

# PROPOSED FOOD STORE AT COTEFIELD BUSINESS PARK, BODICOTE

## Retail Statement

OXF7993  
Proposed Food Store at  
Cotefield Business Park,  
Bodicote  
Final  
26 June 2019

## REPORT

### Quality Management

| Version | Status | Authored by  | Reviewed by   | Approved by  | Review date |
|---------|--------|--------------|---------------|--------------|-------------|
| Fv      | Final  | Chris Tookey | Richard Moore | Simon Gamage | 27.06.19    |

### Approval for issue

Simon Gamage

27 June 2019

### File/Model Location

#### Document location:

O:\7993 Cotefield Farm 2\5. Oxford Reports-Docs\Planning\Reports\190626 - OXF7993 - Proposed Food Store at Cotefield Business Park, Bodicote - 1 - Report.docx

#### Model / Appendices location:

© Copyright RPS Group Plc. All rights reserved.

The report has been prepared for the exclusive use of our client and unless otherwise agreed in writing by RPS Group Plc, any of its subsidiaries, or a related entity (collectively 'RPS'), no other party may use, make use of, or rely on the contents of this report. The report has been compiled using the resources agreed with the client and in accordance with the scope of work agreed with the client. No liability is accepted by RPS for any use of this report, other than the purpose for which it was prepared. The report does not account for any changes relating to the subject matter of the report, or any legislative or regulatory changes that have occurred since the report was produced and that may affect the report. RPS does not accept any responsibility or liability for loss whatsoever to any third party caused by, related to or arising out of any use or reliance on the report.

RPS accepts no responsibility for any documents or information supplied to RPS by others and no legal liability arising from the use by others of opinions or data contained in this report. It is expressly stated that no independent verification of any documents or information supplied by others has been made. RPS has used reasonable skill, care and diligence in compiling this report and no warranty is provided as to the report's accuracy. No part of this report may be copied or reproduced, by any means, without the prior written consent of RPS.

Prepared by:

Prepared for:

**RPS**

**Cotefield Holdings Limited**

**Chris Tookey**  
**Associate Director**

Park House  
Greyfriars Road  
Cardiff CF10 3AF

**T** +44 2920 668662  
**E** tookeyc@rpsgroup.com

## Contents

|          |   |           |
|----------|---|-----------|
| <b>1</b> | <b>INTRODUCTION</b> .....   | <b>1</b>  |
|          | Scope and Purpose .....   | 1         |
|          | Pre-application discussions .....   | 1         |
| <b>2</b> | <b>THE SITE AND THE PROPOSED DEVELOPMENT</b> .....  | <b>3</b>  |
|          | The Application Site .....  | 3         |
|          | The Proposed Development .....  | 3         |
|          | Likely Store Format and Operator .....  | 3         |
| <b>3</b> | <b>PLANNING POLICY CONTEXT</b> .....  | <b>5</b>  |
|          | Cherwell Local Plan 2011-2031 Part 1 .....  | 5         |
|          | Cherwell Local Plan 1996 .....  | 6         |
|          | National Planning Policy Framework .....  | 6         |
| <b>4</b> | <b>COMPLIANCE WITH RETAIL POLICIES</b> .....  | <b>8</b>  |
|          | The Sequential Approach to Site Selection .....   | 8         |
|          | Impact on Existing, Committed and Planned Public and Private Investment in Town Centres<br>within the Catchment Area .....          | 11        |
|          | Impact on Town Centre Vitality and Viability, Including Local Consumer Choice and Trade in<br>Town Centres and the Wider Area ..... | 13        |
| <b>5</b> | <b>SUMMARY AND CONCLUSIONS</b> .....  | <b>17</b> |

## Appendices

Appendix A: Statistical Tables

Appendix B: Catchment Plan

# 1 INTRODUCTION

## Scope and Purpose

- 1.1 This Retail Statement has been prepared by RPS Planning and Development on behalf of Cotefield Holdings Limited to accompany a planning application for the development of a new food store on land at Cotefield Business Park in Bodicote.
- 1.2 This report focuses on the retail policy issues associated with the proposed development and is intended to assist Cherwell District Council in its determination of the application. It has been prepared in accordance with the requirements set out in the National Planning Policy Framework (NPPF) and following pre-application consultation with planning officers.
- 1.3 It seeks to evaluate the proposal against national and local planning policies and considers the justification and implications of the proposed development including the impact on trading patterns, the vitality and viability of designated town centres and the turnovers of existing small shops in Bodicote and the surrounding area.

## Pre-application discussions

- 1.4 The approach to this statement has been defined through pre-application discussions with Cherwell District Council (CDC) between February 2017 and October 2018. The first pre-application response was received from CDC in February 2017 (CDC reference 17/00017/PREAPP) and a follow up application seeking further comments was then submitted in April 2018 (CDC reference 18/00060/PREAPP). CDC's first response to these submissions (as relevant to retail impact) confirmed that (in summary):
- A subsequent planning application was likely to be determined under delegated powers;
  - a retail impact assessment would be required with any subsequent planning application (in accordance with Policy SLE2);
  - query over the need for a retail unit of the scale proposed, in this location, given the proximity to existing retail and planned retail at Longford Park;
  - any subsequent planning application would need a sequential test and retail impact assessment;
  - that impact assessment should include (and not be limited to) potential for impacts on existing retail in Bodicote and the Longford Park development; and,
  - no comments were received from the economic development or planning policy teams.
- 1.5 In response to the second pre-application submission (CDC reference 18/00060/PREAPP) which was supported by further information on potential retail impact:
- More attention needs to be paid to potential impacts on smaller local stores;
  - the Council will need to understand potential; for trade diversion from those stores;
  - due regard would need to be had to any subsequent impact assessment carried out for the Castle Quay development;
  - any subsequent planning application would need a sequential test; and,
  - no further comments could be made until these matters had been addressed.
- 1.6 On 5 October 2018 Chris Tookey of RPS emailed and had a further telephone conversation with Bob Neville of CDC. It was agreed in that conversation that the catchment area and settlements to focus on were Bodicote, Bloxham, Adderbury, and Kings Sutton. The catchment/study area that

has been adopted is defined by lower level super output areas and encompasses those villages and the southern end of Banbury; the village of Deddington to the south of Adderbury has also been included. The extent of the catchment area is shown on the plan enclosed at Appendix 2.

1.7 This statement has been prepared with regard to all feedback received thus far in consultation with CDC.

1.8 The report is structured as follows:

- Section 2 describes the application site, the proposed development and some details on the likely format of the food store.
- Section 3 reviews the relevant policy background, including national and local planning policy.
- Section 4 evaluates the proposed development's compliance with retail policies, i.e. the sequential and impact tests.
- Section 5 summarises the key considerations and presents our overall conclusions.

## 2 THE SITE AND THE PROPOSED DEVELOPMENT

### The Application Site

- 2.1 The application site consists of a parcel of developed land in the single ownership of Cotefield Holdings Limited on the southern edge of the settlement of Bodicote. The site is around 600m from Bodicote village centre; about 1.2km from the edge of the town of Banbury and about 3km from Banbury Cross. It forms the eastern boundary of Cotefield Business Park adjacent to the A4260 Oxford Road and has a total area of 0.48ha.
- 2.2 The site is currently used for car parking for nearby commercial uses, and a temporary site compound for the adjacent housing scheme. It is covered by a hard standing with established planting around the boundaries. To the immediate south lies Cotefield Business Park and to the north Cotefield Nurseries and the village of Bodicote. To the west and southwest are parcels of agricultural land where 181 new dwellings have been approved under planning permissions 11/00617/OUT (as modified by 16/01599/F) and 14/02156/OUT. The scheme approved under planning permission 11/00617/OUT has been implemented by Cala Homes and is nearing completion. The scheme approved under 14/02156/OUT is currently under construction.
- 2.3 Access to the site is taken from the A4260 Oxford Road, via an access which currently serves Cotefield Nurseries and the existing businesses at Cotefield Business Park. The access will also serve as the access onto the main road network for the new dwellings on the adjoining sites.

### The Proposed Development

- 2.4 The proposed development comprises a 1,235 square metre (sqm) gross food store, which would have a net sales area of circa 833sqm, with surface level parking for 86 cars. The operator has not yet been finalised although interest has been expressed from a number of different convenience retailers.
- 2.5 This is a small food store that is intended to serve the needs of existing residents in Bodicote and the adjoining villages to the south, as well as new residential developments approved to the west of Oxford Road and the Longford Park development which is under construction to the northeast. A second phase of development at Longford Park is proposing 700 further dwellings (under application ref. 17/01408/OUT) and is anticipated that planning permission for this will be granted in early 2019. It is not thought likely that the catchment of the proposed food store will extend very far north into Banbury. The size of food store being proposed will cater for top-up and an element of main food shopping.
- 2.6 The catchment of the proposed store was agreed with Cherwell District Council on 5 December 2018, as discussed at paragraph 1.5 above.

### Likely Store Format and Operator

- 2.7 As already noted above the operator of the proposed food store has not yet been finalised. Within the convenience sector Budgens, Co-op, Costcutter, Londis, Premier and Spar all have stores of approximately this size within their portfolios and a number of potential operators have expressed an interest in locating in Bodicote. At present Budgens are considered to be the more likely end user and therefore for the purpose of this report we have assumed their trading format and benchmark turnover for the proposed food store. In terms of turnover one accepted practice would be to adopt a notional sales density equivalent to the average of the individual densities of each of the above six retailers - that would equate to £7077/sqm at 2018, meaning the proposed food store would turnover £5.9m. In contrast Budgen's density at 2018 is £8268/sqm which generates a higher turnover of £6.9m. For the sake of robustness, and because they are the more likely end

user, we have therefore chosen to adopt Budgen's sales density for the purposes of modelling the potential impact of the food store.

- 2.8 Like many of the convenience store operators identified above, Budgens stores are run and owned by local independent retailers and as individual stores serve their own local communities they are generally close to local issues and therefore able to recognise and cater their services to the communities' needs.
- 2.9 The word "local" is an important part of the business model of most companies operating smaller food stores, and in relation to Budgens it means that as well offering a wide range of everyday essentials at supermarket prices, they also stock over 700 locally-produced items, many award-winning and sourced by the independent food store owner themselves, giving food stores a local feel. The company strongly believes that supporting local producers in this way brings benefits to their customers, in terms of quality and choice, as well as to the local economy.
- 2.10 The proposed food store will serve as a weekly destination store for Bodicote, the south of Banbury and the villages to the south, stocking locally produced products as well as everyday essentials. The food store format is likely to include specialist butcher, fishmonger, delicatessen and bakery counters, all of which will stock locally sourced produce.
- 2.11 In terms of the range of products on offer, as an example Budgens typically stock approx. 6,500 product lines, which allows them to provide a wide range of products but at the same time limits them from offering multiple size, scale and variation of each product. The range of goods is significantly smaller than that offered by other retailers - from our experience we are aware that the major operators, such as Morrison, Tesco, Asda and Sainsbury, can retail over 35,000 lines, while a Limited Assortment Discounter such as Lidl will typically stock between 2,000 and 3,500 lines. As a consequence, smaller food stores such as that now proposed at Bodicote do not necessarily offer a 'one-stop' shop, with customers often also shopping elsewhere if they need a wider range of goods.
- 2.12 This size and format of food stores also have only a limited (if any) amount of non-food floorspace (0-10%). This compares to other large food stores, which can devote 20%-50% of their sales space to non-food comparison goods. For the sake of robustness, we have assumed 10% of the proposed store's turnover will be derived from comparison goods.
- 2.13 For the above reasons, whilst the proposed food store will inevitably bring an element of competition to larger supermarkets, it will also complement existing local traders and business. The number of lines on offer will provide improved choice for local shoppers, including the availability of specialist local produce.

### 3 PLANNING POLICY CONTEXT

- 3.1 This section of the report briefly considers the national and local planning policies of relevance to the proposed development.
- 3.2 Section 38(6) of the Planning and Compulsory Purchase Act 2004 states that planning applications must be determined in accordance with the development plan, unless material considerations indicate otherwise. The courts have also clarified that the term 'accordance' means accordance with the plan as a whole, not with each relevant policy (see *R (Cummins) v Camden LBC*, 2001).
- 3.3 In this instance the development plan consists of the adopted Cherwell Local Plan 2011-2031 Part 1, together with saved policies in the Cherwell Local Plan 1996. Other material considerations include the National Planning Policy Framework (NPPF). The 'Cherwell Local Plan 2011-2031 Part 2: Development Management Policies and Sites' is also in preparation but has not yet progressed beyond the initial issues consultation.

#### Cherwell Local Plan 2011-2031 Part 1

- 3.4 The Cherwell Local Plan 2011-2031 Part 1 was adopted on 20 July 2015 and is intended to provide the strategic planning policy framework and site allocations for the District for the period up to 2031. On the Proposals Map Cotefield Business Park is shown as lying to the south of the built-up area and without any land use designation. However, the same is true of the two adjoining sites where 181 new homes have been consented under planning permissions 11/00617/OUT (86 new homes, now nearing completion) and 14/02156/OUT (95 new homes, construction is understood to start in 2019 following approval of reserved matters).
- 3.5 In relation to retail development Policy SLE2: Securing Dynamic Town Centres directs 'main town centre uses' (which include Class A1 shops) towards the town centres of Banbury and Bicester and the village centre in Kidlington, saying that the NPPF's sequential test will be applied (after these centres the next preference is for edge-of-centre locations and only after that out-of-centre sites).
- 3.6 The policy also confirms the Council will require an impact assessment where, for sites outside Banbury or Bicester, the proposals are in excess of 350sqm. This report therefore addresses that requirement. However, it is noteworthy that at 1,235sqm gross the proposed food store is below the default threshold for an impact assessment set out in the NPPF, and that if the site was located within Banbury an impact assessment would not be needed. At its nearest point the application site is some 350m from the edge of Banbury civil parish, on the opposite side of the Oxford Road where the Longford Park site is currently under development.
- 3.7 Paragraph C.109 of the Local Plan states that most employment and housing growth is planned to take place on the edge of Banbury, and that at the same time the Plan seeks to take steps to strengthen the town centre; paragraphs C.119-C.121 clarify that this is to maintain its position against other competing centres.
- 3.8 Policy Banbury 1 identifies a 26ha site at Banbury Canalside for mixed use development including retail but says that this should not include any significant convenience retail.
- 3.9 Policy Banbury 8 identifies 2ha at Bolton Road on the northern edge of the town centre for uses including small scale A1 shops.
- 3.10 Policy Banbury 9 allocates 5ha as the Spiceball Development Area, to the northeast of the Castle Quay Shopping Centre, for mixed uses including retail. Detailed planning permission has been granted for development including a food store of 2942sqm gross. We understand that the Council have purchased the site and are progressing the development with Lidl contracted to take the food store.



- 3.11 Policies Banbury 4 and Banbury 17 also allocate land for major housing developments at Bankside Phase 2 (which is being developed as Longford Park) and south of Salt Way respectively – both allocations include the provision of community and/or local retail facilities.

## Cherwell Local Plan 1996

- 3.12 The Cherwell Local Plan was adopted on 6 November 1996 and was intended to cover the period up to 2001. It is therefore now very dated however its policies were ‘saved’ by direction of the Secretary of State in 2007 and remain extant until they are replaced by the new Cherwell Local Plan Part 2.
- 3.13 Policy S4 states that proposals for major out-of-centre retail development will not normally be permitted unless: i) it can be demonstrated that the proposal will not undermine the vitality and viability of Banbury Town Centre; ii) it is easily accessible by public transport; and iii) the proposal is compatible with other policies in the Plan. No definition is provided of what constitutes major retail development, but it is unlikely to include schemes of less than 1,000sqm.
- 3.14 Policy S28 relates to local shops and says that favourable consideration will be given to proposals for small shops, or extensions to existing shops, required to serve local needs. The supporting text says that the policy is intended to allow new shops serving a small local catchment to be established in suitable locations. We believe that the proposed food store falls within this definition.

## National Planning Policy Framework

- 3.15 A revised edition of the National Planning Policy Framework (NPPF) was published in February 2019. The Framework must be taken into account in the preparation of local and neighbourhood plans and is also a material consideration in planning decisions.
- 3.16 Two of the objectives of the NPPF were to simplify national planning policy and support and encourage sustainable economic development. Paragraph 11 makes clear that “At the heart of the National Planning Policy Framework is a presumption in favour of sustainable development”. It is also made explicit that in making decisions on planning applications this means:
- *“approving development proposals that accord with the development plan without delay; and*
  - *where the development plan is absent, silent or relevant policies are out-of-date, granting permission unless:*
    - i. *any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in the Framework taken as a whole; or*
    - ii. *specific policies in the Framework indicate development should be restricted”.*
- 3.17 Paragraph 80 says that planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt, and that significant weight should be placed on the need to support economic growth and productivity. Paragraph 81 goes on to say that planning policies should, inter alia, be flexible enough to accommodate needs not anticipated in the plan, to enable a rapid response to changes in economic circumstances. Paragraph 82 says that planning policies and decisions should recognise and address the specific locational requirements of different sectors.
- 3.18 In relation to town centres and retailing, Section 7 of the Framework reiterates previous guidance that LPAs should support the role that town centres play at the heart of communities, by taking a positive approach to their growth, management and adaptation, and promote their long-term vitality and viability. Paragraph 86 requires a sequential approach to selecting sites for main town centre uses (which include retail development, hotels, restaurants and bars) where they are not in an existing centre or in accordance with an up-to-date Local Plan. The first preference is for sites

within town centres, followed by edge-of-centre locations and only then out-of-centre sites. Sites must be suitable and available, and both developers and local planning authorities should demonstrate flexibility on issues such as format and scale.

- 3.19 Paragraph 89 states that for retail development outside a town centre and not in accordance with an up-to-date Local Plan, an impact assessment will be required if the development is over a proportionate locally set floorspace threshold: in the absence of a locally set threshold the default is 2,500sqm. Any such assessment should consider:
- The impact of the proposal on existing, committed and planned public and private sector investment in a centre or centres within the catchment area of the proposal; and
  - The impact on town centre vitality and viability, including local consumer choice and trade in the centre and wider area.
- 3.20 In respect of the current application the default threshold does not apply given Policy SLE2 of the adopted Local Plan mandates an impact assessment for retail floorspace of over 350sqm outside Banbury and Bicester. Since the proposed food store is 1235sqm gross an impact assessment is therefore required.
- 3.21 The NPPF is clear in saying that an assessment of impact may be made up to five years ahead of when the application is submitted. For major schemes where the full impact will not be realised in five years the impact should also be assessed up to ten years from the date of the application.
- 3.22 Paragraph 90 of the Framework says that where an application fails to satisfy the sequential test or is likely to have significant adverse impact on the vitality and viability of defined centres, or planned investment in any centre, it should be refused.
- 3.23 Paragraph 91 says that planning policies and decisions should aim to achieve healthy, inclusive and safe places that, inter alia, promote social interaction and plan positively for the provision and use of community facilities such as local shops. In that respect the proposed food store will provide local shopping provision for both existing residents in Bodicote and the surrounding areas, as well as the new housing that is proposed elsewhere nearby, including at Cotefield Farm.

## 4 COMPLIANCE WITH RETAIL POLICIES

4.1 Section 7 of the NPPF relates to retail development and the vitality of town centres, and requires the following assessments for developments proposed outside defined retail centres and not in accordance with an up to date development plan:

- Sequential test.
- Retail impact, comprising:
  - Impact on existing, committed and planned public and private investment in centres within the catchment area.
  - Impact on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area.

4.2 Paragraph 90 of the NPPF is clear that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact, it should be refused.

### The Sequential Approach to Site Selection

4.3 Both national and local planning policies on retail development mandate a sequential approach to site selection, whereby the first preference should be locations within town centres, followed by sites on the edge of a centre and only then out-of-centre sites at accessible locations. In assessing potential sites there is a requirement for them to be both suitable and available, and for both developers and planning authorities to demonstrate flexibility on issues such as scale and format.

4.4 In terms of the sequential approach to site selection the first preference has to be sites within or adjoining a defined centre. In this case the only centre within the vicinity is Banbury Town Centre.

4.5 The above exercise is designed to ensure that consideration is given to the possibility of fitting the development into more central sites by reducing the footprint of the application proposal, although as national planning guidance notes, use of the sequential test should recognise that certain main town centre uses have particular market and locations requirements which mean that they may only be accommodated in specific locations.

4.6 The applicants have identified a need for a new food store to serve Bodicote and the rural settlements to the south, meaning sites in other parts of the town or district would therefore not be suitable.

4.7 'Need' remains a consideration informing the sequential approach to site selection, since the purpose of searching for alternative sites is to ensure that the identified need (which can be both quantitative and qualitative) is met in the most appropriate location. Indeed, a number of High Court judgments have established that suitability of potential sites needs to be judged having regard to the nature of the need: see *R v Cambridge City Council ex parte Warner Village Cinemas Ltd* (2000) and *JJ Gallagher Ltd v SSL, DTR and Gateshead MBC* (2002).

4.8 Similarly, in considering whether a site is 'suitable' under the sequential approach, it has been established in case law that the requirement is for sites capable of accommodating the development that is being proposed by the applicant. This was made clear in the judgment of the Supreme Court in *Tesco Stores Limited (Appellants) v Dundee City Council (Respondents)* (Scotland) [2012] UKSC 13 where at paragraph 37 of the judgment Lord Hope stated:

*"It is the proposal for which the developer seeks permission that has to be considered when the question is asked whether no suitable site is available within or on the edge of the town centre."*

4.9 In the present case the requirement is for a food store of 1235sqm gross and a sales area of circa 833sqm net sales with dedicated surface level parking.

- 4.10 The Dundee judgement makes it clear that the application of the sequential test ought to centre on the nature of the development proposed and not on a hypothetical scenario of disaggregated floorspace for which there is no identified interest.
- 4.11 The conclusions of the Supreme Court in *Tesco v Dundee* were highlighted in an Inspectors Report relating to a called-in application for a major mixed-use development at Rushden Lakes in Northamptonshire (PINS ref. APP/G2815/V/12/2190175, June 2014), where the Inspector noted that “Plainly the case in question [Dundee] is of seminal importance”. He also noted that the Supreme Court has said what ‘suitable’ means and that they had expressly rejected the notion that it is that one should alter or reduce a proposal so as to fit on to an alternative site. His own conclusion was that the sequential test is solely that set out in paragraph 24 of the NPPF which, he noted, includes no requirement to consider the disaggregation of floorspace. Specifically, he noted that while the last sentence of paragraph 24 requires applicants and LPAs to demonstrate flexibility on issues such as format and scale, this contrasts with the explicit requirement for disaggregation that was previously included in the preceding PPS4: “There is no longer any such requirement stated in the NPPF. It is no answer to this to refer to the words “such as” in the last sentence of paragraph 24 of the NPPF. These words cannot be read so as to imply that a major, and extremely controversial, part of previously stated national policy lives on by implication in the NPPF. Had the Government intended to retain disaggregation as a requirement it would and should have explicitly stated this in the NPPF. If it had been intended to carry on with the requirement then all that would have been required is the addition of the word “disaggregation” at the end of NPPF paragraph 24” (Inspectors Report paragraph 8.47). It should be noted that the Secretary of State’s decision accepted the Inspector’s conclusions on this matter.
- 4.12 It is therefore clear that while applicants are expected to show some flexibility on issues such as scale and format, this does not include a requirement to split up the development onto several sites. Neither the NPPF nor NPPG give any indication as to what degree of flexibility is required, or what forms it might take, although the now superseded PPS4 Practice Guidance referred to the inclusion of multi-level stores; shared or multi-level car parking and innovative servicing arrangements. Smaller operators like the kind who would take on a food store like the one proposed do not operate such formats and a multi-level store would not be viable for such a small food store.

### Parameters of the Sequential Search

- 4.13 The proposed food store can be accommodated on this previously developed site, with enough operational space and retail floor space, a policy compliant level of car parking, and landscaping, to deliver a viable retail operation that satisfies relevant development control policies. There are no distinct elements of the proposed store that can be viably provided on an alternative site(s)/an ‘off site’ location. The parameters of the sequential approach are therefore focused on sites capable of accommodating a similar development to the scheme proposed on the application site.

### Sequential Search

#### Banbury Town Centre

- 4.14 Banbury is the District’s largest town and is a focus for employment and housing and is, in retail terms, a sub-regional centre. The health check undertaken by CBRE as part of the 2012 retail study concluded that it was performing well as a town centre and offered a wide variety of facilities and services, albeit there was a slight under representation of convenience outlets compared to the national average. However, that will soon be addressed through the opening of a new Lidl store that is being constructed on the Spiceball Development Area. In terms of the retail strategy for the town the Local Plan identifies a need to strengthen the centre against competition from elsewhere – this can only be done through improvements to the centre’s comparison goods offer.

- 4.15 In terms of sites identified as having potential for retail development, these comprise land at Bolton Road and the Spiceball Development Area. In respect of the former, this is a 2ha site allocated under Policy Banbury 8 and while it would be large enough to accommodate the proposed food store, it is located on the northern edge of the town centre and is therefore unsuitable for a development intended to meet the needs of Bodicote; the policy also says that any retail uses should be small scale.
- 4.16 In terms of the Spiceball area, this is allocated under Policy Banbury 9 and is located at the northeastern end of the town centre, and so is also unsuitable to meet the identified local need in Bodicote. In addition to that, detailed planning permission has already been granted for the redevelopment of this area (under outline permission 16/02366/OUT and reserve matters 17/00284/REM) to provide a 2,942sqm gross food store; 117 bed hotel an 8-screen cinema; 6 restaurants/cafes and a 586-space car park. Following the Council's purchase of the site this development (Castle Quay 2) is being brought forward and we understand that Lidl will occupy the food store, which is currently under construction. The size of that unit would make it too large for an operator such as Budgens but in any event it is unavailable since Lidl are contracted to take it. In sequential terms the site is therefore unsuitable and unavailable to accommodate the development proposed on Cotefield Business Park.

### **Edge-of-Centre**

- 4.17 Outside the defined town centre Policy Banbury 1 allocates 26ha at Canalside, between the centre and the railway station for mixed use including 700 homes; 15,000sqm of employment space; retail and leisure uses and multi-storey car parks to serve the station. However as before, the location on the western edge of the centre means it is not suitable to meet the identified need in Bodicote. The policy also says that development should not include any significant convenience retail, added to which the site is also currently in predominantly industrial use, so the development of a small food store in isolation would not be an attractive or viable proposition for any retailer: any such development would have to come forward as part of a larger more comprehensive development and we do not believe that such a scheme is likely to come forward within the short term. The Canalside site has diverse land ownerships, including a considerable number of freehold interests which would lengthen the timescale for bringing forward a comprehensive development.
- 4.18 We note that supplementary planning guidance was proposed to help guide development of Canalside but that this was never finalised. The Council's website indicates that a new/revised SPD is being prepared but other than an initial questionnaire published in January 2018 there is no indication as to when a draft SPD will be published for public consultation. Overall, we have seen nothing to suggest that a redevelopment scheme for this site is likely to come forward anytime soon. Therefore, in terms of the sequential test it is neither suitable nor available as an alternative location for the development now proposed at Cotefield Business Park.

### **Local Centres to Serve Housing Commitments**

- 4.19 In pre-application consultation officers drew attention to the retail floorspace that has been approved as part of large-scale housing development at Longford Park and Wykham Park Farm (1,300sqm and 1,000sqm respectively). However, in terms of the sequential approach, both these locations are out-of-centre and therefore not superior to the application site at Cotefield Business Park. They are more significant in terms of potential impact, since they are retail commitments approved to serve the needs of the new housing. However, as our impact assessment will show, the additional expenditure that is/will be generated by the significant numbers of new homes that are already committed within the catchment area is sufficient to accommodate both the proposed food store and the two new local centres.

## Conclusions on the Sequential Test

4.20 In light of the above we do not believe that there are any alternative sites within or on the edge of the town centre that would be suitable and available to accommodate the proposed development. Over the last 15 years substantial numbers of new housing has been approved and developed on the southern side of Banbury and the wider catchment area, however over the same period there has been no new retail space to meet the local shopping needs of these new residents. The proposed new store is intended to address this and consequently, having regard to the judgement of Lord Hope in *Tesco v Dundee City Council* (i.e. that it is the proposal for which the developer is seeking permission that has to be considered when asking whether there are suitable sites available within or on the edge of the town centre) we have concluded that the application site satisfies the sequential test.

## Impact on Existing, Committed and Planned Public and Private Investment in Town Centres within the Catchment Area

4.21 In terms of the Council's strategy for Banbury Town Centre, paragraphs C.119-C.120 of the Local Plan identifies that the town is facing increasing competition from other centres such as Northampton and Oxford, which are enhancing their commercial offers. Accordingly, paragraph C.121 notes that there is a need to maintain the renewal and strengthening of the town centre. Paragraph C.122 says that the Council intend to:

- Create more natural pedestrian flows between its various quarters, to create a single whole rather than a group of unrelated parts;
- bring together a broad mix of uses including open space, commercial, leisure, shopping and education;
- ensure the town is accessible by a variety of transport options;
- make features and focal points of key assets including the waterside areas; and,
- promote a wide variety of activities throughout the year.

4.22 We do not believe that the development of the proposed food store in Bodicote is likely to inhibit or prejudice the implementation of any of the above. In terms of shopping the identified requirement is for an improvement in the town centre's comparison goods offer, to allow it to compete with other towns: the only new convenience floorspace proposed is on the Spiceball Development Area and that is being built out by Lidl, whose scale and format are markedly different to the food store proposed at Bodicote. As a Limited Assortment Discounter, the new Lidl in the town centre will operate in a different sector of the market to the more traditional food store proposed on the application site and it is not conceivable that a small food store in Bodicote could prejudice the viability of the retail space coming forward on the Spiceball area.

4.23 The Cherwell Retail Study 2012 identified significant capacity for additional retail floorspace: across the district as a whole this was 5,772sqm of convenience sales space at 2022 and 19,012sqm of comparison. It should be noted that floorspace capacity is dependent on the sales density assumed for new floorspace, which can vary considerably between retailers. If we disregard that and consider just the expenditure capacity, the retail study calculated that to be £71.4m for convenience goods at 2022, rising to £83.8m in 2027. However, it is important to note that this surplus expenditure originates from the estimated overtrading of existing food stores rather than any significant growth in spending or market share.

4.24 Looking specifically at Banbury, the retail study's household survey indicated that the four main food stores in the town (Tesco Extra, Sainsbury, Morrison and Aldi) were achieving a combined turnover of £172.8m. Since the benchmark company average turnovers of the four stores was

estimated at only £109.7m that meant a combined overtrading of £63.1m. Since all of these stores are out-of-centre it is entirely reasonable to factor in their over trading when assessing the capacity for additional floorspace, as otherwise the excess turnovers of out-of-centre stores would be inhibiting the development of new floorspace, including potentially new shops within the town centre. Providing improved choice and competition has long been one of the objectives of the planning system and there is no policy requirement to protect out-of-centre stores.

- 4.25 The only convenience goods development of any significance that has taken place in Banbury has been the Waitrose on Southam Road – the retail assessment submitted with that planning application estimated its potential convenience turnover in 2019 to be £28.38m, but even after deducting that the identified capacity remains around £39m.
- 4.26 Paragraph 6.7 of the retail study advised that Banbury would benefit from a town centre food store and subsequent to that full planning permission has been granted for Castle Quay 2 on the Spiceball development area within the town centre. That scheme submitted with the outline planning application included a food store of up to 5,550sqm gross and for the purposes of their impact assessment (Turley Associates, October 2013) a store of 2,500sqm net sales was assumed; convenience space was estimated to be 75% of the total net area and a benchmark convenience sales density of £11,890/sqm was adopted – because the final operator was not then known that was an average of Waitrose, Sainsbury, Tesco, Asda and Morrison. However, following the granting of the outline planning permission the reserved matters approval downsized the food store element, with the officer's report to committee noting that the food store element of the scheme was 2,942sqm gross with 1,686sqm net sales. The Council have purchased the site and are now bringing forward the development and we understand that Lidl have contracted to take the food store, most recently confirmed in a press release by CDC dated 14 February 2019 ([www.cherwell.gov.uk/full-steam-ahead-for-the-future-castle-quay](http://www.cherwell.gov.uk/full-steam-ahead-for-the-future-castle-quay)),
- 4.27 In terms of the identified need to strengthen Banbury Town Centre against competing centres, that requires improvement to the centre's non-food comparison goods offer and sites have been allocated within the Local Plan to accommodate additional retail floorspace. What development will come forward to meet this need will depend on the market, however it cannot be expected that the proposed food store in Bodicote would provide any disincentive to non-food retail investment to take place within the town centre.
- 4.28 In respect of the strategy for a new food store within the town centre, the Lidl currently under construction will address that, and a small food store in Bodicote is not expected to have any material impact on that store which will be up and trading first. It should also be noted that in terms of the capacity for new convenience floorspace, in granting permission for Castle Quay 2 the Council were looking at a store with a convenience sales area of 1,875sqm and a convenience turnover of just over £22m. However, the reserved matters application downsized the food store to 1,686sqm net sales, and with Lidl now the intended operator their usual convenience/comparison split of 80/20 means the food store will provide 1,349sqm of convenience sales space. In terms of its likely turnover, Lidl's sales density is far lower than the average adopted by Turley in their retail assessment - having prepared many impact assessments for Lidl ourselves, their company average convenience sales density will be £4,921/sqm in 2023 (derived from Global Data, formerly Verdict Research), so the 1,349sqm convenience space, which will generate a turnover of £6.6m in 2023, considerably less than the figure assumed for the unit when the Council granted permission.
- 4.29 The Cherwell Retail Study identified £63.1m of convenience goods expenditure capacity in Banbury, principally from the overtrading of existing stores. After allowing for the new Waitrose (£28.38m), the proposed Lidl (£6.6m) and an allowance for the two committed local centres (£8.35m) there still remains a notional capacity of £19.77m that can support further new floorspace. That is well in excess of the expected turnover of the proposed store at Cotefield Business Park. Overall it is evident that the development of a small food store at Cotefield Business Park is unlikely to have any material impact on investment within Banbury Town Centre,

particularly given the overtrading of existing large food stores in Banbury and predicted spending of residents associated with the extensive housing growth that is planned for this part of Banbury and Cherwell District and has taken place since the 2012 study was completed.

## **Impact on Town Centre Vitality and Viability, Including Local Consumer Choice and Trade in Town Centres and the Wider Area**

- 4.30 In this section we evaluate the impact of the proposed development on the vitality and viability of existing stores and centres. The scale and function of the proposed food store is such that we expect it to draw little to no trade from shops in the town centre, with its turnover derived predominantly from the Sainsbury and Morrison stores on the southern side of Banbury, and to a lesser extent from smaller convenience outlets in Bodicote and the surrounding villages. The potential impact on outlying villages was an issue raised by planning officers during pre-application discussions, and to ensure this was fully considered and built into the impact assessment, a catchment area for the proposed food store was agreed with them that includes Bloxham, Adderbury and Kings Sutton. To that list we have also added Deddington.
- 4.31 The statistical tables that model the turnover of existing shops and the potential impact of the proposed development are enclosed at Appendix 1.

### **Catchment Area**

- 4.32 The proposed food store is expected to serve a relatively confined catchment area that encompasses Bodicote, the southern side of Banbury and south as far as Deddington. The extent of the area is shown on the plan enclosed at Appendix 2 and comprises the following eleven Lower Level Super Output Areas (LSOA):
- Cherwell 006D
  - Cherwell 007A
  - Cherwell 007C
  - Cherwell 008A
  - Cherwell 008B
  - Cherwell 008C
  - Cherwell 008D
  - Cherwell 009A
  - Cherwell 010A
  - Cherwell 010B
  - South Northamptonshire 011A

### **Price Base and Design Year**

- 4.33 All monetary figures are expressed in 2013 prices. We have assumed a design year of 2023. The design year is presented as a point in time when the store is likely to have been open and operating for up to two years, and the store is operating under 'normal' trading conditions following the initial opening and setting up when turnover would be expected to be lower, to begin with.



## Expenditure Growth Within the Catchment Area 2012-2023

- 4.34 As previously mentioned significant housing growth has taken place, and is planned, within the catchment area. Our Table 1 details the new housing that has been granted permission since 2011, derived from the Council's Annual Monitoring Reports for 2011 and 2018: these include sites on the southern side of Banbury (including Bankside and the land south of Salt Way), Bodicote, Bloxham, Adderbury, Milcombe, Deddington and Kings Sutton. The total housing growth 2012 to 2023 is 2886, of which 1434 have been completed by 2018 leaving 1452 left to be built by 2023. A further 1477 homes are also committed over the period 2023 to 2031.
- 4.35 **Table 2** estimates the per capita spending on convenience goods within the catchment area, based on the figures for Zone 3 of the study area utilised in the Cherwell Retail Study 2012 (since most of the proposed food store's catchment area falls within that zone). The per capita spend in Zone 3 at their baseline year of 2011 has been taken and converted to our 2013 price base, and then projected forward using Experian's actual and forecast growth in convenience spending per head from their 'Retail Planner Briefing Note 16'.
- 4.36 **Table 3** then estimates the convenience spending that has been/will be generated within the catchment area from the committed housing development set out in Table 1. We have assumed an average household size of 2.5 persons per dwelling (the average for Cherwell District in the 2011 Census): the 2886 new dwellings 2012-2023 will therefore result in a population increase of 7215 persons, and assuming the per capita spend in Table 2 that generates £17.67m of convenience goods spending. Committed housing 2023-2031 will provide a further £9.12m. In the absence of any new convenience stores having been developed within the catchment area we believe it reasonable to apportion this additional £17.67m of spending to the existing shops on the south side of Banbury (including the Sainsbury's and Morrison stores) and in the villages to the south

## Turnover of Existing Shops

- 4.37 Our **Table 4** details the turnover of existing shops within the catchment area. Local knowledge indicates these stores are trading well. However, since the Cherwell Retail Study 2012 does not provide a fine grain analysis of the actual turnover of existing stores in and around Banbury as derived from their household shopper survey, our impact assessment has been carried out on the basis of benchmark average turnovers. This was also necessary because many of the shops that have been included in the impact analysis are small local shops for which no floorspace or sales density data is available. The available spending providing by committed housing has 2012 as the base year and looks forward to 2023, and Table 4 therefore does the same for the benchmark turnovers of existing shops.
- 4.38 In relation to the gross floorspace of the smaller convenience shops in our Table 4, these are the building footprints that have been measured off digital Promap mapping. We have then assumed a net to gross ratio of 70% to estimate the sales areas, which we assume will be given over wholly to convenience goods.
- 4.39 The sales densities assumed for Londis and Spar are their company averages derived from Retail Rankings, which we have projected backwards to 2012 and forwards to 2023 using Experian's changes in convenience retail sales densities from their 'Retail Planner Briefing Notes' Nos. 12 to 16. The 2012 sales densities adopted for Co-op, Sainsbury's and Morrison are their company averages for convenience goods from Verdict Research 2013, while their figures for 2018 and 2023 are derived from Global Data (formerly Verdict Research) 2017 projected forward using Experian's forecast changes in convenience sales densities. In the absence of a figure for the general store in Adderbury we have assumed that shop trades at the same sales density as a Spar.
- 4.40 Table 4 shows that the total benchmark turnover of existing stores within the catchment area was £7.07m in 2012, which has risen to £7.71m at 2018 and will be £7.84m by 2023. The current

turnover of these stores will of course be derived from spending by existing residents within the area. Just outside the catchment area the Sainsbury on Oxford Road had a benchmark turnover of £44.85m in 2012 and the Morrison at Swan Close £34.09m; owing to changes in each company's trading position and profitability over the last six years, the Sainsbury's benchmark turnover at 2018 has now reduced to £34.15m and the Morrison's to £29.43m.

- 4.41 In terms of the new retail floorspace that is proposed as part of the new housing at Longford Park and Wykeham Farm, both developments include an element of Class A1 retail space to provide local facilities to serve the new housing the schemes will deliver. Our Table 5 provides an estimate of the potential turnover of this floorspace. The floorspace for Longford Park (Bankside) is taken from the Cherwell Retail Study 2012; the gross floorspace for Wykeham Farm (land south of Salt Way) is taken from that planning application and we have assumed that net sales will account for 80% of the gross area and that half of the sales space will be given over to convenience goods. The sales density assumed for both schemes is the 2017 estimate that was assumed for committed floorspace in the Cherwell Retail Study, converted to 2013 prices and projected forward to 2023 using Experian growth rates. It can be seen that this provides a notional combined turnover for both schemes of £8.35m in 2023. In practice we believe that this is likely to be an over-estimate as the sales density adopted from the Cherwell Retail Study is quite high for small local centre shops, where a sales density more akin to Spar or Londis is more likely - using the average for those two retailers would mean a total turnover of only £4.7m.

## Turnover of the Proposed Development

- 4.42 **Table 6** details the expected turnover of the proposed food store. The net sales area is 833sqm of which 90% is assumed will be given over to convenience goods. The assumed sales density at the 2023 design year is the company average provided for Budgens (as a potential end user) derived from Retail Rankings, which has been projected forward to 2023 using Experian's forecast growth in convenience retail sales densities from their 'Retail Planner Briefing Note 16'. This provides a notional convenience goods turnover of £6.36m.

## Retail Impact

- 4.43 **Table 7** sets out the estimated convenience goods trade draw pattern to the proposed development and the consequent impact on existing stores. The baseline for our assessment is the 2012 benchmark turnovers of the existing stores (derived from Table 4 and detailed in Column 1), which have then been growthed up to 2023 by apportioning on a pro rata basis the expenditure generated within the catchment area by the committed housing 2012-2023 (£17.67m from Table 3, apportioned as per Column 2). Column 3 then shows the estimated 2023 turnover of each store.
- 4.44 The fourth column then shows the expected trade draw to the proposed store at Cotefield Business Park. It is anticipated that it will draw the largest part of its turnover from the Sainsbury and Morrison stores just outside the catchment area in the southern side of Banbury – this will be spending by residents living in Bodicote and settlements to the south, who are currently travelling up to shop at the Sainsbury and Morrison stores but who will divert to shop at the proposed food store rather than continue on into Banbury. We anticipate £2.54m will be drawn from Sainsbury and £1.91m from the Morrison, with only minimal amounts from other smaller stores spread across the catchment area.
- 4.45 The fifth column sets out an estimate of the trade draw to the committed local centres on Longford Park/Bankside and on the land south of Salt Way; again, the largest diversions are expected to be from the Sainsbury and Morrison stores.
- 4.46 The sixth column shows the turnover of the existing stores at 2023, including their share of the spending generated by the committed housing, but also with the turnover diverted to the proposed store and the local centres deducted (i.e. post-impact).

- 4.47 The seventh column details the solus impact of the proposed store, which is the percentage change in turnover after the impact of trade draw to the proposed store and expected growth to 2023. It can be seen that there are no negative impacts, with the reduction in turnover caused by the proposed store being less than the growth resulting from the new housing across the catchment area.
- 4.48 The final column shows the cumulative impact of both the proposed store and the two committed local centres. It can be seen that the additional £8.35m of trade that taken by the local centres does result in some negative impacts, but these are only on two stores and are small in scale. The largest is -4.2% on the Co-op at Chatsworth Drive in south Banbury, and the other is -2.9% on the Londis at the petrol station in Bloxham. Neither of these impacts are high enough to be significant. Moreover, they are worst case scenarios, because as noted in paragraph 4.41 above, the £8.35m of turnover ascribed to the two local centres is likely to be an over estimate.
- 4.49 Overall it can be seen that the levels of trade diversion will be modest and the few resulting cumulative impacts minor: if the proposed store is looked at in isolation (and we have no way of knowing when or if the permitted local centres will be built out) there are no negative impacts. In terms of the policy test set out in paragraph 89 of the NPPF (and Policy SLE2 of the Local Plan and saved Policy S4 of the 1996 Local Plan) the proposed development can be considered to be acceptable since none of the impacts will be significantly adverse. The impact on the vitality and viability of the town centre will be de-minimis and the expected increase in available spending from committed housing will be sufficient to support both the proposed food store and the local centres proposed at Longford Park and Wykham Farm.

### Comparison Goods Impact

- 4.50 The proposed food store will comprise a convenience business, and the small proportion of the food store's floorspace that will be given over to comparison goods will turnover only £0.7m (at 2023). Given the smaller convenience stores in the catchment area have little or no comparison goods offer any comparison trade diversion is likely to be from the larger Sainsbury and Morrison stores: those are over-trading and a small loss of comparison turnover will not have any appreciable impact on either store, which in any event are out-of-centre and so enjoy no policy protection. The growth in comparison goods spending within the catchment area will also be far in excess of the turnover of the store, which will quickly ameliorate any impact. Accordingly, there is no reason to suppose that the food store's small non-food turnover will undermine any existing store or centre.

## 5 SUMMARY AND CONCLUSIONS

- 5.1 This retail assessment has been prepared by RPS Planning and Development on behalf of Cotefield Holdings Limited to accompany a planning application for a new 1235sqm gross food store on land at Cotefield Business Park in Bodicote.
- 5.2 With regard to the prevailing planning policy context the pertinent facts are as follows:
- This is a previously developed brownfield site covered in hardstanding and currently used only as a car park and temporary site compound for the adjacent housing scheme. The proposed development will bring the site into more productive use, creating new employment opportunities.
  - The proposed food store is intended to provide a quantitative and qualitative improvement in local food shopping in Bodicote and will improve choice and competition for local residents.
  - There are no sites within or immediately adjoining Banbury Town Centre that are available and suitable to meet the need the proposed food store is intended to address.
  - The proposed food store will not result in any significant adverse impact on the vitality and viability of Banbury Town Centre or on any of the existing local shops in Bodicote or the surrounding villages.
  - The proposal will not prejudice planned investment in the town centre or the future development of the local shopping facilities proposed as part of the housing developments at Longford Park and Wykham Farm.
  - The NPPF seeks to encourage sustainable development and provide new employment opportunities and the proposed food store will meet those policy objectives.
- 5.3 An examination of the catchment area shows that over the period 2012-2018: i) there has been significant new housing development (some 1409 homes); but ii) there has been no additional retail stores to meet the needs of the increased population. The dominant stores on the south side of Banbury are the Sainsbury and Morrison, both of which were assessed as heavily overtrading in the Cherwell Retail Study (the Sainsbury 35% above its benchmark and Morrison 40%). Even allowing for some trade draw from those stores to the new Waitrose on the northern side of the town, we believe that both continue to trade above their respective benchmarks and this will have been, and will continue to be, bolstered further by all the committed housing on the south side of the town. Looked at simply, the combined turnover of the proposed store at Cotefield Business Park and the two committed local centres is estimated to be £14.71m, which is less than the additional convenience goods spending that is being provided from the committed housing growth to 2023 (which is circa £17.67m) and to 2031 (circa an additional £9.12m on top of the 2023 figure).
- 5.4 Having regard to the above conclusions, it can be seen that the proposed development would conform to both national and local planning policies. Paragraph 90 of the NPPF states that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact, it should be refused. That suggests that where it has been demonstrated that there are no sequentially preferable sites suitable and available and that there will be no significant adverse impact, then planning permission should be granted.
- 5.5 The proposed food store would conform to the NPPF's fundamental presumption in favour of sustainable development (at NPPF paragraph 10). Since the development satisfies the sequential test; it is previously developed brownfield land located at an accessible location; it involves a substantial investment in Bodicote that will provide increased choice and competition; it will create new employment opportunities for local people; and as it will not result in any significant adverse impact on any defined centre, it is clear that the benefits of the scheme clearly outweigh any adverse impacts that might arise and consequently in accordance with the NPPF planning permission should be granted.



**APPENDICES**



# Appendix A

# Statistical Tables

**Cotefield Holdings Ltd**  
**Proposed Neighbourhood Foodstore at Cotefield Farm, Bodicote**

Table 1: Committed Housing Development

|   | Total Completions<br>1/4/11 to 31/3/18 | Completions<br>2011/2012 | Completions<br>2012-2018 | Projected Completions<br>2018-2019 | Projected Completions<br>2019-2020 | Projected Completions<br>2020-2021 | Projected Completions<br>2021-2022 | Projected Completions<br>2022-2023 | Housing Growth<br>2012-2023 | Housing Growth<br>2023-2031 |
|---|--|--------------------------|--------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|-----------------------------|-----------------------------|
| <b>Banbury</b>  |  |                          |                          |                                    |                                    |                                    |                                    |                                    |                             |                             |
| Bankside Ph1  | 702                                    | 0                        | 702                      | 75                                 | 150                                | 100                                | 63                                 | 0                                  | 1090                        | 0                           |
| South Salt Way  | 0                                      | 0                        | 0                        | 25                                 | 50                                 | 50                                 | 50                                 | 50                                 | 225                         | 93                          |
| South Salt Way East   | 126                                    | 0                        | 126                      | 19                                 | 20                                 | 100                                | 125                                | 150                                | 540                         | 885                         |
| Bankside Ph2  | 0                                      | 0                        | 0                        | 0                                  | 0                                  | 0                                  | 50                                 | 100                                | 150                         | 450                         |
| <i>Windfalls</i>  | 287                                    | 35                       | 252                      | 35                                 | 35                                 | 35                                 | 35                                 | 35                                 | 427                         | 154                         |
| <i>5% Allowance for proportion of windfalls assumed to be in catchment area</i> | 14                                     | 2                        | 12                       | 2                                  | 2                                  | 2                                  | 2                                  | 2                                  | 22                          | 7                           |
| <b>Other Areas</b>  |  |                          |                          |                                    |                                    |                                    |                                    |                                    |                             |                             |
| Cotefield Bodicote Ph1  | 72                                     | 0                        | 72                       | 14                                 | 0                                  | 0                                  | 0                                  | 0                                  | 86                          | 0                           |
| Cotefield Bodicote Ph2  | 0                                      | 0                        | 0                        | 0                                  | 30                                 | 54                                 | 11                                 | 0                                  | 95                          | 0                           |
| Brfrd Rd Bloxham  | 75                                     | 0                        | 75                       | 0                                  | 0                                  | 0                                  | 0                                  | 0                                  | 75                          | 0                           |
| Aynho Rd Adderbury  | 60                                     | 0                        | 60                       | 0                                  | 0                                  | 0                                  | 0                                  | 0                                  | 60                          | 0                           |
| Oak Farm Milcombe   | 29                                     | 0                        | 29                       | 0                                  | 0                                  | 0                                  | 0                                  | 0                                  | 29                          | 0                           |
| South Milton Rd Adderbury   | 65                                     | 0                        | 65                       | 0                                  | 0                                  | 0                                  | 0                                  | 0                                  | 65                          | 0                           |
| South Milton Rd Bloxham   | 61                                     | 20                       | 41                       | 0                                  | 0                                  | 0                                  | 0                                  | 0                                  | 41                          | 0                           |
| Nrth of Gaveston Gardens Deddington   | 58                                     | 0                        | 58                       | 27                                 | 0                                  | 0                                  | 0                                  | 0                                  | 85                          | 0                           |
| Nrth Milton Road Adderbury  | 31                                     | 0                        | 31                       | 5                                  | 0                                  | 0                                  | 0                                  | 0                                  | 36                          | 0                           |
| North of the Green Milcombe   | 0                                      | 0                        | 0                        | 0                                  | 20                                 | 20                                 | 0                                  | 0                                  | 40                          | 0                           |
| Banbury Rd Adderbury  | 6                                      | 0                        | 6                        | 19                                 | 0                                  | 0                                  | 0                                  | 0                                  | 25                          | 0                           |
| South Milton Rd Bloxham   | 19                                     | 0                        | 19                       | 40                                 | 26                                 | 0                                  | 0                                  | 0                                  | 85                          | 0                           |
| South West Tadmarton Rd Bloxham   | 53                                     | 0                        | 53                       | 7                                  | 0                                  | 0                                  | 0                                  | 0                                  | 60                          | 0                           |
| <i>Windfall allowance</i>   | 559                                    | 61                       | 498                      | 61                                 | 61                                 | 61                                 | 61                                 | 61                                 | 803                         | 271                         |
| <i>5% Allowance for proportion of windfalls assumed to be in catchment area</i> | 28                                     | 3                        | 25                       | 3                                  | 3                                  | 3                                  | 3                                  | 3                                  | 40                          | 14                          |
| <b>South Northants</b>  |  |                          |                          |                                    |                                    |                                    |                                    |                                    |                             |                             |
| Kings Sutton  | 35                                     | 0                        | 35                       | 2                                  | 0                                  | 0                                  | 0                                  | 0                                  | 37                          | 0                           |
| <b>Sub-total catchment area</b>   | <b>1392</b>                            | <b>20</b>                | <b>1372</b>              | <b>233</b>                         | <b>296</b>                         | <b>324</b>                         | <b>299</b>                         | <b>300</b>                         | <b>2824</b>                 | <b>1452</b>                 |
| <b>Sub-total windfalls allowance</b>  | <b>42</b>                              | <b>5</b>                 | <b>37</b>                | <b>5</b>                           | <b>5</b>                           | <b>5</b>                           | <b>5</b>                           | <b>5</b>                           | <b>62</b>                   | <b>25</b>                   |
| <b>TOTAL</b>  | <b>1434</b>                            | <b>25</b>                | <b>1409</b>              | <b>238</b>                         | <b>301</b>                         | <b>329</b>                         | <b>304</b>                         | <b>305</b>                         | <b>2886</b>                 | <b>1477</b>                 |

**Notes:**  
Derived from Cherwell District Council Annual Monitoring Reports (AMR) 2011 & 2018. Figures include actual completions to 31/3/18 and projected deliveries to 2031.

**Cotefield Holdings Ltd**  
**Proposed Neighbourhood Foodstore at Cotefield Farm, Bodicote**

**Table 2: Per Capita Spending on Convenience Goods**

|                      | 2012 | 2023 | 2031 |
|----------------------|------|------|------|
| Spend per person (£) | 2354 | 2449 | 2469 |

**Notes:**

Per capita spend is derived from baseline 2011 figure for Zone 3 (which includes the catchment of the proposed store) in the Cherwell Retail Study 2012, converted to 2013 prices and then projected forward using Experian's actual and forecast growth in convenience spending per head from their 'Retail Planner Briefing Note 16'.

**Table 3: Growth in Convenience Spending From Housing Commitments**

|                         | Housing Growth<br>2012-2023 | Housing Growth<br>2023-2031 |
|-------------------------|-----------------------------|-----------------------------|
| New dwellings           | 2886                        | 1477                        |
| Additional population   | 7215                        | 3693                        |
| Generated spending (£m) | 17.67                       | 9.12                        |

**Notes:**

Number of new dwellings derived from Table 1.  
 Additional residents/population assumes 2.5 persons per dwelling (average household size for Cherwell District from 2011 Census).  
 Generated spending assumes per capita spend at 2023 and 2031 from Table 2.  
 Monetary values are expressed in 2013 prices.



**Cotefield Holdings Ltd**  
**Proposed Neighbourhood Foodstore at Cotefield Farm, Bodicote**

**Table 4: Benchmark Turnovers of Existing Stores**

|   | Gross<br>Floorspace<br>(sq m) | Conv. Sales<br>Area<br>(sq m) | Notional Sales<br>Density 2012<br>(£/sq m) | Notional Sales<br>Density 2018<br>(£/sq m) | Notional Sales<br>Density 2023<br>(£/sq m) | Turnover<br>2012<br>(£m) | Turnover<br>2018<br>(£m) | Turnover<br>2023<br>(£m) |
|---|-------------------------------|-------------------------------|--|--|--|--------------------------|--------------------------|--------------------------|
| <b>Bloxham</b>                          |                               |                               |  |  |  |                          |                          |                          |
| Londis, BP PFS, South Newington Rd      | 73                            | 51                            | 5999                                       | 5784                                       | 5883                                       | 0.31                     | 0.30                     | 0.30                     |
| Co-op, High Street                      | 161                           | 113                           | 8885                                       | 10216                                      | 10391                                      | 1.00                     | 1.15                     | 1.17                     |
| Londis, High Street                     | 113                           | 79                            | 5999                                       | 5784                                       | 5883                                       | 0.47                     | 0.46                     | 0.47                     |
| <b>Sub-total Bloxham</b>                | <b>347</b>                    | <b>243</b>                    |  |  |  | <b>1.78</b>              | <b>1.90</b>              | <b>1.94</b>              |
| <b>Adderbury</b>                        |                               |                               |  |  |  |                          |                          |                          |
| Taste Buds, High Street                 | 105                           | 74                            | 6647                                       | 6408                                       | 6518                                       | 0.49                     | 0.47                     | 0.48                     |
| <b>Sub-total Adderbury</b>              | <b>105</b>                    | <b>74</b>                     |  |  |  | <b>0.49</b>              | <b>0.47</b>              | <b>0.48</b>              |
| <b>Kings Sutton</b>                     |                               |                               |  |  |  |                          |                          |                          |
| Co-op, Richmond Street                  | 156                           | 109                           | 8885                                       | 10216                                      | 10391                                      | 0.97                     | 1.12                     | 1.13                     |
| <b>Sub-total Kings Sutton</b>           | <b>156</b>                    | <b>109</b>                    |  |  |  | <b>0.97</b>              | <b>1.12</b>              | <b>1.13</b>              |
| <b>Bodicote/South Banbury</b>           |                               |                               |  |  |  |                          |                          |                          |
| Spar, Molyneux Drive                    | 128                           | 90                            | 6647                                       | 6408                                       | 6518                                       | 0.60                     | 0.57                     | 0.58                     |
| Spar, Esso PFS, Oxford Road             | 84                            | 59                            | 6647                                       | 6408                                       | 6518                                       | 0.39                     | 0.38                     | 0.38                     |
| Co-op, Chatsworth Drive                 | 302                           | 211                           | 8885                                       | 10216                                      | 10391                                      | 1.88                     | 2.16                     | 2.20                     |
| <b>Sub-total Bodicote/South Banbury</b> | <b>514</b>                    | <b>360</b>                    |  |  |  | <b>2.86</b>              | <b>3.11</b>              | <b>3.16</b>              |
| <b>Deddington</b>                       |                               |                               |  |  |  |                          |                          |                          |
| Co-op, Market Place, Deddington         | 155                           | 109                           | 8885                                       | 10216                                      | 10391                                      | 0.96                     | 1.11                     | 1.13                     |
| <b>Sub-total Deddington</b>             | <b>155</b>                    | <b>109</b>                    |  |  |  | <b>0.96</b>              | <b>1.11</b>              | <b>1.13</b>              |
| <b>TOTAL CATCHMENT AREA</b>             | <b>1277</b>                   | <b>894</b>                    |  |  |  | <b>7.07</b>              | <b>7.71</b>              | <b>7.84</b>              |
| <b>Stores Outside Catchment</b>         |                               |                               |  |  |  |                          |                          |                          |
| Sainsbury, Oxford Road, Banbury         | -                             | 3110                          | 14420                                      | 10980                                      | 11168                                      | 44.85                    | 34.15                    | 34.73                    |
| Morrison, Swan Close, Banbury           | -                             | 2398                          | 14216                                      | 12271                                      | 12481                                      | 34.09                    | 29.43                    | 29.93                    |
| <b>TOTAL</b>                            |                               | <b>6402</b>                   |  |  |  | <b>86.01</b>             | <b>71.28</b>             | <b>72.50</b>             |

**Notes:**

Gross floor area is footprint of each unit measured on Promap.

Net sales area assumed to average 70% of gross area.

Sales densities for Londis and Spar are derived from their company averages derived from Retail Rankings, projected backwards to 2012 and forward to 2023 using Experian's changes in convenience sales densities from their Retail Planner Briefing Notes Nos. 12 to 16.

2012 sales densities for Co-op, Sainsbury and Morrison are company averages derived from Verdict 2013; their figures for 2018 and 2023 are derived from Global Data 2017 (formerly Verdict Research), projected forwards using Experian forecast changes in convenience sales densities. Sales density for Taste Buds in Adderbury assumes it will trade at around the same level as a Spar.

Expressed in 2013 prices.

**Cotefield Holdings Ltd**  
**Proposed Neighbourhood Foodstore at Cotefield Farm, Bodicote**

**Table 5: Benchmark Turnover of Committed Convenience Goods Floorspace**

|   | <b>Gross<br/>Floorspace<br/>(sq m)</b> | <b>Conv. Sales<br/>Area<br/>(sq m)</b> | <b>Notional Sales<br/>Density 2023<br/>(£/sq m)</b> | <b>Turnover<br/>2023<br/>(£m)</b> |
|---|--|--|---|-----------------------------------|
| Longford Park (05/10337/OUT)                          | 1300                                   | 380                                    | 10705   | 4.07                              |
| Wykham Park Farm, South of Salt Way<br>(14/01932/OUT) | 1000                                   | 400                                    | 10705   | 4.28                              |
| <b>TOTAL</b>  | <b>2300</b>                            | <b>780</b>                             |   | <b>8.35</b>                       |

**Notes:**

Local Centre floorspace for Longford Park is as per planning application and summary of retail commitments in Table F5 of the Cherwell Retail Study 2012.

Local Centre gross floorspace for Wykham Park Farm is taken from the planning application: the convenience floorspace is an RPS estimate assuming a net to gross ratio of 80% and that half of the floorspace will be given over to convenience goods.

Notional sales density is the 2017 estimate assumed for committed floorspace in Table F5 of the Cherwell Retail Study, converted to 2013 prices and projected forward to 2023 using Experian's forecast growth rates in their 'Retail Planner Briefing Note 16'.

**Cotefield Holdings Ltd**  
**Proposed Neighbourhood Foodstore at Cotefield Farm,**

**Table 6: Turnover of the Proposed Development**

|                                 |          |      |
|---------------------------------|----------|------|
| Gross floor area                | (sq m)   | 1235 |
| Net sales area                  | (sq m)   | 833  |
| Benchmark sales density 2023    | (£/sq m) | 8485 |
| Benchmark turnover 2023         | (£m)     | 7.07 |
| Convenience goods turnover 2023 | (£m)     | 6.36 |
| Comparison goods turnover 2023  | (£m)     | 0.71 |

**Notes:**

Net sales floorspace assumed to be 67% of gross area.

Benchmark sales density is Budgens company average derived from Retail Rankings, projected forward to 2023 by applying Experian's forecast growth in convenience retail sales densities from their 'Retail Planner Briefing Note'.

Assumes 90% of sales area will be given over to convenience goods.

Expressed in 2013 prices.

Cotefield Holdings Ltd  
Proposed Neighbourhood Foodstore at Cotefield Farm, Bodicote

Table 7: Retail Impact

|   | Turnover<br>2012 | Share of Catchment<br>Exp Growth 2012-2023 | Turnover<br>2023 | Trade Draw<br>to New Store | Trade Draw to<br>Committed Local<br>Centres | Turnover Including<br>Growth & Trade<br>Diversions | Solus Impact<br>of New Store | Cumulative Impact<br>of New Store & Local<br>Centres |
|---|------------------|--|------------------|----------------------------|---|--|------------------------------|--|
|   | (£m)             | (£m)                                       | (£m)             | (£m)                       | (£m)  | (£m)   | (%)                          | (%)  |
| <b>Bloxham</b>                          |                  |  |                  |                            |   |  |                              |  |
| Londis, BP PFS, South Newington Rd      | 0.31             | 0.06                                       | 0.37             | 0.03                       | 0.04  | 0.30   | 10.76%                       | -2.94%   |
| Co-op, High Street                      | 1.00             | 0.21                                       | 1.21             | 0.13                       | 0.04  | 1.04   | 7.96%                        | 3.77%  |
| Londis, High Street                     | 0.47             | 0.10                                       | 0.57             | 0.03                       | 0.04  | 0.50   | 14.01%                       | 5.16%  |
| <b>Sub-total Bloxham</b>                | <b>1.78</b>      | <b>0.37</b>                                | <b>2.15</b>      | <b>0.19</b>                | <b>0.13</b>                                 | <b>1.84</b>  |                              |  |
| <b>Adderbury</b>                        |                  |  |                  |                            |   |  |                              |  |
| Taste Buds, High Street                 | 0.49             | 0.10                                       | 0.59             | 0.03                       | 0.00  | 0.56   | 14.00%                       | 14.00%   |
| <b>Sub-total Adderbury</b>              | <b>0.49</b>      | <b>0.10</b>                                | <b>0.59</b>      | <b>0.03</b>                | <b>0.00</b>                                 | <b>0.56</b>  |                              |  |
| <b>Kings Sutton</b>                     |                  |  |                  |                            |   |  |                              |  |
| Co-op, Richmond Street                  | 0.97             | 0.20                                       | 1.17             | 0.13                       | 0.04  | 1.00   | 7.46%                        | 3.13%  |
| <b>Sub-total Kings Sutton</b>           | <b>0.97</b>      | <b>0.20</b>                                | <b>1.17</b>      | <b>0.13</b>                | <b>0.04</b>                                 | <b>1.00</b>  |                              |  |
| <b>Bodicote/South Banbury</b>           |                  |  |                  |                            |   |  |                              |  |
| Spar, Molyneux Drive                    | 0.60             | 0.12                                       | 0.72             | 0.06                       | 0.04  | 0.61   | 9.97%                        | 2.91%  |
| Spar, Esso PFS, Oxford Road             | 0.39             | 0.08                                       | 0.47             | 0.03                       | 0.04  | 0.40   | 12.36%                       | 1.61%  |
| Co-op, Chatsworth Drive                 | 1.88             | 0.39                                       | 2.26             | 0.25                       | 0.21  | 1.80   | 7.02%                        | -4.16%   |
| <b>Sub-total Bodicote/South Banbury</b> | <b>2.86</b>      | <b>0.59</b>                                | <b>3.45</b>      | <b>0.35</b>                | <b>0.29</b>                                 | <b>2.81</b>  |                              |  |
| <b>Deddington</b>                       |                  |  |                  |                            |   |  |                              |  |
| Co-op, Market Place, Deddington         | 0.96             | 0.20                                       | 1.16             | 0.13                       | 0.04  | 0.99   | 7.37%                        | 3.02%  |
| <b>Sub-total Deddington</b>             | <b>0.96</b>      | <b>0.20</b>                                | <b>1.16</b>      | <b>0.13</b>                | <b>0.04</b>                                 | <b>0.99</b>  |                              |  |
| <b>TOTAL CATCHMENT AREA</b>             | <b>7.07</b>      | <b>1.45</b>                                | <b>8.52</b>      | <b>0.82</b>                | <b>0.50</b>                                 | <b>7.20</b>  |                              |  |
| <b>Stores Outside Catchment</b>         |                  |  |                  |                            |   |  |                              |  |
| Sainsbury, Oxford Road, Banbury         | 44.85            | 9.21                                       | 54.06            | 2.54                       | 3.76  | 47.76  | 14.88%                       | 6.50%  |
| Morrison, Swan Close, Banbury           | 34.09            | 7.00                                       | 41.09            | 1.91                       | 3.34  | 35.84  | 14.94%                       | 5.15%  |
| Other stores in Banbury                 |                  |  |                  | 0.45                       | 0.42  |  |                              |  |
| Other stores outside Banbury            |                  |  |                  | 0.64                       | 0.33  |  |                              |  |
| <b>TOTAL</b>                            | <b>86.01</b>     | <b>17.67</b>                               | <b>103.68</b>    | <b>6.36</b>                | <b>8.35</b>                                 |  |                              |  |

**Notes:**

Baseline 2012 turnovers are derived from Table 4.

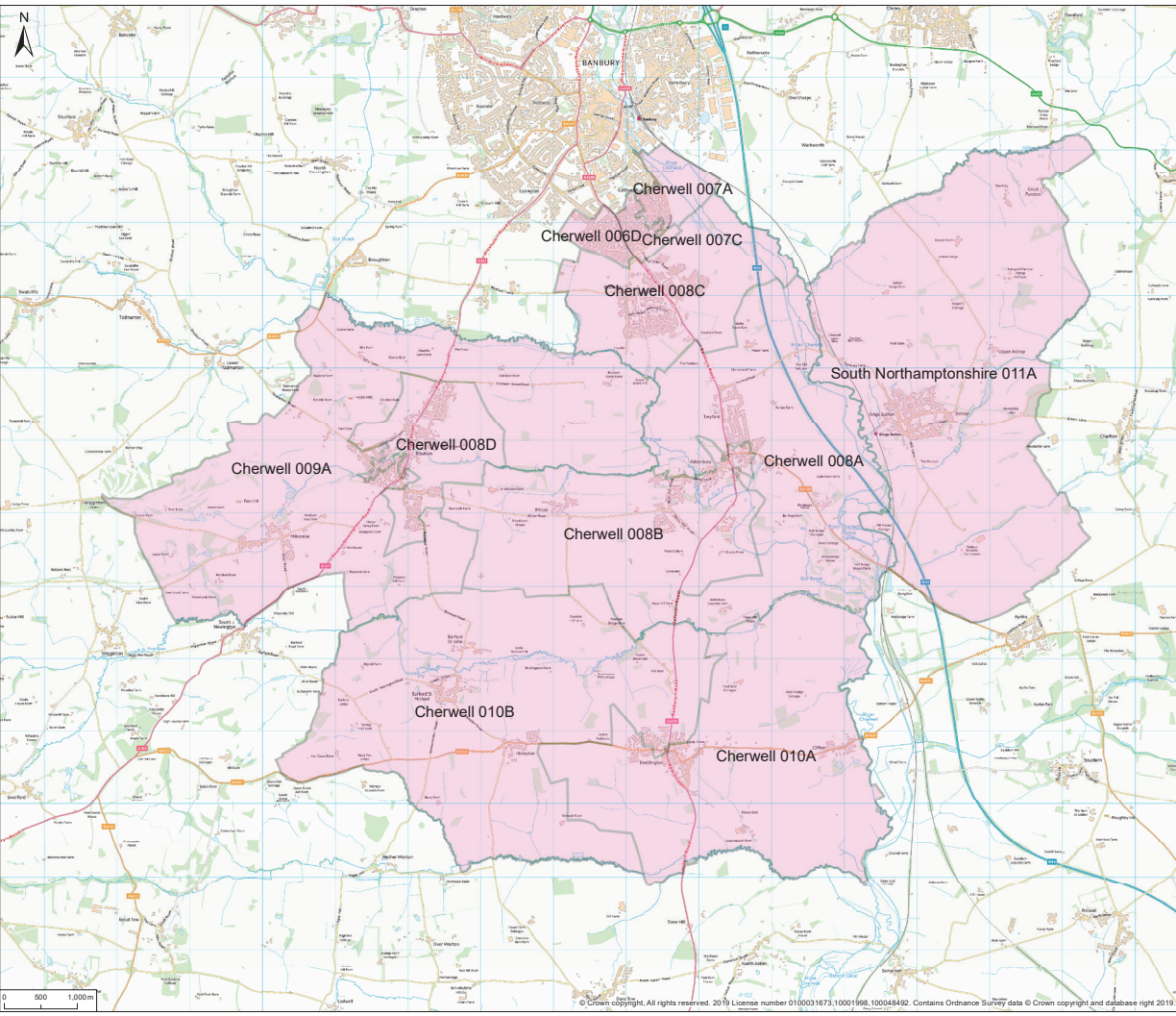
Additional convenience spending generated 2012-2023 (£17.4m) from committed housing has been apportioned between existing stores on a pro rata basis.



**Appendix B**

**Catchment Area Plan**

0:04-1:08:50:1 OPEN:JOBS:JPW1325-001:JPW1325-001:RA:CT14 Drawings:1:RPS Drawings:W:\1325-001\RevA\_D190515\_Catchment Plan\mxd



© 2019 RPS Group  
 Notes  
 1. This drawing has been prepared in accordance with the scope of RPS's appointment with its client and is subject to the terms and conditions of that appointment. RPS accepts no liability for any use of this document other than by its client and only for the purposes for which it was prepared and provided.  
 2. If received electronically it is the recipient's responsibility to print to correct scale. Only written dimensions should be used.

**Legend**  
 Catchment Area

| Rev | Description         | By | CB | Date     |
|-----|---------------------|----|----|----------|
| A   | Catchment amendment | GG | CT | 15/05/19 |

**rps** MAKING COMPLEX EASY  
 Park House, Greyfriars Road, Cardiff, CF10 3AF  
 T: +44(0)2920 688 682 E: rpsca@rpsgroup.com

Client: COTEFIELD HOLDINGS LTD  
 Project: PROPOSED FOOD STORE COTEFIELD BUSINESS PARK  
 Title: CATCHMENT PLAN

Status: PLANNING  
 Drawn By: GG  
 Project Number: JPW1325  
 Scale @ A3: 1:50,000  
 Drawing Number: JPW1325-001

PMI/Checked By: CT  
 Date Created: MAY 2019  
 Rev: A

rpsgroup.com

© Crown copyright. All rights reserved. 2019. License number 0100031673,10001998,100045492. Contains Ordnance Survey data © Crown copyright and database right 2019.