

GVA

An **APLEONA** company

65 Gresham Street
London
EC2V 7NQ

T: +44 (0)20 7911 2468
F: +44 (0)20 7911 2560



South Oxfordshire District Retail Needs Update 2017

GVA for South Oxfordshire District Council
Appendices, August 2017



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Prepared By: Adam Bunn

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For and on behalf of GVA Grimley Limited

Appendix I

Convenience goods needs tables

South Oxfordshire District Council
Retail and Leisure Needs Assessment — 2017 Update
Convenience Capacity Modelling

Table 1
Survey Population Forecasts

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

Source: Experian Micromarketer (October 2014)

Table 1A
Survey Area Postal Sectors

Zone	Postal Sectors
Zone 1	HP17 8, HP18 0, HP18 9
Zone 2	OX9 2, OX9 3
Zone 3	OX10 7, OX44 7, OX44 9, OX33 1
Zone 4	OX9 7, OX49 5, HP14 3, HP14 3, HP27 0, HP27 9, OX39 4
Zone 5	RG4 9, RG9 5, RG9 6, RG9 4, SL7 2
Zone 6	RG9 1, RG9 2
Zone 7	RG4 6, RG5 4, RG9 3, RG10 0, RG10 8, RG10 9, SL6 3, SL6 5, SL6 6
Zone 8	RG8 0, RG8 7, RG8 8, RG8 9
Zone 9	OX10 0, OX10 6, OX10 8, OX10 9
Zone 10	OX11 0, OX11 6, OX11 7, OX11 8, OX11 9
Zone 11	OX12 7, OX12 8, OX13 6, OX14 4, RG20 6, RG20 7
Zone 12	OX14 1, OX14 2, OX14 3, OX14 5

Denotes zones which fall wholly or predominantly within South Oxfordshire District

South Oxfordshire District Council
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Table 2
Survey Area Retail Expenditure Forecasts Per Capita (2012 prices) - Convenience Goods

Growth in comparison goods per capita retail expenditure:						Special Forms of Trading (SFT):						
2015-16	-1.10%					2017	3.20%					
2016-17	0.00%					2022	4.10%					
2017-18	-0.20%					2027	4.70%					
2018-19	-0.90%					2033	5.10%					
2019-23	0.00%	(per annum)				Denotes zones which fall wholly or predominantly within South Oxfordshire District						
2023-33	0.10%	(per annum)										
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12
2015	2,558	2,244	2,416	2,431	2,561	2,281	2,319	2,549	2,303	2,207	2,362	2,178
2017	2,530	2,219	2,389	2,404	2,533	2,256	2,293	2,521	2,278	2,183	2,336	2,154
2017 Minus SFT at 3.2%	2,449	2,148	2,313	2,327	2,452	2,184	2,220	2,440	2,205	2,113	2,261	2,085
2022	2,435	2,136	2,300	2,314	2,438	2,171	2,208	2,427	2,192	2,101	2,249	2,073
2022 Minus SFT at 4.1%	2,335	2,049	2,206	2,219	2,338	2,082	2,117	2,327	2,102	2,015	2,156	1,988
2027	2,423	2,125	2,288	2,303	2,426	2,161	2,197	2,414	2,181	2,090	2,237	2,063
2027 Minus SFT at 4.7%	2,309	2,026	2,181	2,194	2,312	2,059	2,093	2,301	2,079	1,992	2,132	1,966
2033	2,437	2,138	2,302	2,316	2,440	2,174	2,210	2,429	2,194	2,103	2,251	2,075
2033 Minus SFT at 5.1%	2,313	2,029	2,185	2,198	2,316	2,063	2,097	2,305	2,083	1,996	2,136	1,970

Source: Per capita spend data sourced from Experian Location Analyst, accessed July 2017. All data in 2015 prices. SFT sourced from Experian Retail Planner 14, Figure 5.

Table 3
Survey Area Retail Expenditure Forecasts (2015 prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
2017	62.3	28.4	49.4	102.2	51.3	26.4	157.2	46.8	49.8	77.8	70.6	78.8	801.1
2022	62.5	30.0	53.5	100.0	50.2	28.5	155.7	45.7	54.2	88.2	69.3	77.7	815.5
2027	64.5	31.3	65.7	101.2	51.0	30.3	159.1	46.2	56.0	100.4	70.3	78.8	854.9
2033	67.6	31.8	99.0	104.0	52.6	31.1	165.3	47.2	56.5	112.0	72.4	81.2	920.6

Source: Tables 1 & 2

South Oxfordshire District Council
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Table 4
Convenience Goods Allocation 2014 - % Market Share

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)	Zone 12 (%)
DIDCOT												
Sainsbury's Superstore, Central Drive	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	2.9%	17.2%	29.7%	4.3%	2.1%
Other Didcot Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	3.0%	0.2%	0.0%
Total Didcot In Centre	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	3.9%	17.2%	32.7%	4.5%	2.1%
Tesco, Wallingford Road, North Moreton (OOC)	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	1.2%	4.1%	49.2%	5.3%	0.0%
Tesco Express, Cockroft Road (OOC)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%	6.6%	0.8%	0.0%
Total Didcot Out of Centre	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	4.6%	4.1%	55.8%	6.2%	0.0%
Total Didcot	0.0%	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%	8.6%	21.4%	88.4%	10.7%	2.1%
HENLEY-ON-THAMES												
Waitrose, Bell Street	0.0%	0.0%	0.0%	0.6%	28.6%	42.6%	2.6%	0.5%	0.0%	0.0%	0.0%	0.0%
Sainsburys Local, Bell Street	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Henley Town Centre	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Henley-on-Thames In Centre	0.0%	0.0%	0.0%	0.6%	29.6%	47.4%	2.6%	0.5%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Reading Road (OOC)	0.0%	0.0%	0.0%	0.0%	13.8%	45.6%	3.3%	0.0%	0.0%	0.5%	0.0%	0.0%
Total Henley-on-Thames Out of Centre	0.0%	0.0%	0.0%	0.0%	13.8%	45.6%	3.3%	0.0%	0.0%	0.5%	0.0%	0.0%
Total Henley-on-Thames	0.0%	0.0%	0.0%	0.6%	43.4%	93.0%	5.9%	0.5%	0.0%	0.5%	0.0%	0.0%
THAME												
Waitrose, Greyhound Lane	22.1%	46.2%	2.9%	2.4%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, High Street	0.9%	16.6%	0.3%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsburys, High Street	4.1%	13.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Thame Town Centre	3.3%	1.3%	0.0%	0.3%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Thame	30.4%	77.2%	3.9%	3.1%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
WALLINGFORD												
Waitrose, St Martin's Street	0.0%	0.0%	7.3%	2.0%	1.4%	0.0%	0.0%	28.7%	47.1%	0.4%	0.0%	0.6%
Other Wallingford Town Centre	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%
Total Wallingford	0.0%	0.0%	10.2%	2.0%	1.4%	0.0%	0.0%	28.7%	47.9%	0.4%	0.0%	0.6%
SOUTH OXON OUT OF CENTRE STORES												
Asda Superstore, London Road, Wheatley	19.7%	10.5%	37.7%	2.8%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.9%
Total S Oxon Out of Centre Stores	19.7%	10.5%	37.7%	2.8%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.9%
OUTSIDE SOUTH OXFORDSHIRE DISTRICT												
Tesco Extra, Marcham Road, Abingdon	0.0%	0.0%	3.1%	0.5%	0.0%	0.0%	0.0%	0.0%	0.5%	1.1%	31.3%	26.1%
Waitrose, London Road, Twyford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.4%	0.6%	0.0%	0.0%	0.0%	0.0%
Asda Superstore, Holmers Farm Way, High Wycombe	0.0%	0.0%	0.0%	24.2%	7.1%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Longwick Road, Princes Risborough	0.9%	1.9%	0.0%	20.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Waitrose, Abbey Close, Abingdon	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	3.8%	23.8%
Total Outside South Oxfordshire District	0.9%	1.9%	4.0%	45.0%	7.1%	0.0%	19.7%	0.6%	0.5%	2.1%	35.2%	49.9%
Other	49.1%	10.4%	39.6%	46.5%	44.4%	7.0%	74.4%	61.5%	28.4%	8.6%	54.2%	46.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: South Oxfordshire Telephone Survey, October 2014. No new household telephone survey has been undertaken in support of this 2017 Update.

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Table 5
Convenience Goods Allocation 2017- Spend (£) 2015 Prices

Zone Centre / Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)
DIDCOT													
Sainsbury's Superstore, Central Drive	0.0	0.0	0.5	0.0	0.0	0.0	0.0	1.4	8.6	23.1	3.0	1.7	38.2
Other Didcot Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	2.3	0.2	0.0	3.0
Total Didcot In Centre	0.0	0.0	0.5	0.0	0.0	0.0	0.0	1.8	8.6	25.4	3.2	1.7	41.2
Tesco, Wallingford Road, North Moreton (OOC)	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.6	2.1	38.2	3.8	0.0	46.4
Tesco Express, Cockroft Road (OOC)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	0.0	5.1	0.6	0.0	7.3
Total Didcot Out of Centre	0.0	0.0	1.7	0.0	0.0	0.0	0.0	2.2	2.1	43.4	4.3	0.0	53.7
Total Didcot	0.0	0.0	2.3	0.0	0.0	0.0	0.0	4.0	10.6	68.8	7.5	1.7	94.9
HENLEY-ON-THAMES													
Waitrose, Bell Street	0.0	0.0	0.0	0.6	14.7	11.2	4.1	0.2	0.0	0.0	0.0	0.0	30.9
Sainsburys Local, Bell Street	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	1.3
Other Henley Town Centre	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Total Henley-on-Thames In Centre	0.0	0.0	0.0	0.6	15.2	12.5	4.1	0.2	0.0	0.0	0.0	0.0	32.7
Tesco Superstore, Reading Road (OOC)	0.0	0.0	0.0	0.0	7.1	12.0	5.1	0.0	0.0	0.4	0.0	0.0	24.7
Total Henley-on-Thames Out of Centre	0.0	0.0	0.0	0.0	7.1	12.0	5.1	0.0	0.0	0.4	0.0	0.0	24.7
Total Henley-on-Thames	0.0	0.0	0.0	0.6	22.3	24.6	9.2	0.2	0.0	0.4	0.0	0.0	57.3
THAME													
Waitrose, Greyhound Lane	13.7	13.2	1.4	2.4	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	32.2
Co-op, High Street	0.5	4.7	0.1	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.8
Sainsburys, High Street	2.6	3.7	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.6
Other Thame Town Centre	2.1	0.4	0.0	0.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2
Total Thame	18.9	22.0	1.9	3.1	1.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	47.8
WALLINGFORD													
Waitrose, St Martin's Street	0.0	0.0	3.6	2.0	0.7	0.0	0.0	13.5	23.4	0.3	0.0	0.5	44.0
Other Wallingford Town Centre	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	1.9
Total Wallingford	0.0	0.0	5.0	2.0	0.7	0.0	0.0	13.5	23.9	0.3	0.0	0.5	45.9
SOUTH OXON OUT OF CENTRE STORES													
Asda Superstore, London Road, Wheatley	12.3	3.0	18.6	2.9	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.7	38.3
Total S Oxon Out of Centre Stores	12.3	3.0	18.6	2.9	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.7	38.3
OUTSIDE SOUTH OXFORDSHIRE DISTRICT													
Tesco Extra, Marcham Road, Abingdon	0.0	0.0	1.5	0.5	0.0	0.0	0.0	0.0	0.3	0.8	22.1	20.6	45.9
Waitrose, London Road, Twyford	0.0	0.0	0.0	0.0	0.0	0.0	30.5	0.3	0.0	0.0	0.0	0.0	30.8
Asda Superstore, Holmers Farm Way, High Wycombe	0.0	0.0	0.0	24.7	3.7	0.0	0.5	0.0	0.0	0.0	0.0	0.0	28.9
Tesco Superstore, Longwick Road, Princes Risborough	0.5	0.6	0.0	20.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	21.9
Waitrose, Abbey Close, Abingdon	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.8	2.7	18.8	22.7
Total Outside South Oxfordshire District	0.5	0.6	2.0	46.0	3.7	0.0	31.0	0.3	0.3	1.6	24.8	39.4	150.1
Other	30.6	3.0	19.6	47.6	22.8	1.8	117.0	28.8	14.1	6.7	38.2	36.5	366.7
Total	62.3	28.4	49.4	102.2	51.3	26.4	157.2	46.8	49.8	77.8	70.6	78.8	801.1

Source: Tables 3 & 4

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Table 6
Convenience Goods Allocation 2022 - Spend (£) 2015 Prices

Zone Centre / Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)
DIDCOT													
Sainsbury's Superstore, Central Drive	0.0	0.0	0.6	0.0	0.0	0.0	0.0	1.3	9.3	26.2	3.0	1.7	42.0
Other Didcot Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	2.7	0.2	0.0	3.3
Total Didcot In Centre	0.0	0.0	0.6	0.0	0.0	0.0	0.0	1.8	9.3	28.8	3.1	1.7	45.3
Tesco, Wallingford Road, North Moreton (OOC)	0.0	0.0	1.9	0.0	0.0	0.0	0.0	0.5	2.2	43.4	3.7	0.0	51.7
Tesco Express, Cockroft Road (OOC)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	0.0	5.8	0.6	0.0	7.9
Total Didcot Out of Centre	0.0	0.0	1.9	0.0	0.0	0.0	0.0	2.1	2.2	49.2	4.3	0.0	59.7
Total Didcot	0.0	0.0	2.4	0.0	0.0	0.0	0.0	3.9	11.6	78.0	7.4	1.7	105.0
HENLEY-ON-THAMES													
Waitrose, Bell Street	0.0	0.0	0.0	0.6	14.4	12.1	4.1	0.2	0.0	0.0	0.0	0.0	31.4
Sainsburys Local, Bell Street	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.0	0.0	0.0	0.0	0.0	1.4
Other Henley Town Centre	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Total Henley-on-Thames In Centre	0.0	0.0	0.0	0.6	14.9	13.5	4.1	0.2	0.0	0.0	0.0	0.0	33.3
Tesco Superstore, Reading Road (OOC)	0.0	0.0	0.0	0.0	7.0	13.0	5.1	0.0	0.0	0.4	0.0	0.0	25.5
Total Henley-on-Thames Out of Centre	0.0	0.0	0.0	0.0	7.0	13.0	5.1	0.0	0.0	0.4	0.0	0.0	25.5
Total Henley-on-Thames	0.0	0.0	0.0	0.6	21.8	26.5	9.1	0.2	0.0	0.4	0.0	0.0	58.7
THAME													
Waitrose, Greyhound Lane	13.8	13.9	1.5	2.4	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	33.0
Co-op, High Street	0.5	5.0	0.2	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.0
Sainsburys, High Street	2.6	3.9	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.9
Other Thame Town Centre	2.1	0.4	0.0	0.3	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2
Total Thame	19.0	23.1	2.1	3.1	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	49.1
WALLINGFORD													
Waitrose, St Martin's Street	0.0	0.0	3.9	2.0	0.7	0.0	0.0	13.1	25.5	0.3	0.0	0.5	46.0
Other Wallingford Town Centre	0.0	0.0	1.6	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	2.0
Total Wallingford	0.0	0.0	5.5	2.0	0.7	0.0	0.0	13.1	26.0	0.3	0.0	0.5	48.1
SOUTH OXFORDSHIRE OUT OF CENTRE STORES													
Asda Superstore, London Road, Wheatley	12.3	3.1	20.2	2.8	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.7	40.1
Total S Oxon Out of Centre Stores	12.3	3.1	20.2	2.8	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.7	40.1
OUTSIDE SOUTH OXFORDSHIRE DISTRICT													
Tesco Extra, Marcham Road, Abingdon	0.0	0.0	1.7	0.5	0.0	0.0	0.0	0.0	0.3	1.0	21.7	20.3	45.4
Waitrose, London Road, Twyford	0.0	0.0	0.0	0.0	0.0	0.0	30.2	0.3	0.0	0.0	0.0	0.0	30.5
Asda Superstore, Holmers Farm Way, High Wycombe	0.0	0.0	0.0	24.2	3.6	0.0	0.5	0.0	0.0	0.0	0.0	0.0	28.3
Tesco Superstore, Longwick Road, Princes Risborough	0.5	0.6	0.0	20.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	21.4
Waitrose, Abbey Close, Abingdon	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.9	2.6	18.5	22.5
Total Outside South Oxfordshire District	0.5	0.6	2.1	45.0	3.6	0.0	30.7	0.3	0.3	1.8	24.4	38.8	148.2
Other	30.7	3.1	21.2	46.5	22.3	2.0	115.8	28.2	15.4	7.6	37.5	36.0	366.3
Total	62.5	30.0	53.5	100.0	50.2	28.5	155.7	45.7	54.2	88.2	69.3	77.7	815.5

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Table 7
Convenience Goods Allocation 2027 - Spend (£) 2015 Prices

Zone Centre / Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)
DIDCOT													
Sainsbury's Superstore, Central Drive	0.0	0.0	0.7	0.0	0.0	0.0	0.0	1.3	9.7	29.8	3.0	1.7	46.2
Other Didcot Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	3.0	0.2	0.0	3.7
Total Didcot In Centre	0.0	0.0	0.7	0.0	0.0	0.0	0.0	1.8	9.7	32.8	3.2	1.7	49.9
Tesco, Wallingford Road, North Moreton (OOC)	0.0	0.0	2.3	0.0	0.0	0.0	0.0	0.6	2.3	49.4	3.8	0.0	58.3
Tesco Express, Cockroft Road (OOC)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	0.0	6.6	0.6	0.0	8.8
Total Didcot Out of Centre	0.0	0.0	2.3	0.0	0.0	0.0	0.0	2.1	2.3	56.0	4.3	0.0	67.1
Total Didcot	0.0	0.0	3.0	0.0	0.0	0.0	0.0	4.0	12.0	88.8	7.5	1.7	117.0
HENLEY-ON-THAMES													
Waitrose, Bell Street	0.0	0.0	0.0	0.6	14.6	12.9	4.1	0.2	0.0	0.0	0.0	0.0	32.5
Sainsburys Local, Bell Street	0.0	0.0	0.0	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	1.5
Other Henley Town Centre	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Total Henley-on-Thames In Centre	0.0	0.0	0.0	0.6	15.1	14.4	4.1	0.2	0.0	0.0	0.0	0.0	34.4
Tesco Superstore, Reading Road (OOC)	0.0	0.0	0.0	0.0	7.1	13.8	5.2	0.0	0.0	0.5	0.0	0.0	26.6
Total Henley-on-Thames Out of Centre	0.0	0.0	0.0	0.0	7.1	13.8	5.2	0.0	0.0	0.5	0.0	0.0	26.6
Total Henley-on-Thames	0.0	0.0	0.0	0.6	22.1	28.2	9.3	0.2	0.0	0.5	0.0	0.0	61.0
THAME													
Waitrose, Greyhound Lane	14.2	14.5	1.9	2.4	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	34.5
Co-op, High Street	0.6	5.2	0.2	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.3
Sainsburys, High Street	2.7	4.1	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.2
Other Thame Town Centre	2.2	0.4	0.0	0.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.3
Total Thame	19.6	24.2	2.5	3.1	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	51.3
WALLINGFORD													
Waitrose, St Martin's Street	0.0	0.0	4.8	2.0	0.7	0.0	0.0	13.3	26.4	0.4	0.0	0.5	48.0
Other Wallingford Town Centre	0.0	0.0	1.9	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	2.4
Total Wallingford	0.0	0.0	6.7	2.0	0.7	0.0	0.0	13.3	26.8	0.4	0.0	0.5	50.4
SOUTH OXON OUT OF CENTRE STORES													
Asda Superstore, London Road, Wheatley	12.7	3.3	24.8	2.8	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.7	45.3
Total S Oxon Out of Centre Stores	12.7	3.3	24.8	2.8	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.7	45.3
OUTSIDE SOUTH OXFORDSHIRE DISTRICT													
Tesco Extra, Marcham Road, Abingdon	0.0	0.0	2.0	0.5	0.0	0.0	0.0	0.0	0.3	1.1	22.0	20.6	46.6
Waitrose, London Road, Twyford	0.0	0.0	0.0	0.0	0.0	0.0	30.9	0.3	0.0	0.0	0.0	0.0	31.2
Asda Superstore, Holmers Farm Way, High Wycombe	0.0	0.0	0.0	24.5	3.6	0.0	0.5	0.0	0.0	0.0	0.0	0.0	28.6
Tesco Superstore, Longwick Road, Princes Risborough	0.6	0.6	0.0	20.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	21.7
Waitrose, Abbey Close, Abingdon	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	1.0	2.7	18.8	23.1
Total Outside South Oxfordshire District	0.6	0.6	2.6	45.6	3.6	0.0	31.4	0.3	0.3	2.1	24.7	39.3	151.1
Other	31.7	3.3	26.1	47.1	22.7	2.1	118.4	28.5	15.9	8.6	38.1	36.5	378.8
Total	64.5	31.3	65.7	101.2	51.0	30.3	159.1	46.2	56.0	100.4	70.3	78.8	854.9

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Table 8
Convenience Goods Allocation 2033 - Spend (£) 2015 Prices

Zone Centre / Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)
DIDCOT													
Sainsbury's Superstore, Central Drive	0.0	0.0	1.1	0.0	0.0	0.0	0.0	1.4	9.7	33.2	3.1	1.7	50.2
Other Didcot Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	3.4	0.2	0.0	4.0
Total Didcot In Centre	0.0	0.0	1.1	0.0	0.0	0.0	0.0	1.9	9.7	36.6	3.3	1.7	54.2
Tesco, Wallingford Road, North Moreton (OOC)	0.0	0.0	3.5	0.0	0.0	0.0	0.0	0.6	2.3	55.1	3.9	0.0	65.3
Tesco Express, Cockroft Road (OOC)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	0.0	7.4	0.6	0.0	9.6
Total Didcot Out of Centre	0.0	0.0	3.5	0.0	0.0	0.0	0.0	2.2	2.3	62.4	4.5	0.0	74.9
Total Didcot	0.0	0.0	4.5	0.0	0.0	0.0	0.0	4.1	12.1	99.0	7.7	1.7	129.1
HENLEY-ON-THAMES													
Waitrose, Bell Street	0.0	0.0	0.0	0.6	15.1	13.2	4.3	0.2	0.0	0.0	0.0	0.0	33.4
Sainsburys Local, Bell Street	0.0	0.0	0.0	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	1.5
Other Henley Town Centre	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Total Henley-on-Thames In Centre	0.0	0.0	0.0	0.6	15.6	14.7	4.3	0.2	0.0	0.0	0.0	0.0	35.5
Tesco Superstore, Reading Road (OOC)	0.0	0.0	0.0	0.0	7.3	14.2	5.4	0.0	0.0	0.6	0.0	0.0	27.4
Total Henley-on-Thames Out of Centre	0.0	0.0	0.0	0.0	7.3	14.2	5.4	0.0	0.0	0.6	0.0	0.0	27.4
Total Henley-on-Thames	0.0	0.0	0.0	0.6	22.8	28.9	9.7	0.2	0.0	0.6	0.0	0.0	62.9
THAME													
Waitrose, Greyhound Lane	14.9	14.7	2.9	2.5	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.4
Co-op, High Street	0.6	5.3	0.3	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.5
Sainsburys, High Street	2.8	4.2	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.6
Other Thame Town Centre	2.3	0.4	0.0	0.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.5
Total Thame	20.5	24.6	3.8	3.2	1.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	54.0
WALLINGFORD													
Waitrose, St Martin's Street	0.0	0.0	7.2	2.1	0.7	0.0	0.0	13.6	26.6	0.4	0.0	0.5	51.1
Other Wallingford Town Centre	0.0	0.0	2.9	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	3.4
Total Wallingford	0.0	0.0	10.1	2.1	0.7	0.0	0.0	13.6	27.1	0.4	0.0	0.5	54.4
SOUTH OXON OUT OF CENTRE STORES													
Asda Superstore, London Road, Wheatley	13.3	3.3	37.3	2.9	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.8	58.6
Total S Oxon Out of Centre Stores	13.3	3.3	37.3	2.9	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.8	58.6
OUTSIDE SOUTH OXFORDSHIRE DISTRICT													
Tesco Extra, Marcham Road, Abingdon	0.0	0.0	3.1	0.5	0.0	0.0	0.0	0.0	0.3	1.2	22.7	21.2	49.0
Waitrose, London Road, Twyford	0.0	0.0	0.0	0.0	0.0	0.0	32.1	0.3	0.0	0.0	0.0	0.0	32.3
Asda Superstore, Holmers Farm Way, High Wycombe	0.0	0.0	0.0	25.2	3.7	0.0	0.6	0.0	0.0	0.0	0.0	0.0	29.5
Tesco Superstore, Longwick Road, Princes Risborough	0.6	0.6	0.0	21.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	22.3
Waitrose, Abbey Close, Abingdon	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0	1.1	2.8	19.3	24.1
Total Outside South Oxfordshire District	0.6	0.6	4.0	46.9	3.7	0.0	32.6	0.3	0.3	2.3	25.4	40.6	157.3
Other	33.2	3.3	39.2	48.4	23.4	2.2	123.0	29.0	16.0	9.6	39.2	37.7	404.2
Total	67.6	31.8	99.0	104.0	52.6	31.1	165.3	47.2	56.5	112.0	72.4	81.2	920.6

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Table 9: Existing convenience goods floorspace

	Total Net Flsp (Note A) (sqm)	Net Conv Ratio (Note B) (%)	Net Convenience (sqm)	Co Average Sales (Note C) (£ per sqm net)	Average Turnover 2017 (£m)	Actual Turnover 2017 (£m)
DIDCOT						
Sainsbury's Superstore, Central Drive	4,043	72%	2,919	11,068	32.3	38.2
Other Didcot Town Centre	978	100%	978	2,500	2.4	3.0
Tesco, Wallingford Road, North Moreton (OOC)	1,987	76%	1,504	12,221	18.4	46.4
Tesco Express, Cockroft Road (OOC)	136	100%	136	12,221	1.7	7.3
Total Didcot	7,144	-	5,537	9,896	54.8	94.9
HENLEY-ON-THAMES						
Waitrose, Bell Street	1,640	82%	1,348	13,042	17.6	30.9
Sainsburys Local, Bell Street	245	90%	221	11,068	2.4	1.3
Other Henley-on-Thames Town Centre	998	100%	998	2,500	2.5	0.5
Tesco Superstore, Reading Road (OOC)	1,995	76%	1,510	12,221	18.5	24.7
Total Henley-on-Thames	4,878	-	4,077	10,051	41.0	57.3
THAME						
Waitrose, Greyhound Lane	2,078	82%	1,708	13,042	22.3	32.2
Co-op, High Street	1,168	87%	1,020	10,298	10.5	5.8
Sainsburys, High Street	632	90%	569	11,068	6.3	6.6
Other Thame Town Centre	1,750	100%	1,750	2,500	4.4	3.2
Total Thame	5,628	-	5,047	8,610	43.4	47.8
WALLINGFORD						
Waitrose, St Martin's Street	2,393	82%	1,967	13,042	25.7	44.0
Other Wallingford Town Centre	500	100%	500	2,500	1.3	1.9
Total Wallingford	2,393	-	1,967	13,042	25.7	45.9
SOUTH OXFORDSHIRE OUT-OF-CENTRE STORES						
Asda Superstore, London Road, Wheatley	2,673	67%	1,791	13,317	23.8	38.3
Total South Oxfordshire Out-of-Centre Stores	2,673	-	1,791	13,317	23.8	38.3
Total Within South Oxfordshire District	22,716		18,419	10,246	188.7	284.2
OUTSIDE SOUTH OXFORDSHIRE DISTRICT						
Tesco Extra, Marcham Road, Abingdon	5,066	76%	3,835	12,221	46.9	45.9
Waitrose, London Road, Twyford	2,824	82%	2,321	13,042	30.3	30.8
Asda Superstore, Holmers Farm Way, High Wycombe	5,459	67%	3,658	13,317	48.7	28.9
Tesco Superstore, Longwick Road, Princes Risborough	1,015	76%	768	12,221	9.4	21.9
Waitrose, Abbey Close, Abingdon	2,466	82%	2,027	13,042	26.4	22.7
Total Outside South Oxfordshire District	16,830	-	12,609	12,822	161.7	150.1
TOTAL	39,546	-	31,028	11,293	350.4	434.4

Note A: Floorspace figures derived from IGD / Experian Goad

Note B: Net Convenience ratio derived from Verdict Grocery Retailers 2012 / GVA assumptions

Note C: Company average turnover derived from Verdict Grocery Retailers 2012 / GVA assumptions

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Table 10: Convenience Goods Commitments

	Net Convenience Floorspace (Sq m)	Company Average Sales (£/sqm net)	Average Turnover 2017 (£m)	Average Turnover 2022 (£m)	Average Turnover 2027 (£m)	Average Turnover 2033 (£m)
M&S Food, Orchard Centre Phase II, Didcot (In-Centre)	1,018	11,283	11.5	11.7	11.8	12.0
Aldi, Land at the Broadway, Didcot (Out-of-Centre)	969	11,552	11.2	11.4	11.5	11.7
Former Waitrose, Wallingford (In-Centre)	142	3,000	0.4	0.4	0.4	0.4
Total	2,129	-	23.1	23.5	23.8	24.2

Morrisons Floorspace: Planning App Ref: P12/S2563/FUL

*Aldi Floorspace: Planning App Ref: P13/S3489/FUL (*this store is now trading but was not trading at the time of the household telephone survey in October 2014)*

Former Waitrose Wallingford Planning App Ref: P/16/S1514/FUL

Sales efficiency of 0.3% per annum applied to 2033 (source: Experian Retail Planner 14)

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Table 11: Convenience goods floorspace capacity for South Oxfordshire District, 2017-33

	2017	2022	2027*	2033*
Residents Spending in South Oxfordshire District (£m)	284.2	300.9	325.0	359.1
Existing Shop Floorspace (within South Oxfordshire District Only) (sq.m net)	18,419	18,419	18,419	18,419
Sales per sq.m net (£)	15,432	10,246	10,401	10,590
Sales from existing floorspace (£m)	284.2	188.7	191.6	195.0
Sales from committed floorspace (£m)	-	23.5	23.8	24.2
Residual spending to support new shops (£m)	0	88.8	109.6	139.8
Sales per sqm net in new shops (£) <i>Based on large store format</i>	12,000	12,181	12,365	12,589
Capacity for new floorspace (sq.m net)	0	7,287	8,863	11,104

Assumes growth in sales efficiency of 0.3% per annum to 2033 (source: Experian Retail Planner 14)

**indicative forecasts, should be subject to further review throughout Local Plan period.*

Appendix II

Comparison goods needs tables

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Table 2
Survey Area Retail Expenditure Forecasts Per Capita (2015 prices) - Comparison Goods

Growth in comparison goods per capita retail expenditure:						Special Forms of Trading (SFT):						
2015-16	4.60%					2017	13.80%					
2016-17	3.30%					2022	15.80%					
2017-18	1.40%					2027	16.10%					
2018-19	1.00%					2033	16.40%					
2019-23	3.00%	(per annum)				Denotes zones which fall wholly or predominantly within South Oxfordshire District						
2023-33	3.20%	(per annum)										
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12
2015	4,411	3,765	3,923	4,109	4,611	3,941	4,059	4,462	3,920	3,596	3,903	3,481
2017	4,766	4,068	4,239	4,440	4,982	4,258	4,386	4,821	4,236	3,886	4,217	3,761
2017 Minus SFT at 13.8%	4,108	3,507	3,654	3,827	4,295	3,671	3,781	4,156	3,651	3,349	3,635	3,242
2022	5,334	4,553	4,744	4,969	5,576	4,766	4,908	5,396	4,740	4,348	4,720	4,209
2022 Minus SFT at 15.8%	4,491	3,833	3,994	4,184	4,695	4,013	4,133	4,543	3,991	3,661	3,974	3,544
2027	6,232	5,319	5,542	5,805	6,514	5,568	5,734	6,304	5,538	5,080	5,514	4,918
2027 Minus SFT at 16.1%	5,228	4,463	4,650	4,870	5,465	4,671	4,811	5,289	4,646	4,262	4,626	4,126
2033	7,528	6,425	6,695	7,013	7,869	6,726	6,927	7,615	6,690	6,137	6,661	5,941
2033 Minus SFT at 16.4%	6,293	5,372	5,597	5,862	6,579	5,623	5,791	6,366	5,593	5,131	5,569	4,966

Source: Per capita spend data sourced from Experian Location Analyst, accessed July 2017. All data in 2015 prices. SFT sourced from Experian Retail Planner 14, Figure 5.

Table 3
Survey Area Retail Expenditure Forecasts (2015 prices)

	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)
2017	104.6	46.4	78.0	168.1	89.9	44.4	267.7	79.7	82.4	123.3	113.5	122.5	1,320.6
2022	120.2	56.1	96.9	188.5	100.8	54.9	303.9	89.3	102.9	160.2	127.7	138.5	1,539.9
2027	146.1	69.0	140.2	224.5	120.5	68.8	365.7	106.3	125.1	214.9	152.5	165.3	1,898.9
2033	183.9	84.3	253.6	277.5	149.3	84.7	456.4	130.3	151.6	287.8	188.7	204.8	2,452.9
<i>Growth 2017-33</i>	79.3	37.8	175.6	109.3	59.4	40.4	188.7	50.5	69.2	164.5	75.2	82.2	1,132.3

Source: Tables 1 & 2

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Table 4
Comparison Goods Allocation 2014 - % Market Share

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12
Centre / Store	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
South Oxfordshire In-Centre												
Didcot	0.1%	0.0%	4.3%	0.0%	0.7%	0.0%	0.0%	2.4%	28.1%	55.3%	7.4%	5.1%
Henley-on-Thames	0.0%	0.1%	0.0%	0.3%	20.9%	42.1%	4.7%	0.1%	0.1%	0.0%	0.0%	0.0%
Thame	11.2%	34.2%	1.9%	1.9%	3.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Wallingford	0.0%	0.3%	3.7%	0.1%	0.3%	0.0%	0.0%	9.1%	14.0%	0.6%	4.3%	0.0%
Other South Oxfordshire Centres (including Goring, Sonning Common, Watlington and Wheatley)	1.3%	0.1%	4.2%	2.7%	3.2%	0.6%	1.2%	3.3%	1.1%	0.0%	0.0%	0.6%
South Oxfordshire Out-of-Centre												
Wallingford Road Retail Park, Wallingford Road	0.0%	0.0%	0.2%	0.0%	0.3%	0.2%	0.0%	0.3%	0.3%	0.4%	0.6%	0.0%
Total South Oxfordshire	12.6%	34.8%	14.2%	5.1%	28.6%	42.9%	6.0%	15.3%	43.5%	56.3%	12.3%	5.7%
Outside South Oxfordshire In-Centre												
Abingdon	0.0%	0.0%	2.7%	0.0%	0.5%	0.0%	0.0%	0.2%	3.3%	1.9%	7.6%	30.1%
Aylesbury	7.8%	5.1%	0.2%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
High Wycombe	4.1%	10.6%	5.5%	51.2%	9.6%	6.3%	1.7%	1.6%	2.5%	0.1%	0.0%	0.9%
Oxford	7.2%	11.1%	34.8%	3.3%	2.8%	0.3%	0.0%	2.2%	9.4%	13.9%	23.5%	20.8%
Reading	0.0%	0.0%	4.7%	1.5%	37.8%	30.3%	39.4%	69.2%	32.7%	10.4%	3.3%	2.8%
Outside South Oxfordshire Out-of-Centre												
B&Q, Fairacres Shopping Park, Furniture Village and Tesco Extra, ABINGDON	0.2%	0.0%	6.4%	0.3%	0.0%	0.2%	0.0%	0.2%	2.2%	10.8%	15.2%	22.0%
Aylesbury Shopping Park, Broadfields Retail Park and Vale Retail Park, AYLESBURY	43.6%	31.2%	0.0%	10.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.3%	0.0%
B&Q, Homebase, John Lewis & Wycombe Retail Park, HIGH WYCOMBE	9.5%	2.3%	4.6%	16.9%	8.7%	7.6%	8.3%	0.0%	0.0%	0.0%	0.2%	0.3%
Botley Road and Oxford Retail Parks, Oxford Trade Centre and Templar Shopping Park, OXFORD	2.5%	1.5%	15.5%	0.3%	0.1%	0.3%	0.0%	0.0%	2.0%	0.6%	9.1%	7.3%
Forbury Retail Park, Reading Link and Reading Gate, READING	0.0%	0.0%	0.8%	0.0%	4.9%	8.4%	8.6%	4.0%	1.4%	0.0%	2.0%	0.7%
Other	12.6%	3.4%	10.3%	8.3%	6.9%	3.8%	36.0%	7.3%	3.0%	5.7%	26.4%	9.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: South Oxfordshire Telephone Survey, October 2014. No new household telephone survey has been undertaken in support of this 2017 Update.

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Table 5
Comparison Goods Allocation 2017 - Spend (£) 2015 Prices

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
Centre/store	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
South Oxfordshire In-Centre													
Didcot	0.1	0.0	3.4	0.0	0.7	0.0	0.0	1.9	23.1	68.2	8.4	6.3	112.2
Henley-on-Thames	0.0	0.1	0.0	0.6	18.8	18.7	12.5	0.1	0.1	0.0	0.0	0.0	50.7
Thame	11.7	15.9	1.5	3.2	2.8	0.0	0.3	0.0	0.0	0.0	0.0	0.0	35.4
Wallingford	0.0	0.2	2.9	0.1	0.3	0.0	0.0	7.3	11.5	0.7	4.8	0.0	27.8
Other South Oxfordshire Centres (including Goring, Sonning Common, Watlington and Wheatley)	1.4	0.0	3.2	4.6	2.9	0.3	3.2	2.7	0.9	0.0	0.0	0.7	19.9
South Oxfordshire Out-of-Centre													
Wallingford Road Retail Park, Wallingford Road	0.0	0.0	0.1	0.0	0.2	0.1	0.0	0.2	0.3	0.5	0.7	0.0	2.2
Total South Oxfordshire	13.1	16.2	11.1	8.5	25.7	19.1	16.0	12.2	35.9	69.4	14.0	7.0	248.2
Outside South Oxfordshire In-Centre													
Abingdon	0.0	0.0	2.1	0.0	0.4	0.0	0.0	0.1	2.7	2.3	8.7	36.8	53.2
Aylesbury	8.2	2.4	0.2	4.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	15.0
High Wycombe	4.3	4.9	4.3	86.1	8.7	2.8	4.6	1.2	2.1	0.1	0.0	1.1	120.2
Oxford	7.5	5.1	27.2	5.5	2.5	0.1	0.0	1.8	7.7	17.1	26.6	25.5	126.7
Reading	0.0	0.0	3.7	2.6	34.0	13.4	105.4	55.2	27.0	12.8	3.8	3.4	261.2
Outside South Oxfordshire Out-of-Centre													
B&Q, Fairacres Shopping Park, Furniture Village and Tesco Extra, ABINGDON	0.2	0.0	5.0	0.5	0.0	0.1	0.1	0.1	1.8	13.4	17.2	26.9	65.3
Aylesbury Shopping Park, Broadfields Retail Park and Vale Retail Park, AYLESBURY	45.6	14.5	0.0	18.0	0.0	0.0	0.0	0.0	0.0	0.3	0.4	0.0	78.8
B&Q, Homebase, John Lewis & Wycombe Retail Park, HIGH WYCOMBE	9.9	1.1	3.6	28.3	7.8	3.4	22.2	0.0	0.0	0.0	0.3	0.4	77.0
Botley Road and Oxford Retail Parks, Oxford Trade Centre and Templar Shopping Park, OXFORD	2.6	0.7	12.1	0.5	0.1	0.1	0.0	0.0	1.7	0.7	10.3	9.0	37.7
Forbury Retail Park, Reading Link and Reading Gate, READING	0.0	0.0	0.6	0.0	4.4	3.7	23.0	3.2	1.1	0.0	2.3	0.9	39.3
Other	13.2	1.6	8.0	13.9	6.2	1.7	96.5	5.9	2.5	7.1	30.0	11.5	198.0
Total Survey Area	104.6	46.4	78.0	168.1	89.9	44.4	267.7	79.7	82.4	123.3	113.5	122.5	1320.6

Source: Tables 3 & 4

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Table 6
Comparison Goods Allocation 2022 - Spend (£) 2015 Prices

Zone Centre/store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)
South Oxfordshire In-Centre													
Didcot	0.1	0.0	4.2	0.0	0.7	0.0	0.0	2.2	28.9	88.6	9.5	7.1	141.3
Henley-on-Thames	0.0	0.1	0.0	0.6	21.1	23.1	14.2	0.1	0.1	0.0	0.0	0.0	59.2
Thame	13.4	19.2	1.8	3.6	3.2	0.0	0.4	0.0	0.0	0.0	0.0	0.0	41.6
Wallingford	0.0	0.2	3.6	0.1	0.3	0.0	0.0	8.2	14.4	0.9	5.4	0.0	33.1
Other South Oxfordshire Centres (including Goring, Sonning Common, Watlington and Wheatley)	1.6	0.1	4.0	5.2	3.2	0.3	3.6	3.0	1.1	0.0	0.0	0.8	23.0
South Oxfordshire Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Wallingford Road Retail Park, Wallingford Road	0.0	0.0	0.2	0.0	0.3	0.1	0.0	0.3	0.3	0.6	0.8	0.0	2.6
Total South Oxfordshire	15.1	19.5	13.8	9.6	28.8	23.6	18.2	13.7	44.8	90.2	15.8	8.0	300.8
Outside South Oxfordshire In-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Abingdon	0.0	0.0	2.6	0.0	0.5	0.0	0.0	0.1	3.4	3.0	9.8	41.6	61.0
Aylesbury	9.4	2.9	0.2	4.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	17.3
High Wycombe	4.9	5.9	5.3	96.5	9.7	3.5	5.3	1.4	2.6	0.2	0.0	1.2	136.5
Oxford	8.6	6.2	33.8	6.2	2.9	0.2	0.0	2.0	9.6	22.3	30.0	28.8	150.4
Reading	0.0	0.0	4.6	2.9	38.1	16.6	119.6	61.8	33.7	16.7	4.2	3.8	302.1
Outside South Oxfordshire Out-of-Centre													
B&Q, Fairacres Shopping Park, Furniture Village and Tesco Extra, ABINGDON	0.2	0.0	6.2	0.6	0.0	0.1	0.1	0.2	2.2	17.4	19.4	30.4	76.8
Aylesbury Shopping Park, Broadfields Retail Park and Vale Retail Park, AYLESBURY	52.4	17.5	0.0	20.2	0.0	0.0	0.0	0.0	0.0	0.4	0.4	0.0	91.0
B&Q, Homebase, John Lewis & Wycombe Retail Park, HIGH WYCOMBE	11.4	1.3	4.5	31.8	8.8	4.2	25.1	0.0	0.0	0.0	0.3	0.5	87.8
Botley Road and Oxford Retail Parks, Oxford Trade Centre and Templar Shopping Park, OXFORD	2.9	0.8	15.0	0.5	0.1	0.1	0.0	0.0	2.1	0.9	11.6	10.1	44.3
Forbury Retail Park, Reading Link and Reading Gate, READING	0.0	0.0	0.8	0.0	4.9	4.6	26.1	3.6	1.4	0.0	2.6	1.0	45.0
Other	15.2	1.9	10.0	15.6	7.0	2.1	109.5	6.6	3.1	9.2	33.7	13.0	226.8
Total Survey Area	120.2	56.1	96.9	188.5	100.8	54.9	303.9	89.3	102.9	160.2	127.7	138.5	1,539.9

Source: Tables 3 & 4

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Table 7
Comparison Goods Allocation 2027 - Spend (£) 2015 Prices

Zone Centre/store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)
South Oxfordshire In-Centre													
Didcot	0.1	0.0	6.0	0.0	0.9	0.0	0.0	2.6	35.1	118.9	11.4	8.5	183.5
Henley-on-Thames	0.0	0.1	0.0	0.7	25.2	28.9	17.1	0.1	0.1	0.0	0.0	0.0	72.2
Thame	16.3	23.6	2.6	4.3	3.8	0.0	0.5	0.0	0.0	0.0	0.0	0.0	51.1
Wallingford	0.0	0.2	5.2	0.2	0.4	0.0	0.0	9.7	17.5	1.2	6.5	0.0	40.9
Other South Oxfordshire Centres (including Goring, Sonning Common, Watlington and Wheatley)	1.9	0.1	5.8	6.2	3.9	0.4	4.3	3.5	1.4	0.0	0.0	1.0	28.5
South Oxfordshire Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Wallingford Road Retail Park, Wallingford Road	0.0	0.0	0.3	0.0	0.3	0.2	0.0	0.3	0.4	0.8	1.0	0.0	3.2
Total South Oxfordshire	18.4	24.0	19.9	11.4	34.4	29.5	21.9	16.3	54.4	120.9	18.8	9.5	379.5
Outside South Oxfordshire In-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Abingdon	0.0	0.0	3.8	0.0	0.6	0.0	0.0	0.2	4.1	4.0	11.6	49.7	74.0
Aylesbury	11.5	3.5	0.3	5.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	21.0
High Wycombe	6.0	7.3	7.7	115.0	11.6	4.3	6.4	1.7	3.1	0.2	0.0	1.5	164.7
Oxford	10.5	7.6	48.8	7.4	3.4	0.2	0.0	2.4	11.7	29.9	35.8	34.4	192.1
Reading	0.0	0.0	6.6	3.5	45.6	20.8	143.9	73.5	41.0	22.4	5.1	4.6	366.9
Outside South Oxfordshire Out-of-Centre													
B&Q, Fairacres Shopping Park, Furniture Village and Tesco Extra, ABINGDON	0.3	0.0	9.0	0.7	0.0	0.1	0.1	0.2	2.7	23.3	23.1	36.3	95.9
Aylesbury Shopping Park, Broadfields Retail Park and Vale Retail Park, AYLESBURY	63.7	21.5	0.0	24.0	0.0	0.0	0.0	0.0	0.0	0.6	0.5	0.0	110.4
B&Q, Homebase, John Lewis & Wycombe Retail Park, HIGH WYCOMBE	13.8	1.6	6.5	37.8	10.5	5.2	30.3	0.0	0.0	0.0	0.4	0.6	106.7
Botley Road and Oxford Retail Parks, Oxford Trade Centre and Templar Shopping Park, OXFORD	3.6	1.0	21.8	0.6	0.1	0.2	0.0	0.0	2.5	1.2	13.8	12.1	57.0
Forbury Retail Park, Reading Link and Reading Gate, READING	0.0	0.0	1.2	0.0	5.9	5.8	31.4	4.2	1.7	0.0	3.0	1.2	54.5
Other	18.5	2.3	14.5	18.5	8.4	2.6	131.8	7.8	3.7	12.3	40.3	15.5	276.2
Total Survey Area	146.1	69.0	140.2	224.5	120.5	68.8	365.7	106.3	125.1	214.9	152.5	165.3	1898.9

Source: Tables 3 & 4

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Table 8
Comparison Goods Allocation 2033 - Spend (£) 2015 Prices

Zone Centre/store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)
South Oxfordshire In-Centre													
Didcot	0.2	0.0	10.9	0.0	1.1	0.0	0.0	3.2	42.6	159.2	14.0	10.5	241.8
Henley-on-Thames	0.0	0.1	0.0	0.9	31.2	35.7	21.3	0.1	0.1	0.0	0.0	0.0	89.4
Thame	20.5	28.8	4.8	5.3	4.7	0.0	0.6	0.0	0.0	0.0	0.0	0.0	64.7
Wallingford	0.0	0.3	9.4	0.2	0.5	0.0	0.0	11.9	21.2	1.6	8.1	0.0	53.1
Other South Oxfordshire Centres (including Goring, Sonning Common, Watlington and Wheatley)	2.4	0.1	10.5	7.6	4.8	0.5	5.4	4.3	1.7	0.0	0.0	1.2	38.6
South Oxfordshire Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Wallingford Road Retail Park, Wallingford Road	0.0	0.0	0.5	0.0	0.4	0.2	0.0	0.4	0.5	1.1	1.2	0.0	4.2
Total South Oxfordshire	23.1	29.3	36.1	14.1	42.6	36.4	27.3	20.0	66.0	162.0	23.3	11.8	491.9
Outside South Oxfordshire In-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Abingdon	0.0	0.0	6.8	0.0	0.7	0.0	0.0	0.2	5.0	5.4	14.4	61.5	94.1
Aylesbury	14.4	4.3	0.6	7.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	26.3
High Wycombe	7.5	8.9	14.0	142.1	14.4	5.3	7.9	2.0	3.8	0.3	0.0	1.8	208.1
Oxford	13.2	9.3	88.4	9.1	4.2	0.2	0.0	2.9	14.2	40.0	44.3	42.6	268.4
Reading	0.0	0.0	12.0	4.3	56.5	25.6	179.6	90.1	49.6	30.0	6.3	5.7	459.7
Outside South Oxfordshire Out-of-Centre													
B&Q, Fairacres Shopping Park, Furniture Village and Tesco Extra, ABINGDON	0.4	0.0	16.4	0.8	0.0	0.1	0.1	0.2	3.3	31.2	28.6	45.0	126.2
Aylesbury Shopping Park, Broadfields Retail Park and Vale Retail Park, AYLESBURY	80.2	26.3	0.1	29.7	0.1	0.0	0.0	0.0	0.0	0.8	0.6	0.0	137.6
B&Q, Homebase, John Lewis & Wycombe Retail Park, HIGH WYCOMBE	17.4	2.0	11.7	46.8	13.0	6.5	37.8	0.0	0.0	0.0	0.5	0.7	136.2
Botley Road and Oxford Retail Parks, Oxford Trade Centre and Templar Shopping Park, OXFORD	4.5	1.3	39.4	0.8	0.1	0.2	0.0	0.0	3.1	1.6	17.1	15.0	83.2
Forbury Retail Park, Reading Link and Reading Gate, READING	0.0	0.0	2.1	0.0	7.3	7.1	39.2	5.2	2.1	0.0	3.8	1.5	68.3
Other	23.2	2.9	26.2	22.9	10.4	3.2	164.5	9.6	4.5	16.5	49.8	19.2	352.9
Total Survey Area	183.9	84.3	253.6	277.5	149.3	84.7	456.4	130.3	151.6	287.8	188.7	204.8	2452.9

Source: Tables 3 & 4

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Table 9: Existing Comparison Goods Floorspace (In-Centre)

Centre	Net Floorspace (sqm)
Didcot	10,085
Henley-on-Thames	4,231
Thame	2,825
Wallingford	2,134
Total In-Centre Floorspace	19,275

Note: Includes comparison floorspace in major foodstores.

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Table 10: Comparison Goods Commitments

	Net Comparison Floorspace (sqm)	Benchmark Sales Density (£/sqm net)	Average Turnover 2017 (£m)	Average Turnover 2022 (£m)	Average Turnover 2027 (£m)	Average Turnover 2033 (£m)
Foodstore, Lupton Road, Wallingford (Out-of-Centre)	601	9,000	5.4	5.8	6.2	6.8
Aldi, Land at the Broadway, Didcot (Out-of-Centre)*	171	7,007	1.2	1.3	1.4	1.5
Orchard Centre Phase II, Didcot (In-centre)	6,427	6,000	38.6	41.3	44.3	48.2
Former Waitrose, Wallingford (Out-of-centre)	142	2,000	0.3	0.3	0.3	0.4
Total	7,341	-	45.5	48.7	52.2	56.8

Morrisons Floorspace: Planning App Ref: P12/S2563/FUL

*Aldi Floorspace: Planning App Ref: P13/S3489/FUL (*this store is now trading but was not trading at the time of the household telephone survey in October 2014)*

Sales efficiency of 1.4% per annum applied to 2033 (source: Experian Retail Planner 14)

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Table 11: Comparison goods floorspace capacity for South Oxfordshire District, 2017-33

	2017	2022	2027*	2033*
Total Available Expenditure (£m)	1,320.6	1,539.9	1,898.9	2,452.9
Market Share from Survey Area (%)	19	19	19	19
Survey Area Residents Spending (£m)	248.2	300.8	379.5	491.9
Inflow of Expenditure (%)	33	33	33	33
Inflow of Expenditure (£m)	81.9	99.3	125.2	162.3
Total spending (£m)	330.1	400.1	504.7	654.2
Existing Retail Floorspace (sq.m net)	19,275	19,275	19,275	19,275
Sales per sq.m net (£)	17,124	18,357	19,678	21,390
Sales from Existing Floorspace (£m)	330.1	353.8	379.3	412.3
Sales from Commitments (£m)	0.0	48.7	52.2	56.8
Residual Spending to support new floorspace (£m)	0.0	-2.4	73.2	185.1
Sales per sq m net in new shops (£)	6,000	6,432	6,895	7,495
Capacity for new floorspace (sq.m net)	0	-380	10,618	24,700

Assumes 1.4% pa growth in sales efficiency 2012-2027

*indicative forecasts which should be subject to further review during Local Plan period