00	0.00	0.33	n/a	6.47
Chippenham	0.00	0.29	0.45	0.00	0.11	13.34	152.88	0.00	n/a	167.07
Cirencester	0.22	4.95	13.46	1.14	0.34	0.22	6.33	77.00	n/a	103.65
Devizes	0.00	0.00	0.90	0.00	0.45	54.21	2.66	0.00	n/a	58.22
Faringdon	0.22	0.00	0.00	0.45	0.00	0.00	0.00	0.00	n/a	0.68
Hungerford	0.00	0.00	0.00	0.00	9.20	0.22	0.00	0.00	n/a	9.42
Malmesbury	0.00	0.00	0.00	0.00	0.00	0.22	8.99	0.00	n/a	9.21
Marlborough	1.10	0.58	2.02	0.00	12.50	7.53	1.00	0.00	n/a	24.73
Newbury	0.44	0.00	0.00	11.37	40.89	1.08	0.00	0.00	n/a	53.78
Oxford	1.55	1.45	0.45	32.29	0.11	0.00	0.00	0.00	n/a	35.85
Reading	0.66	1.45	0.67	1.82	2.04	0.65	0.00	0.17	n/a	7.47
Salisbury	0.00	0.00	0.22	0.00	1.25	8.82	0.00	0.00	n/a	10.29
Wootton Bassett	0.00	1.45	6.06	0.00	0.45	0.00	1.00	0.00	n/a	8.97
Other	6.62	5.82	12.57	88.46	10.11	28.61	14.32	29.27	n/a	195.78
Other Sub-Total	**23.19**	**32.29**	**48.02**	**143.04**	**78.04**	**140.68**	**256.79**	**115.91**	**n/a**	837.96
TOTAL	**220.81**	**290.92**	**224.40**	**227.41**	**113.60**	**215.10**	**333.06**	**166.30**	**n/a**	**1,872.67**

Source: Table 3 and 4

Table 6: Future Comparison Goods Market Shares (%)

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Swindon Central	42.0%	33.3%	33.3%	21.6%	23.8%	25.0%	17.7%	16.5%	11.0%
Swindon Other	47.4%	55.5%	44.1%	14.6%	7.5%	9.4%	5.1%	13.8%	5.0%
Highworth Town Centre	0.1%	0.1%	0.0%	0.8%	0.0%	0.1%	0.1%	0.0%	5.0%
Wroughton Village Centre	0.0%	0.0%	1.2%	0.1%	0.0%	0.1%	0.0%	0.0%	5.0%
Swindon Total	**89.5%**	**88.9%**	**78.6%**	**37.1%**	**31.3%**	**34.6%**	**22.9%**	**30.3%**	
Other Outside Swindon	10.5%	11.1%	21.4%	62.9%	68.7%	65.4%	77.1%	69.7%	n/a
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey January 2016 with NLP adjustments

Table 7: Future 2021 Comparison Goods Expenditure (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow	Total
Expenditure 2021	**263.95**	**347.76**	**262.28**	**265.45**	**132.65**	**250.58**	**388.00**	**192.14**		
Swindon Central	110.86	115.80	87.34	57.34	31.57	62.64	68.68	31.70	69.95	635.88
Swindon Other	125.11	193.01	115.67	38.76	9.95	23.55	19.79	26.51	29.07	581.42
Highworth Town Centre	0.26	0.35	0.00	2.12	0.00	0.25	0.39	0.00	0.18	3.55
Wroughton Village Centre	0.00	0.00	3.15	0.27	0.00	0.25	0.00	0.00	0.19	3.86
Swindon Borough Total	**236.24**	**309.16**	**206.15**	**98.48**	**41.52**	**86.70**	**88.85**	**58.22**	**99.39**	**1,224.71**
Other Outside Swindon Borough	27.72	38.60	56.13	166.97	91.13	163.88	299.15	133.92	n/a	977.48
TOTAL	**263.95**	**347.76**	**262.28**	**265.45**	**132.65**	**250.58**	**388.00**	**192.14**	**n/a**	**2,202.19**

Source: Table 3 and 6

Table 8: Future 2026 Comparison Goods Expenditure (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow	Total
Expenditure 2026	**322.22**	**424.52**	**317.09**	**319.05**	**159.35**	**300.87**	**465.87**	**229.89**		
Swindon Central	135.33	141.37	105.59	68.91	37.93	75.22	82.46	37.93	84.63	769.36
Swindon Other	152.73	235.61	139.84	46.58	11.95	28.28	23.76	31.72	35.29	705.76
Highworth Town Centre	0.32	0.42	0.00	2.55	0.00	0.30	0.47	0.00	0.21	4.28
Wroughton Village Centre	0.00	0.00	3.81	0.32	0.00	0.30	0.00	0.00	0.23	4.66
Swindon Borough Total	**288.38**	**377.40**	**249.23**	**118.37**	**49.88**	**104.10**	**106.68**	**69.66**	**120.36**	**1,484.06**
Other Outside Swindon Borough	33.83	47.12	67.86	200.68	109.47	196.77	359.18	160.23	n/a	1175.15
TOTAL	**322.22**	**424.52**	**317.09**	**319.05**	**159.35**	**300.87**	**465.87**	**229.89**	**n/a**	**2,659.21**

Source: Table 3 and 6

Table 9: Future 2031 Comparison Goods Expenditure (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow	Total
Expenditure 2031	**397.73**	**524.02**	**386.56**	**384.84**	**192.12**	**363.50**	**562.85**	**277.43**		
Swindon Central	167.05	174.50	128.72	83.13	45.72	90.88	99.63	45.78	103.25	938.65
Swindon Other	188.53	290.83	170.47	56.19	14.41	34.17	28.71	38.29	43.24	864.83
Highworth Town Centre	0.40	0.52	0.00	3.08	0.00	0.36	0.56	0.00	0.26	5.19
Wroughton Village Centre	0.00	0.00	4.64	0.38	0.00	0.36	0.00	0.00	0.28	5.67
Swindon Borough Total	**355.97**	**465.85**	**303.84**	**142.78**	**60.13**	**125.77**	**128.89**	**84.06**	**147.04**	**1,814.33**
Other Outside Swindon Borough	41.76	58.17	82.72	242.07	131.99	237.73	433.96	193.37	n/a	1421.76
TOTAL	**397.73**	**524.02**	**386.56**	**384.84**	**192.12**	**363.50**	**562.85**	**277.43**	**n/a**	**3,236.10**

Source: Table 3 and 6

Table 10: Future 2036 Comparison Goods Expenditure (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow	Total
Expenditure 2036	**483.06**	**636.43**	**465.31**	**459.51**	**229.36**	**434.68**	**673.07**	**331.28**		
Swindon Central	202.88	211.93	154.95	99.25	54.59	108.67	119.13	54.66	124.35	1,130.42
Swindon Other	228.97	353.22	205.20	67.09	17.20	40.86	34.33	45.72	52.24	1,044.82
Highworth Town Centre	0.48	0.64	0.00	3.68	0.00	0.43	0.67	0.00	0.31	6.21
Wroughton Village Centre	0.00	0.00	5.58	0.46	0.00	0.43	0.00	0.00	0.34	6.82
Swindon Borough Total	**432.34**	**565.79**	**365.73**	**170.48**	**71.79**	**150.40**	**154.13**	**100.38**	**177.24**	**2,188.27**
Other Outside Swindon Borough	50.72	70.64	99.58	289.03	157.57	284.28	518.93	230.90	n/a	1701.66
TOTAL	**483.06**	**636.43**	**465.31**	**459.51**	**229.36**	**434.68**	**673.07**	**331.28**	**n/a**	**3,889.93**

Source: Table 3 and 6

Table 11: Comparison Goods Floorspace 2016

Centre	Gross Floorspace (sq.m)	Sales Floorspace (sq.m net)
Swindon Town Centre	75,390	56,543
Old Town	3,890	2,723
Swindon Designer Outlet	19,700	14,775
West Swindon Shopping Centre (excl. Asda)	600	420
Orbital Shopping Park	17,007	14,456
Highworth	995	697
Gorse Hill	4,436	3,105
Cavendish Square	931	652
Wroughton	269	188
Mannington Retail Park	5,879	4,997
St Margarets Retail Park	7,123	6,055
Greenbridge Retail Park	18,810	15,989
Bridgemead Retail Park	5,583	4,746
Other retail warehouses in Swindon	32,400	27,540
Food store comparison goods floorspace	n/a	19,589
Swindon Borough Total	**193,013**	**172,473**

Source: Goad Plans, VOA and Completely Retail

Table 12: Comparison Goods Commitments/Proposals, 2016

Store	Comparison Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Kimmerfields (estimated potential comparison goods element) [1]	7,500	£7,000	£52.50
Proposed Aldi, Land At Hobley Drive, Stratton St Margaret [2]	251	£6,980	£1.75
Bulky goods units, Barnfield Road [3]	2,654	£2,750	£7.30
C/U to bulky goods unit, Bridgemead Industrial Estate [4]	2,470	£2,750	£6.79
Commitments Total	**12,875**		**£68.34**
North Star (planning application) [5]	9,000	£6,000	£54.00
Wichelstowe [6]	1,000	£6,000	£6.00
Commonhead [7]	200	£6,000	£1.20
Eastern Villages [8]	1,500	£6,000	£9.00
Tadpole Farm [9]	200	£6,000	£1.20
Kingsdown [10]	150	£6,000	£0.90
Former School site, Rodbourne Road [11]	280	£6,000	£1.68
Proposals Total	**12,330**		**£73.98**

Source: Swindon Borough Council and Mintel
Notes:
[1] LPA Ref. S/11/0614
[2] LPA Ref. S/15/1028
[3] LPA Ref. S/08/2385
[4] LPA Ref. S/14/0024/RM
[5] LPA Ref. S/OUT/15/0943
[6] Local Plan allocation NC1 - estimated potential comparison goods floorspace, excludes existing Waitrose store (3,765 sq.m gross)
[7] Local Plan allocation NC2 - estimated potential comparison goods floorspace
[8] Local Plan allocation NC3 - estimated potential comparison goods floorspace in district and local centres, excludes existing Sainsbury's, Oxford Road (7,136 sq.m gross)
[9] Local Plan allocation NC4 - estimated potential comparison goods floorspace
[10] Local Plan allocation NC5 - estimated potential comparison goods floorspace
[11] Development Brief for site includes potential food store

Table 13: Summary of Comparison Goods Expenditure 2016 to 2036 - With Commitments

Centre	2016	2021	2026	2031	2036
Available Expenditure in Swindon Borough (£m)					
Swindon Central	469.17	635.88	769.36	938.65	1,130.42
Swindon Other	559.21	581.42	705.76	864.83	1,044.82
Highworth	3.03	3.55	4.28	5.19	6.21
Wroughton	3.30	3.86	4.66	5.67	6.82
Total	**1,034.71**	**1,224.71**	**1,484.06**	**1,814.33**	**2,188.27**
Turnover of Existing Facilities (£m)					
Swindon Central	469.17	575.96	635.91	702.09	775.17
Swindon Other	559.21	634.90	700.98	773.94	854.50
Highworth	3.03	3.35	3.69	4.08	4.50
Wroughton	3.30	3.64	4.02	4.44	4.90
Total	**1,034.71**	**1,217.85**	**1,344.61**	**1,484.56**	**1,639.07**
Surplus/Deficit Expenditure (£m)					
Swindon Central	0.00	59.92	133.46	236.56	355.25
Swindon Other	0.00	-53.48	4.78	90.88	190.33
Highworth	0.00	0.21	0.59	1.11	1.71
Wroughton	0.00	0.21	0.63	1.23	1.91
Total	**0.00**	**6.85**	**139.45**	**329.77**	**549.20**

Source: Tables 5 to 11

Commitments added in at 2021:
Kimmerfields (estimated potential comparison goods element)
Proposed Aldi, Land At Hobley Drive, Stratton St Margaret
Bulky goods units, Barnfield Road
C/U to bulky goods unit, Bridgemead Industrial Estate

Table 14: Comparison Goods Floorspace Expenditure Capacity 2016 to 2036 - With Commitments

Centre	2016	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£7,000	£7,729	£8,533	£9,421	£10,402
Floorspace Requirement (sq.m net)					
Swindon Central	0	7,753	15,640	25,109	34,153
Swindon Other	0	-6,920	560	9,647	18,298
Highworth	0	27	69	118	164
Wroughton	0	27	74	130	184
Total	**0**	**887**	**16,343**	**35,004**	**52,800**
Floorspace Requirement (sq.m gross)					
Swindon Central	0	10,337	20,853	33,479	45,537
Swindon Other	0	-9,227	746	12,862	24,397
Highworth	0	35	91	157	219
Wroughton	0	37	99	174	245
Total	**0**	**1,182**	**21,790**	**46,672**	**70,399**

Table 15: Summary of Comparison Goods Expenditure 2016 to 2036 - With Commitments and Proposals

Centre	2016	2021	2026	2031	2036
Available Expenditure in Swindon Borough (£m)					
Swindon Central	469.17	635.88	769.36	938.65	1,130.42
Swindon Other	559.21	581.42	705.76	864.83	1,044.82
Highworth	3.03	3.55	4.28	5.19	6.21
Wroughton	3.30	3.86	4.66	5.67	6.82
Total	**1,034.71**	**1,224.71**	**1,484.06**	**1,814.33**	**2,188.27**
Turnover of Existing Facilities (£m)					
Swindon Central	469.17	575.96	635.91	702.09	775.17
Swindon Other	559.21	716.58	791.17	873.51	964.43
Highworth	3.03	3.35	3.69	4.08	4.50
Wroughton	3.30	3.64	4.02	4.44	4.90
Total	**1,034.71**	**1,299.53**	**1,434.79**	**1,584.13**	**1,749.00**
Surplus/Deficit Expenditure (£m)					
Swindon Central	0.00	59.92	133.46	236.56	355.25
Swindon Other	0.00	-135.16	-85.41	-8.69	80.40
Highworth	0.00	0.21	0.59	1.11	1.71
Wroughton	0.00	0.21	0.63	1.23	1.91
Total	**0.00**	**-74.83**	**49.27**	**230.21**	**439.27**

Source: Tables 5 to 11

Commitments added in at 2021:
Kimmerfields (estimated potential comparison goods element)
Proposed Aldi, Land At Hobley Drive, Stratton St Margaret
Bulky goods units, Barnfield Road
C/U to bulky goods unit, Bridgemead Industrial Estate

Proposals added in at 2021:
North Star (planning application)
Wichelstowe
Commonhead
Eastern Villages
Tadpole Farm
Kingsdown
Former School site, Rodbourne Road

Table 16: Comparison Goods Floorspace Expenditure Capacity 2016 to 2036 - With Commitments and Proposals

Centre	2016	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£7,000	£7,729	£8,533	£9,421	£10,402
Floorspace Requirement (sq.m net)					
Swindon Central	0	7,753	15,640	25,109	34,153
Swindon Other	0	-17,489	-10,009	-922	7,729
Highworth	0	27	69	118	164
Wroughton	0	27	74	130	184
Total	**0**	**-9,682**	**5,774**	**24,435**	**42,231**
Floorspace Requirement (sq.m gross)					
Swindon Central	0	10,337	20,853	33,479	45,537
Swindon Other	0	-23,318	-13,345	-1,229	10,306
Highworth	0	35	91	157	219
Wroughton	0	37	99	174	245
Total	**0**	**-12,909**	**7,699**	**32,580**	**56,308**

Appendix 4 Cinema Capacity

Table 1: Study Area Population

Zone	2011	2016	2021	2026	2031	2036
Zone 1 - Swindon Urban East	71,140	75,595	79,879	83,008	87,123	90,183
Zone 2 - Swindon Urban West	88,045	93,558	98,861	102,733	107,826	111,613
Zone 3 - Swindon Rural West	59,838	63,028	65,119	67,017	69,469	71,268
Zone 4 - Vale of White Horse	58,529	60,754	62,689	64,140	65,785	66,946
Zone 5 - Hungerford/West Berkshire	28,262	29,051	29,987	30,666	31,437	31,987
Zone 6 - Central Wiltshire	57,963	59,957	61,741	63,107	64,830	66,073
Zone 7 - Chippenham/North Wiltshire	91,183	94,319	97,126	99,275	101,986	103,941
Zone 8 - Cotswolds/Cirencester	42,673	43,548	44,475	45,298	46,482	47,306
Total	**497,633**	**519,810**	**539,877**	**555,245**	**574,936**	**589,318**

Sources: *Experian 2011 Census of Population and ONS - SNPP 2012 projections*

Table 2: Total Number of Cinema Trips (per annum)

Zone	2016	2021	2026	2031	2036
Zone 1 - Swindon Urban East	211,665	223,663	232,422	243,944	252,513
Zone 2 - Swindon Urban West	261,963	276,811	287,653	301,912	312,518
Zone 3 - Swindon Rural West	176,478	182,332	187,648	194,513	199,552
Zone 4 - Vale of White Horse	170,111	175,529	179,592	184,197	187,448
Zone 5 - Hungerford/West Berkshire	81,343	83,964	85,865	88,023	89,565
Zone 6 - Central Wiltshire	167,879	172,875	176,700	181,524	185,004
Zone 7 - Chippenham/North Wiltshire	264,094	271,954	277,971	285,560	291,034
Zone 8 - Cotswolds/Cirencester	121,935	124,529	126,835	130,150	132,456
Total	**1,455,468**	**1,511,656**	**1,554,687**	**1,609,822**	**1,650,090**

Sources:
Table 1; 2.8 Trips per annum per person (NLP CineScope Model)

Table 3: Base Year 2016 Cinema Market Shares (%)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Swindon Borough	98.8%	89.9%	100.0%	32.9%	44.7%	39.0%	44.8%	59.4%	20.0%
Witney	0.0%	0.0%	0.0%	39.2%	0.0%	0.0%	0.0%	8.7%	n/a
Devizes	0.0%	0.0%	0.0%	0.0%	1.3%	31.7%	1.5%	0.0%	n/a
Chippenham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.4%	0.0%	n/a
Newbury	0.0%	0.0%	0.0%	1.3%	39.5%	0.0%	0.0%	0.0%	n/a
Trowbridge	0.0%	0.0%	0.0%	0.0%	0.0%	19.5%	5.2%	0.0%	n/a
Other	1.2%	10.1%	0.0%	26.6%	14.5%	9.8%	35.1%	31.9%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey January 2016

Table 4: Base Year 2016 Total Cinema Trips Per Annum

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Trips 2016	**211,665**	**261,963**	**176,478**	**170,111**	**81,343**	**167,879**	**264,094**	**121,935**		
Swindon Borough	209,125	235,505	176,478	55,967	36,360	65,473	118,314	72,429	242,413	**1,212,063**
Witney	0	0	0	66,684	0	0	0	10,608	n/a	**77,292**
Devizes	0	0	0	0	1,057	53,218	3,961	0	n/a	**58,236**
Chippenham	0	0	0	0	0	0	35,389	0	n/a	**35,389**
Newbury	0	0	0	2,211	32,131	0	0	0	n/a	**34,342**
Trowbridge	0	0	0	0	0	32,736	13,733	0	n/a	**46,469**
Other	2,540	26,458	0	45,250	11,795	16,452	92,697	38,897	n/a	**234,089**
Total	**211,665**	**261,963**	**176,478**	**170,111**	**81,343**	**167,879**	**264,094**	**121,935**	**n/a**	**1,697,880**

Source: Tables 2 and 3

Table 5: Total Cinema Trips Per Annum 2021

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Trips 2021	**223,663**	**276,811**	**182,332**	**175,529**	**83,964**	**172,875**	**271,954**	**124,529**		
Swindon Borough	220,979	248,854	182,332	57,749	37,532	67,421	121,835	73,970	252,668	**1,263,340**
Witney	0	0	0	68,807	0	0	0	10,834	n/a	**79,641**
Devizes	0	0	0	0	1,092	54,801	4,079	0	n/a	**59,972**
Chippenham	0	0	0	0	0	0	36,442	0	n/a	**36,442**
Newbury	0	0	0	2,282	33,166	0	0	0	n/a	**35,448**
Trowbridge	0	0	0	0	0	33,711	14,142	0	n/a	**47,852**
Other	2,684	27,958	0	46,691	12,175	16,942	95,456	39,725	n/a	**241,630**
Total	**223,663**	**276,811**	**182,332**	**175,529**	**83,964**	**172,875**	**271,954**	**124,529**	**n/a**	**1,764,324**

Source: Tables 2 and 3

Table 6: Total Cinema Trips Per Annum 2026

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Trips 2026	**232,422**	**287,653**	**187,648**	**179,592**	**85,865**	**176,700**	**277,971**	**126,835**		
Swindon Borough	229,633	258,600	187,648	59,086	38,382	68,913	124,531	75,340	260,533	**1,302,666**
Witney	0	0	0	70,400	0	0	0	11,035	n/a	**81,435**
Devizes	0	0	0	0	1,116	56,014	4,170	0	n/a	**61,300**
Chippenham	0	0	0	0	0	0	37,248	0	n/a	**37,248**
Newbury	0	0	0	2,335	33,917	0	0	0	n/a	**36,251**
Trowbridge	0	0	0	0	0	34,456	14,454	0	n/a	**48,911**
Other	2,789	29,053	0	47,772	12,450	17,317	97,568	40,460	n/a	**247,409**
Total	**232,422**	**287,653**	**187,648**	**179,592**	**85,865**	**176,700**	**277,971**	**126,835**	**n/a**	**1,815,220**

Source: Tables 2 and 3

Table 7: Total Cinema Trips Per Annum 2031

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Trips 2031	**243,944**	**301,912**	**194,513**	**184,197**	**88,023**	**181,524**	**285,560**	**130,150**		
Swindon Borough	241,016	271,419	194,513	60,601	39,346	70,794	127,931	77,309	270,732	**1,353,662**
Witney	0	0	0	72,205	0	0	0	11,323	n/a	**83,528**
Devizes	0	0	0	0	1,144	57,543	4,283	0	n/a	**62,971**
Chippenham	0	0	0	0	0	0	38,265	0	n/a	**38,265**
Newbury	0	0	0	2,395	34,769	0	0	0	n/a	**37,164**
Trowbridge	0	0	0	0	0	35,397	14,849	0	n/a	**50,246**
Other	2,927	30,493	0	48,996	12,763	17,789	100,231	41,518	n/a	**254,719**
Total	**243,944**	**301,912**	**194,513**	**184,197**	**88,023**	**181,524**	**285,560**	**130,150**	**n/a**	**1,880,554**

Source: Tables 2 and 3

Table 8: Total Cinema Trips Per Annum 2036

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Trips 2036	**252,513**	**312,518**	**199,552**	**187,448**	**89,565**	**185,004**	**291,034**	**132,456**		
Swindon Borough	249,483	280,953	199,552	61,670	40,035	72,152	130,383	78,679	278,227	**1,391,135**
Witney	0	0	0	73,479	0	0	0	11,524	n/a	**85,003**
Devizes	0	0	0	0	1,164	58,646	4,366	0	n/a	**64,176**
Chippenham	0	0	0	0	0	0	38,999	0	n/a	**38,999**
Newbury	0	0	0	2,437	35,378	0	0	0	n/a	**37,815**
Trowbridge	0	0	0	0	0	36,076	15,134	0	n/a	**51,210**
Other	3,030	31,564	0	49,861	12,987	18,130	102,153	42,254	n/a	**259,979**
Total	**252,513**	**312,518**	**199,552**	**187,448**	**89,565**	**185,004**	**291,034**	**132,456**	**n/a**	**1,928,316**

Source: Tables 2 and 3

Table 9: Cinema Screen Capacity 2016 to 2036

	2016	2021	2026	2031	2036
Total Cinema Trips attracted to Swindon Borough (per annum)	1,212,063	1,263,340	1,302,666	1,353,662	1,391,135
Number of Trips per Screen (per annum)	47,000	47,000	47,000	47,000	47,000
Cinema Screen Potential	26	27	28	29	30
Existing Screens in Swindon Borough	25	25	25	25	25
Swindon Borough Screen Capacity	1	2	3	4	5

Table 10: Cinema Seat Capacity 2016 to 2036

	2016	2021	2026	2031	2036
Total Cinema Trips attracted to Swindon Borough (per annum)	1,212,063	1,263,340	1,302,666	1,353,662	1,391,135
Number of Trips per Seat (per annum)	232	232	232	232	232
Cinema Seat Potential	5,224	5,445	5,615	5,835	5,996
Existing Seats in Swindon Borough	4,872	4,872	4,872	4,872	4,872
Swindon Borough Seat Capacity	352	573	743	963	1,124

Appendix 5 Food and Beverage Capacity

Table 1: Study Area Population

Zone	2011	2016	2021	2026	2031	2036
Zone 1 - Swindon Urban East	71,140	75,595	79,879	83,008	87,123	90,183
Zone 2 - Swindon Urban West	88,045	93,558	98,861	102,733	107,826	111,613
Zone 3 - Swindon Rural West	59,838	63,028	65,119	67,017	69,469	71,268
Zone 4 - Vale of White Horse	58,529	60,754	62,689	64,140	65,785	66,946
Zone 5 - Hungerford/West Berkshire	28,262	29,051	29,987	30,666	31,437	31,987
Zone 6 - Central Wiltshire	57,963	59,957	61,741	63,107	64,830	66,073
Zone 7 - Chippenham/North Wiltshire	91,183	94,319	97,126	99,275	101,986	103,941
Zone 8 - Cotswolds/Cirencester	42,673	43,548	44,475	45,298	46,482	47,306
Total	**497,633**	**519,810**	**539,877**	**555,245**	**574,936**	**589,318**

Sources: *Experian 2011 Census of Population and ONS - SNPP 2012 projections*

Table 2: Food & Beverage Expenditure per person (£)

Zone	2016	2021	2026	2031	2036
Zone 1 - Swindon Urban East	1,037	1,110	1,188	1,274	1,366
Zone 2 - Swindon Urban West	1,116	1,194	1,279	1,371	1,470
Zone 3 - Swindon Rural West	1,220	1,305	1,398	1,498	1,606
Zone 4 - Vale of White Horse	1,271	1,360	1,456	1,561	1,673
Zone 5 - Hungerford/West Berkshire	1,320	1,412	1,512	1,621	1,738
Zone 6 - Central Wiltshire	1,232	1,318	1,412	1,514	1,623
Zone 7 - Chippenham/North Wiltshire	1,206	1,290	1,382	1,482	1,588
Zone 8 - Cotswolds/Cirencester	1,341	1,434	1,536	1,647	1,765

Sources:

Experian Local Expenditure 2014 (2014 prices)

Growth Rates: 2.7% 2014-2015, 1.6% 2015-2017, 1.3% 2017 to 2022 and 1.4% p.a. from 2022

Table 3: Total Food & Beverage Expenditure (£m)

Zone	2016	2021	2026	2031	2036
Zone 1 - Swindon Urban East	78.40	88.64	98.64	110.99	123.15
Zone 2 - Swindon Urban West	104.46	118.09	131.42	147.86	164.07
Zone 3 - Swindon Rural West	76.88	84.98	93.66	104.08	114.46
Zone 4 - Vale of White Horse	77.21	85.24	93.40	102.69	112.02
Zone 5 - Hungerford/West Berkshire	38.35	42.35	46.38	50.97	55.59
Zone 6 - Central Wiltshire	73.88	81.40	89.10	98.12	107.20
Zone 7 - Chippenham/North Wiltshire	113.77	125.34	137.20	151.09	165.07
Zone 8 - Cotswolds/Cirencester	58.39	63.80	69.59	76.55	83.51
Total	**621.34**	**689.83**	**759.39**	**842.34**	**925.09**

Source: Tables 1 and 2

Table 4: Base Year 2016 Food and Beverage Market Shares (%)

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Swindon Town Centre	28.8%	35.4%	20.5%	7.5%	11.1%	5.1%	6.2%	2.8%	10.0%
Swindon Designer Outlet	2.0%	5.0%	6.4%	0.0%	0.0%	0.0%	0.3%	0.0%	10.0%
Old Town Swindon	30.6%	14.9%	17.7%	0.7%	1.0%	1.6%	0.0%	1.9%	5.0%
Gorse Hill	0.9%	1.7%	0.3%	0.2%	0.0%	0.0%	0.0%	0.0%	5.0%
Orbital Retail Park	1.1%	3.9%	0.9%	0.3%	0.0%	0.0%	0.2%	0.5%	5.0%
West Swindon District Centre	0.2%	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Highworth	0.9%	0.9%	0.0%	7.0%	0.0%	0.0%	0.0%	1.7%	5.0%
Wroughton	0.0%	0.0%	7.9%	0.0%	0.0%	0.4%	0.4%	0.0%	5.0%
Other Swindon	26.4%	24.4%	7.8%	2.7%	0.7%	2.7%	0.3%	7.3%	5.0%
Swindon Total	**90.9%**	**86.2%**	**66.8%**	**18.4%**	**12.8%**	**9.8%**	**7.4%**	**14.2%**	
Calne	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	16.2%	0.0%	n/a
Chippenham	0.9%	0.0%	1.2%	0.0%	0.8%	2.4%	35.8%	0.0%	n/a
Cirencester	0.0%	1.1%	3.1%	0.0%	0.0%	0.0%	1.8%	44.8%	n/a
Devizes	0.0%	0.0%	0.0%	0.0%	0.5%	48.8%	0.2%	0.0%	n/a
Farringdon	0.0%	0.0%	0.0%	6.6%	0.0%	0.0%	0.0%	0.0%	n/a
Marlborough	1.3%	0.0%	0.7%	0.0%	21.3%	7.3%	1.2%	0.0%	n/a
Malmesbury	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	8.4%	0.0%	n/a
Wantage	0.0%	0.0%	0.0%	14.3%	0.6%	0.0%	0.0%	0.0%	n/a
Wootton Bassett	0.0%	2.1%	9.6%	0.4%	0.0%	0.0%	4.1%	0.5%	n/a
Other	6.9%	10.6%	17.8%	60.3%	64.0%	31.7%	24.9%	40.5%	n/a
Other Sub-Total	**9.1%**	**13.8%**	**33.2%**	**81.6%**	**87.2%**	**90.2%**	**92.6%**	**85.8%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey January 2016

Table 5: Base Year 2016 Food & Beverage Expenditure (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow	Total
Expenditure 2016	**78.40**	**104.46**	**76.88**	**77.21**	**38.35**	**73.88**	**113.77**	**58.39**		
Swindon Town Centre	22.58	36.98	15.76	5.79	4.26	3.77	7.05	1.63	10.87	108.69
Swindon Designer Outlet	1.57	5.22	4.92	0.00	0.00	0.00	0.34	0.00	1.34	13.39
Old Town Swindon	23.99	15.56	13.61	0.54	0.38	1.18	0.00	1.11	2.97	59.35
Gorse Hill	0.71	1.78	0.23	0.15	0.00	0.00	0.00	0.00	0.15	3.02
Orbital Retail Park	0.86	4.07	0.69	0.23	0.00	0.00	0.23	0.29	0.34	6.71
West Swindon District Centre	0.16	0.00	4.07	0.00	0.00	0.00	0.00	0.00	0.22	4.45
Highworth	0.71	0.94	0.00	5.40	0.00	0.00	0.00	0.99	0.42	8.47
Wroughton	0.00	0.00	6.07	0.00	0.00	0.30	0.46	0.00	0.36	7.18
Other Swindon	20.70	25.49	6.00	2.08	0.27	1.99	0.34	4.26	3.22	64.35
Swindon Total	**71.27**	**90.04**	**51.36**	**14.21**	**4.91**	**7.24**	**8.42**	**8.29**	**19.88**	**275.62**
Calne	0.00	0.00	0.23	0.00	0.00	0.00	18.43	0.00	n/a	18.66
Chippenham	0.71	0.00	0.92	0.00	0.31	1.77	40.73	0.00	n/a	44.44
Cirencester	0.00	1.15	2.38	0.00	0.00	0.00	2.05	26.16	n/a	31.74
Devizes	0.00	0.00	0.00	0.00	0.19	36.06	0.23	0.00	n/a	36.47
Farringdon	0.00	0.00	0.00	5.10	0.00	0.00	0.00	0.00	n/a	5.10
Marlborough	1.02	0.00	0.54	0.00	8.17	5.39	1.37	0.00	n/a	16.48
Malmesbury	0.00	0.00	0.38	0.00	0.00	0.00	9.56	0.00	n/a	9.94
Wantage	0.00	0.00	0.00	11.04	0.23	0.00	0.00	0.00	n/a	11.27
Wootton Bassett	0.00	2.19	7.38	0.31	0.00	0.00	4.66	0.29	n/a	14.84
Other	5.41	11.07	13.68	46.56	24.54	23.42	28.33	23.65	n/a	176.66
Other Sub-Total	**7.13**	**14.41**	**25.52**	**63.01**	**33.44**	**66.64**	**105.35**	**50.10**	**n/a**	**365.61**
TOTAL	**78.40**	**104.46**	**76.88**	**77.21**	**38.35**	**73.88**	**113.77**	**58.39**	**n/a**	**641.22**

Source: Table 3 and 4

Table 6: Future Food and Beverage Market Shares (%)

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Swindon Central	35.0%	45.0%	30.0%	8.0%	11.5%	6.0%	6.5%	5.0%	10.0%
Other Swindon	55.0%	40.3%	28.9%	3.4%	1.3%	3.4%	0.5%	7.5%	5.0%
Highworth	0.9%	0.9%	0.0%	7.0%	0.0%	0.0%	0.0%	1.7%	5.0%
Wroughton	0.0%	0.0%	7.9%	0.0%	0.0%	0.4%	0.4%	0.0%	5.0%
Swindon Total	**90.9%**	**86.2%**	**66.8%**	**18.4%**	**12.8%**	**9.8%**	**7.4%**	**14.2%**	
Other	9.1%	13.8%	33.2%	81.6%	87.2%	90.2%	92.6%	85.8%	n/a
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey January 2016 with NLP adjustments

Table 7: 2021 Food & Beverage Expenditure (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow	Total
Expenditure 2021	**88.64**	**118.09**	**84.98**	**85.24**	**42.35**	**81.40**	**125.34**	**63.80**		
Swindon Central	31.02	53.14	25.49	6.82	4.87	4.88	8.15	3.19	15.29	152.85
Other Swindon	48.75	47.59	24.56	2.90	0.55	2.77	0.63	4.78	6.98	139.50
Highworth	0.80	1.06	0.00	5.97	0.00	0.00	0.00	1.08	0.47	9.38
Wroughton	0.00	0.00	6.71	0.00	0.00	0.33	0.50	0.00	0.40	7.94
Swindon Total	**80.57**	**101.79**	**56.77**	**15.68**	**5.42**	**7.98**	**9.28**	**9.06**	**23.13**	**309.67**
Other	8.07	16.30	28.21	69.55	36.93	73.42	116.07	54.74	n/a	403.28
TOTAL	**88.64**	**118.09**	**84.98**	**85.24**	**42.35**	**81.40**	**125.34**	**63.80**	**n/a**	**309.67**

Source: Table 3 and 6

Table 8: 2026 Food & Beverage Expenditure (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow	Total
Expenditure 2026	**98.64**	**131.42**	**93.66**	**93.40**	**46.38**	**89.10**	**137.20**	**69.59**		
Swindon Central	34.52	59.14	28.10	7.47	5.33	5.35	8.92	3.48	16.92	169.23
Other Swindon	54.25	52.96	27.07	3.18	0.60	3.03	0.69	5.22	7.74	154.73
Highworth	0.89	1.18	0.00	6.54	0.00	0.00	0.00	1.18	0.52	10.31
Wroughton	0.00	0.00	7.40	0.00	0.00	0.36	0.55	0.00	0.44	8.74
Swindon Total	**89.67**	**113.28**	**62.57**	**17.19**	**5.94**	**8.73**	**10.15**	**9.88**	**25.61**	**343.01**
Other	8.98	18.14	31.10	76.21	40.44	80.37	127.05	59.71	n/a	441.99
TOTAL	**98.64**	**131.42**	**93.66**	**93.40**	**46.38**	**89.10**	**137.20**	**69.59**	**n/a**	**343.01**

Source: Table 3 and 6

Table 9: 2031 Food & Beverage Expenditure (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow	Total
Expenditure 2031	**110.99**	**147.86**	**104.08**	**102.69**	**50.97**	**98.12**	**151.09**	**76.55**		
Swindon Central	38.84	66.54	31.22	8.22	5.86	5.89	9.82	3.83	18.91	189.13
Other Swindon	61.04	59.59	30.08	3.49	0.66	3.34	0.76	5.74	8.67	173.36
Highworth	1.00	1.33	0.00	7.19	0.00	0.00	0.00	1.30	0.57	11.39
Wroughton	0.00	0.00	8.22	0.00	0.00	0.39	0.60	0.00	0.49	9.70
Swindon Total	**100.89**	**127.46**	**69.52**	**18.89**	**6.52**	**9.62**	**11.18**	**10.87**	**28.64**	**383.58**
Other	10.10	20.40	34.55	83.79	44.44	88.51	139.91	65.68	n/a	487.39
TOTAL	**110.99**	**147.86**	**104.08**	**102.69**	**50.97**	**98.12**	**151.09**	**76.55**	**n/a**	**383.58**

Source: Table 3 and 6

Table 10: 2036 Food & Beverage Expenditure (£m)

Centre/Facility	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow	Total
Expenditure 2036	**123.15**	**164.07**	**114.46**	**112.02**	**55.59**	**107.20**	**165.07**	**83.51**		
Swindon Central	43.10	73.83	34.34	8.96	6.39	6.43	10.73	4.18	20.89	208.85
Other Swindon	67.73	66.12	33.08	3.81	0.72	3.64	0.83	6.26	9.59	191.79
Highworth	1.11	1.48	0.00	7.84	0.00	0.00	0.00	1.42	0.62	12.47
Wroughton	0.00	0.00	9.04	0.00	0.00	0.43	0.66	0.00	0.53	10.66
Swindon Total	**111.95**	**141.43**	**76.46**	**20.61**	**7.12**	**10.51**	**12.22**	**11.86**	**31.63**	**423.78**
Other	11.21	22.64	38.00	91.41	48.48	96.70	152.86	71.65	n/a	532.95
TOTAL	**123.15**	**164.07**	**114.46**	**112.02**	**55.59**	**107.20**	**165.07**	**83.51**	**n/a**	**423.78**

Source: Table 3 and 6

Table 11: Food and Beverage Outlets 2016 (main centres only)

Centre	Class A3 Cafés/Restaurants	Class A4 Pubs/Bars	Class A5 Takeaways	Total
Swindon Town Centre	39	9	14	62
Swindon Old Town	24	9	10	43
Swindon Designer Outlet	10	9	1	20
West Swindon Shopping Centre	2	1	3	6
Orbital Retail Park	3	0	0	3
Highworth	3	3	5	11
Gorse Hill	4	0	13	17
Cavendish Square	0	0	3	3
Wroughton	2	0	3	5
Swindon Borough Total	**87**	**31**	**52**	**170**

Source: NLP Survey January 2016 and Goad

Table 12: Food and Beverage Commitments/Proposals, 2016

Store	F&B Floorspace (sq.m gross)	Turnover (£ per sq.m)	Total Turnover (£m)
Proposed Roadside Facilities, Catsbrain Farm, Highworth Road [1]	1,750	£5,000	£8.75
Kimmerfields (estimated potential F&B floorspace) [2]	3,000	£5,000	£15.00
Commitments Total	**4,750**		**£23.75**
North Star (planning application) [3]	12,000	£5,000	£60.00
Wichelstowe [4]	400	£5,000	£2.00
Commonhead [5]	250	£5,000	£1.25
Eastern Villages [6]	400	£5,000	£2.00
Tadpole Farm [7]	250	£5,000	£1.25
Kingsdown [8]	250	£5,000	£1.25
Former Allotment site, Rodbourne Road [9]	300	£5,000	£1.50
Proposals Total	**13,850**		**£69.25**

Source: Swindon Borough Council and Mintel
Notes:
[1] LPA Ref. S/OUT/14/1912
[2] LPA Ref. S/11/0614
[3] LPA Ref. S/OUT/15/0943
[4] Local Plan allocation NC1 - estimated potential F&B goods floorspace
[5] Local Plan allocation NC2 - estimated potential F&B goods floorspace
[6] Local Plan allocation NC3 - estimated potential F&B goods floorspace in district and local centres
[7] Local Plan allocation NC4 - estimated potential F&B goods floorspace
[8] Local Plan allocation NC5 - estimated potential F&B goods floorspace
[9] Development Brief for site includes potential A3/A5 uses

Table 13: Summary of Food and Beverage Expenditure 2016 to 2036 - With Commitments

Centre	2016	2021	2026	2031	2036
Available Expenditure in Swindon Borough (£m)					
Swindon Central	122.08	152.85	169.23	189.13	208.85
Other Swindon	137.88	139.50	154.73	173.36	191.79
Highworth	8.47	9.38	10.31	11.39	12.47
Wroughton	7.18	7.94	8.74	9.70	10.66
Total	**275.62**	**309.67**	**343.01**	**383.58**	**423.78**
Turnover of Existing Facilities (£m)					
Swindon Central	122.08	144.08	151.42	159.15	167.27
Other Swindon	137.88	154.11	161.98	170.24	178.92
Highworth	8.47	8.90	9.35	9.83	10.33
Wroughton	7.18	7.55	7.93	8.34	8.76
Total	**275.62**	**314.64**	**330.69**	**347.56**	**365.28**
Surplus/Deficit Expenditure (£m)					
Swindon Central	0.00	8.78	17.81	29.98	41.59
Other Swindon	0.00	-14.61	-7.24	3.12	12.87
Highworth	0.00	0.48	0.95	1.56	2.14
Wroughton	0.00	0.39	0.81	1.36	1.90
Total	**0.00**	**-4.97**	**12.33**	**36.03**	**58.49**

Source: Tables 5 to 11

Commitments added in at 2021:
Proposed Roadside Facilities, Catsbrain Farm, Highworth Road
Kimmerfields (estimated potential F&B floorspace)

Table 14: Food and Beverage Floorspace Expenditure Capacity 2016 to 2036 - With Commitments

Centre	2016	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,255	£5,523	£5,805	£6,101
Floorspace Requirement (sq.m gross)					
Swindon Central	0	1,670	3,224	5,165	6,816
Other Swindon	0	-2,781	-1,312	538	2,109
Highworth	0	92	173	269	351
Wroughton	0	74	146	235	311
Total	**0**	**-945**	**2,232**	**6,207**	**9,587**

Table 15: Summary of Food and Beverage Expenditure 2016 to 2036 - With Commitments and Proposals

Centre	2016	2021	2026	2031	2036
Available Expenditure in Swindon Borough (£m)					
Swindon Central	122.08	152.85	169.23	189.13	208.85
Other Swindon	137.88	139.50	154.73	173.36	191.79
Highworth	8.47	9.38	10.31	11.39	12.47
Wroughton	7.18	7.94	8.74	9.70	10.66
Total	**275.62**	**309.67**	**343.01**	**383.58**	**423.78**
Turnover of Existing Facilities (£m)					
Swindon Central	122.08	144.08	151.42	159.15	167.27
Other Swindon	137.88	217.70	228.81	240.48	252.74
Highworth	8.47	8.90	9.35	9.83	10.33
Wroughton	7.18	7.55	7.93	8.34	8.76
Total	**275.62**	**378.22**	**397.52**	**417.79**	**439.11**
Surplus/Deficit Expenditure (£m)					
Swindon Central	0.00	8.78	17.81	29.98	41.59
Other Swindon	0.00	-78.20	-74.07	-67.11	-60.95
Highworth	0.00	0.48	0.95	1.56	2.14
Wroughton	0.00	0.39	0.81	1.36	1.90
Total	**0.00**	**-68.55**	**-54.50**	**-34.21**	**-15.33**

Source: Tables 5 to 11

Commitments added in at 2021:
Proposed Roadside Facilities, Catsbrain Farm, Highworth Road
Kimmerfields (estimated potential F&B floorspace)

Proposals added in at 2021:
North Star (planning application)
Wichelstowe
Commonhead
Eastern Villages
Tadpole Farm
Kingsdown
Former Allotment site, Rodbourne Road

Table 15: Food and Beverage Floorspace Expenditure Capacity 2016 to 2036 - With Commitments and Proposals

Centre	2016	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,255	£5,523	£5,805	£6,101
Floorspace Requirement (sq.m gross)					
Swindon Central	0	1,670	3,224	5,165	6,816
Other Swindon	0	-14,881	-13,412	-11,562	-9,991
Highworth	0	92	173	269	351
Wroughton	0	74	146	235	311
Total	**0**	**-13,045**	**-9,868**	**-5,893**	**-2,513**

Appendix 6 Town Centre Health Checks

A. Swindon Town Centre

Swindon Town Centre is the main shopping and commercial centre in the Borough. It is designated as the only town centre in the Borough in the Swindon Local Plan 2026. It has a reasonably large number of retail and service uses. The centre serves shoppers from across the Borough and beyond, particularly for comparison shopping. Its key roles include:

- *convenience shopping* – there is one large food store over 2,000 sq.m net - Morrisons at Regent Circus (3,038 sq.m net). This is complemented by a range of medium food stores - Sainsbury's, Brunel Plaza (1,554 sq.m net), Tesco Metro, The Parade (899 sq.m net) and the Marls & Spencer food hall (1,347 sq.m net). In addition, there is an Iceland, Co-op and Londis. These facilities are supplemented by small convenience outlets, and serve both main food and grocery shopping trips and basket/top-up food shopping trips;
- *comparison shopping* – a good range of multiple and independent shops selling a range of high and lower order comparison goods. There is a good selection of multiples, mainly located within The Brunel Shopping Centre and The Parade;
- *services* – including a good range of high street national banks, and a reasonable selection of cafés, restaurants, takeaways, travel agents and hairdressers/beauty parlours;
- *entertainment* – including Wyvern Theatre, MECA (Music Entertainment Cultural Arena) and several pubs and bars; and
- *community facilities* – including a public library and the Health Hydro fitness centre.

A heath check study of Swindon Town Centre was undertaken in 2010 by GVA Grimley, and comparisons have been made between the position of the centre in 2010 and any significant changes in the interim.

Swindon is a relatively compact shopping centre. The Brunel Shopping Centre forms the central focus of the retail offer, with retail units concentrated in surrounding areas of Regent Street, Canal Walk, The Parade, Havelock Square and Bridge Street. An existing market hall is located to the south west of The Brunel centre on Market Street.

The household shopper survey (Appendix 7) provides an indication of the varied role of the town centre. These results indicated that for the study area as a whole, Swindon Town Centre was the location that 30.6% of respondents stated was the destination for most of their non-food shopping, and 21.9% stated that Swindon Town Centre was the most frequent destination to use local shops or services.

The convenience goods expenditure directed towards Swindon Town Centre is £25.71 million in 2016 (Appendix 2), which is equivalent to just 4.9% of the total convenience goods spending in stores and centres within Swindon

Borough. However as noted in the assessment of retail floorspace needs, this survey did not reflect the presence of the Morrisons store, which only opened for trading in late 2014 and has not yet achieved settled shopping patterns. Once the market share has been adjusted to take account of this store, the assessment estimates the convenience goods turnover of Swindon Town Centre will increase to £59.36 million by 2021. The 2010 heathcheck referred to the convenience goods turnover of the centre of £53 million.

The comparison goods expenditure directed towards Swindon Town Centre is £410.53 million in 2016 (Appendix 3), equivalent to 39.7% of the total comparison goods spending in centres within Swindon Borough. The 2010 heathcheck referred to the comparison goods turnover of the centre of £377 million. Food and beverage expenditure directed towards Swindon Town Centre is £108.69 million (Appendix 5), which is equivalent to 63.0% of the total food and beverage spending at facilities within Swindon Borough.

The 2010 health check identified the Venuescore ranking of Swindon Town Centre had fallen from 55th position in 2007 to 65th in 2010. The latest (2015/16) rankings place Swindon Town Centre at 72nd position. Although the development of new shopping centres entering the market will have had some effect on the rankings, there is a clear downward direction of Swindon's position. However, this is not unique to Swindon and other centres in the wider area have also seen a decline in ranking, including Cheltenham, which has fallen from 20th in 2007 to 27th in 2010 and 31st in 2015/16.

Mix of Uses and Retailer Occupation

Swindon Town Centre has a total of 484 retail/service uses. The diversity of uses present in Swindon Town Centre in terms of the number of units is set out in Table A.1, compared against the national average and the 2010 health check.

Table A.1 Swindon Town Centre Use Class Mix by Unit

<table>
<tr><th rowspan="2">Type of Unit</th><th rowspan="2">Units 2010</th><th rowspan="2">Units 2015</th><th colspan="2">% of Total Number of Units</th></tr>
<tr><th>Swindon %</th><th>UK Average (1)</th></tr>
<tr><td>Comparison Retail</td><td>182</td><td>168</td><td>34.7</td><td>35.8</td></tr>
<tr><td>Convenience Retail</td><td>26</td><td>39</td><td>8.0</td><td>8.4</td></tr>
<tr><td>A1 Services (2)</td><td rowspan="4">146</td><td>59</td><td>12.2</td><td>12.3</td></tr>
<tr><td>A2 Services (3)</td><td>72</td><td>14.9</td><td>12.3</td></tr>
<tr><td>A3/A5</td><td>53</td><td>10.9</td><td>14.9</td></tr>
<tr><td>A4 Pubs/bar</td><td>9</td><td>1.9</td><td>4.5</td></tr>
<tr><td>Vacant</td><td>75</td><td>84</td><td>17.4</td><td>11.8</td></tr>
<tr><td>Total</td><td>429</td><td>484</td><td>100.0</td><td>100.0</td></tr>
</table>

Source: Goad Plans July 2015.
(1) UK average for all town centres surveyed by Goad Plans (June 2015)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) incl. betting shops (sui generis)

Figure A.1: Goad Plan of Swindon Town Centre

The centre has a broadly similar mix of comparison and convenience retail when compared with the national average. The proportion of A2 services is higher than the national average whilst the proportion of A3/A5 and A4 pubs/bars are all below the national average. The proportion of vacant units is significantly above the national average suggesting a deflated demand for retail and service uses within the town centre.

Between 2010 and 2015, the number of comparison retail units has decreased by 14 whilst conversely the number of convenience retail units has increased by 13. There are nine more vacant units in the centre in 2015 than in 2010. The overall number of units in the centre has increased, which could either be due to subdivision of units, new units (eg. Regent Circus and the BHS/Topshop development scheme at The Parade, which was under construction at the time of the 2010 study), or a change to the area included within the Goad plan boundary. The main increase in number of units relates to the “service” categories, and it may be that there is a difference in the classification of categories adopted in the 2010 health check, for example some of the Class A service uses may have been excluded.

Table A.2 below summarises the town centre mix of uses by floorspace for 2010 and 2015. The overall floorspace within the centre has increased, and there has also been an increase of floorspace in all of the use categories. Again, this is likely to be primarily due to the Regent Circus/The Parade developments and potential differences in classification of categories.

Table A.2 Swindon Town Centre Use Class Mix by Floorspace

Type of Unit	Floorspace 2010 (sq.m gross)	Floorspace 2015 (sq.m gross)
Comparison Retail	61,230	75,390
Convenience Retail	6,950	17,960
A1 Services (1)	19,480	5,660
A2 Services (2)		11,140
A3/A5		8,880
A4 Pubs/bar		4,370
Vacant	14,000	14,920
Total	**101,660**	**138,320**

Source: Goad Plans July 2015 and ORC StorePoint 2016
(1) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(2) incl. betting shops (sui generis)

Retailer Representation

Despite the reduction in comparison outlets since 2010, Swindon Town Centre still has a good selection of comparison shops (168) reflecting its size and role in the shopping hierarchy. However, while the proportion of comparison goods units is similar to the national average, for higher order shopping centres, in general terms, the proportion of comparison goods units would be expected to be noticeably higher, reflecting the main shopping draw of the centre.

Table A.3 provides a breakdown of comparison shop units by category. Not all Goad Plan comparison categories are represented within the centre, with no cars, motorcycles and motor accessories shops. Of the categories represented, there is a good choice of clothing/footwear shops and electrical/ gas/music/photography shops and a reasonable choice in chemists/drug stores/opticians, variety/department/catalogue, toys/hobby/cycle/sport, jewellers, charity/second-hand and other comparison retail stores. The proportion of furniture/carpets/textiles, booksellers/arts/crafts/stationers and DIY/hardware and homewares is significantly lower than the national average.

Table A.3 Swindon Town Centre Breakdown of Comparison Units

Type of Unit	Swindon Town Centre		% UK Average*
	Units 2015	%	
Clothing and footwear	43	25.6	25.0
Furniture, carpets and textiles	5	3.0	7.4
Booksellers, arts, crafts and stationers	9	5.4	10.6
Electrical, gas, music and photography	26	15.5	9.4
DIY, hardware and homewares	3	1.8	6.4
China, glass, gifts and fancy goods	5	3.0	4.6
Cars, motorcycles and motor accessories	0	0	1.3
Chemists, drug stores and opticians	19	11.3	10.0
Variety, department and catalogue	11	6.5	1.6
Florists, nurserymen and seedsmen	1	0.6	2.3
Toys, hobby, cycle and sport	11	6.5	5.2
Jewellers	11	6.5	5.0
Charity/second-hand	14	8.3	8.4
Other comparison retailers	10	6.0	2.9
Total	**168**	**100.0**	**100.0**

Source: Goad Plans July 2015.
*UK average for all town centres surveyed by Goad Plans (June 2015)

There is a good range and mix of major national multiple comparison retailers present within Swindon Town Centre, including:

- Accessorize	- Clarks	- Miss Selfridge	- Sports Direct
- Ann Summers	- Debenhams	- Monsoon	- Superdrug
- Argos	- Deichmann	- New Look	- Topshop
- BHS	- Dorothy Perkins	- Peacocks	- USC
- Blue Inc	- Evans	- Primark	- Wallis
- Bonmarche	- H&M	- River Island	- Warehouse
- Boots	- House of Fraser	- Robert Dyas	- Waterstones
- Burton	- JD Sports	- Schuh	- WH Smiths
- Claire's	- Marks & Spencer	- Soletrader	- Wilko

National multiple retailers in Swindon are concentrated around The Brunel Centre and The Parade. The Brunel Centre is the only enclosed shopping centre in the town and is anchored by M&S, Sainsbury's, House of Fraser (outlet) and Boots. The Parade is an open air shopping space that is anchored by Debenhams, BHS and Tesco.

Experian defines multiple retailers as being part of a network of nine or more outlets. Experian notes that the presence of multiple outlets can enhance the appeal of a centre to local consumers, and the strong branding and comprehensive product mix of retailers such as Marks & Spencer are often sufficient in itself to attract a consumer to a centre.

Within Swindon Town Centre, the proportion of the comparison goods floorspace that is occupied by multiple retailers is relatively high (78.9%), which suggests that the existing comparison goods floorspace provided is likely to offer a good selection of higher order goods.

However, the proportion of comparison goods units that is occupied by multiple retailers units (58%) is much lower. This is because multiple retailers prefer to locate in larger retail units. Within Swindon Town Centre the average size of a retail unit occupied by a multiple retailer is 417sq.m gross, compared to 154 sq.m gross for an independent retailer.

In economic terms, the centres with the greatest proportion of multiple retailers are invariably the most successful. Although it would appear that Swindon Town Centre has strong retail offer and is well represented by multiple retailers, many of the premium brands are located in the Swindon Designer Outlet or in out of centre retail parks.

The 2013 Swindon Masterplan notes that although Swindon benefits from a strong retail offer, many of the premium brands are located in the Swindon Designer Outlet or in out of centre retail parks. The Masterplan also notes that Swindon has good representation of larger retail stores – Debenhams, Marks & Spencer, BHS plus House of Fraser (outlet store), but that Swindon's fashion offer is less strong in the retail core, particularly lacking high quality and aspirational retailers. Debenhams, which should be a key anchor of the retail core, suffers from a lack of prominence.

The 2013 Masterplan identifies that Swindon Designer Outlet is a strong competitor to the nearby town centre retail core at The Parade and Regent Street, but that the pedestrian links between the two locations are so poor that it is unlikely many visitors to the Outlet will also shop in the town centre during the same visit. While the Masterplan confirms that enhancing the pedestrian links would be beneficial, in conjunction providing a more attractive leisure and retail offer in the town centre core would help to encourage more movement between the two areas.

The 2010 health check provided data from the Focus database to establish retailer requirements for Swindon. This showed interest from 30 retail and service operators who were keen to locate in Swindon. Of these, only two are now located in Swindon Town Centre – Ask Italian at Regent Circus, and the British Heart Foundation Furniture & Electrical. This suggests that Swindon Town Centre does not currently have the type of units available to attract new operators to the centre. The 2010 health check also noted that the level of retailer requirement for Swindon had reduced from the 2004 retail and leisure study, which identified around 100 requirements, however it suggested that this is not solely related to a drop in Swindon's attractiveness/performance, as the recession will have affected many other centres.

NLP sent out a canvas of operators to over 300 national retail, leisure and service operators in January 2016. Only 16 of these responded, and the comments are summarised in Appendix 10. Of these responses, only six had a requirement for new or expanded premises in Swindon Borough, and four within Swindon Town Centre. These comprised Fraser Hart, Barnardos, Select and the Gym Group, all of which required new units, rather than relocated units. The reasons given for what has prevented them securing this requirement to date included competition, not being able to find suitable, affordable premises, finding the right shop for their requirements and lack of opportunity.

Service Uses

Swindon Town Centre has a good range of non-retail service uses, with a choice of service providers across all categories, as shown in Table A.4.

Table A.4 Swindon Town Centre Analysis of Selected Service Uses

Type of Unit	Swindon Town Centre		% UK Average*
	Units 2015	%	
Restaurants/cafés	39	25.2	22.5
Fast food/takeaways	14	9.0	14.7
Pubs/bars	9	5.8	11.1
Banks/other financial services	24	15.5	11.8
Betting shops/casinos	8	5.2	3.8
Estate agents/valuers	18	11.6	9.1
Travel agents	4	2.6	2.2
Hairdressers/beauty parlours	38	24.5	22.7
Laundries/dry cleaners	1	0.6	2.1
Total	**155**	**100.0**	**100.0**
Other A1 Retail Services	38	n/a	n/a
Total	**193**	**n/a**	**n/a**

Source: Goad Plans July 2015
*UK average for all town centres surveyed by Goad Plans (June 2015)

The proportion of units in each category is broadly similar to the national average. The centre has an above average proportion of restaurants/cafés, banks/other financial services, betting shops/casinos, estate agents/valuers, travel agents and hairdressers/beauty parlours when compared with the national average. The centre has a relatively low proportion of fast food/ takeaways, pubs/bars and laundries/dry cleaners when compared with the national average.

While there appears to be a reasonable range of restaurants and cafés within the town centre, the 2013 Swindon Masterplan highlighted that there was a limited offer in the evenings, with few shops, restaurants and cafés open beyond 6pm in the core of the town centre. One of the key objectives of the Masterplan is to encourage the development of new primarily family friendly, quality restaurants and cafés, plus bars that will provide a high quality and balanced evening economy. The concentration of bars and nightclubs around the junction of Fleet Street and Bridge Road has had a detrimental effect on the perception of this area, and there is a desire for this area to be improved, through diversifying the evening offer, limiting future A4/A5 uses and increasing surveillance/enforcement.

Most of the main high street banks/building societies are represented within Swindon Town centre including, Santander, Lloyds, Barclays, Nationwide, Halifax, HSBC and the Co-operative Bank.

In addition to these service uses, Swindon Town Centre is represented by other non retail uses, including Wyvern Theatre, MECA (Music Entertainment Cultural Arena) Swindon, a public library and the Health Hydro fitness centre.

Characteristics of the Shopping Area

The Masterplan for Swindon (2013) summarises how the town centre performs, and notes:

- there have been a number of significant public realm improvements in recent years in areas including Canal Walk and Regent Street;
- Swindon's transport network, railway and canal heritage make a very significant contribution to Swindon's character and identity;
- improving the routes between key town centre attractions, open spaces, the station, business areas and the residential hinterland would help to promote Swindon’s existing assets. A Green Spine which connects the Old Town and town centre is promoted in the current Swindon Central Area Action Plan;
- there is a lack of a central focal point in the heart of the town centre;
- the central area is dominated by blocks of single uses - introducing a greater diversity of uses would help to make the town centre more sustainable; and
- Swindon is home to a significant number of large employers, many of which are located at the periphery of the town. Opportunities to explore how the town centre can better serve employees should be examined.

The 2013 Masterplan states that the town centre is contained by a boundary of arterial roads. The centre itself comprises a mixture of smaller older buildings and a range of recent buildings of varying architectural styles. The smaller buildings are tired and the more recent buildings are described as bland with little architectural merit.

The 2013 Masterplan goes on to state that Swindon Town Centre has a limited offer in the evenings, with few shops, restaurants and cafés open beyond 6pm in the core of the town centre (Regent Street, Bridge Street and Canal Walk), and evening footfall within the centre is not as high as it could be.

The draft 2015 Masterplan for Swindon describes the core of Swindon’s town centre as predominantly retail in land use, encircled by service yards and routes which pedestrians are forced to use to gain direct access to the main shopping streets. The Masterplan notes that the lack of diversity of land use in the central core area combined with pedestrianisation means that outside the trading hours, the streets can feel somewhat deserted and unsafe.

The 2010 health check comments on the general environmental quality of the town centre, and noted that the quality is mixed, with an apparent lack of investment in the physical environment in a number of areas. In terms of the main shopping area, this is mostly pedestrianised, to create a shopper-friendly environment.

The Parade and Canal Walk provide a good quality environment, with trees and hard landscaping, however while there is public art and elements of interest in this area, there is no clear focal point of the shopping core. The quality of the pedestrianised areas along Regent Street and Bridge Street reduces with distance from the crossroads with The Parade and Canal Walk. The Brunel Centre was refurbished in 1996, but its appearance is dated and has little active frontage to the surrounding streets. The recent development at Regent Circus has improved the spaces around this southern end of the town centre, although it is separated from the main retail core.

The centre has distinct areas, which generally accommodate single land uses, such as the retail core and the commercial quarter. The 2010 health check and the subsequent Masterplan note that concentrations of single land uses can detract from the town centre's vitality and viability, and the aim should be to create a more sustainable, mixed use centre.

The characteristics of the town centre are not uniform, and there are variations in quality within the centre. There has clearly been investment in the public realm in some parts of the centre, particularly at the crossroads of The Parade, Regent Street, Canal Walk and Bridge Street. There are a number of buildings within the primary and secondary retail frontages that are vacant. Further improvements to the public realm would help to create a more attractive shopping environment.

Customer Views on Shops and Services

Respondents to the household survey were asked what would make you shop more often in Swindon Town Centre. Of the respondents almost 50% were either of the view that nothing would change their shopping habits or they did not know/had never visited the centre.

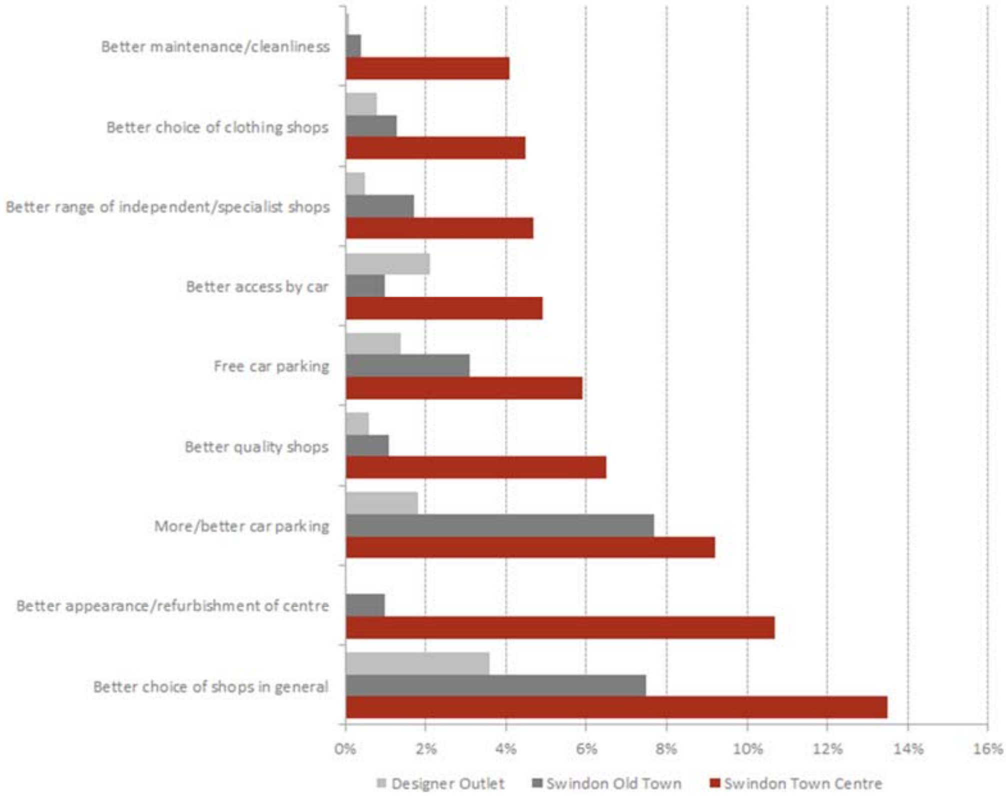
Of those who were of the view that the town centre could be improved, the majority of respondents were looking for better quality/more diverse range of shops, a better appearance/refurbishment of the town centre and improvements to parking. In summary:

- 13.5% of respondents wanted a better choice of shops in general;
- 6.5% were looking for better quality shops;
- 4.7% wanted a better range of independent stores/specialist shops ;
- 4.5% wanted a better choice of clothing shops;
- 10.7% wanted better appearance/refurbishment of the town centre;
- 9.2% wanted more/better parking; and

- 5.9% wanted free parking.

Figure A.2 below shows the main responses to the question, compared to the same question for Swindon Old Town and Swindon Designer Outlet.

Figure A.2: What would make you shop more often in Swindon Town Centre?



Source: NEMS household survey, January 2016

These responses suggest that improvements to the range of shops, design of the town centre and parking may improve expenditure within Swindon town Centre.

The Brunel Shopping Centre commissioned a customer survey in March 2015. While the focus of the survey was the Brunel Centre, as a key component of the retail core, the findings are relevant for the town centre as a whole.

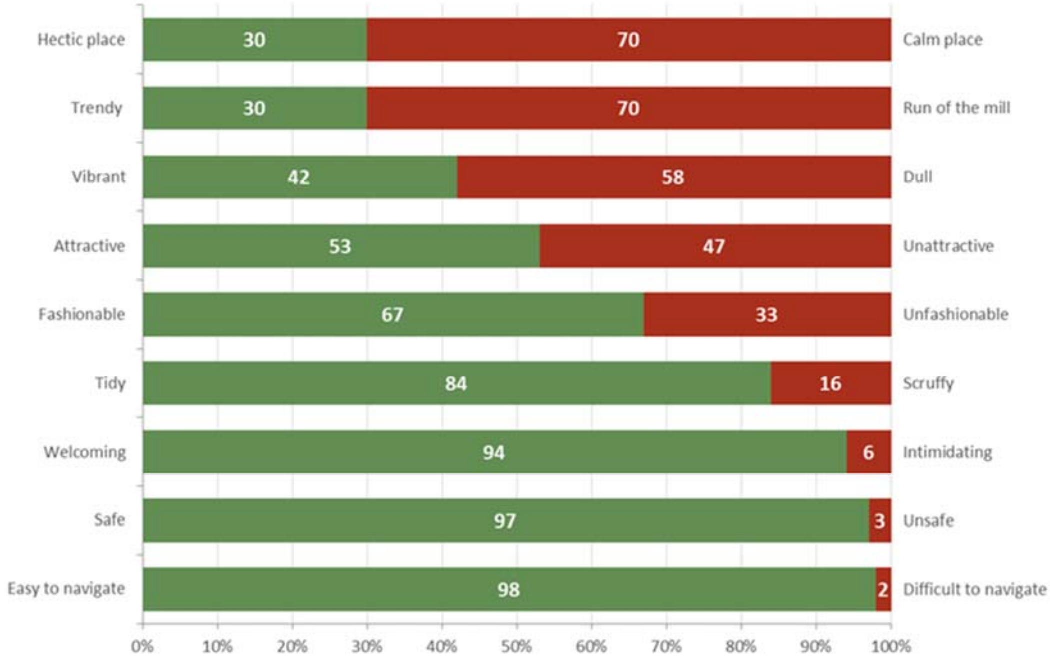
The Brunel Centre survey asked visitors who responded that Swindon Town Centre was not their main non-food shopping destination the reasons why they chose an alternative shopping destination, and the responses were as follows:

- too far away/too far to travel (47%);
- better choice/variety of shops elsewhere (26%);
- better quality of shops elsewhere (12%);
- similar retailers/offer in other centre(s) I visit (12%);
- just prefer elsewhere (10%);

- do not like shopping in Swindon Town Centre/Swindon not safe place to visit (3%);
- parking generally difficult (3%); and
- cheaper/free parking in other destinations (1%).

Visitors were asked their perceptions of the Brunel Centre, and the results are summarised in the extract from the survey below.

Figure A.3 Visitor Perception of Brunel Centre



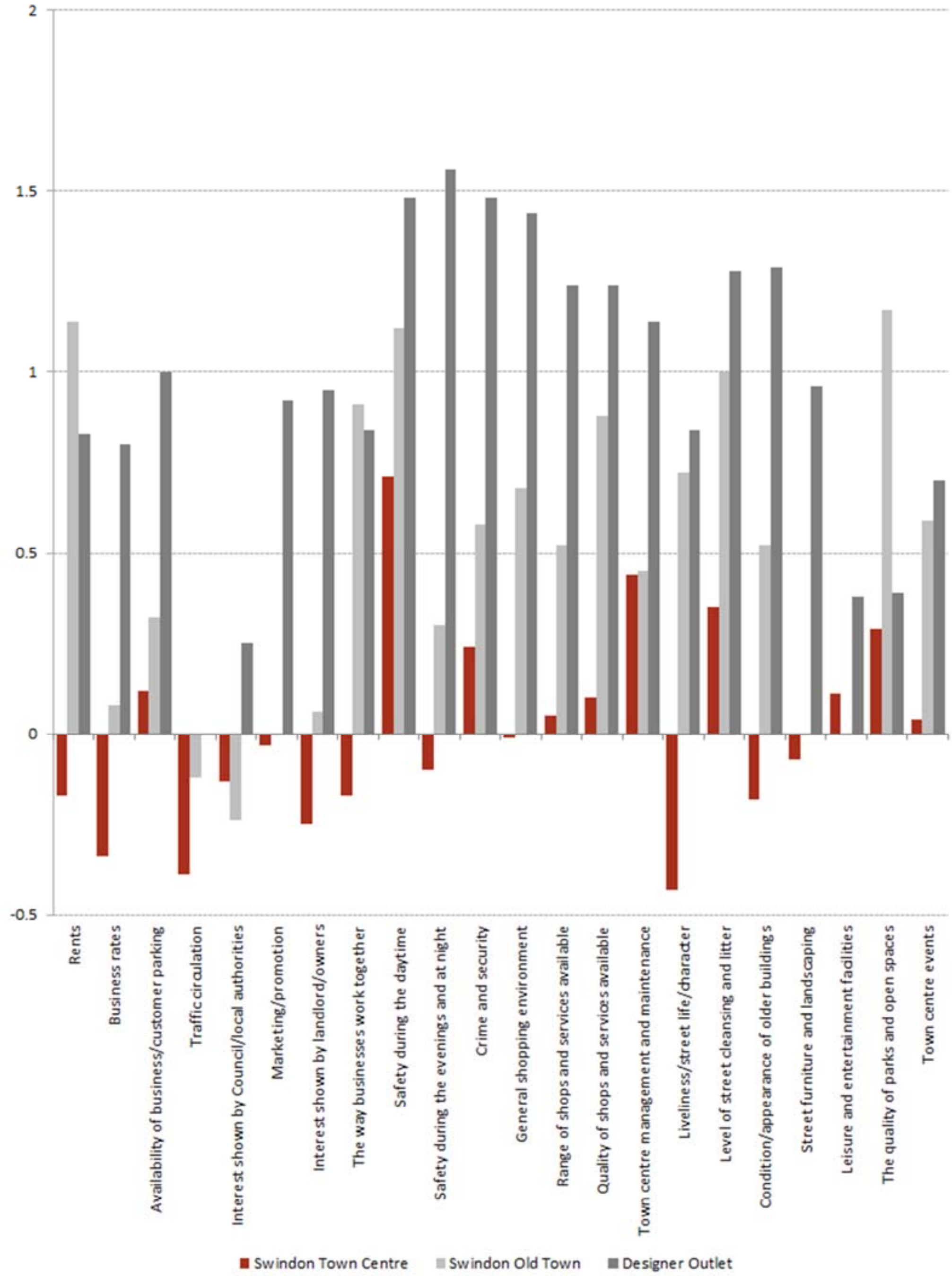
Source: The Brunel Swindon Consumer Marketing Research: Off-Peak Visitor Tracking Survey 2015

Visitors were asked which specific retailer, if any, they would most like to see represented at the Brunel Centre. Of those that provided a response, 9% mentioned John Lewis and Zara, followed by an arts and craft shop (6%) and the Disney Store (5%). 4% of responses stated Waitrose, Next, clothes shops and independent shops, and 3% mentioned Urban Outfitters, Phase 8, Hollister and Apple Store.

Visitors were asked what, if anything, was lacking at the Brunel Centre which would make them visit the centre more often and/or make their visit a more enjoyable experience. The majority of responses related to the retail offer, with a number of people mentioning better quality and range of shops, a better catering offer, and environmental improvements

In addition to the household survey, a business occupier survey was undertaken of 150 businesses in Swindon (Appendix 9). One of the questions asked respondents to rate various aspects within the centre, and Figure A.4 summarises the responses.

Figure A.4: How do you rate the following aspects of Swindon Town Centre?



Source: NEMS business survey, January 2016

Note: Mean Score: 2 = Very good, 1 = Quite good, 0 = Neither good nor poor, -1 = Quite poor, -2 = Very poor

The factors that Swindon Town Centre scored well on include safety during the daytime, town centre management and maintenance, level of street cleansing and litter, crime and security and the quality of parks and open spaces. There are a number of aspects that achieved a negative rating, particularly liveliness/ street life/character, traffic circulation and business rates. When compared with Swindon Old Town and Swindon Designer Outlet, the town centre does not perform as well, achieving lower ratings than the other two centres in all categories, with the exception of “interest shown by the Council/local authorities”, where Swindon Old Town achieved a lower rating.

Vacant Premises

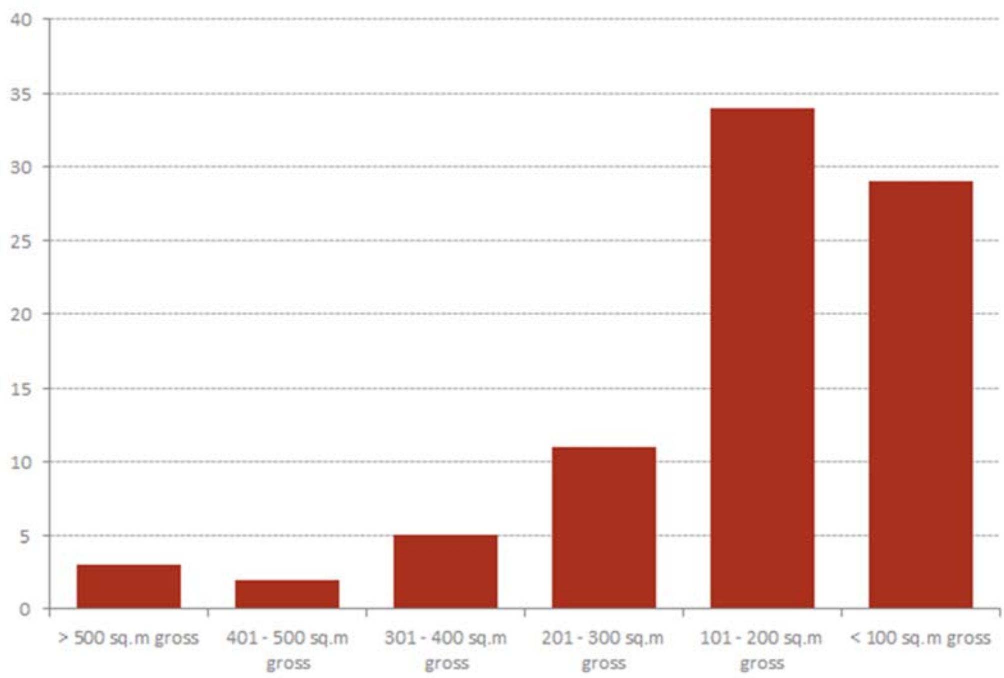
Based on the latest Goad data for Swindon (July 2015) there are 84 vacant retail units within Swindon Town Centre (14,920 sq.m gross). The vacancy rate is 17.4%, which is significantly above the national average of 11.8%. Vacant floorspace represents around 10.8% of the total retail/service floorspace in Swindon Town Centre.

The number of vacant units has risen from 75 units in 2010, an increase of nine units. The 2010 figure represents 16.7% of all units in the town centre, and the 2015 figure represents a slight increase in the number of units in overall percentage terms. The 2010 health check identified 14,000 sq.m of vacant floorspace within the town centre, which represented 13.4% of the total retail/service floorspace.

The vacant units are generally spread throughout the centre. Vacancies are primarily small retail units (less than 200 sq.m gross) reflecting the increasing preference for modern retailers to occupy larger retail units. There are some vacant units within the Brunel Shopping Centre and The Parade, although it should be noted that a number of the vacant units within the Brunel Centre at the upper level are under conversion to create a new food and beverage hub. There are clusters of vacant units on Bridge Street and Fleet Street.

Figure A.5 provides a breakdown of the vacant units within Swindon Town Centre by size of unit.

Figure A.5: Swindon Town Centre Vacant Units

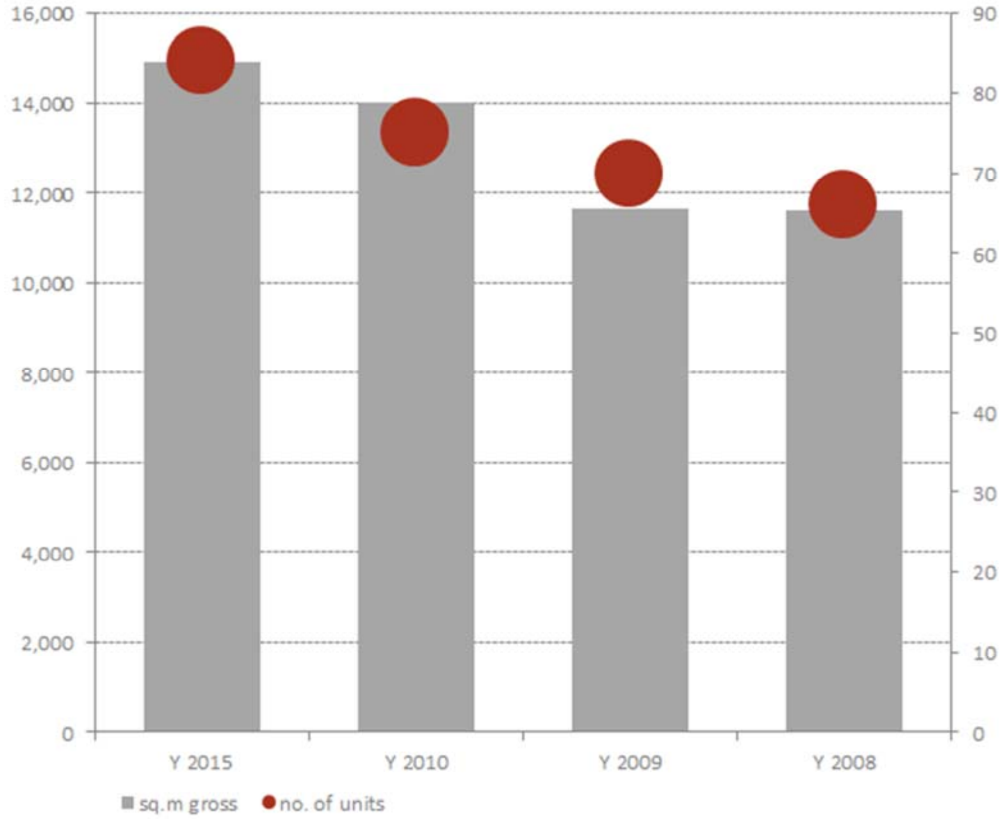


Source: Goad

The average size of vacant unit within Swindon Town Centre is 178 sq.m gross. The majority of vacant units in the centre are small, with 75% of the units less 200 sq.m or less. There are only three large vacant units (generally 500 sq.m or more) – the largest of these is a unit of 1,050 sq.m gross within the Brunel Centre.

Figure A.6 below shows the amount of vacant floorspace and number of vacant units for 2015 and historic data for 2010, 2009 and 2008. Although the number and amount of vacant floorspace has increased over time, the greatest increase occurred between 2009 and 2010.

Figure A.6: Swindon Town Centre Vacant Floorspace and Units by Year



The 2013 Masterplan highlights that there are opportunities for “meanwhile” or temporary uses to tackle these vacancies and to generally improve the retail experience within the centre.

Supply and Quality of Commercial Premises

Zone A retail rents vary significantly throughout the centre, and are detailed at Table A.5 below. Retail rents in Swindon Town Centre vary dramatically from £90 per sq.m on Corporation Street up to £2,100 per sq.m on Regent Street.

Table A.5 Swindon Town Centre Zone A Retail Rents

Location	£ per sq.m
Regent Street	550 - 2,100
The Parade	1,050 - 1,500
Canal Walk	520 - 1,400
Brunel Plaza	250 - 1,050
Havelock Square	425 - 700
Bridge Street	400 - 700
The Arcade Brunel Centre	250 - 650
Regent Circus	400 - 425
Morely Street	195 -200
Theatre Square	235 - 250
The Market	165 - 220
Fleet Street	130 - 210
Edgeware Road	185
Corporation Street	90

The 2013 Masterplan identifies that units within the town centre comprise a mixture of smaller older buildings with ground floor shops and a range of more recent buildings of varying architectural quality. The smaller buildings are predominantly tired in appearance whilst the recent buildings are functional.

Accessibility and Movement

A significant proportion of the household survey respondents travel by car for their food and non-food shopping with 86.9% of respondents travelling by car as driver or passenger for their main food shopping and 71.3% for their non-food shopping. The 2010 health check included the results of an in-centre shopper survey in Swindon Town Centre, and this identified that 26% of visitors came by car, compared to 47% who came by bus, 22% walked and less than 1% used a taxi.

There are several large car parks within the town centre to accommodate this demand including:

- Brunel North Multi-Storey Car Park;
- Brunel West Multi-Storey Car Park;
- Catherine Street Car Park;
- Cheltenham Street Car Park;
- Fleming Way Multi-Storey Car Park;
- Granville Street Car Park;
- Queen Street Car Park;

- Queenstown Car Park;
- Regent Circus Car Park;
- Sheppard Street Car Park;
- The Parade Multi-Storey Car Park; and
- Whalebridge Multi-Storey Car Park.

These car parks are distributed around the town centre and are conveniently located near the main shopping area.

The centre is well served by buses, with bus routes from surrounding areas within the Borough and beyond. The household survey identified that a total of 4.7% of respondents travel by bus, minibus or coach for their food shopping and 12.2% travel by this method for their non-food shopping.

There is a railway station adjacent to the northern boundary of the town centre which provides services to Bristol to the west and to London to the east. 0.1% of respondents travel by train for their food shopping and 3.3% travel by train for their non-food shopping. The railway line itself forms a barrier to movement between different parts of the town centre. There is currently no direct or clear pedestrian route between the railway station and the retail core, and the linkages should be strengthened and improved. The underpass beneath Fleming Way in particular does not present an attractive entrance to the shopping centre.

Pedestrian access throughout the centre is reasonable and the retail core is pedestrianised, however the centre does not have a natural retail circuit that encourages flows around the main retail area. As noted above, footfall within the centre in the evening reduces significantly after many shops close at 6pm.

Pedestrian flow surveys were commissioned to inform the 2010 health check. These identified that the central and western parts of Regent Street and The Parade are the busiest locations in the town centre, followed by Canal Walk. The weekly average count for the busiest area was around 110,000 people. Lower levels of pedestrian activity were identified in the more peripheral areas of the town centre, and the study noted that there has been an increased polarisation between the busiest and quietest areas since previous work was undertaken in 2001. The study suggested that footfall in and around the town centre will be affected by improvements to the public realm, and alterations that would make the area more legible, attractive and easy to use.

Profile of Residents

Swindon Town Centre serves the Borough as a whole. The Borough's population is highly diverse and Swindon Town Centre's shops, restaurants and services reflect this diversity. Swindon has a similar age profile when compared with England and Wales, with a mean age of 38.1 (median 38.0) compared to 39.4 (39.0). Swindon has a higher proportion of those aged 30-44

(23.1% compared to 20.5%) and conversely a lower proportion of elderly residents aged 65 and over (13.8% compared to 16.6%). In socio-economic terms, Swindon is similar to the national picture. The Borough has a slightly higher than the average gross weekly pay for full time workers when compared with the average for the South West and Great Britain (£546.90 compared to £498.80 and £529.60). However, Swindon has a lower proportion of people employed in SOC 2010 Major Group 1-3 when compared with the South West and Great Britain averages (40.4% compared with 44.2% and 44.3%) and conversely a slightly higher proportion of SOC 2010 Major Group 8-9 when compared with the South West and Great Britain averages (22.4% compared to 11.0% and 10.8%)[1].

Catchment Area

The household survey results indicate that 30.6% of respondents do most of their non-food shopping at Swindon Town Centre across the study area as a whole, which was the highest percentage for all centres in the Borough[2]. Swindon Town attracts a high proportion of respondents in Zones 1 (Swindon Urban East), 2 (Swindon Urban West) and 3 (Swindon Rural West) equivalent to 35.7%, 27.4% and 27.1% respectively. The customer draw from Zones 4 (Vale of White Horse), 5 (Hungerford/West Berkshire) and 6 (Central Wiltshire) is lower but still significant (15.0%, 15.8% and 19.2% respectively). The customer draw from Zones 7 (Chippenham/North Wiltshire) and 8 (Cotswolds/ Cirencester) neighbouring the Borough are lower, equivalent to 12.2% and 9.7% respectively[3]. These results indicate Swindon Town Centre has a wide catchment area that covers the Borough and beyond.

Swindon Town Centre’s Strengths, Weaknesses, Opportunities and Threats

Strengths

- Swindon Town Centre is the main shopping centre within the Borough and its catchment extends across the Borough and beyond.
- Swindon Town Centre provides a good range of convenience and comparison shops, and it has a good selection of national multiple retailers.
- The centre provides a range of service facilities, including banks and building societies, restaurants, cafés and bars.
- The centre also contains complementary uses and provides a range of functions, including leisure, entertainment, cultural, civic and commercial.

[1] NOMIS, Labour Market Profile-Swindon: Ages Structure (2011), Earnings by residence (2015) and Employment by Occupation (October 2014-September 2015).
[2] NEMS household survey, Question 6
[3] Table 4, Appendix 3

- The environmental quality of the centre is mixed, but there has been investment and improvements to the public realm at the crossroads of The Parade, Regent Street, Canal Walk and Bridge Street, and at Regent Circus.
- The central shopping area is pedestrianised, providing a traffic free shopping environment.
- The centre is easily accessible by a range of modes of transport other than the private car, and has good public transport links to the surrounding area.
- Buildings within the centre are generally in reasonable to good condition.

Weaknesses

- Swindon Town Centre has a strong comparison retail core but does not have a strong fashion offer, and suffers in comparison with the Swindon Designer Outlet in this respect.
- The form of the retail core does not provide a natural circuit for shoppers.
- The environmental quality of the centre is mixed, and peripheral parts of the centre have suffered from a lack of recent investment.
- Single land use areas can detract from the vitality and viability of the centre, with some areas deserted after 6pm.
- The centre suffers from a lack of an evening economy.
- The pedestrian links between the railway station and the centre are poor.
- The proportion of vacant units is significantly higher than the national average.
- The area around Fleet Street and Bridge Street suffers from a concentration of bars and nightclubs, which has a detrimental effect on the perception of this area, and there are clusters of vacant units.

Opportunities

- Swindon Town Centre has a large and relatively affluent catchment population. A significant proportion of the expenditure generated by this catchment population leaks from the area. Population and expenditure is expected to grow in the future. If Swindon Town Centre can improve or just maintain its current share of expenditure, there is potential to improve and expand retail, leisure and service uses in the centre.
- There are a number of development opportunities within the town centre which could accommodate new retail and leisure uses. This would help to retain more expenditure and customers in the area, and in turn generate more trade for existing occupiers in the centre, and could create a retail circuit for shoppers.
- Improved linkages between the town centre and the railway station could provide better access for pedestrians.

- Improved linkages between the town centre and Swindon Designer Outlet and Swindon Old Town would encourage more linked trips between the different shopping destinations.

Threats

- Other competing shopping centres are likely to continue to improve their environment and retail offer, therefore the competitive gap may widen and the amount of expenditure leakage from the Swindon area could increase. If Swindon does not improve its range and choice of facilities, the town centre's role in the wider hierarchy could decline.

B. Swindon Old Town

Swindon Old Town is designated as a district centre in the Swindon Borough Local Plan 2026. It has a reasonable range of retail and service uses, and primarily functions as a day to day top up shopping and service centre for local residents. Its key roles include:

- *convenience shopping* – the main food store in the centre is the Co-op store on the High Street (1,603 sq.m net), to the south of the main shopping area;
- *comparison shopping* – a limited range of comparison goods retailers within the centre, primarily comprising independent retailers, with Boots and the Sue Ryder store the only national multiples present;
- *services* – including a number of high street national banks, and a good selection of cafés, restaurants, takeaways and hairdressers/beauty parlours; and
- *entertainment* – including the Swindon Arts Centre, Swindon Museum and Gallery, social clubs and several pubs and bars.

Swindon Old Town is located to the south east of Swindon Town Centre. The Old Town has an attractive environment, with the majority of the centre located within a conservation area. The main retail function of the centre is focused on Wood Street, High Street, Devizes Road, Victoria Road and Bath Street.

Mix of Uses and Occupier Representation

Swindon Old Town has a total of 148 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table B.1, compared against the national average.

Table B.1 Old Town Swindon Use Class Mix by Unit

Type of Unit	Units 2010	Units 2015	% of Total Number of Units	
			Old Town %	UK Average (1)
Comparison Retail	45	29	19.6	35.8
Convenience Retail	9	11	7.4	8.4
A1 Services (2)	57	23	15.5	12.3
A2 Services (3)		21	14.2	12.3
A3/A5		34	23.0	14.9
A4 pubs/bars		9	6.1	4.5
Vacant	24	21	14.2	11.8
Total	**135**	**148**	**100.0**	**100.0**

Source: Goad Plans January 2015.
(1) UK average for all town centres surveyed by Goad Plans (June 2015)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) incl. betting shops (sui generis)

Figure B.1 Goad Plan for Swindon Old Town

The centre has a significantly lower proportion of comparison units and a higher proportion of A3/A4/A5 uses when compared to the national average which reflects its role as a service centre within the Borough.

The number of comparison goods units within the centre has reduced by around a third since 2010, while conversely the number of service units has increased. The vacancy rate of this centre is relatively high at 14.2%, which is above the national average of 11.8%, although the actual number of vacant units has fallen since 2010.

Retailer Representation

Swindon Old Town has a reasonable selection of comparison shops (29). Table B.2 provides a breakdown of comparison shop units by category.

The centre provides most but not all of the Goad Plan comparison categories and the choice available in certain categories is low. The choice of furniture/ carpets/textiles shops is particularly good, including a number of antiques dealers and home furnishing stores. There is also a good range of toys/hobby/ cycle/sport shops and chemists/drug stores/opticians.

Table B.2 Old Town Swindon Breakdown of Comparison Units

Type of Unit	Old Town		% UK Average*
	Units 2015	%	
Clothing and footwear	3	10.3	25.0
Furniture, carpets and textiles	6	20.7	7.4
Booksellers, arts, crafts and stationers	1	3.4	10.6
Electrical, gas, music and photography	1	3.4	9.4
DIY, hardware and homewares	2	6.9	6.4
China, glass, gifts and fancy goods	1	3.4	4.6
Cars, motorcycles and motor accessories	0	0	1.3
Chemists, drug stores and opticians	4	13.8	10.0
Variety, department and catalogue	0	0	1.6
Florists, nurserymen and seedsmen	1	3.4	2.3
Toys, hobby, cycle and sport	3	10.3	5.2
Jewellers	1	3.4	5.0
Charity/second-hand	3	10.3	8.4
Other comparison retailers	3	10.3	2.9
Total	**29**	**100.0**	**100.0**

Source: Goad Plans January 2015.
*UK average for all town centres surveyed by Goad Plans (June 2015

Service Uses

Swindon Old Town has an extensive range and choice of non-retail service uses, with most categories present well represented (see Table B.3) reflecting the centre's service role in the shopping hierarchy. Swindon Old Town has a particularly high provision of Class A3 restaurants/cafés and Class A2 financial services.

Table B.3 Old Town Swindon Analysis of Selected Service Uses

Type of Unit	Old Town		% UK Average*
	Units 2015	%	
Restaurants/cafés	24	29.6	22.5
Fast food/takeaways	10	12.3	14.7
Pubs/bars	9	11.1	11.1
Banks/other financial services	11	13.6	11.8
Betting shops/casinos	2	2.5	3.8
Estate agents/valuers	8	9.9	9.1

Type of Unit	Old Town		% UK Average*
	Units 2015	%	
Travel agents	0	0	2.2
Hairdressers/beauty parlours	17	21.0	22.7
Laundries/dry cleaners	0	0	2.1
Total	**81**	**100.0**	**100.0**
Other A1 Retail Services	6	n/a	n/a
Total	**87**	**n/a**	**n/a**

Source: Goad Plans January 2015
*UK average for all town centres surveyed by Goad Plans (June 2015)

Vacant Units and Property Indicators

There are 21 vacant units within Old Town (January 2015), a vacancy rate of 14.2%, which is above the national average of 11.8%. The vacant units are dispersed through the centre. There is a concentration of 11 vacant units on Victoria Road, north of Prospect Place. The retail frontages in this section of Victoria Road are peripheral to the rest of Old Town centre and are fragmented with residential uses.

Zone A retail rents vary throughout the centre, and are detailed at Table B.4 below. The highest retail rents in Swindon Old Town are achieved in Wood Street of £250 per sq.m, and lower rents of £150 per sq.m in Victoria Road.

Table B.4 Old Town Zone A Retail Rents

Location	£ per sq.m
Wood Street	225 - 250
Bath Road	225
High Street	200 - 210
Godwin Court	200
Devizes Road	185 - 200
Victoria Road	150 - 210

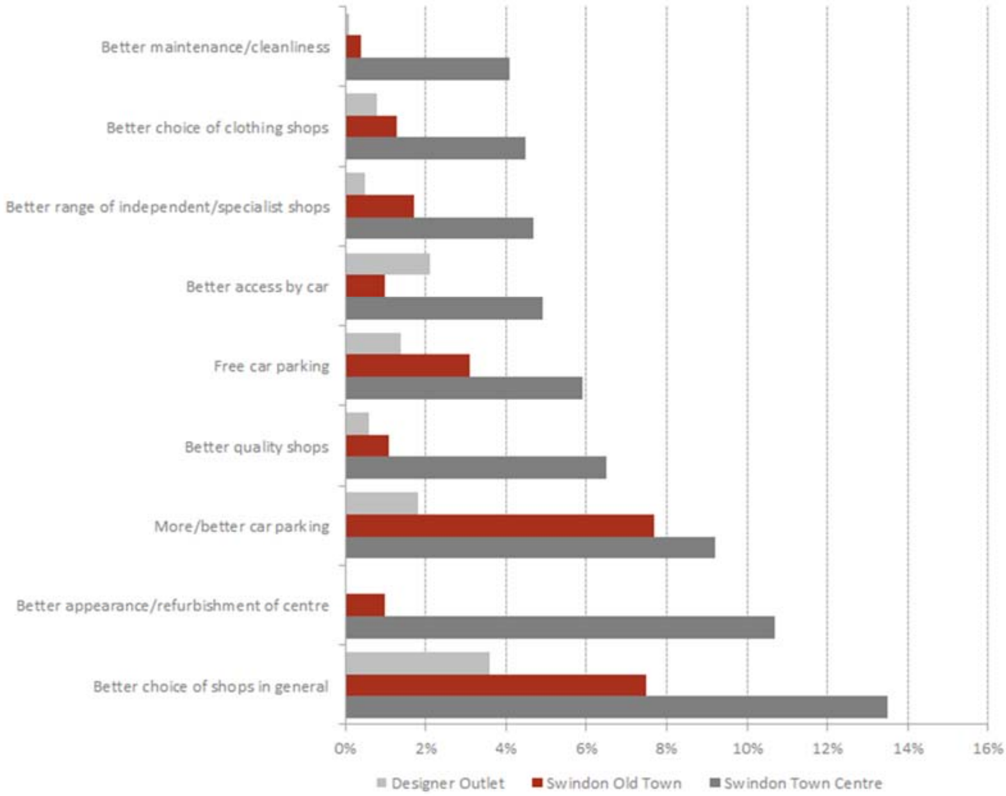
Characteristics of the Shopping Area

The 2010 health check study also included an assessment of Swindon Old Town. This noted that the Old Town had a distinct personality, characterised by a mix of land uses and a concentration of old buildings of historic and architectural interest. Development of the area enclosed within Wood Street, Devizes Road, Newport Street and High Street had recently been completed. Wood Street represents the busiest part of the centre and has an attractive shopping environment. The environmental quality of Victoria Road is poor and the viability of retail uses within this part of the centre is fragile.

Views of Customers

Respondents to the household survey were asked what would make you shop more often in Swindon Old Town. Of the respondents, over 75% were either of the view that nothing would change their shopping habits or they did not know/had never visited the centre. Figure B.2 below shows the main responses to the question, compared to the same question for Swindon Town Centre and Swindon Designer Outlet.

Figure B.2 What would make you shop more often in Swindon Old Town?



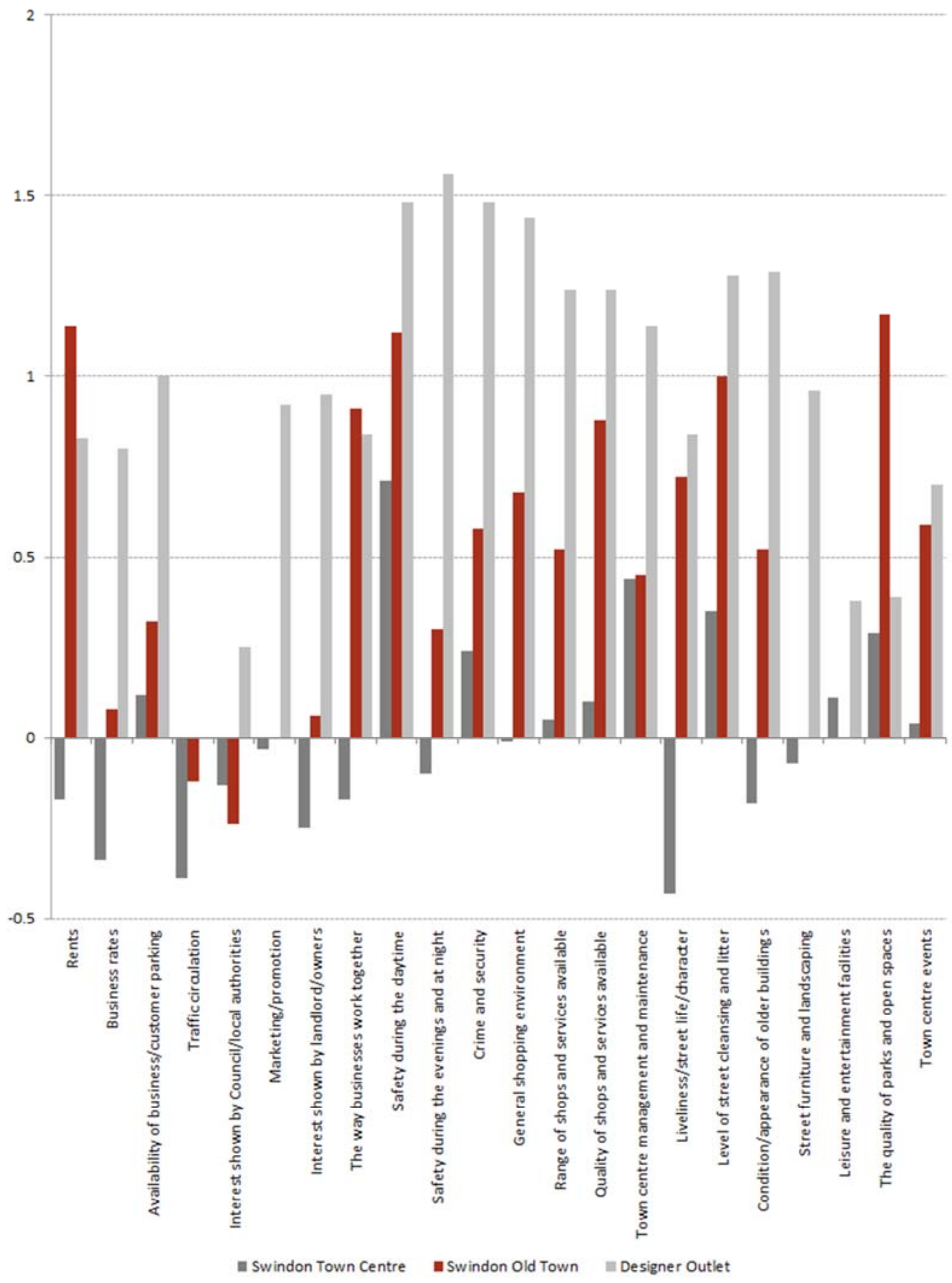
Source: NEMS Household Survey, January 2016

Of those who were of the view that the centre could be improved, the majority of respondents were looking for improvements to parking and for better quality/more diverse range of shops. In summary:

- 7.7% suggested more/better parking while 3.1% wanted free parking;
- 7.5% stated a better choice of shops in general;
- 1.7% wanted a better range of independent stores/specialist shops;
- 1.3% wanted a better choice of clothing shops;
- 1.1% were looking for better quality shops; and
- 1.0% referred to better appearance/refurbishment of the town centre.

In addition to the household survey, a business occupier survey was undertaken of 150 businesses in Swindon (Appendix 9). One of the questions asked respondents to rate various aspects within the centre, and Figure B.3 summarises the responses.

Figure B.3 : How do you rate the following aspects of Swindon Old Town?



Note: Mean Score: 2 = Very good, 1 = Quite good, 0 = Neither good nor poor, -1 = Quite poor, -2 = Very poor

The factors that Swindon Old Town scored well on include rents, safety during the daytime, level of street cleansing and litter, the quality of parks and open spaces, the way businesses work together and the quality of shops and services. Only two aspects achieved a negative rating – the interest shown by the Council/local authorities and traffic circulation. The centre appears to preform reasonably well in most other aspects, and generally achieves better ratings than Swindon Town Centre.

Catchment Area

Swindon Old Town is a second tier shopping centre in the Borough and has a relatively local catchment, with a service focus. The household survey results indicate that only 0.2% of respondents do most of their non-food shopping at Swindon Old Town. 0.7% stated that Swindon Old Town was the place they visited most frequently to use local shops and services. These respondents live in the local area Zone 1 (Swindon Urban East) and Zone2 (Swindon Urban West). These results indicate Swindon Old Town has a limited local catchment area.

Swindon Old Town's Strengths, Weaknesses, Opportunities and Threats

Strengths

- Swindon Old Town provides a retail and service offer to surrounding local residents.
- Swindon has a reasonable range of convenience and comparison shops, for a centre of its size, and has a particularly strong representation of antique dealers and home furnishing stores.
- The centre provides a range of service facilities, with a high provision of restaurants, cafés and A2 uses.
- The environmental quality of the centre is good, with the majority of the centre located within a conservation area.
- Buildings within the centre are generally in reasonable to good condition.

Weaknesses

- The proportion of vacant units is higher than the national average.
- Victoria Road has a concentration of vacant units and the environmental quality of this area is poor in comparison to the rest of the centre.
- The pedestrian route between Swindon Old Town and Swindon Town Centre is along Victoria Road and is unattractive.

Opportunities

- Given its size and current offer, Swindon Old Town has a limited catchment, and a significant proportion of the retail expenditure generated by local residents leaks from the area to higher order centres. If Swindon Old Town can maintain its current share of expenditure, there is potential to improve and expand retail, leisure and service uses in the centre.
- There are limited development opportunities within the centre to accommodate new retail and leisure uses. The main opportunity for development is the Locarno site that could provide a mixed use scheme.

- Improved linkages between Swindon Old Town and Swindon Town Centre would encourage more linked trips between the two destinations.

Threats

- Other competing shopping centres are likely to continue to improve their environment and retail offer, therefore the competitive gap may widen and the amount of expenditure leakage from the Swindon Old Town area could increase. If Swindon Old Town does not improve its range and choice of facilities, the town centre's role in the wider hierarchy could decline.
- Anecdotal evidence from businesses that the conversion of Class B1 office space in Swindon Old Town has had a negative impact on footfall and trade.

C. Swindon Designer Outlet

Swindon Designer Outlet (SDO) is a significant, established out of centre comparison goods retail destination. It is not defined as centre within the retail hierarchy of the Local Plan, as it does not provide the same function as a town or district centre, rather it functions as a specialised comparison shopping destination that attracts visitors from a wide area. It is located in about 0.5 kilometres to the west of Swindon town centre, to the north of the railway line. The outlet occupies the former Great Western railway works buildings and is owned by McArthur Glen. It opened in 1997.

Mix of Uses and Occupier Representation

SDO has a total of 121 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table C.1, compared against the national average.

Table C.1 Swindon Designer Outlet Use Class Mix by Unit

Type of Unit	Units 2015	% of Total Number of Units	
		SDO %	UK Average (1)
Comparison Retail	86	71.1	35.8
Convenience Retail	4	3.3	8.4
A1 Services (2)	1	0.8	12.3
A2 Services (3)	0	0.0	12.3
A3/A5	10	8.3	14.9
A4 pubs/bars	0	0.0	4.5
Vacant	20	16.5	11.8
Total	**121**	**100.0**	**100.0**

Source: Goad Plans July 2015.
(1) UK average for all town centres surveyed by Goad Plans (June 2015)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) incl. betting shops (sui generis)

The SDO's mix of uses is different when compared with the national average, with a much higher proportion of non-food comparison outlets, and conversely much lower levels of other uses. There are no class A2 financial and professional services or Class A4 pubs/bars. This mix of uses reflects the SDO's specialist/niche function as a designer fashion outlet.

Retailer Representation

The SDO has a reasonable number of comparison shops (86). Table C.2 provides a breakdown of comparison units by category. The SDO has a high representation of clothing/footwear outlets, homeware and gift/fancy goods. The centre does not provide any outlets within five of the Goad Plan comparison categories, although the choice available in represented categories is reasonable. The main tenants include Clarks, Gap Outlet, John Lewis, Marks & Spencer Outlet, Next, Nike and Polo Ralph Lauren.

Table C.2 Swindon Designer Outlet Breakdown of Comparison Units

Type of Unit	SDO		% UK Average*
	Units 2015	%	
Clothing and footwear	53	61.6	25.0
Furniture, carpets and textiles	2	2.3	7.4
Booksellers, arts, crafts and stationers	2	2.3	10.6
Electrical, gas, music and photography	0	0	9.4
DIY, hardware and homewares	7	8.1	6.4
China, glass, gifts and fancy goods	6	7.0	4.6
Cars, motorcycles and motor accessories	0	0	1.3
Chemists, drug stores and opticians	0	0	10.0
Variety, department and catalogue	1	1.2	1.6
Florists, nurserymen and seedsmen	0	0	2.3
Toys, hobby, cycle and sport	7	8.1	5.2
Jewellers	3	3.5	5.0
Charity/second-hand	0	0	8.4
Other comparison retailers	5	5.8	2.9
Total	**86**	**100.0**	**100.0**

Source: SDO Shopping Guide 2015.
*UK average for all town centres surveyed by Goad Plans (June 2015)

Service Uses

SDO has a limited range of non-retail service uses, reflecting its niche shopping function as shown in Table C.3.

Table C.3 Swindon Designer Outlet Analysis of Selected Service Uses

Type of Unit	SDO		% UK Average*
	Units 2015	%	
Restaurants/cafés	9	90.9	22.5
Fast food/takeaways	1	0	14.7
Pubs/bars	0	0	11.1
Banks/other financial services	0	0	11.8
Betting shops/casinos	0	0	3.8
Estate agents/valuers	0	0	9.1
Travel agents	0	0	2.2
Hairdressers/beauty parlours	1	9.1	22.7
Laundries/dry cleaners	0	0	2.1
Total	**11**	**100.0**	**100.0**
Other A1 Retail Services	0	n/a	n/a
Total	**11**	**n/a**	**n/a**

Source: SOD Shopping Guide 2015 *UK average for all town centres surveyed by Goad Plans (June 2015)

Services are limited to coffee shops, restaurants, cafés and one fast food outlet. The tenants include Costa Coffee, Ed's Diner, Giraffe, KFC, Pizza Express and Starbucks. There is also a beauty/nail bar outlet.

Vacant Units and Property Indicators

The proportion of vacant units within the SDO is significantly above the national average, and is high for such a successful retail destination. However, a scheme for the alteration, conversion and extension of the SDO has recently been implemented, which provided new and reconfigured retail floorspace. This recent development is primarily the reason that the SDO has a relatively high number of vacant units for such a successful retail destination, as some of the units have yet to be fitted out and let.

Valuation Office Agency (VOA) information indicates that rental levels across the centre are £400 per sq.m.

The SDO provides a high quality, attractive shopping environment, with a good provision of street furniture and public spaces. The centre provides a covered, easily navigated shopping experience.

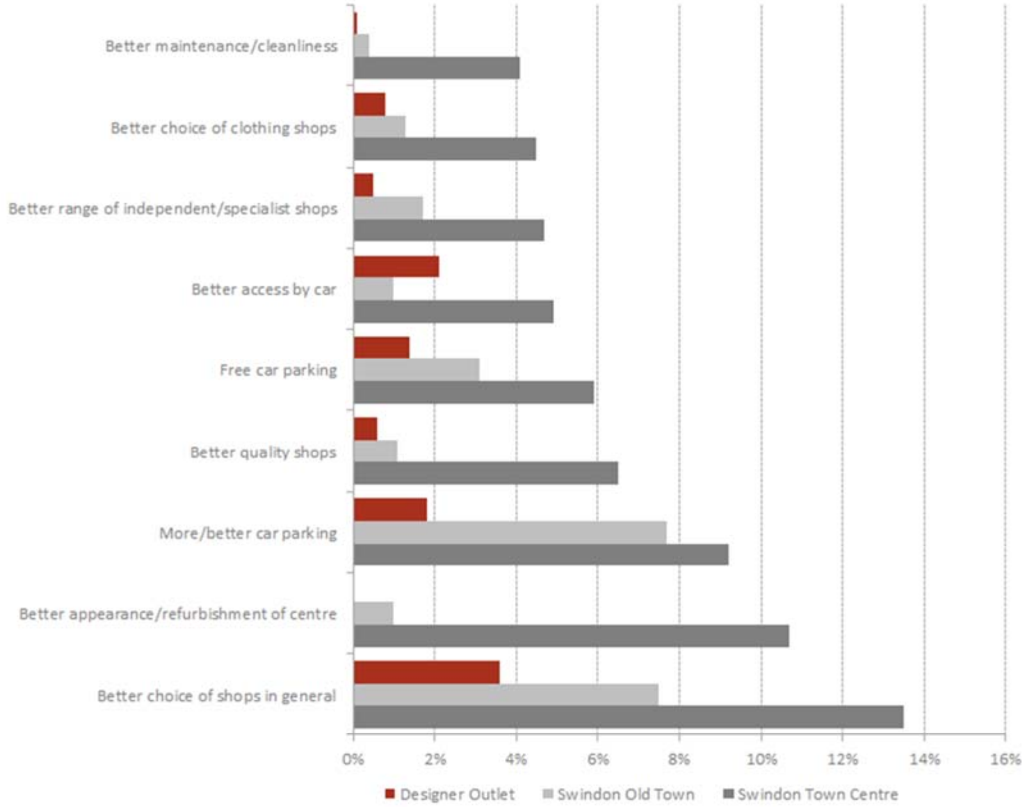
Catchment Area

The household survey results indicate that 2.7% of respondents do most of their non-food shopping at SDO across the study area as a whole. While this is a relatively low proportion, it is estimated that the SDO's catchment extends significantly beyond the study area. The centre does not provide the same range of comparison goods categories, and therefore cannot fulfil all shopping requirements in the same way as other centres.

Customer Views

Respondents to the household survey were asked what would make you shop more often in Swindon Designer Outlet. Of the respondents, 84% were either of the view that nothing would change their shopping habits or they did not know/had never visited the centre. This suggests that there is a high level of customer satisfaction with the SDO. Figure C.1 below shows the main responses to the question, compared to the same question for Swindon Town Centre and Swindon Old Town.

Figure C.1 What would make you shop more often in Swindon Designer Outlet?



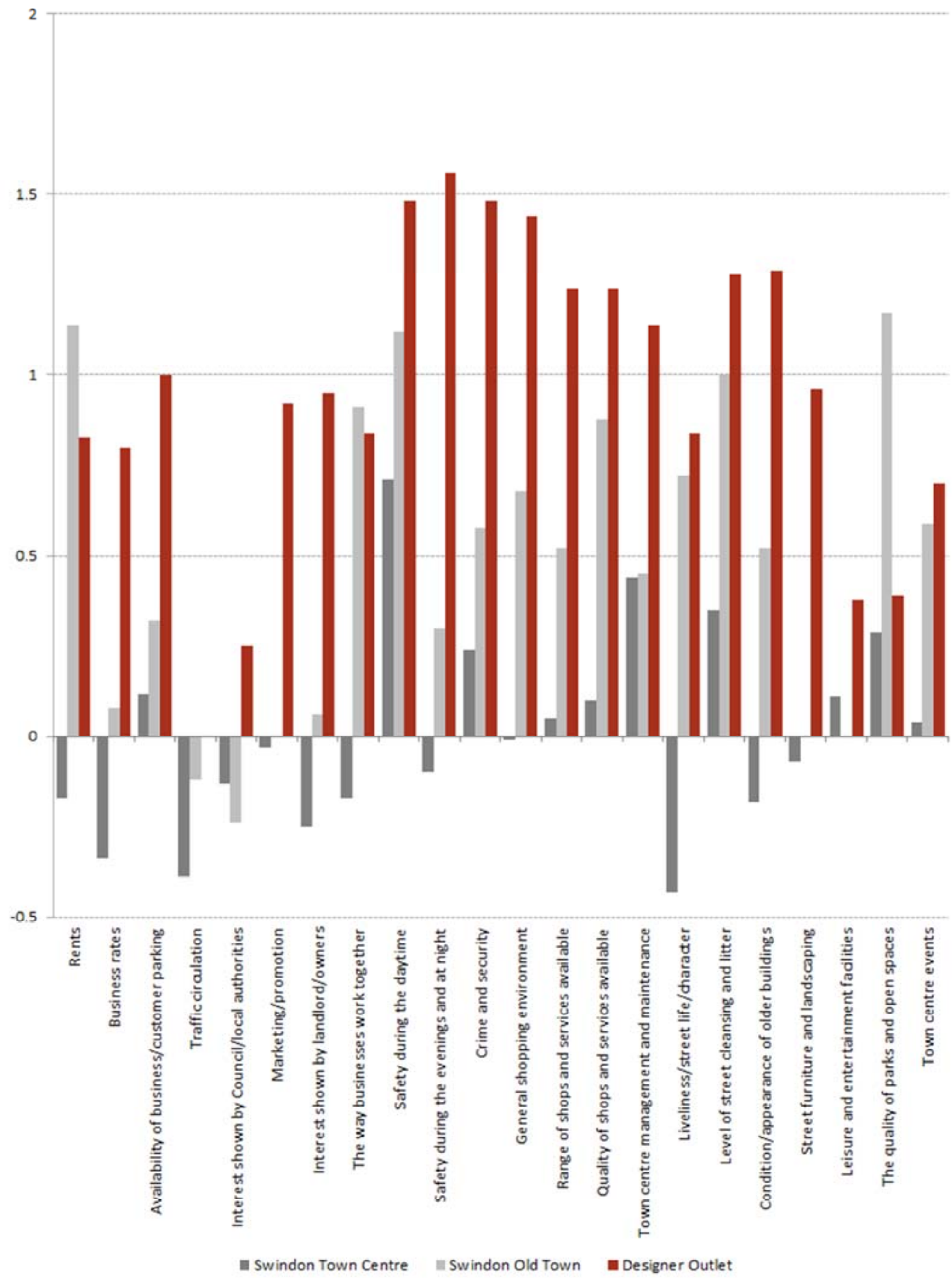
Source: NEMS Household Survey, January 2016

Of those who were of the view that the centre could be improved, the majority of respondents were looking for a better choice of shops in general and improvements to parking. In summary:

- 2.1 suggested better access by car, 1.8% stated more parking while 1.4% wanted free parking;
- 3.6% stated a better choice of shops in general;
- 1.6% stated more/better restaurant/café facilities; and
- 1.5% suggested lower prices.

In addition to the household survey, a business occupier survey was undertaken of 150 businesses in Swindon (Appendix 9). One of the questions asked respondents to rate various aspects within the centre, and Figure C.2 summarises the responses.

Figure C.2 : How do you rate the following aspects of Swindon Designer Outlet?



Note: Mean Score: 2 = Very good, 1 = Quite good, 0 = Neither good nor poor, -1 = Quite poor, -2 = Very poor

SDO scored well on all aspects, and did not receive any negative ratings. The highest scoring elements were safety during the evenings and at night, safety during the daytime, crime and security and the general shopping environment.

Swindon Designer Outlet's Strengths, Weaknesses, Opportunities and Threats

Strengths

- SDO provides a specialist designer retail offer, with a strong fashion focus.
- There is a high level of customer satisfaction with the centre.
- The quality of the shopping environment and public realm is high, and the centre provides a covered, easily navigated shopping experience.

Weaknesses

- SDO offers a limited function compared with other centres, and lacks the range of comparison goods categories and service uses.
- The pedestrian links between SDO and Swindon Town Centre are poor.
- The proportion of vacant units is significantly higher than the national average.

Opportunities

- There is scope for redevelopment of the areas of open space between SDO and the STEAM museum that could deliver additional retail units, plus improvements to the public realm.
- Improved linkages between SDO and Swindon Town Centre would encourage more linked trips between the different shopping destinations.
- SDO remains an out of centre retail destination, and it is not considered appropriate to expand its offer to mirror the range of uses within a more traditional centre.
- There is a need to control future development at SDO, in order to protect Swindon Town Centre and ensure that the main focus of retail development and growth is not directed away from the town centre.

Threats

- Other competing shopping centres are likely to continue to improve their environment and retail offer, therefore the competitive gap may widen. However, the occupation of the vacant units within the centre, plus the development opportunity, should retain SDO's unique position in the retail hierarchy.

D. West Swindon Shopping Centre

West Swindon Shopping Centre is an established medium sized shopping centre that has been at the heart of the West Swindon community for over 25 years. It is a designated district centre located within the Swindon Urban Area Boundary. It is located approximately 2.5km west of Swindon Town Centre.

Mix of Uses and Occupier Representation

West Swindon Shopping Centre (WSSC) has a total of 29 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table D.1, compared against the national average.

Table D.1 West Swindon Shopping Centre Use Class Mix by Unit

Type of Unit	Units 2015	% of Total Number of Units	
		WSSC %	UK Average (1)
Comparison Retail	8	27.6	35.8
Convenience Retail	3	10.4	8.4
A1 Services (2)	5	17.2	12.3
A2 Services (3)	5	17.2	12.3
A3/A5	5	17.2	14.9
A4 pubs/bars	1	3.5	4.5
Vacant	2	6.9	11.8
Total	**29**	**100.0**	**100.0**

Source: NLP site visit
(1) UK average for all town centres surveyed by Goad Plans (June 2015)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) incl. betting shops (sui generis)

WSSC is dominated by a large Asda store (5,758 sq.m net). In addition to the main Asda store, which includes a significant non-food element, there is also an Asda pharmacy, Asda sound and vision and Asda kiosk in the centre. The mix of units in WSSC is different when compared with the national average for all centres. There is a lower proportion of non-food comparison outlets, and a higher than average proportion of convenience retail. There is a higher proportion of A1 services, A2 services and A3/A5 restaurants/cafés/ takeaways than the national average. There are only two vacant units within the centre, which give a vacancy rate significantly below the national average. This mix of uses reflects WSSC's function as a local retail centre that is well used by the local population.

Retailer Representation

WSSC has a limited number of comparison shops (8) and as such it is not possible to draw accurate statistical comparison with the UK average figures. Nevertheless, Table D.2 provides a breakdown of comparison shop units by category. Of note, there are no clothing and footwear units located within the shopping centre, although the Asda store includes George Clothing.

Table D.2 West Swindon Shopping Centre Breakdown of Comparison Units

Type of Unit	WSSC		% UK Average[1]
	Units 2015	%	
Clothing and footwear	0	0.0	25.0
Furniture, carpets and textiles	0	0.0	7.4
Booksellers, arts, crafts and stationers	1	12.5	10.6
Electrical, gas, music and photography	2	25.0	9.4
DIY, hardware and homewares	0	0.0	6.4
China, glass, gifts and fancy goods	0	0.0	4.6
Cars, motorcycles and motor accessories	1	12.5	1.3
Chemists, drug stores and opticians	2	25.0	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	0	0.0	2.3
Toys, hobby, cycle and sport	0	0.0	5.2
Jewellers	1	12.5	5.0
Charity/second-hand	1	12.5	8.4
Other comparison retailers	0	0.0	2.9
Total	**8**	**100.0**	**100.0**

Source: NLP site visit.
(1) UK average for all town centres surveyed by Goad Plans (June 2015)

Service Uses

Table D.3 West Swindon Shopping Centre Analysis of Selected Service Uses

Type of Unit	WSSC		% UK Average[1]
	Units 2015	%	
Restaurants/cafés	2	12.5	22.5
Fast food/takeaways	3	18.8	14.7
Pubs/bars	1	6.2	11.1
Banks/other financial services	2	12.5	11.8
Betting shops/casinos	2	12.5	3.8
Estate agents/valuers	1	6.2	9.1
Travel agents	1	6.2	2.2
Hairdressers/beauty parlours	3	18.8	22.7
Laundries/dry cleaners	1	6.2	2.1
Total	**16**	**100.0**	**100.0**
Other A1 Retail Services	0	n/a	n/a
Total	**16**	**n/a**	**n/a**

Source: SOD Shopping Guide 2015
(1) UK average for all town centres surveyed by Goad Plans (June 2015)
(2) McDonalds is considered to be A3 use.
(3) Figure less than 100% due to rounding.

WSSC has a limited range of non-retail service uses and as such it is not possible to draw accurate statistical comparison with the UK average figures. Services present in the centre include hairdressers, one coffee shop, one restaurant, three takeaways, one pub/restaurant, two banks, an estate agent and two bookmakers. The tenants include Costa Coffee, McDonalds, HK97, Britz Fish & Chips, Dominos, Harvester, Taylors Estate agents, Halifax and Natwest.

Vacant Units and Property Indicators

There are only two vacant units within WSSC, indicating a good demand for the premises in the centre. However, the centre is relatively low quality and appears dated. The centre would benefit from overall improvements to the public realm. Valuation Office Agency (VOA) information indicates that rental levels across the shopping centre are typically between £250-£400.

E. Orbital Retail Park

Orbital Retail Park is a designated District Centre located within the Swindon Urban Area Boundary approximately 3.8 kilometres north west of Swindon town centre. The retail centre is anchored by a large Asda (10,625 sq.m net).

Mix of Uses and Occupier Representation

Orbital Retail Park has a total of 16 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table E.1, compared against the national average.

Table E.1 Orbital Retail Park Use Class Mix by Unit

Type of Unit	Units 2015	% of Total Number of Units	
		ORP%	UK Average [1]
Comparison Retail	7	43.8	35.8
Convenience Retail	1	6.3	8.4
A1 Services [2]	3	18.8	12.3
A2 Services [3]	2	12.5	12.3
A3/A5	3	18.8	14.9
A4 pubs/bars	0	0	4.5
Vacant	0	0	11.8
Total	**16**	**100.0**	**100.0**

Source: NLP site visit
(1) UK average for all town centres surveyed by Goad Plans (June 2015)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) incl. betting shops (sui generis)
(4) Stores within other stores e.g. the Starbucks within the New Look have not been included in the table

Orbital Retail Park has a significantly higher proportion of A1 comparison units, A1 Services and A3/A5 uses than the national average. Conversely Orbital Retail Park has a lower proportion of convenience retail and no A4 pubs/bars. This mix of uses reflects Orbital Retail Park's function as a district centre retail park. There are no vacant units within Orbital Retail Park.

Retailer Representation

The Orbital Retail Park has a limited number of comparison shops (7). All of the comparison shops are occupied by national multiples, anchored by Next and Marks & Spencer. Table E.2 provides a breakdown of comparison shop units by category. The Orbital Retail Park has a high representation of clothing and footwear outlets.

Table E.2 Orbital Retail Park Breakdown of Comparison Unit

Type of Unit	ORP		% UK Average[1]
	Units 2015	%	
Clothing and footwear	3	42.8	25.0
Furniture, carpets and textiles	0	0	7.4
Booksellers, arts, crafts and stationers	0	0	10.6
Electrical, gas, music and photography	1	14.3	9.4
DIY, hardware and homewares	1	14.3	6.4
China, glass, gifts and fancy goods	0	0	4.6
Cars, motorcycles and motor accessories	0	0	1.3
Chemists, drug stores and opticians	1	14.3	10.0
Variety, department and catalogue	1	14.3	1.6
Florists, nurserymen and seedsmen	0	0	2.3
Toys, hobby, cycle and sport	0	0	5.2
Jewellers	0	0	5.0
Charity/second-hand	0	0	8.4
Other comparison retailers	0	0	2.9
Total	**7**	**100.0**	**100.0**

Source: NLP site visit.
(1) UK average for all town centres surveyed by Goad Plans (June 2015)

Service Uses

Table E.3 Orbital Retail Park Analysis of Selected Service Uses

Type of Unit	ORP		% UK Average[1]
	Units 2015	%	
Restaurants/cafés	3	37.5	22.5
Fast food/takeaways	0	0	14.7
Pubs/bars	0	0	11.1
Banks/other financial services	0	0	11.8
Betting shops/casinos	2	25.0	3.8
Estate agents/valuers	2	25.0	9.1
Travel agents	1	12.5	2.2
Hairdressers/beauty parlours	0	0	22.7
Laundries/dry cleaners	0	0	2.1
Total	**8**	**100.0**	**100.0**
Other A1 Retail Services	0	n/a	n/a
Total	**8**	**n/a**	**n/a**

Source: NLP site visit
(1) UK average for all town centres surveyed by Goad Plans (June 2015)
(2) McDonalds is considered to be A3 use.

Orbital Retail Park has a limited range of non-retail service uses. Services comprise one coffee shop, two restaurants and two estate agents. Table E.3 provides a breakdown of comparison shop units by category. The tenants include Costa Coffee, Pizza Hut, McDonalds, Connell Estate Agents and Countrywide.

Vacant Units and Property Indicators

There do not appear to be any units currently available to let within the Orbital Retail Park which suggests that the demand for premises is strong. Valuation Office Agency (VOA) information indicates that rental levels across the retail park are typically £275-£350 per sq.m for larger units whilst smaller units (under 100sq.m) are typically £635 per sq.m.

F. Highworth

Highworth is a designated Primary Rural Centre located outside of the Swindon Urban Area. It is located approximately 8.6km north east of Swindon town centre.

Mix of Uses and Occupier Representation

Highworth has a total of 45 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table F.1, compared against the national average.

Table F.1 Highworth Use Class Mix by Unit

Type of Unit	Units 2015	% of Total Number of Units	
		Highworth %	UK Average (1)
Comparison Retail	9	20.0	35.8
Convenience Retail	4	8.9	8.4
A1 Services (2)	8	17.8	12.3
A2 Services (3)	12	26.7	12.3
A3/A5	8	17.8	14.9
A4 pubs/bars	3	6.7	4.5
Vacant	1	2.2	11.8
Total	**45**	**100.0**	**100.0**

Source: NLP site visit
(1) UK average for all town centres surveyed by Goad Plans (June 2015)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) incl. betting shops (sui generis)

Highworth has a significantly lower than average proportion of comparison goods outlets. Conversely Highworth has a higher than average proportion of A1 and A2 services when compared with the national average. There is a slightly higher than average proportion of A3/A5 uses and A4 uses when compared with the national average. There is one vacant unit, the former post office on Sheep Street.

Retailer Representation

Highworth has a limited number of comparison shops (10). The majority of A1 GOAD comparison groups are represented excluding furniture, carpets and textiles; cars, motorcycles and motor access; variety, department and catalogue; toys, hobby, cycle and sport; jewellers; and other comparison retailers. Table F.2 provides a breakdown of comparison shop units by category.

Table F.2 Highworth: Breakdown of Comparison Units

Type of Unit	Highworth		% UK Average[1]
	Units 2015	%	
Clothing and footwear	1	11.1	25.0
Furniture, carpets and textiles	0	0	7.4
Booksellers, arts, crafts and stationers	1	11.1	10.6
Electrical, gas, music and photography	2	22.2	9.4
DIY, hardware and homewares	1	11.1	6.4
China, glass, gifts and fancy goods	1	11.1	4.6
Cars, motorcycles and motor accessories	0	0	1.3
Chemists, drug stores and opticians	1	11.1	10.0
Variety, department and catalogue	0	0	1.6
Florists, nurserymen and seedsmen	1	11.1	2.3
Toys, hobby, cycle and sport	0	0	5.2
Jewellers	0	0	5.0
Charity/second-hand	1	11.1	8.4
Other comparison retailers	0	0	2.9
Total	**9**	**100.0**	**100.0**

Source: NLP site visit.
(1) UK average for all town centres surveyed by Goad Plans (June 2015)

Service Uses

Table F.3 provides a breakdown of service uses.

Table F.3 Highworth Analysis of Selected Service Uses

Type of Unit	Highworth		% UK Average[1]
	Units 2015	%	
Restaurants/cafés	3	11.1	22.5
Fast food/takeaways	5	18.5	14.7
Pubs/bars	3	11.1	11.1
Banks/other financial services	4	14.8	11.8
Betting shops/casinos	1	3.7	3.8
Estate agents/valuers	5	18.5	9.1
Travel agents	1	3.7	2.2
Hairdressers/beauty parlours	5	18.5	22.7
Laundries/dry cleaners	0	0	2.1
Total	**27**	**100.0**	**100.0**
Other A1 Retail Services	1	n/a	n/a
Total	**28**	**n/a**	**n/a**

Source: NLP site visit
(1) UK average for all town centres surveyed by Goad Plans (June 2015)

Highworth has a range of non-retail service uses. Services comprise three restaurant/cafes, five fast food takeaways, two banks, five estate agents, three pubs/bars, a post office, a travel agent, a dog grooming centre and five hairdressers/beauty parlours. Services are predominantly independent retailers and there are high levels of estate agents, fast food/takeaways and hairdressers/beauty parlours.

Vacant Units and Property Indicators

There are no vacant units, which suggest that demand from premises is strong. Valuation Office Agency (VOA) information indicates that rental levels are typically £225 per sq.m.

G. Gorse Hill

Gorse Hill is a designated District Centre located within the Swindon Urban Area Boundary. It is located approximately 600m north west of Swindon town centre.

Mix of Uses and Occupier Representation

Gorse Hill has a total of 76 retail/service uses and five vacant units. The diversity of uses present in the centre in terms of the number of units is set out in Table G.1, compared against the national average.

Table G.1 Gorse Hill Use Class Mix by Unit

Type of Unit	Units 2015	% of Total Number of Units	
		Gorse Hill %	UK Average (1)
Comparison Retail	27	33.4	35.8
Convenience Retail	7	8.6	8.4
A1 Services (2)	17	21.0	12.3
A2 Services (3)	8	9.9	12.3
A3/A5	17	21.0	14.9
A4 pubs/bars	0	0	4.5
Vacant	5	6.2	11.8
Total	**81**	**100.0**	**100.0**

Source: NLP site visit
(1) UK average for all town centres surveyed by Goad Plans (June 2015)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) incl. betting shops (sui generis)

Gorse Hill has an average proportion of comparison and convenience retail when compared with the national average. However, the proportion of A1 services and A3/A5 use is significantly above the national average. There are no A4 pubs/bars and the proportion of A2 services is below the national average. The vacancy rate is below the national average.

Retailer Representation

Gorse Hill has a number of comparison shops (27). Of the comparison shops all of them are independent retailers. Table G.2 provides a breakdown of comparison shop units by category. There is a significantly higher than average representation of charity/second hand units, equating to over a quarter of all A1 comparison units in Gorse Hill.

Table G.2 Gorse Hill: Breakdown of Comparison Units

Type of Unit	Gorse Hill		% UK Average[1]
	Units 2015	%	
Clothing and footwear	4	14.8	25.0
Furniture, carpets and textiles	3	11.1	7.4
Booksellers, arts, crafts and stationers	0	0	10.6
Electrical, gas, music and photography	5	18.5	9.4
DIY, hardware and homewares	4	14.8	6.4
China, glass, gifts and fancy goods	0	0	4.6
Cars, motorcycles and motor access	0	0	1.3
Chemists, drug stores and opticians	1	3.7	10.0
Variety, department and catalogue	0	0	1.6
Florists, nurserymen and seedsmen	1	3.7	2.3
Toys, hobby, cycle and sport	0	0	5.2
Jewellers	1	3.7	5.0
Charity/second-hand	7	25.9	8.4
Other comparison retailers	1	3.7	2.9
Total	**27**	**100.0**	**100.0**

Source: NLP site visit
(1) UK average for all town centres surveyed by Goad Plans (June 2015)

Service Uses

Table G.3 Gorse Hill Analysis of Selected Service Uses

Type of Unit	Gorse Hill		% UK Average[1]
	Units 2015	%	
Restaurants/cafés	4	11.1	22.5
Fast food/takeaways	13	27.8	14.7
Pubs/bars	0	0	11.1
Banks/other financial services	2	5.6	11.8
Betting shops/casinos	3	8.3	3.8
Estate agents/valuers	1	2.8	9.1
Travel agents	1	2.8	2.2
Hairdressers/beauty parlours	11	30.6	22.7
Laundries/dry cleaners	1	2.8	2.1
Total	**36**	**100.0**	**100.0**
Other A1 Retail Services	2	n/a	n/a
Total	**38**	**n/a**	**n/a**

Source: NLP site visit
(1) UK average for all town centres surveyed by Goad Plans (June 2015)

Gorse Hill has a range of non-retail service uses. Services comprise four restaurant/cafes, 13 fast food takeaways, a bank, an estate agent, a travel agent, three betting shops, 11 hairdressers/beauty parlours, a dry cleaner and one other retail service (shoe repairs). Services are predominantly independent retailers and there are a significantly higher proportion of fast food/takeaways and hairdressers/beauty parlours.

Vacant Units and Property Indicators

Gorse Hill has a number of vacant units which are clustered to the north of Gorse Hill District Centre. This suggests that demand for premises is weaker in the north of the district centre. Valuation Office Agency (VOA) information indicates that rental levels for larger units (above 1000 sq.m) are typically £70 per sq.m whilst smaller units are typically £175 per sq.m.

H. Cavendish Square

Cavendish Square is a designated District Centre located within the Swindon Urban Area Boundary. It is located approximately 2.0 kilometres east of Swindon town centre.

Mix of Uses and Occupier Representation

Cavendish Square has a total of 14 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table H.1, compared against the national average.

Table H.1 Cavendish Square Use Class Mix by Unit

Type of Unit	Units 2015	% of Total Number of Units	
		CavendishSquare %	UK Average [1]
Comparison Retail	4	28.6	35.8
Convenience Retail	3	21.4	8.4
A1 Services [2]	2	14.3	12.3
A2 Services [3]	2	14.3	12.3
A3/A5	3	21.4	14.9
A4 pubs/bars	0	0	4.5
Vacant	0	0	11.8
Total	**14**	**100.0**	**100.0**

Source: NLP site visit
(1) UK average for all town centres surveyed by Goad Plans (June 2015)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) incl. betting shops (sui generis)

Cavendish Square has a higher proportion of convenience units when compared with the national average. There is a below average proportion of comparison units. There is an above average proportion of A1 services/A2/A3/A5 use and there are no A4 pubs/bars. There are no vacant units.

Retailer Representation

Cavendish Square has a limited number of comparison shops (4). Table H.2 provides a breakdown of comparison shop units by category.

Table H.2 Cavendish Square: Breakdown of Comparison Units

Type of Unit	Cavendish Square		% UK Average[1]
	Units 2015	%	
Clothing and footwear	1	25.0	25.0
Furniture, carpets and textiles	0	0	7.4
Booksellers, arts, crafts and stationers	0	0	10.6
Electrical, gas, music and photography	0	0	9.4
DIY, hardware and homewares	0	0	6.4
China, glass, gifts and fancy goods	0	0	4.6
Cars, motorcycles and motor accessories	0	0	1.3
Chemists, drug stores and opticians	1	25.0	10.0
Variety, department and catalogue	1	25.0	1.6
Florists, nurserymen and seedsmen	0	0	2.3
Toys, hobby, cycle and sport	0	0	5.2
Jewellers	0	0	5.0
Charity/second-hand	1	25.0	8.4
Other comparison retailers	0	0	2.9
Total	**4**	**100.0**	**100.0**

Source: NLP site visit.
(1) UK average for all town centres surveyed by Goad Plans (June 2015)

Service Uses

Table H.3 Cavendish Square Analysis of Selected Service Uses

Type of Unit	Cavendish Square		% UK Average[1]
	Units 2015	%	
Restaurants/cafés	0	37.5	22.5
Fast food/takeaways	3	0	14.7
Pubs/bars	0	0	11.1
Banks/other financial services	1	0	11.8
Betting shops/casinos	1	25.0	3.8
Estate agents/valuers	0	25.0	9.1
Travel agents	0	12.5	2.2
Hairdressers/beauty parlours	1	0	22.7
Laundries/dry cleaners	0	0	2.1
Total	**6**	**100.0**	**100.0**
Other A1 Retail Services	1	n/a	n/a
Total	**7**	**n/a**	**n/a**

Source: NLP site visit
(1) UK average for all town centres surveyed by Goad Plans (June 2015)

Cavendish Square has a limited range of non-retail service uses. Services comprise a post office, three takeaways, a financial service, a hairdresser and a betting shop. The tenants include Post Office, MJ Kebab and Pizza, Zeera Indian Takeaway, Fish, Chips & Chinese, Steam Ahead Credit Union, Haircare and William Hill.

Vacant Units and Property Indicators

There do not appear to be any units currently available to let within Cavendish Square, which suggest the demand for premises is strong. Valuation Office Agency (VOA) information indicates that rental levels are typically £130.00 per sq.m for large units and £180.00 per sq.m for smaller units (under 200sq.m).

I. Wroughton

Wroughton is a designated Primary Rural Centre located outside of the Swindon Urban Area. It is located approximately 3.7km south west of Swindon town centre.

Mix of Uses and Occupier Representation

Wroughton has a total of 17 retail/service uses and one vacant unit, within the designated centre area. The diversity of uses present in the centre in terms of the number of units is set out in Table I.1, compared against the national average.

Table I.1 Wroughton Use Class Mix by Unit

Type of Unit	Units 2015	% of Total Number of Units	
		Wroughton %	UK Average (1)
Comparison Retail	4	23.5	35.8
Convenience Retail	4	23.5	8.4
A1 Services	2	11.8	12.3
A2 Services	2	11.8	12.3
A3/A5	5	29.4	14.9
A4 pubs/bars	0	0	4.5
Vacant	1	5.9	11.8
Total	**17**	**100.0**	**100.0**

Source: NLP site visit
(1) UK average for all town centres surveyed by Goad Plans (June 2015)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) incl. betting shops (sui generis)

Wroughton's mix of units is very different to the national average for all centres. There is lower than average number of comparison retail units and conversely a higher than average number of convenience retail. There is an above average proportion of A3/A5 services and below average proportion of A1 and A2 services. There are no A4 pubs/bars within the designated centre area, although there are facilities outside the designated centre.

Retailer Representation

There are four comparison A1 retail units in Wroughton. These comprise Prospect Hospice, Ellendune Mobility Store, Rosey Lea Florist and an opticians.

Service Uses

Wroughton has a limited range of non-retail service uses comprising two hairdressers/beauty parlours, two estate agents, a café and two takeaways. The tenants include JR's Barbers Shop, Expressions Hair Salon & Nail Bar, Richard James Estate Agents, Mcfarlane Estate Agents, Honey Pot Café, Great Western Fryer and Bombay Spice Indian.

Vacant Units and Property Indicators

There are no vacant units currently available to let within Wroughton, which suggest the demand for premises is strong. Valuation Office Agency (VOA) information indicates that rental levels are typically £200.00 per sq.m although VOA indicates that rental levels for the Tesco Express is £70.0 per sq.m

Appendix 7 Household Survey Results

Appendix 8 Household Survey Results – Market Shares

Figure A8.1: Convenience Goods: Swindon Borough Market Share

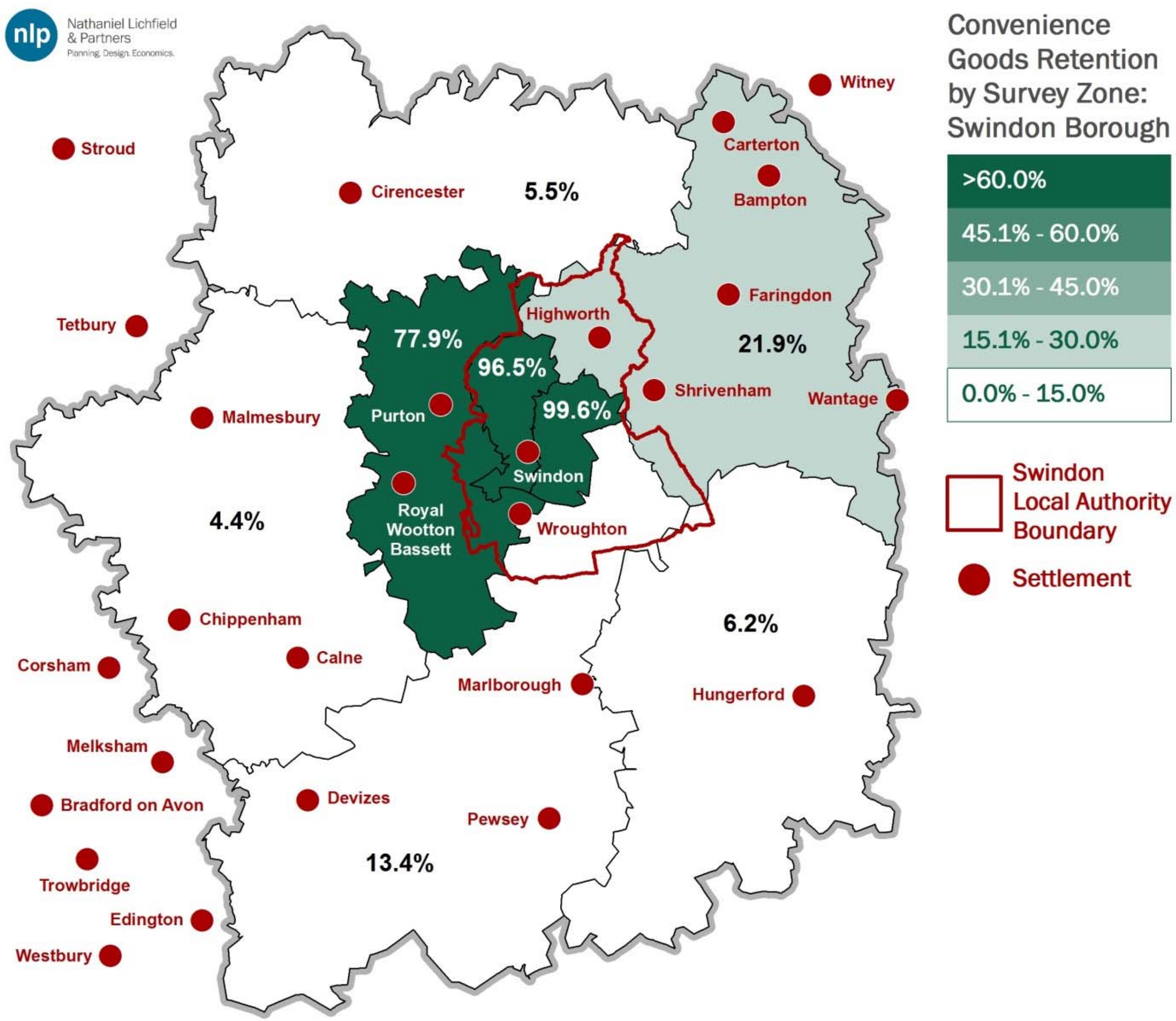


Figure A8.2: Convenience Goods: Swindon Town Centre Market Share

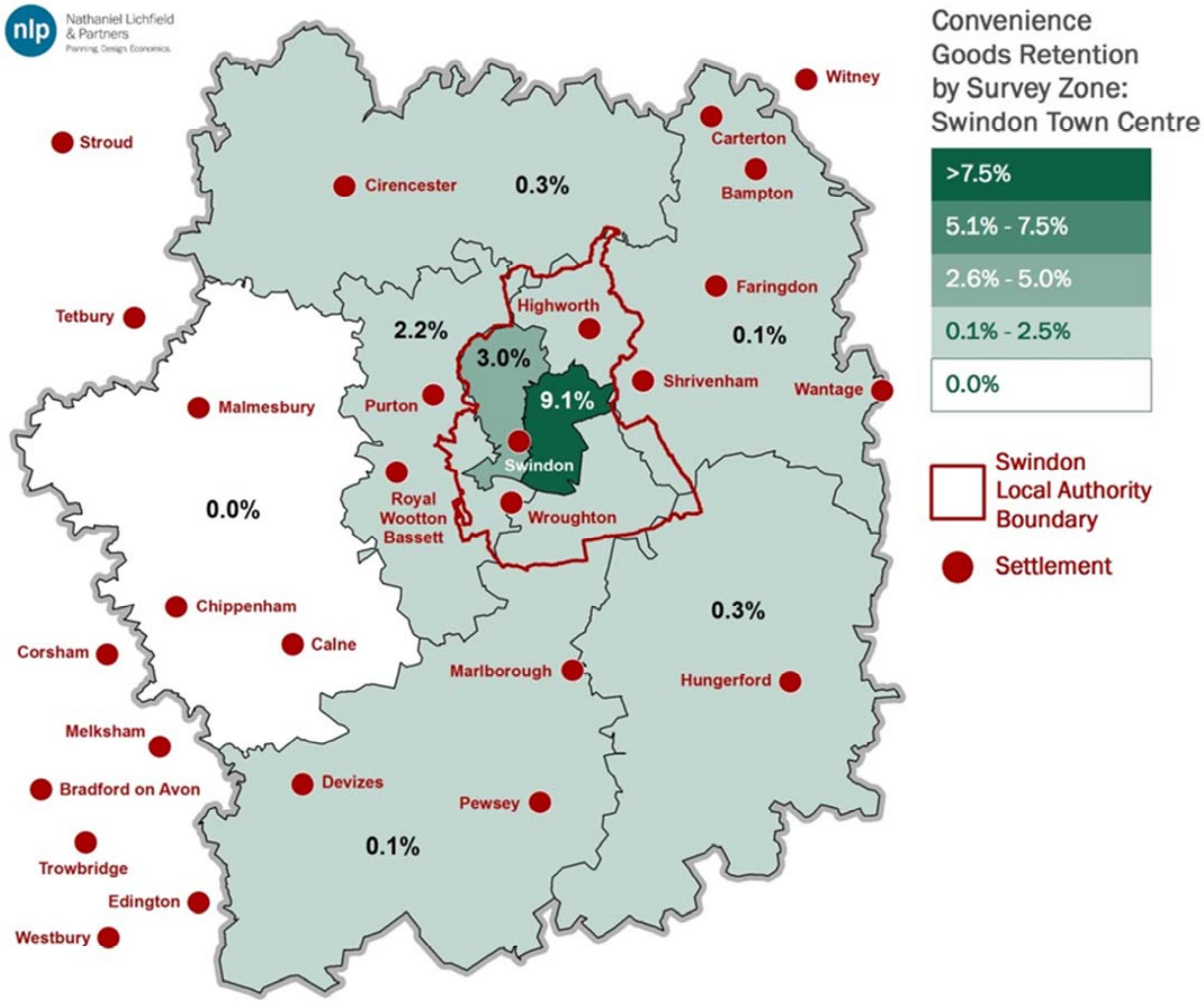


Figure A8.3: Comparison Goods: Swindon Borough Market Share

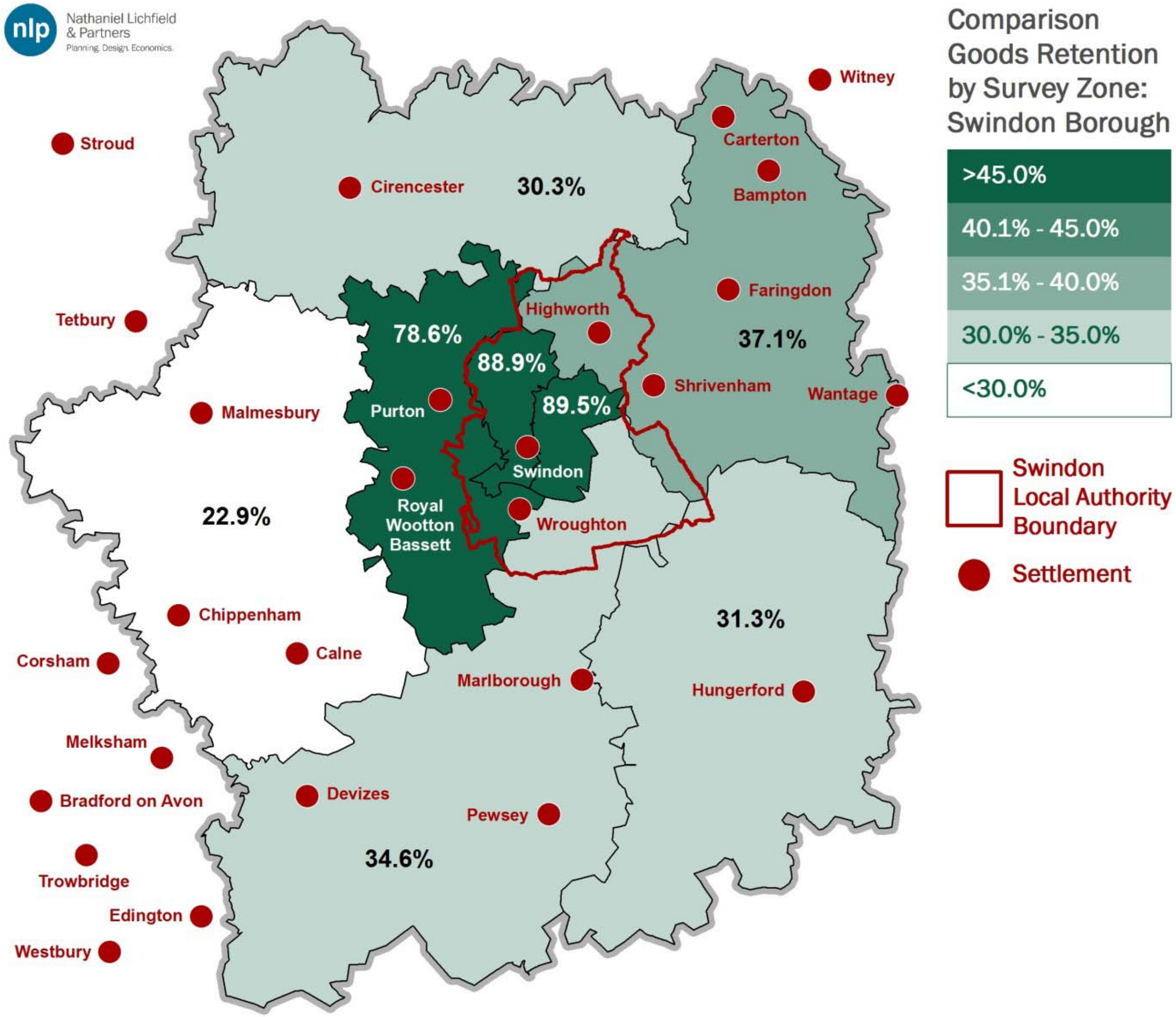


Figure A8.4: Comparison Goods: Swindon Town Centre Market Share

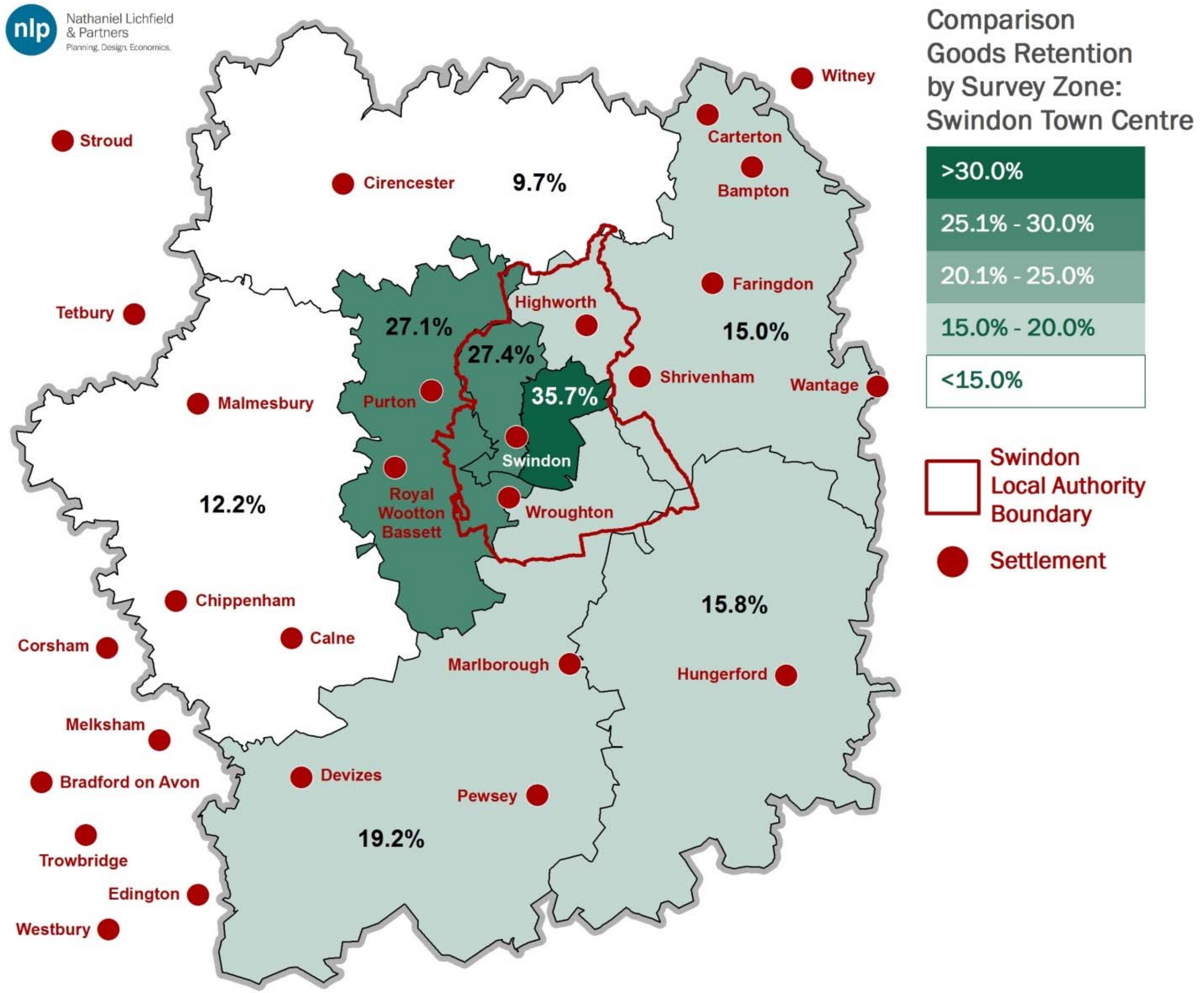


Figure A8.5: Food & Beverage: Swindon Borough Market Share

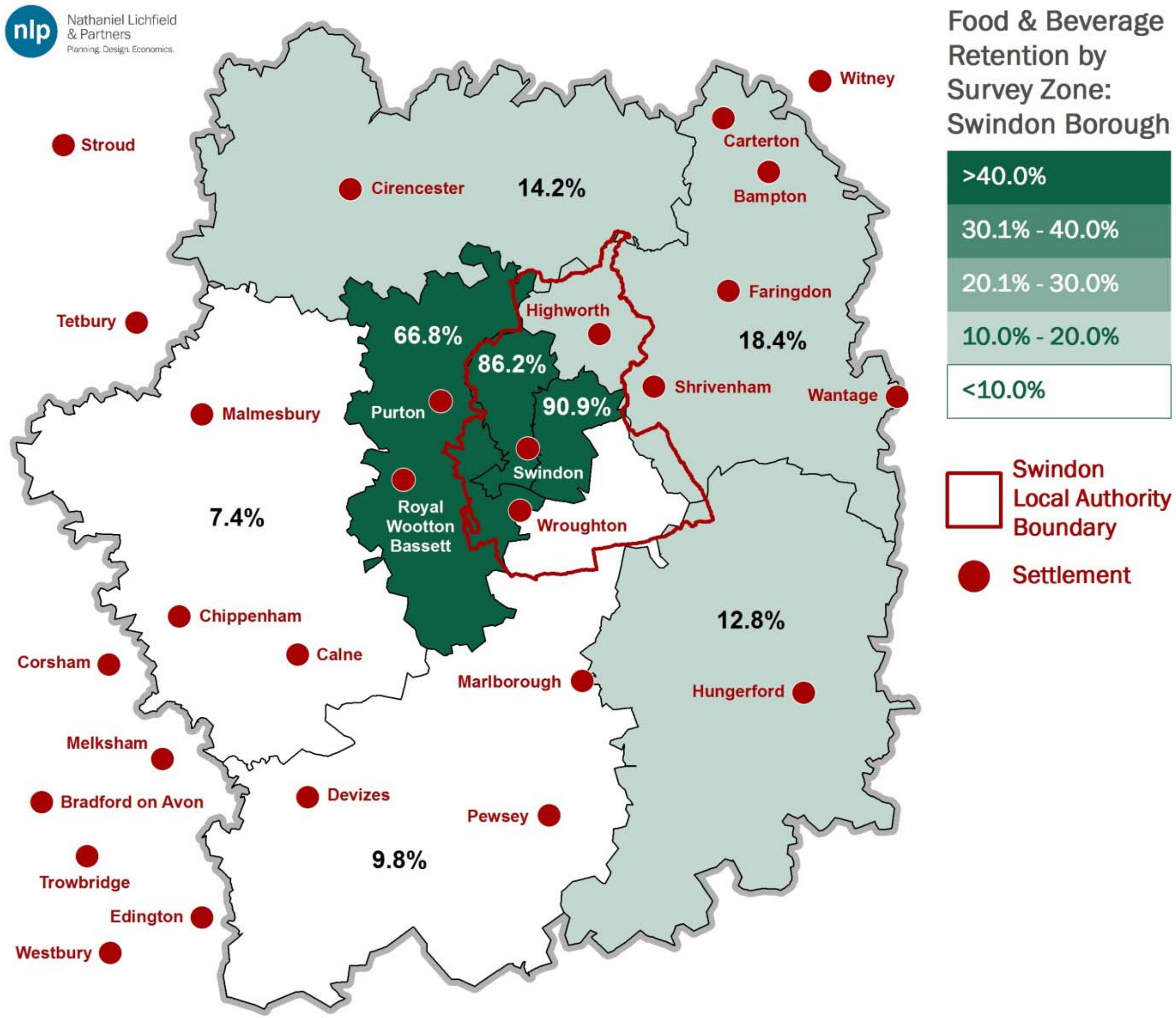
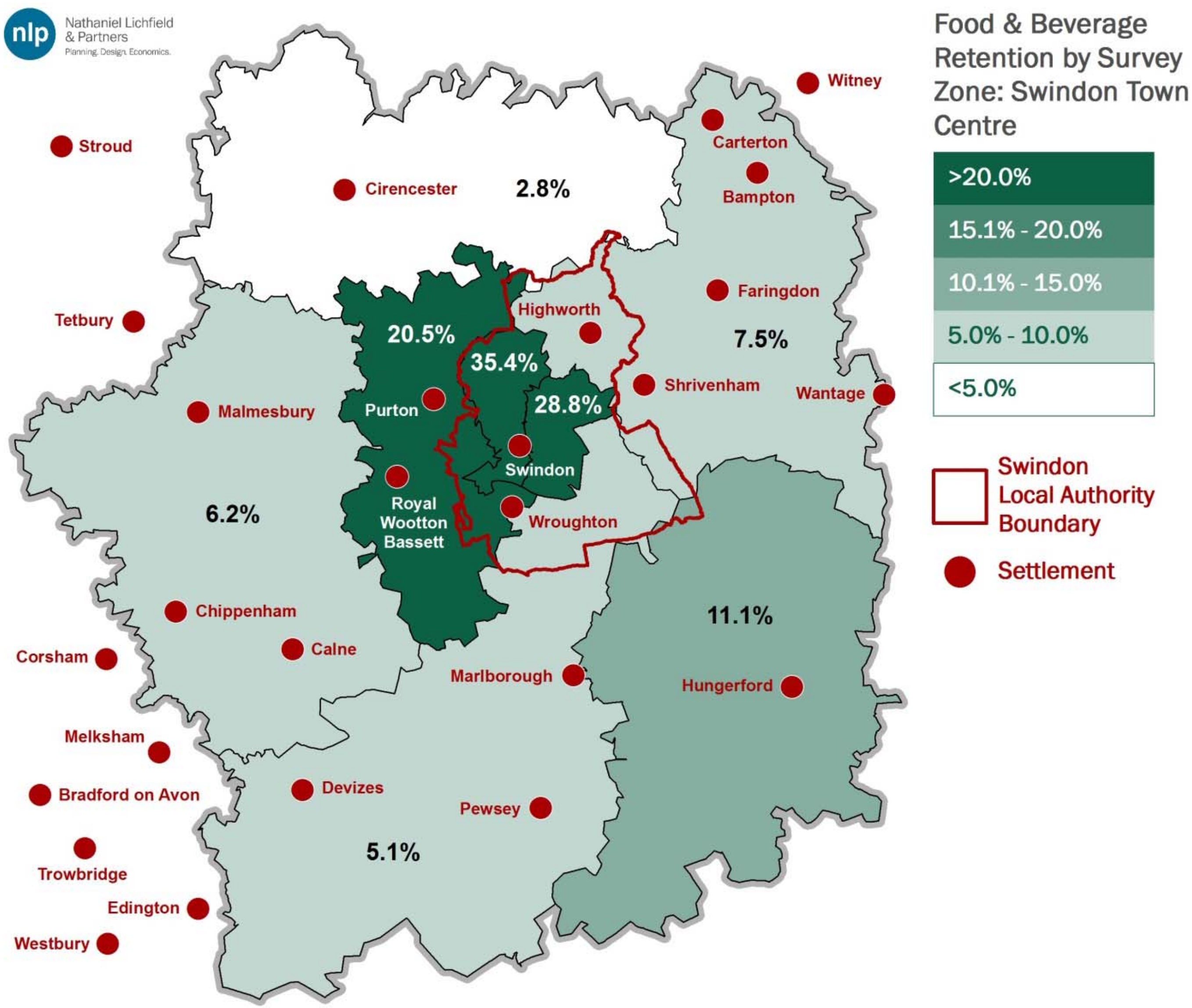


Figure A8.6: Food & Beverage: Swindon Town Centre Market Share



Appendix 9 Business Occupier Survey Results

Appendix 10 Canvas of Retail Operators

No.	Company/Trading Name	Q1		Q2		Q3	Q4	Q5	Q6										Q7	Q8	Q9	Q10
		Is your company looking to open new stores across the UK in the next 12 months?		Does your company have a requirement for new or expanded premises in Swindon Borough including the main centres: Swindon Town Centre, Old Town and Swindon Designer Outlet? If YES go to Question 5		What are the main reasons you and not looking for premises in Swindon? Could this change in the future?	Could this change in the future? Under what circumstances would you consider Swindon? [Go to Question 10]	What additional information might influence you in deciding to choose to locate in Swindon Borough?	What type of requirement do you have (tick relevant boxes)										Approximately how much space do you require (sq.m/sq.ft/site area)?	What has prevented you from securing this requirement to date?	Is there anything that you feel the Council could do to influence this?	Please made any additional comments in the space provided
									Swindon Town		Old Town		Swindon Design Outlet		Other District/ Local Centre		Out-of-Centre Location in Swindon Borough					
		YES	NO	YES	NO				New Unit	Expanded Unit	New Unit	Expanded Unit	New Unit	Expanded Unit	New Unit	Expanded Unit	New Unit	Expanded Unit				
1	Fraser Hart	1			1	Competition and yes	Good location and good rent	Other jewellers relocations	1										100 sq.m	Competition	No	
2	Barnardo's	1		1					1		1	1	1	1	1	1	1		100 sq.m	We have not found suitable affordable premises	No	
3	Select	1		1				Rents and locations	1		1	1	1	1					2,500 - 5,000 sq.ft	Finding right shop for our requirements	No other than reducing business rates	We are always looking for new shops to open and currently do not have one in Swindon
4	Schuh	1			1	We opened in Swindon only a couple of years ago																
5	F. Hinds	1			1	Already have representation in Brunel Centre (Arcade)	No															
6	Clarks/C&J Clark International Ltd	1			1	We have sufficient representation both within town and in the outlet centre	N/A															Parking into the town centre could be improved to encourage people to go there rather than just to the outlet centre.
7	Real Estate - UK		1		1																	
8	Jurys Inn		1		1	Not in the business plans this year	Unlikely to change	N/A for type of business														We are a hotel, so extremely unlikely to need to relocate
9	Sports Direct.com Retail Ltd	1			1	We have just acquired the freehold of the HSM/Monsoon on Regent Street as a resite for existing																Having worked in the west country for nearly 30 years I find it sad to see the town centre in such decline - it used to be stronger than Bristol.
10	Austin Reed Group Limited	1			1	In designer outlet	Unlikely, town centre more appealing	Nothing at present													See Q4.	
11	SCS	1		1				None									1		800 sq.ft	Unsuitable existing units, no new development	Advise of any developments in planning.	With trading mezzanine
12	Sofaworks	1		1		The size of population and demographic profile of Swindon are suitable to sustain a Sofaworks store.	N/A										1	1	1,400 sq.m	Nothing suitable available		Out of centre areas considering are: Mannington Roundabout/Greenbridge.
13	Arcadia	1			1	The market in Swindon is poor and we have loss making store in the town that we intend to exit.	If the retail spend was increased significantly.	Nothing at this time. We do not intend to expand in Swindon for the foreseeable future.														
14	Nando's	1		1											1	1	1		4,000+ sq.ft	Nothing	Not at this stage	We are currently looking at one site close to the city centre and one site out of the centre. Hopefully when it comes to planning the Council are happy with us being there.
15	Showcase Cinemas				1																	
16	The Gym Group Ltd	1		1				None	1	1							1					Lack of opportunity
	Total	**13**	**2**	**6**	**10**				**4**	**4**	**2**	**2**	**2**	**2**	**2**	**2**	**5**	**1**				

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