

South Oxfordshire District Council

Retail and Leisure Needs Assessment 2015

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
2014	22,939	13,112	21,278	42,969	20,456	11,786	71,050	19,156	21,747	34,001	31,019	37,900	347,413
2019	24,248	13,457	21,810	43,962	20,952	12,097	75,460	19,917	22,316	34,944	32,151	39,231	360,545
2021	25,440	13,794	22,331	44,927	21,422	12,397	79,272	20,625	22,863	35,842	33,185	40,431	372,529
2029	26,210	14,001	22,635	45,559	21,713	12,556	81,787	21,001	23,168	36,384	33,714	41,053	379,781
2031	26,470	14,065	22,728	45,784	21,810	12,611	82,623	21,122	23,265	36,539	33,876	41,241	382,134

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

South Oxfordshire District Council Retail and Leisure Needs Assessment 2015 Convenience Capacity Modelling

Table 2

Survey Area Retail Expenditure Forecasts Per Capita (2012 prices) - Convenience Goods

2012 - 2014 -0.9% pa 2014 - 2019 0.6% pa 2019 - 2024 0.6% pa 2024 - 2029 0.6% pa 2029 - 2031 0.6% pa												
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12
2012	2,337	2,101	2,228	2,252	2,366	2,079	2,234	2,344	2,023	1,965	2,079	2,015
2014	2,295	2,063	2,188	2,212	2,324	2,042	2,194	2,302	1,987	1,930	2,042	1,979
2014 Minus SFT at 2.6%	2,235	2,010	2,131	2,154	2,263	1,989	2,137	2,242	1,935	1,880	1,989	1,927
2019	2,365	2,126	2,254	2,279	2,394	2,104	2,261	2,372	2,047	1,988	2,104	2,039
2019 Minus SFT at 3.8%	2,275	2,045	2,169	2,192	2,303	2,024	2,175	2,282	1,969	1,913	2,024	1,961
2024	2,437	2,191	2,323	2,348	2,467	2,168	2,329	2,444	2,109	2,049	2,168	2,101
2024 Minus SFT at 4.8%	2,320	2,085	2,211	2,235	2,348	2,064	2,217	2,327	2,008	1,950	2,064	2,000
2029	2,511	2,257	2,393	2,419	2,542	2,233	2,400	2,518	2,173	2,111	2,233	2,165
2029 Minus SFT at 5.3%	2,377	2,137	2,267	2,291	2,407	2,115	2,273	2,385	2,058	1,999	2,115	2,050
2031	2,541	2,284	2,422	2,448	2,572	2,260	2,429	2,548	2,199	2,136	2,260	2,191
2031 Minus SFT at 5.6%	2,398	2,156	2,287	2,311	2,428	2,134	2,293	2,406	2,076	2,017	2,134	2,068

Source: Experian E-Marketer, October 2014. Growth rates and allowance for SFT are derived from Experian Retail Planner 12.1

Table 3

Survey Area Retail Expenditure Forecasts (2012 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
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
2014	51,278	26,351	45,347	92,560	46,295	23,438	151,826	42,950	42,082	63,908	61,685	73,049	720,768
2019	55,162	27,522	47,302	96,372	48,255	24,481	164,099	45,445	43,946	66,841	65,066	76,950	761,441
2024	59,011	28,766	49,383	100,423	50,307	25,582	175,776	47,985	45,908	69,906	68,478	80,862	802,387
2029	62,314	29,926	51,305	104,376	52,263	26,556	185,878	50,079	47,681	72,733	71,306	84,155	838,572
2031	63,488	30,328	51,970	105,818	52,960	26,908	189,436	50,812	48,303	73,688	72,281	85,287	851,280

Source: Tables 1 & 2

South Oxfordshire District Council

Retail and Leisure Needs Assessment 2015

Convenience Capacity Modelling

2014 Baseline

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

South Oxfordshire District Council

Retail and Leisure Needs Assessment 2015

2014 Baseline

Table 5
Convenience Goods Allocation 2014 - Spend (£) 2012 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	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
DIDCOT													
Sainsbury's Superstore, Central Drive	0	0	482	0	0	0	0	1,252	7,257	18,958	2,642	1,560	32,150
Other Didcot Town Centre	0	0	0	0	0	0	0	444	0	1,923	150	0	2,517
Total Didcot In Centre	0	0	482	0	0	0	0	1,696	7,257	20,881	2,792	1,560	34,667
Tesco, Wallingford Road, North Moreton (OOC)	0	0	1,593	0	0	0	0	512	1,741	31,435	3,296	0	38,578
Tesco Express, Cockroft Road (OOC)	0	0	0	0	0	0	0	1,481	0	4,196	499	0	6,175
Total Didcot Out of Centre	0	0	1,593	0	0	0	0	1,993	1,741	35,630	3,795	0	44,753
Total Didcot	0	0	2,075	0	0	0	0	3,689	8,997	56,512	6,587	1,560	79,420
HENLEY-ON-THAMES													
Waitrose, Bell Street	0	0	0	545	13,263	9,980	3,957	216	0	0	0	0	27,961
Sainsburys Local, Bell Street	0	0	0	0	0	1,136	0	0	0	0	0	0	1,136
Other Henley Town Centre	0	0	0	0	442	0	0	0	0	0	0	0	442
Total Henley-on-Thames In Centre	0	0	0	545	13,705	11,116	3,957	216	0	0	0	0	29,539
Tesco Superstore, Reading Road (OOC)	0	0	0	0	6,409	10,690	4,945	0	0	324	0	0	22,368
Total Henley-on-Thames Out of Centre	0	0	0	0	6,409	10,690	4,945	0	0	324	0	0	22,368
Total Henley-on-Thames	0	0	0	545	20,114	21,806	8,902	216	0	324	0	0	51,907
THAME													
Waitrose, Greyhound Lane	11,311	12,185	1,309	2,196	1,313	0	0	0	0	0	0	0	28,314
Co-op, High Street	440	4,371	131	322	0	0	0	0	0	0	0	0	5,264
Sainsburys, High Street	2,118	3,437	310	0	0	0	0	0	0	0	0	0	5,865
Other Thame Town Centre	1,716	348	0	322	360	0	0	0	0	0	0	0	2,746
Total Thame	15,584	20,340	1,751	2,841	1,673	0	0	0	0	0	0	0	42,188
WALLINGFORD													
Waitrose, St Martin's Street	0	0	3,296	1,827	634	0	0	12,338	19,820	245	0	466	38,626
Other Wallingford Town Centre	0	0	1,336	0	0	0	0	0	347	0	0	0	1,684
Total Wallingford	0	0	4,632	1,827	634	0	0	12,338	20,168	245	0	466	40,310
SOUTH OXON OUT OF CENTRE STORES													
Asda Superstore, London Road, Wheatley	10,093	2,760	17,092	2,589	0	0	0	0	750	0	0	680	33,964
Total S Oxon Out of Centre Stores	10,093	2,760	17,092	2,589	0	0	0	0	750	0	0	680	33,964
OUTSIDE SOUTH OXFORDSHIRE DISTRICT													
Tesco Extra, Marcham Road, Abingdon	0	0	1,401	477	0	0	0	0	231	693	19,334	19,081	41,217
Waitrose, London Road, Twyford	0	0	0	0	0	0	29,443	272	0	0	0	0	29,715
Asda Superstore, Holmers Farm Way, High Wycombe	0	0	0	22,401	3,298	0	507	0	0	0	0	0	26,207
Tesco Superstore, Longwick Road, Princes Risborough	440	511	0	18,806	0	0	0	0	0	0	0	0	19,756
Waitrose, Abbey Close, Abingdon	0	0	419	0	0	0	0	0	0	640	2,353	17,393	20,805
Total Outside South Oxfordshire District	440	511	1,820	41,684	3,298	0	29,950	272	231	1,333	21,687	36,474	137,700
Other	25,161	2,740	17,976	43,074	20,576	1,632	112,974	26,434	11,936	5,494	33,411	33,870	335,277
Total	51,278	26,351	45,347	92,560	46,295	23,438	151,826	42,950	42,082	63,908	61,685	73,049	720,768

South Oxfordshire District Council

Retail and Leisure Needs Assessment 2015

Convenience Capacity Modelling

2019 Baseline

Table 6
Convenience Goods Allocation 2014 - Spend (£) 2012 Prices

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	Zone 10 (£000)	Zone 11 (£000)	Zone 12 (£000)	Total (£000)
DIDCOT													
Sainsbury's Superstore, Central Drive	0	0	502	0	0	0	0	1,324	7,578	19,828	2,787	1,644	33,663
Other Didcot Town Centre	0	0	0	0	0	0	0	470	0	2,011	158	0	2,639
Total Didcot In Centre	0	0	502	0	0	0	0	1,794	7,578	21,839	2,945	1,644	36,302
Tesco, Wallingford Road, North Moreton (OOC)	0	0	1,662	0	0	0	0	542	1,818	32,878	3,477	0	40,377
Tesco Express, Cockroft Road (OOC)	0	0	0	0	0	0	0	1,567	0	4,388	526	0	6,481
Total Didcot Out of Centre	0	0	1,662	0	0	0	0	2,109	1,818	37,266	4,004	0	46,858
Total Didcot	0	0	2,164	0	0	0	0	3,904	9,396	59,105	6,948	1,644	83,160
HENLEY-ON-THAMES													
Waitrose, Bell Street	0	0	0	567	13,824	10,424	4,277	229	0	0	0	0	29,322
Sainsburys Local, Bell Street	0	0	0	0	0	1,186	0	0	0	0	0	0	1,186
Other Henley Town Centre	0	0	0	0	461	0	0	0	0	0	0	0	461
Total Henley-on-Thames In Centre	0	0	0	567	14,285	11,611	4,277	229	0	0	0	0	30,969
Tesco Superstore, Reading Road (OOC)	0	0	0	0	6,680	11,166	5,345	0	0	339	0	0	23,530
Total Henley-on-Thames Out of Centre	0	0	0	0	6,680	11,166	5,345	0	0	339	0	0	23,530
Total Henley-on-Thames	0	0	0	567	20,966	22,777	9,622	229	0	339	0	0	54,499
THAME													
Waitrose, Greyhound Lane	12,168	12,727	1,366	2,286	1,369	0	0	0	0	0	0	0	29,915
Co-op, High Street	473	4,565	137	336	0	0	0	0	0	0	0	0	5,510
Sainsburys, High Street	2,278	3,589	324	0	0	0	0	0	0	0	0	0	6,191
Other Thame Town Centre	1,846	363	0	336	375	0	0	0	0	0	0	0	2,919
Total Thame	16,764	21,244	1,826	2,958	1,744	0	0	0	0	0	0	0	44,536
WALLINGFORD													
Waitrose, St Martin's Street	0	0	3,438	1,902	661	0	0	13,055	20,698	256	0	491	40,501
Other Wallingford Town Centre	0	0	1,394	0	0	0	0	0	363	0	0	0	1,757
Total Wallingford	0	0	4,832	1,902	661	0	0	13,055	21,061	256	0	491	42,258
SOUTH OXFORDSHIRE OUT OF CENTRE STORES													
Asda Superstore, London Road, Wheatley	10858	2883	17829	2696	0	0	0	0	783	0	0	716	35,764
Total S Oxon Out of Centre Stores	10858	2883	17829	2696	0	0	0	0	783	0	0	716	35,764
OUTSIDE SOUTH OXFORDSHIRE DISTRICT													
Tesco Extra, Marcham Road, Abingdon	0	0	1,462	497	0	0	0	0	241	725	20,394	20,100	43,418
Waitrose, London Road, Twyford	0	0	0	0	0	0	31,823	288	0	0	0	0	32,111
Asda Superstore, Holmers Farm Way, High Wycombe	0	0	0	23,324	3,438	0	548	0	0	0	0	0	27,310
Tesco Superstore, Longwick Road, Princes Risborough	473	533	0	19,581	0	0	0	0	0	0	0	0	20,587
Waitrose, Abbey Close, Abingdon	0	0	437	0	0	0	0	0	0	670	2,482	18,322	21,911
Total Outside South Oxfordshire District	473	533	1,899	43,401	3,438	0	32,371	288	241	1,395	22,876	38,422	145,336
Other	27,067	2,861	18,751	44,848	21,447	1,705	122,106	27,970	12,465	5,746	35,242	35,678	355,886
Total	55,162	27,522	47,302	96,372	48,255	24,481	164,099	45,445	43,946	66,841	65,066	76,950	761,441

South Oxfordshire District Council Retail and Leisure Needs Assessment 2015 Convenience Capacity Modelling

2024 Baseline

Table 7
Convenience Goods Allocation 2014 - Spend (£) 2012 Prices

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	Zone 10 (£000)	Zone 11 (£000)	Zone 12 (£000)	Total (£000)
DIDCOT													
Sainsbury's Superstore, Central Drive	0	0	524	0	0	0	0	1,398	7,916	20,737	2,933	1,727	35,236
Other Didcot Town Centre	0	0	0	0	0	0	0	496	0	2,103	166	0	2,766
Total Didcot In Centre	0	0	524	0	0	0	0	1,895	7,916	22,841	3,099	1,727	38,002
Tesco, Wallingford Road, North Moreton (OOC)	0	0	1,735	0	0	0	0	572	1,899	34,385	3,659	0	42,251
Tesco Express, Cockcroft Road (OOC)	0	0	0	0	0	0	0	1,655	0	4,589	554	0	6,798
Total Didcot Out of Centre	0	0	1,735	0	0	0	0	2,227	1,899	38,974	4,213	0	49,049
Total Didcot	0	0	2,260	0	0	0	0	4,122	9,815	61,815	7,312	1,727	87,051
HENLEY-ON-THAMES													
Waitrose, Bell Street	0	0	0	591	14,412	10,893	4,581	242	0	0	0	0	30,719
Sainsburys Local, Bell Street	0	0	0	0	0	1,240	0	0	0	0	0	0	1,240
Other Henley Town Centre	0	0	0	0	481	0	0	0	0	0	0	0	481
Total Henley-on-Thames In Centre	0	0	0	591	14,893	12,132	4,581	242	0	0	0	0	32,439
Tesco Superstore, Reading Road (OOC)	0	0	0	0	6,965	11,668	5,725	0	0	354	0	0	24,712
Total Henley-on-Thames Out of Centre	0	0	0	0	6,965	11,668	5,725	0	0	354	0	0	24,712
Total Henley-on-Thames	0	0	0	591	21,857	23,800	10,306	242	0	354	0	0	57,151
THAME													
Waitrose, Greyhound Lane	13,017	13,302	1,426	2,382	1,427	0	0	0	0	0	0	0	31,554
Co-op, High Street	506	4,771	143	350	0	0	0	0	0	0	0	0	5,770
Sainsburys, High Street	2,437	3,752	338	0	0	0	0	0	0	0	0	0	6,527
Other Thame Town Centre	1,974	380	0	350	391	0	0	0	0	0	0	0	3,095
Total Thame	17,934	22,204	1,907	3,082	1,818	0	0	0	0	0	0	0	46,945
WALLINGFORD													
Waitrose, St Martin's Street	0	0	3,589	1,982	689	0	0	13,784	21,622	268	0	516	42,451
Other Wallingford Town Centre	0	0	1,455	0	0	0	0	0	379	0	0	0	1,834
Total Wallingford	0	0	5,045	1,982	689	0	0	13,784	22,001	268	0	516	44,285
SOUTH OXON OUT OF CENTRE STORES													
Asda Superstore, London Road, Wheatley	11616	3013	18614	2809	0	0	0	0	818	0	0	752	37,622
Total S Oxon Out of Centre Stores	11616	3013	18614	2809	0	0	0	0	818	0	0	752	37,622
OUTSIDE SOUTH OXFORDSHIRE DISTRICT													
Tesco Extra, Marcham Road, Abingdon	0	0	1,526	517	0	0	0	0	252	758	21,463	21,121	45,639
Waitrose, London Road, Twyford	0	0	0	0	0	0	34,088	304	0	0	0	0	34,391
Asda Superstore, Holmers Farm Way, High Wycombe	0	0	0	24,304	3,584	0	587	0	0	0	0	0	28,476
Tesco Superstore, Longwick Road, Princes Risborough	506	557	0	20,404	0	0	0	0	0	0	0	0	21,467
Waitrose, Abbey Close, Abingdon	0	0	456	0	0	0	0	0	0	700	2,612	19,254	23,022
Total Outside South Oxfordshire District	506	557	1,982	45,225	3,584	0	34,674	304	252	1,459	24,075	40,375	152,995
Other	28,955	2,991	19,576	46,733	22,359	1,781	130,795	29,534	13,021	6,009	37,091	37,492	376,338
Total	59,011	28,766	49,383	100,423	50,307	25,582	175,776	47,985	45,908	69,906	68,478	80,862	802,387

South Oxfordshire District Council

Retail and Leisure Needs Assessment 2015

Convenience Capacity Modelling

2029 Baseline

Table 8
Convenience Goods Allocation 2014 - Spend (£) 2012 Prices

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	Zone 10 (£000)	Zone 11 (£000)	Zone 12 (£000)	Total (£000)
DIDCOT													
Sainsbury's Superstore, Central Drive	0	0	545	0	0	0	0	1,459	8,222	21,576	3,054	1,797	36,654
Other Didcot Town Centre	0	0	0	0	0	0	0	518	0	2,189	173	0	2,880
Total Didcot In Centre	0	0	545	0	0	0	0	1,977	8,222	23,765	3,227	1,797	39,534
Tesco, Wallingford Road, North Moreton (OOC)	0	0	1,803	0	0	0	0	597	1,972	35,776	3,811	0	43,959
Tesco Express, Cockcroft Road (OOC)	0	0	0	0	0	0	0	1,727	0	4,775	577	0	7,079
Total Didcot Out of Centre	0	0	1,803	0	0	0	0	2,324	1,972	40,551	4,387	0	51,038
Total Didcot	0	0	2,348	0	0	0	0	4,302	10,194	64,316	7,614	1,797	90,571
HENLEY-ON-THAMES													
Waitrose, Bell Street	0	0	0	614	14,973	11,308	4,844	252	0	0	0	0	31,991
Sainsburys Local, Bell Street	0	0	0	0	0	1,287	0	0	0	0	0	0	1,287
Other Henley Town Centre	0	0	0	0	499	0	0	0	0	0	0	0	499
Total Henley-on-Thames In Centre	0	0	0	614	15,472	12,595	4,844	252	0	0	0	0	33,778
Tesco Superstore, Reading Road (OOC)	0	0	0	0	7,235	12,112	6,054	0	0	369	0	0	25,771
Total Henley-on-Thames Out of Centre	0	0	0	0	7,235	12,112	6,054	0	0	369	0	0	25,771
Total Henley-on-Thames	0	0	0	614	22,707	24,707	10,899	252	0	369	0	0	59,548
THAME													
Waitrose, Greyhound Lane	13,745	13,838	1,481	2,476	1,482	0	0	0	0	0	0	0	33,023
Co-op, High Street	534	4,963	149	364	0	0	0	0	0	0	0	0	6,010
Sainsburys, High Street	2,573	3,903	351	0	0	0	0	0	0	0	0	0	6,827
Other Thame Town Centre	2,085	395	0	364	406	0	0	0	0	0	0	0	3,250
Total Thame	18,938	23,100	1,981	3,203	1,888	0	0	0	0	0	0	0	49,110
WALLINGFORD													
Waitrose, St Martin's Street	0	0	3,729	2,060	716	0	0	14,386	22,457	279	0	537	44,164
Other Wallingford Town Centre	0	0	1,512	0	0	0	0	0	394	0	0	0	1,905
Total Wallingford	0	0	5,241	2,060	716	0	0	14,386	22,851	279	0	537	46,070
SOUTH OXON OUT OF CENTRE STORES													
Asda Superstore, London Road, Wheatley	12266	3135	19338	2920	0	0	0	0	849	0	0	783	39,290
Total S Oxon Out of Centre Stores	12266	3135	19338	2920	0	0	0	0	849	0	0	783	39,290
OUTSIDE SOUTH OXFORDSHIRE DISTRICT													
Tesco Extra, Marcham Road, Abingdon	0	0	1,586	538	0	0	0	0	262	789	22,350	21,981	47,505
Waitrose, London Road, Twyford	0	0	0	0	0	0	36,047	317	0	0	0	0	36,363
Asda Superstore, Holmers Farm Way, High Wycombe	0	0	0	25,261	3,724	0	621	0	0	0	0	0	29,605
Tesco Superstore, Longwick Road, Princes Risborough	534	580	0	21,207	0	0	0	0	0	0	0	0	22,321
Waitrose, Abbey Close, Abingdon	0	0	474	0	0	0	0	0	0	729	2,720	20,038	23,960
Total Outside South Oxfordshire District	534	580	2,060	47,006	3,724	0	36,667	317	262	1,518	25,069	42,019	159,755
Other	30,576	3,111	20,338	48,573	23,228	1,849	138,312	30,822	13,524	6,252	38,622	39,019	394,227
Total	62,314	29,926	51,305	104,376	52,263	26,556	185,878	50,079	47,681	72,733	71,306	84,155	838,572

South Oxfordshire District Council

Retail and Leisure Needs Assessment 2015

Convenience Capacity Modelling

2031 Baseline

Table 9
Convenience Goods Allocation 2014 - Spend (£) 2012 Prices

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	Zone 10 (£000)	Zone 11 (£000)	Zone 12 (£000)	Total (£000)
DIDCOT													
Sainsbury's Superstore, Central Drive	0	0	552	0	0	0	0	1,481	8,330	21,859	3,096	1,822	37,139
Other Didcot Town Centre	0	0	0	0	0	0	0	526	0	2,217	175	0	2,918
Total Didcot In Centre	0	0	552	0	0	0	0	2,006	8,330	24,077	3,271	1,822	40,057
Tesco, Wallingford Road, North Moreton (OOC)	0	0	1,826	0	0	0	0	606	1,998	36,246	3,863	0	44,539
Tesco Express, Cockroft Road (OOC)	0	0	0	0	0	0	0	1,752	0	4,838	585	0	7,174
Total Didcot Out of Centre	0	0	1,826	0	0	0	0	2,358	1,998	41,083	4,447	0	51,713
Total Didcot	0	0	2,378	0	0	0	0	4,365	10,327	65,160	7,719	1,822	91,770
HENLEY-ON-THAMES													
Waitrose, Bell Street	0	0	0	623	15,172	11,457	4,937	256	0	0	0	0	32,446
Sainsburys Local, Bell Street	0	0	0	0	0	1,304	0	0	0	0	0	0	1,304
Other Henley Town Centre	0	0	0	0	506	0	0	0	0	0	0	0	506
Total Henley-on-Thames In Centre	0	0	0	623	15,678	12,761	4,937	256	0	0	0	0	34,256
Tesco Superstore, Reading Road (OOC)	0	0	0	0	7,332	12,273	6,170	0	0	373	0	0	26,148
Total Henley-on-Thames Out of Centre	0	0	0	0	7,332	12,273	6,170	0	0	373	0	0	26,148
Total Henley-on-Thames	0	0	0	623	23,010	25,034	11,107	256	0	373	0	0	60,404
THAME													
Waitrose, Greyhound Lane	14,004	14,024	1,500	2,510	1,502	0	0	0	0	0	0	0	33,542
Co-op, High Street	544	5,030	150	369	0	0	0	0	0	0	0	0	6,094
Sainsburys, High Street	2,622	3,955	356	0	0	0	0	0	0	0	0	0	6,933
Other Thame Town Centre	2,124	401	0	369	411	0	0	0	0	0	0	0	3,305
Total Thame	19,295	23,410	2,007	3,247	1,913	0	0	0	0	0	0	0	49,873
WALLINGFORD													
Waitrose, St Martin's Street	0	0	3,777	2,089	725	0	0	14,597	22,751	283	0	544	44,765
Other Wallingford Town Centre	0	0	1,532	0	0	0	0	0	399	0	0	0	1,930
Total Wallingford	0	0	5,309	2,089	725	0	0	14,597	23,149	283	0	544	46,695
SOUTH OXON OUT OF CENTRE STORES													
Asda Superstore, London Road, Wheatley	12497	3177	19589	2960	0	0	0	0	861	0	0	793	39,876
Total S Oxon Out of Centre Stores	12497	3177	19589	2960	0	0	0	0	861	0	0	793	39,876
OUTSIDE SOUTH OXFORDSHIRE DISTRICT													
Tesco Extra, Marcham Road, Abingdon	0	0	1,606	545	0	0	0	0	265	799	22,655	22,277	48,148
Waitrose, London Road, Twyford	0	0	0	0	0	0	36,737	322	0	0	0	0	37,058
Asda Superstore, Holmers Farm Way, High Wycombe	0	0	0	25,610	3,773	0	633	0	0	0	0	0	30,016
Tesco Superstore, Longwick Road, Princes Risborough	544	588	0	21,500	0	0	0	0	0	0	0	0	22,632
Waitrose, Abbey Close, Abingdon	0	0	480	0	0	0	0	0	0	738	2,757	20,307	24,283
Total Outside South Oxfordshire District	544	588	2,086	47,655	3,773	0	37,369	322	265	1,538	25,412	42,584	162,137
Other	31,152	3,153	20,602	49,244	23,538	1,874	140,959	31,274	13,701	6,334	39,150	39,544	400,525
Total	63,488	30,328	51,970	105,818	52,960	26,908	189,436	50,812	48,303	73,688	72,281	85,287	851,280

South Oxfordshire District Council

Retail and Leisure Needs Assessment 2015

Convenience Capacity Modelling

Table 10
Existing 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 2014 (£000s)	Actual Turnover 2014 (£000s)
DIDCOT						
Sainsbury's Superstore, Central Drive	4,043	72%	2,919	12,181	35,557	32,150
Other Didcot Town Centre	978	100%	978	2,500	2,445	2,517
Tesco, Wallingford Road, North Moreton (OOC)	1,987	76%	1,504	11,619	17,477	38,578
Tesco Express, Cockroft Road (OOC)	136	100%	136	11,619	1,580	6,175
Total Didcot	7,144	-	5,537	10,305	57,059	79,420
HENLEY-ON-THAMES						
Waitrose, Bell Street	1,640	82%	1,348	12,561	16,933	27,961
Sainsbury's Local, Bell Street	245	90%	221	12,181	2,686	1,136
Other Henley-on-Thames Town Centre	998	100%	998	2,500	2,495	442
Tesco Superstore, Reading Road (OOC)	1,995	76%	1,510	11,619	17,547	22,368
Total Henley-on-Thames	4,878	-	4,077	9,729	39,661	51,907
THAME						
Waitrose, Greyhound Lane	2,078	82%	1,708	12,561	21,456	28,314
Co-op, High Street	1,168	87%	1,020	7,823	7,977	5,264
Sainsbury's, High Street	632	90%	569	12,181	6,929	5,865
Other Thame Town Centre	1,750	100%	1,750	2,500	4,375	2,746
Total Thame	5,628	-	5,047	8,072	40,736	42,188
WALLINGFORD						
Waitrose, St Martin's Street	2,393	82%	1,967	12,561	24,708	38,626
Other Wallingford Town Centre	500	100%	500	2,500	1,250	1,684
Total Wallingford	2,393	-	1,967	12,561	24,708	40,310
SOUTH OXFORDSHIRE OUT-OF-CENTRE STORES						
Asda Superstore, London Road, Wheatley	2,673	67%	1,791	13,350	23,909	33,964
Total South Oxfordshire Out-of-Centre Stores	2,673	-	1,791	13,350	23,909	33,964
Total Within South Oxfordshire District	22,716		18,419	10,102	186,073	247,790
OUTSIDE SOUTH OXFORDSHIRE DISTRICT						
Tesco Extra, Marcham Road, Abingdon	5,066	76%	3,835	11,619	44,558	41,217
Waitrose, London Road, Twyford	2,824	82%	2,321	12,561	29,158	29,715
Asda Superstore, Holmers Farm Way, High Wycombe	5,459	67%	3,658	13,350	48,828	26,207
Tesco Superstore, Longwick Road, Princes Risborough	1,015	76%	768	11,619	8,928	19,756
Waitrose, Abbey Close, Abingdon	2,466	82%	2,027	12,561	25,462	20,805
Total Outside South Oxfordshire District	16,830	-	12,609	12,446	156,934	137,700
TOTAL	39,546	-	31,028	11,055	343,007	385,491

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

South Oxfordshire District Council
Retail and Leisure Needs Assessment 2015
Convenience Capacity Modelling

Table 11

Convenience Goods Commitments

	Net Convenience Floorspace (Sq m)	Company Average Sales (£/sqm net)	Average Turnover 2012 (£000)
Foodstore, Lupton Road, Wallingford (Out-of-Centre)	2,208	12,000	26,496
M&S Food, Orchard Centre Phase II, Didcot (In-Centre)	1,018	11,119	11,319
Aldi, Land at the Broadway, Didcot (Out-of-Centre)	969	9,704	9,403
	4,195	-	47,218

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

Aldi Floorspace: Planning App Ref: P13/S3489/FUL

South Oxfordshire District Council
Retail and Leisure Needs Assessment 2015
Convenience Capacity Modelling

Capacity Projections: Convenience Goods

Table 12: District-Wide 'Need'

	CONVENIENCE GOODS				
	2014	2019	2024	2029	2031
Residents Spending in South Oxfordshire District (£000)	247,790	260,218	273,055	284,589	288,619
Existing Shop Floorspace (within South Oxfordshire District Only) (sq m net)	18,419	18,419	18,419	18,419	18,419
Sales per sqm net £	13,453	10,102	10,306	10,410	10,451
Sales from Existing Floorspace (£000)	247,790	186,073	189,824	191,730	192,498
Sales from Committed Floorspace (£000)	0	48,170	49,141	49,635	49,834
Residual Spending to Support new shops (£000)	0	25,975	34,089	43,224	46,287
Sales per sqm net in new shops (£) Based on large store format	12,000	12,242	12,365	12,489	12,539
Capacity for new floorspace (sqm net)	0	2,122	2,757	3,461	3,691

Assumes growth in sales efficiency of 0.4% pa 2012-19 and 0.2% pa post-2019 as per Experian Retail Planner 9.

South Oxfordshire District Council

Retail and Leisure Needs Assessment 2015

Comparison Capacity Modelling

Table 1

Survey Area 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
2014	22,939	13,112	21,278	42,969	20,456	11,786	71,050	19,156	21,747	34,001	31,019	37,900	347,413
2019	24,248	13,457	21,810	43,962	20,952	12,097	75,460	19,917	22,316	34,944	32,151	39,231	360,545
2024	25,440	13,794	22,331	44,927	21,422	12,397	79,272	20,625	22,863	35,842	33,185	40,431	372,529
2029	26,210	14,001	22,635	45,559	21,713	12,556	81,787	21,001	23,168	36,384	33,714	41,053	379,781
2031	26,470	14,065	22,728	45,784	21,810	12,611	82,623	21,122	23,265	36,539	33,876	41,241	382,134

Source: Experian Micromarketer, October 2014

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

South Oxfordshire District Council Retail and Leisure Needs Assessment 2015 Convenience Capacity Modelling

Table 2

Survey Area Retail Expenditure Forecasts Per Capita (2012 prices) - Comparison Goods

Growth in convenience goods per capita retail expenditure:												
2012 - 2014	5.2% pa											
2014 - 2019	3.3% pa											
2019 - 2024	3.3% pa											
2024 - 2029	3.3% pa											
2029 - 2031	3.3% pa											
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12
2012	3,988	3,415	3,669	3,759	4,080	3,386	3,747	4,011	3,324	3,100	3,407	3,192
2014	4,405	3,772	4,053	4,152	4,507	3,740	4,139	4,430	3,672	3,424	3,763	3,526
2014 Minus SFT at 11.7%	3,890	3,331	3,579	3,666	3,979	3,303	3,655	3,912	3,242	3,024	3,323	3,113
2019	5,181	4,437	4,767	4,884	5,301	4,399	4,868	5,211	4,319	4,028	4,427	4,147
2019 Minus SFT at 15.3%	4,389	3,758	4,038	4,137	4,490	3,726	4,123	4,414	3,658	3,411	3,749	3,513
2024	6,095	5,219	5,607	5,745	6,235	5,175	5,726	6,130	5,080	4,738	5,207	4,878
2024 Minus SFT at 16.0%	5,120	4,384	4,710	4,826	5,238	4,347	4,810	5,149	4,267	3,980	4,374	4,098
2029	7,169	6,139	6,596	6,757	7,334	6,087	6,736	7,210	5,975	5,573	6,125	5,738
2029 Minus SFT at 15.7%	6,043	5,175	5,560	5,696	6,183	5,131	5,678	6,078	5,037	4,698	5,163	4,837
2031	7,650	6,551	7,038	7,211	7,826	6,495	7,188	7,694	6,376	5,947	6,535	6,123
2031 Minus SFT at 15.5%	6,464	5,535	5,947	6,093	6,613	5,488	6,074	6,501	5,388	5,025	5,522	5,174

Source: Experian E-Marketer, October 2014. Growth rates and allowance for SFT are derived from Experian Retail Planner 12.1

Table 3

Survey Area Retail Expenditure Forecasts (2012 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
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
2014	89,225	43,673	76,144	157,537	81,402	38,923	259,659	74,940	70,504	102,804	103,076	117,994	1,215,882
2019	106,417	50,573	88,061	181,857	94,073	45,076	311,158	87,914	81,632	119,211	120,544	137,808	1,424,324
2024	130,242	60,473	105,180	216,799	112,201	53,887	381,313	106,200	97,560	142,637	145,142	165,674	1,717,308
2029	158,398	72,457	125,851	259,522	134,248	64,427	464,404	127,650	116,702	170,923	174,065	198,580	2,067,226
2031	171,107	77,855	135,166	278,961	144,236	69,214	501,814	137,324	125,349	183,601	187,078	213,378	2,225,083

Source: Tables 1 & 2

South Oxfordshire District Council Retail and Leisure Needs Assessment 2015 Comparison Capacity Modelling

2014 Baseline

Table 4
Comparison 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 (%)
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

South Oxfordshire District Council **Retail and Leisure Needs Assessment 2015** **Comparison Capacity Modelling**

Table 5
Comparison Goods Allocation 2014 - Spend (£) 2012 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	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
South Oxfordshire In-Centre													
Didcot	80	0	3,285	0	603	0	0	1,832	19,789	56,866	7,672	6,075	96,204
Henley-on-Thames	0	63	0	522	17,003	16,382	12,109	78	52	0	0	0	46,209
Thame	9,957	14,953	1,428	3,021	2,548	0	332	0	0	0	0	0	32,239
Wallingford	0	151	2,824	118	251	0	0	6,853	9,839	586	4,398	0	25,021
Other South Oxfordshire Centres (including Goring, Sonning Common, Watlington and Wheatley)	1,174	40	3,161	4,320	2,622	242	3,081	2,500	772	0	0	705	18,616
South Oxfordshire Out-of-Centre													
Wallingford Road Retail Park, Wallingford Road	0	0	140	0	219	87	0	218	222	405	651	0	1,943
Total South Oxfordshire	11,212	15,207	10,838	7,981	23,246	16,712	15,522	11,482	30,674	57,857	12,721	6,781	220,232
Outside South Oxfordshire In-Centre													
Abingdon	0	0	2,038	0	396	0	0	116	2,337	1,935	7,874	35,462	50,157
Aylesbury	6,992	2,226	183	3,976	0	0	0	0	0	0	0	0	13,378
High Wycombe	3,642	4,620	4,195	80,664	7,840	2,456	4,509	1,164	1,767	113	0	1,049	112,020
Oxford	6,394	4,835	26,532	5,162	2,308	110	0	1,678	6,602	14,298	24,180	24,535	116,633
Reading	0	0	3,608	2,422	30,784	11,780	102,180	51,850	23,084	10,704	3,429	3,262	243,102
Outside South Oxfordshire Out-of-Centre													
B&Q, Fairacres Shopping Park, Furniture Village and Tesco Extra, ABINGDON	178	13	4,911	477	0	68	67	132	1,534	11,139	15,621	25,932	60,073
Aylesbury Shopping Park, Broadfields Retail Park and Vale Retail Park, AYLESBURY	38,914	13,610	16	16,845	28	0	0	0	0	269	354	0	70,036
B&Q, Homebase, John Lewis & Wycombe Retail Park, HIGH WYCOMBE	8,439	1,024	3,505	26,552	7,093	2,967	21,486	0	0	0	254	404	71,725
Botley Road and Oxford Retail Parks, Oxford Trade Centre and Templar Shopping Park, OXFORD	2,187	654	11,828	450	65	99	0	21	1,428	583	9,351	8,643	35,309
Forbury Retail Park, Reading Link and Reading Gate, READING	0	0	634	0	3,991	3,257	22,321	2,992	966	0	2,061	880	37,102
Other	11,266	1,484	7,856	13,009	5,652	1,475	93,574	5,507	2,113	5,906	27,231	11,045	186,116
Total Survey Area	89,225	43,673	76,144	157,537	81,402	38,923	259,659	74,940	70,504	102,804	103,076	117,994	1,215,882

Source: Tables 3 & 4

South Oxfordshire District Council Retail and Leisure Needs Assessment 2015 Comparison Capacity Modelling

2019 Baseline

Table 6
Comparison Goods Allocation 2014 - Spend (£) 2012 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	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
South Oxfordshire In-Centre													
Didcot	96	0	3,800	0	697	0	0	2,149	22,913	65,942	8,972	7,095	111,664
Henley-on-Thames	0	73	0	603	19,650	18,972	14,510	91	60	0	0	0	53,959
Thame	11,876	17,315	1,651	3,488	2,945	0	398	0	0	0	0	0	37,672
Wallingford	0	175	3,266	137	290	0	0	8,040	11,392	679	5,144	0	29,122
Other South Oxfordshire Centres (including Goring, Sonning Common, Watlington and Wheatley)	1,401	46	3,656	4,986	3,030	280	3,692	2,933	893	0	0	824	21,741
South Oxfordshire Out-of-Centre	0	0	0	0	0	0	0	0	0	0	0	0	
Wallingford Road Retail Park, Wallingford Road	0	0	161	0	253	101	0	256	257	470	761	0	2,260
Total South Oxfordshire	13,372	17,609	12,534	9,213	26,864	19,353	18,600	13,470	35,515	67,091	14,877	7,919	256,418
Outside South Oxfordshire In-Centre	0	0	0	0	0	0	0	0	0	0	0	0	
Abingdon	0	0	2,357	0	457	0	0	136	2,705	2,244	9,208	41,417	58,524
Aylesbury	8,340	2,578	212	4,590	0	0	0	0	0	0	0	0	15,719
High Wycombe	4,344	5,350	4,852	93,116	9,060	2,844	5,404	1,366	2,046	132	0	1,225	129,738
Oxford	7,626	5,599	30,685	5,958	2,667	127	0	1,968	7,644	16,580	28,277	28,655	135,787
Reading	0	0	4,172	2,796	35,576	13,642	122,445	60,826	26,727	12,413	4,010	3,810	286,416
Outside South Oxfordshire Out-of-Centre													
B&Q, Fairacres Shopping Park, Furniture Village and Tesco Extra, ABINGDON	213	15	5,680	551	0	79	80	155	1,776	12,916	18,269	30,287	70,020
Aylesbury Shopping Park, Broadfields Retail Park and Vale Retail Park, AYLESBURY	46,412	15,761	19	19,445	33	0	0	0	0	312	413	0	82,395
B&Q, Homebase, John Lewis & Wycombe Retail Park, HIGH WYCOMBE	10,066	1,186	4,054	30,651	8,197	3,436	25,748	0	0	0	297	472	84,106
Botley Road and Oxford Retail Parks, Oxford Trade Centre and Templar Shopping Park, OXFORD	2,608	757	13,679	520	76	115	0	24	1,653	676	10,936	10,095	41,138
Forbury Retail Park, Reading Link and Reading Gate, READING	0	0	733	0	4,612	3,772	26,748	3,510	1,118	0	2,410	1,028	43,932
Other	13,437	1,718	9,086	15,017	6,531	1,708	112,133	6,460	2,446	6,848	31,846	12,899	220,129
Total Survey Area	106,417	50,573	88,061	181,857	94,073	45,076	311,158	87,914	81,632	119,211	120,544	137,808	1,424,324

Source: Tables 3 & 4

South Oxfordshire District Council Retail and Leisure Needs Assessment 2015 Comparison Capacity Modelling

2024 Baseline

Table 7
Comparison Goods Allocation 2014 - Spend (£) 2012 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	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
South Oxfordshire In-Centre													
Didcot	117	0	4,538	0	831	0	0	2,597	27,383	78,900	10,803	8,530	133,700
Henley-on-Thames	0	88	0	718	23,436	22,680	17,782	110	72	0	0	0	64,886
Thame	14,534	20,704	1,972	4,158	3,512	0	488	0	0	0	0	0	45,368
Wallingford	0	209	3,901	163	346	0	0	9,712	13,615	813	6,193	0	34,952
Other South Oxfordshire Centres (including Goring, Sonning Common, Watlington and Wheatley)	1,714	55	4,367	5,945	3,613	335	4,524	3,543	1,068	0	0	991	26,154
South Oxfordshire Out-of-Centre	0	0	0	0	0	0	0	0	0	0	0	0	
Wallingford Road Retail Park, Wallingford Road	0	0	193	0	302	121	0	309	308	562	916	0	2,711
Total South Oxfordshire	16,366	21,056	14,970	10,983	32,041	23,136	22,794	16,271	42,445	80,275	17,913	9,521	307,772
Outside South Oxfordshire In-Centre	0	0	0	0	0	0	0	0	0	0	0	0	
Abingdon	0	0	2,815	0	545	0	0	164	3,233	2,685	11,087	49,793	70,322
Aylesbury	10,207	3,082	253	5,471	0	0	0	0	0	0	0	0	19,014
High Wycombe	5,316	6,398	5,795	111,008	10,806	3,400	6,622	1,650	2,445	157	0	1,473	155,070
Oxford	9,333	6,695	36,650	7,103	3,181	152	0	2,377	9,136	19,838	34,047	34,450	162,963
Reading	0	0	4,983	3,333	42,431	16,309	150,052	73,478	31,942	14,852	4,828	4,580	346,788
Outside South Oxfordshire Out-of-Centre													
B&Q, Fairacres Shopping Park, Furniture Village and Tesco Extra, ABINGDON	260	18	6,784	657	0	94	98	187	2,123	15,454	21,997	36,411	84,083
Aylesbury Shopping Park, Broadfields Retail Park and Vale Retail Park, AYLESBURY	56,803	18,846	23	23,181	39	0	0	0	0	373	498	0	99,762
B&Q, Homebase, John Lewis & Wycombe Retail Park, HIGH WYCOMBE	12,319	1,418	4,842	36,540	9,776	4,108	31,553	0	0	0	358	568	101,481
Botley Road and Oxford Retail Parks, Oxford Trade Centre and Templar Shopping Park, OXFORD	3,192	905	16,338	620	90	137	0	29	1,975	809	13,167	12,136	49,400
Forbury Retail Park, Reading Link and Reading Gate, READING	0	0	876	0	5,501	4,509	32,779	4,240	1,337	0	2,902	1,236	53,379
Other	16,445	2,054	10,852	17,903	7,790	2,042	137,415	7,804	2,923	8,194	38,345	15,508	267,273
Total Survey Area	130,242	60,473	105,180	216,799	112,201	53,887	381,313	106,200	97,560	142,637	145,142	165,674	1,717,308

Source: Tables 3 & 4

South Oxfordshire District Council Retail and Leisure Needs Assessment 2015 Comparison Capacity Modelling

2029 Baseline

Table 8
Comparison Goods Allocation 2014 - Spend (£) 2012 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	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
South Oxfordshire In-Centre													
Didcot	143	0	5,430	0	995	0	0	3,121	32,756	94,547	12,956	10,224	160,171
Henley-on-Thames	0	105	0	860	28,041	27,116	21,656	133	86	0	0	0	77,998
Thame	17,676	24,807	2,359	4,977	4,202	0	595	0	0	0	0	0	54,617
Wallingford	0	251	4,667	195	414	0	0	11,674	16,286	974	7,428	0	41,888
Other South Oxfordshire Centres (including Goring, Sonning Common, Watlington and Wheatley)	2,085	66	5,225	7,116	4,323	400	5,510	4,259	1,277	0	0	1,187	31,448
South Oxfordshire Out-of-Centre	0	0	0	0	0	0	0	0	0	0	0	0	
Wallingford Road Retail Park, Wallingford Road	0	0	231	0	361	145	0	372	368	674	1,099	0	3,249
Total South Oxfordshire	19,904	25,229	17,912	13,148	38,337	27,661	27,761	19,558	50,773	96,194	21,482	11,411	369,371
Outside South Oxfordshire In-Centre	0	0	0	0	0	0	0	0	0	0	0	0	
Abingdon	0	0	3,368	0	653	0	0	197	3,867	3,217	13,296	59,682	84,281
Aylesbury	12,414	3,693	303	6,550	0	0	0	0	0	0	0	0	22,960
High Wycombe	6,466	7,665	6,934	132,883	12,929	4,065	8,065	1,983	2,925	189	0	1,765	185,869
Oxford	11,351	8,022	43,853	8,503	3,806	181	0	2,857	10,928	23,772	40,832	41,292	195,398
Reading	0	0	5,963	3,989	50,768	19,499	182,749	88,319	38,210	17,797	5,791	5,490	418,574
Outside South Oxfordshire Out-of-Centre													
B&Q, Fairacres Shopping Park, Furniture Village and Tesco Extra, ABINGDON	317	22	8,117	786	0	112	119	225	2,540	18,519	26,380	43,643	100,780
Aylesbury Shopping Park, Broadfields Retail Park and Vale Retail Park, AYLESBURY	69,083	22,580	27	27,749	47	0	0	0	0	447	597	0	120,530
B&Q, Homebase, John Lewis & Wycombe Retail Park, HIGH WYCOMBE	14,982	1,699	5,793	43,741	11,697	4,912	38,429	0	0	0	429	680	122,362
Botley Road and Oxford Retail Parks, Oxford Trade Centre and Templar Shopping Park, OXFORD	3,882	1,085	19,549	742	108	164	0	35	2,363	969	15,791	14,547	59,235
Forbury Retail Park, Reading Link and Reading Gate, READING	0	0	1,048	0	6,582	5,391	39,922	5,096	1,599	0	3,480	1,481	64,600
Other	20,000	2,462	12,985	21,431	9,321	2,441	167,359	9,380	3,497	9,819	45,986	18,588	323,266
Total Survey Area	158,398	72,457	125,851	259,522	134,248	64,427	464,404	127,650	116,702	170,923	174,065	198,580	2,067,226

Source: Tables 3 & 4

South Oxfordshire District Council Retail and Leisure Needs Assessment 2015 Comparison Capacity Modelling

2031 Baseline

Table 9
Comparison Goods Allocation 2014 - Spend (£) 2012 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	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
South Oxfordshire In-Centre													
Didcot	154	0	5,832	0	1,069	0	0	3,358	35,183	101,560	13,924	10,986	172,066
Henley-on-Thames	0	113	0	924	30,127	29,131	23,401	143	92	0	0	0	83,932
Thame	19,095	26,655	2,534	5,350	4,515	0	642	0	0	0	0	0	58,791
Wallingford	0	269	5,013	209	445	0	0	12,558	17,493	1,046	7,983	0	45,017
Other South Oxfordshire Centres (including Goring, Sonning Common, Watlington and Wheatley)	2,252	71	5,612	7,649	4,645	430	5,954	4,581	1,372	0	0	1,276	33,841
South Oxfordshire Out-of-Centre	0	0	0	0	0	0	0	0	0	0	0	0	
Wallingford Road Retail Park, Wallingford Road	0	0	248	0	388	155	0	400	395	724	1,181	0	3,491
Total South Oxfordshire	21,501	27,109	19,238	14,133	41,189	29,717	29,997	21,040	54,535	103,330	23,088	12,262	397,139
Outside South Oxfordshire In-Centre	0	0	0	0	0	0	0	0	0	0	0	0	
Abingdon	0	0	3,617	0	701	0	0	212	4,154	3,456	14,290	64,130	90,560
Aylesbury	13,409	3,968	326	7,040	0	0	0	0	0	0	0	0	24,744
High Wycombe	6,984	8,237	7,447	142,836	13,891	4,367	8,715	2,134	3,142	203	0	1,897	199,852
Oxford	12,262	8,619	47,098	9,140	4,089	195	0	3,074	11,738	25,535	43,885	44,369	210,005
Reading	0	0	6,404	4,288	54,545	20,948	197,470	95,012	41,041	19,117	6,224	5,899	450,948
Outside South Oxfordshire Out-of-Centre													
B&Q, Fairacres Shopping Park, Furniture Village and Tesco Extra, ABINGDON	342	23	8,718	845	0	121	129	242	2,728	19,893	28,352	46,895	108,288
Aylesbury Shopping Park, Broadfields Retail Park and Vale Retail Park, AYLESBURY	74,626	24,263	29	29,828	50	0	0	0	0	480	642	0	129,917
B&Q, Homebase, John Lewis & Wycombe Retail Park, HIGH WYCOMBE	16,184	1,826	6,222	47,017	12,568	5,276	41,524	0	0	0	461	731	131,809
Botley Road and Oxford Retail Parks, Oxford Trade Centre and Templar Shopping Park, OXFORD	4,193	1,166	20,996	797	116	176	0	38	2,538	1,041	16,972	15,631	63,664
Forbury Retail Park, Reading Link and Reading Gate, READING	0	0	1,125	0	7,072	5,792	43,138	5,482	1,717	0	3,740	1,592	69,658
Other	21,604	2,645	13,946	23,036	10,014	2,622	180,840	10,090	3,756	10,547	49,424	19,973	348,498
Total Survey Area	171,107	77,855	135,166	278,961	144,236	69,214	501,814	137,324	125,349	183,601	187,078	213,378	2,225,083

Source: Tables 3 & 4

South Oxfordshire District Council Retail and Leisure Needs Assessment 2015 Comparison Capacity Modelling

Table 10: Existing Comparison Goods Floorspace (In-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.

South Oxfordshire District Council

Retail and Leisure Needs Assessment 2015

Comparison Capacity Modelling

Table 11: Comparison Goods Commitments

	Net Comparison Floorspace (sqm)	Benchmark Sales Density (£/sqm net)	Average Turnover 2014 (£000)	Average Turnover 2019 (£000)	Average Turnover 2024 (£000)	Average Turnover 2029 (£000)	Average Turnover 2031 (£000)
Foodstore, Lupton Road, Wallingford (Out-of-Centre)	601	9,000	5,409	5,885	6,402	6,965	7,204
Aldi, Land at the Broadway, Didcot (Out-of-Centre)	171	7,907	1,352	1,471	1,600	1,741	1,801
Total	772		6,761	7,356	8,003	8,706	9,005

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

Aldi Floorspace: Planning App Ref: P13/S3489/FUL

South Oxfordshire District Council Retail and Leisure Needs Assessment 2015 Comparison Capacity Modelling

Capacity Projections: Comparison Goods, GLOBAL

Table 12
Comparison Goods Floorspace Capacity

	COMPARISON GOODS				
	2014	2019	2024	2029	2031
Total Available Expenditure (£000)	1,215,882	1,424,324	1,717,308	2,067,226	2,225,083
Market Share from Survey Area	18	18	18	18	18
Survey Area Residents Spending (£000)	220,232	256,418	307,772	369,371	397,139
Inflow of Expenditure (%)	33	33	33	33	33
Inflow of Expenditure (£000)	72,756	84,921	102,102	122,717	132,039
TOTAL SPENDING (£000)	292,988	341,339	409,874	492,088	529,177
Existing Retail Floorspace (sqm net)	19,275	19,275	19,275	19,275	19,275
Sales per sqm net £	15,200	16,537	17,991	19,574	20,245
Sales from Existing Floorspace (£000)	292,988	318,753	346,784	377,280	390,216
Sales from Commitments (£000)	0	7,356	8,003	8,706	9,005
Residual Spending to support new floorspace (£000)	0	15,231	55,088	106,102	129,956
Sales per sq m net in new shops (£)	6,000	6,528	7,102	7,726	7,991
Capacity for new floorspace (sqm net)	0	2,333	7,757	13,733	16,263

Assumes 1.7% pa. growth in sales efficiency 2012-2027

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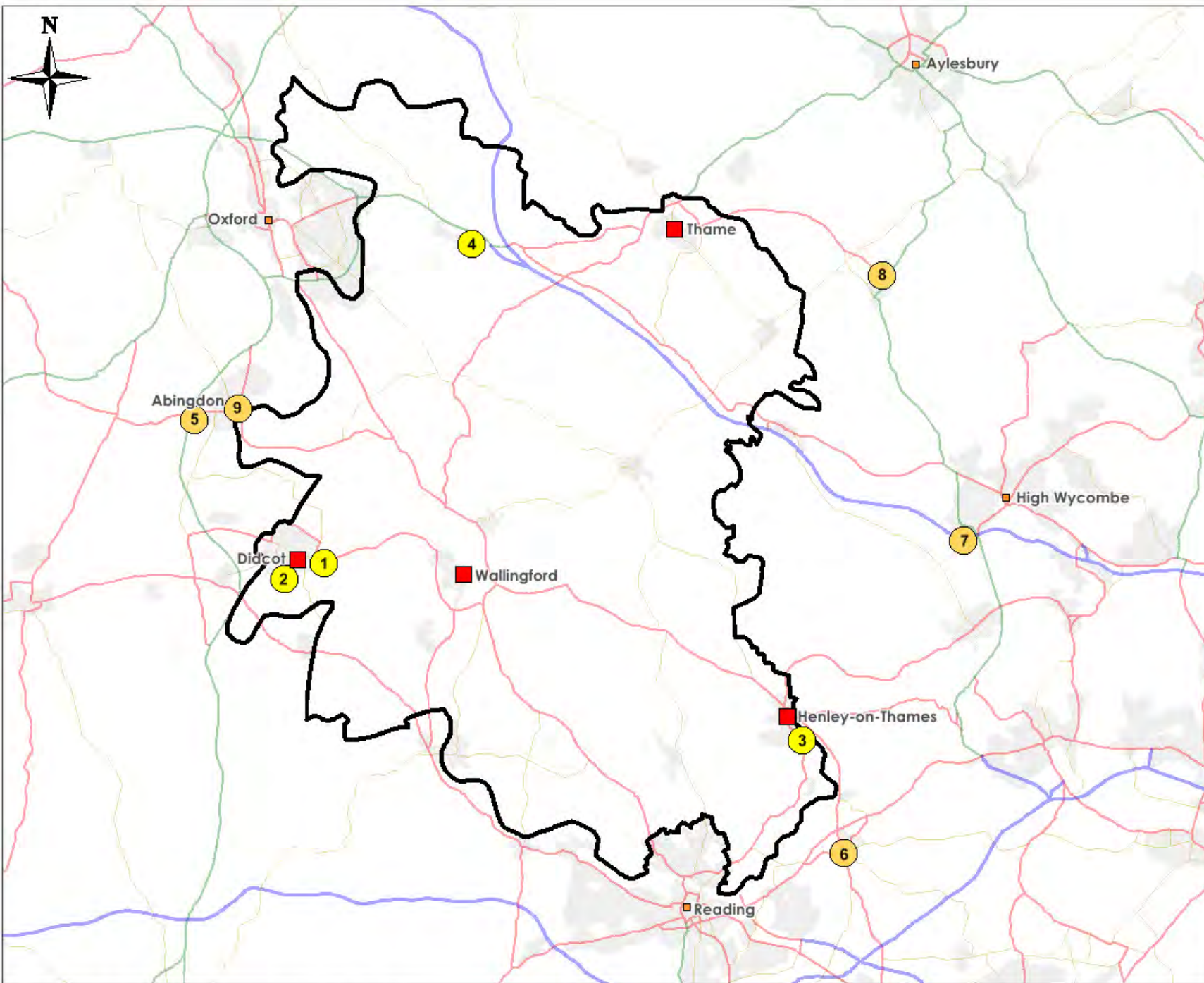
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Report

Plan 1 Town Centres and Foodstores



Centres & Foodstores Location Plan

Key

— South Oxfordshire boundary

■ Town Centre Foodstores

DIDCOT

– Sainsbury's Superstore, Central Drive

HENLEY-ON-THAMES

– Waitrose, Bell Street
– Sainsbury's Local, Bell Street

THAME

– Waitrose, Greyhound Lane
– Co-op, High Street
– Sainsbury's, High Street

WALLINGFORD

– Waitrose, St Martin's Street

● Out of Centre Foodstore

- 1 Tesco, Wallingford Rd, North Moreton
- 2 Tesco Express, Cockroft Rd
- 3 Tesco Superstore, Reading Rd
- 4 Asda Superstore, London Rd, Wheatley

● Key Competing Foodstores
Outside District

- 5 Tesco Extra, Marcham Rd, Abingdon
- 6 Waitrose, London Rd, Twyford
- 7 Asda, Holmers Farm Way, High Wycombe
- 8 Tesco, Longwick Rd, Princes Risborough
- 9 Waitrose, Abbey Close, Abingdon

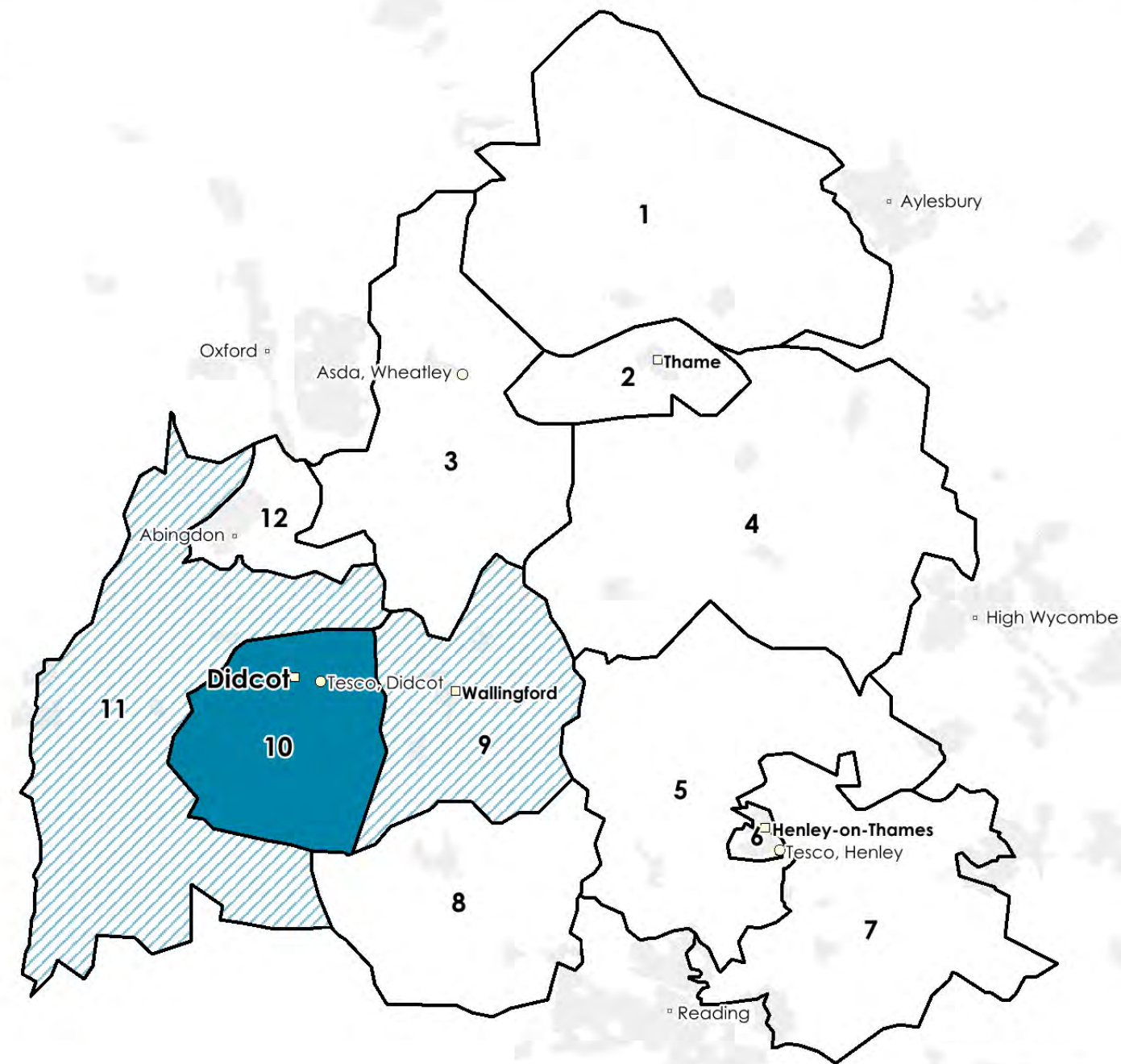
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Report

Plan 2
Didcot Town
Centre
Convenience
Goods Market
Shares



Plan 2. Didcot Town Centre Convenience Goods Market Share

Key

Convenience Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60 +

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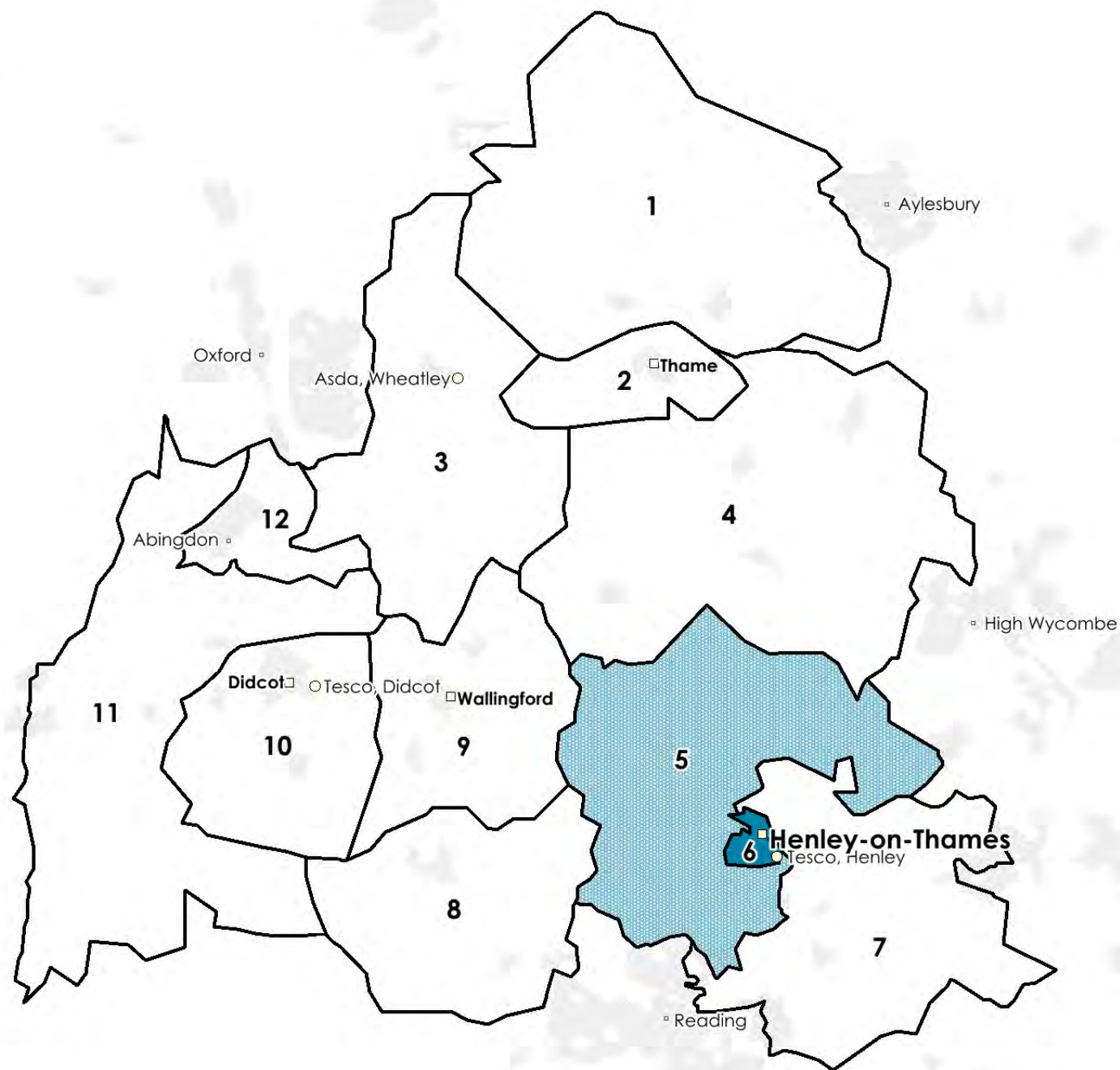
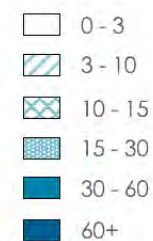
**Plan 3
Henley Town
Centre
Convenience
Goods Market
Shares**



Plan 3. Henley-on-Thames Town Centre Convenience Goods Market Share

Key

Convenience Goods Market
Share (%)



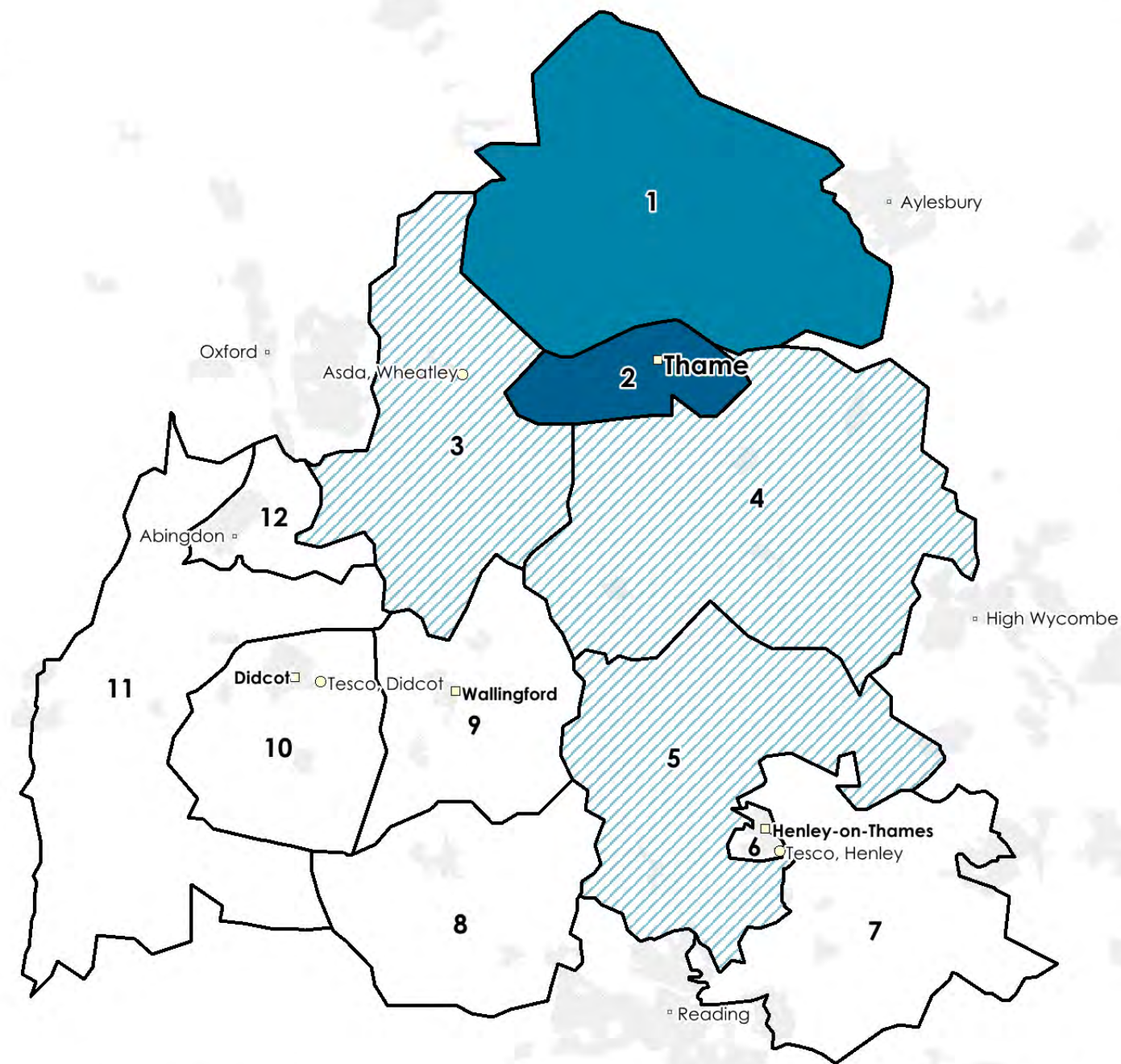
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**Plan 4
Thame Town
Centre
Convenience
Goods Market
Shares**



Plan 4. Thame Town Centre Convenience Goods Market Share

Key

Convenience Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60 +

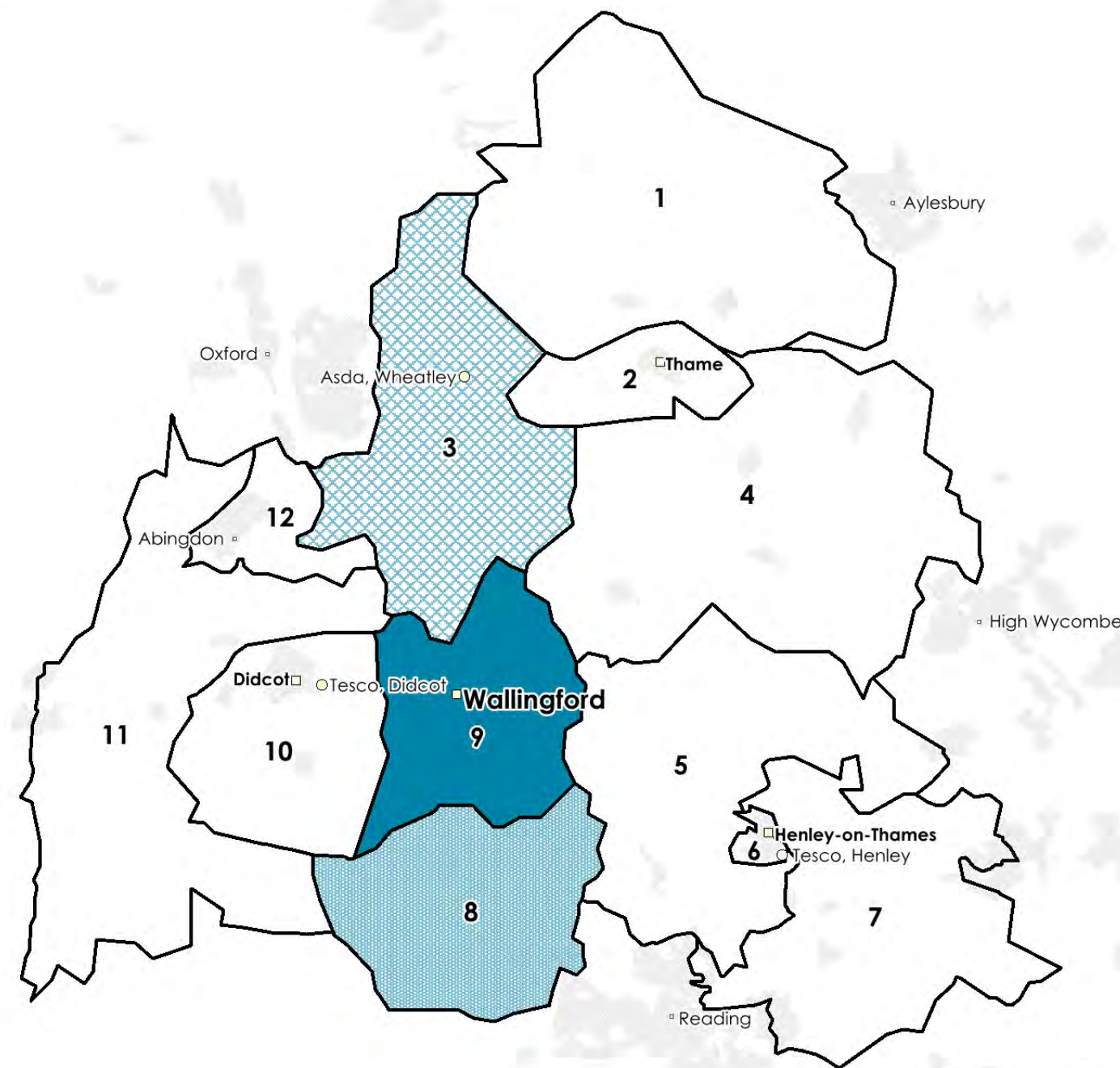
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Report

**Plan 5
Wallingford
Town Centre
Convenience
Goods Market
Shares**



Plan 5. Wallingford Town Centre Convenience Goods Market Share

Key

Convenience Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+

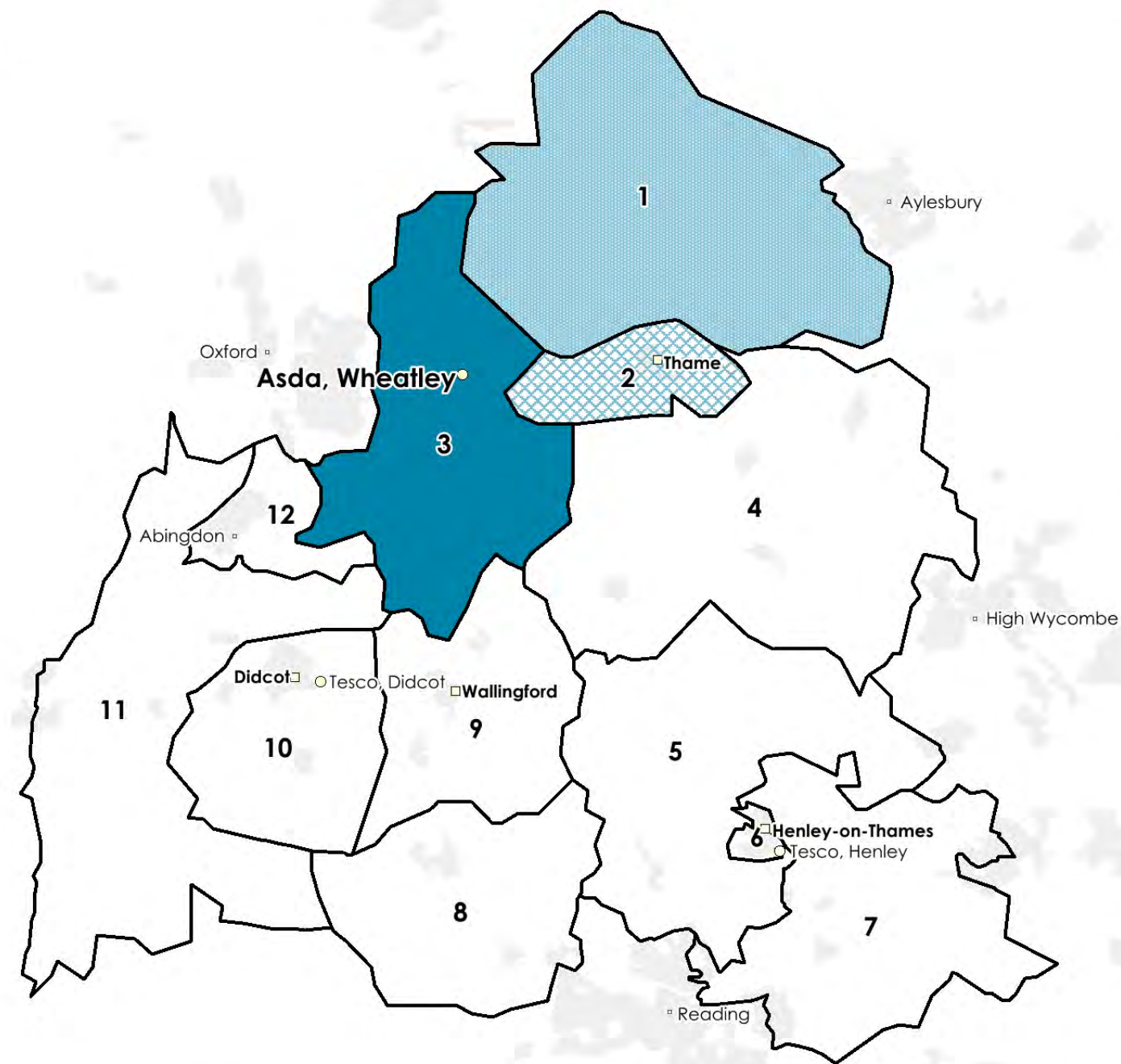
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**Plan 6
Asda,
Wheatley
Convenience
Goods Market
Share**



Plan 6. Asda, Wheatley Convenience Goods Market Share

Key

Convenience Goods Market Share (%)



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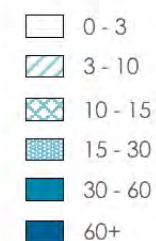
Plan 7
Tesco, Henley-
on-Thames,
Convenience
Goods Market
Share



Plan 7. Tesco, Henley-on-Thames Convenience Goods Market Share

Key

Convenience Goods Market Share (%)



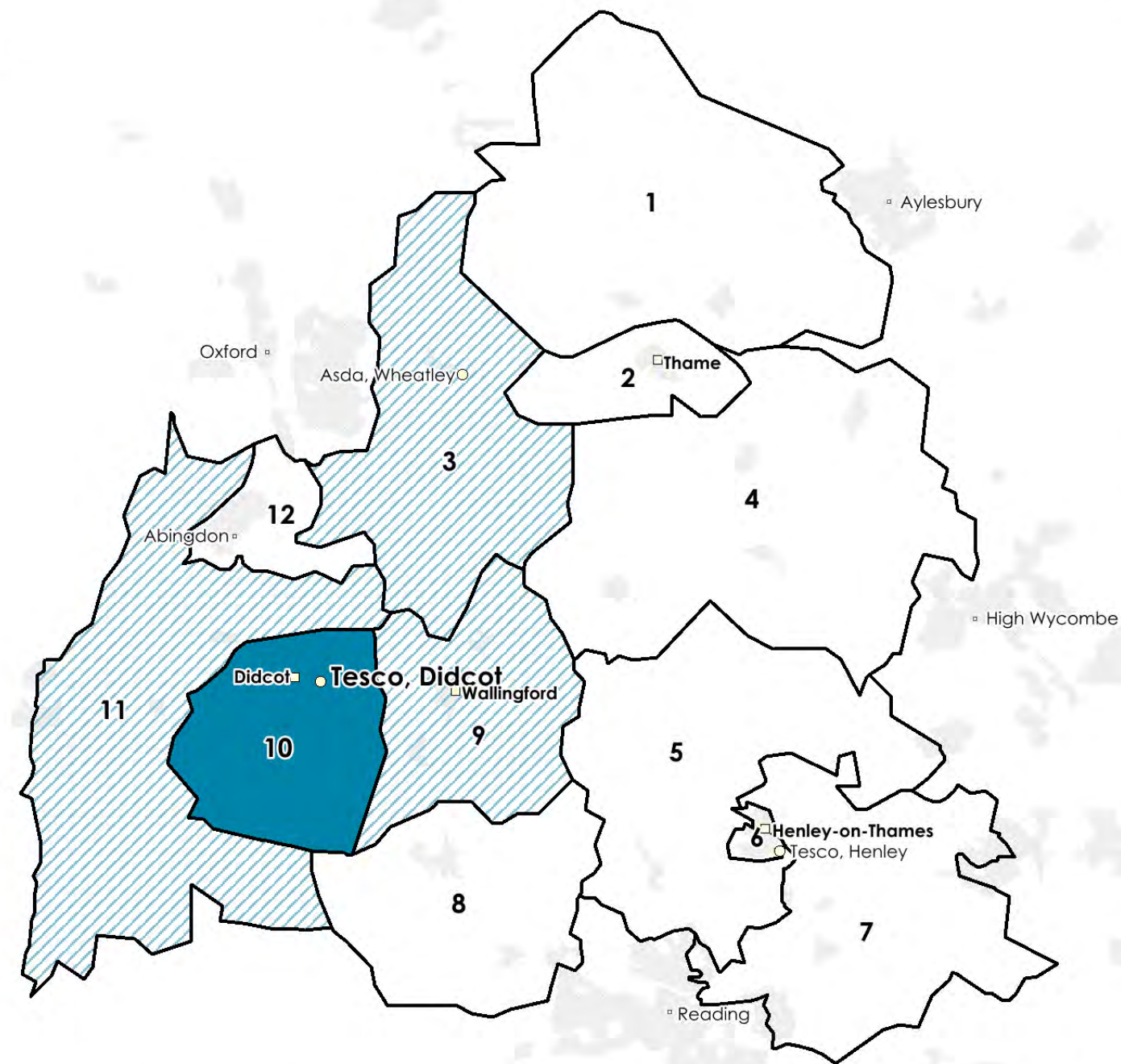
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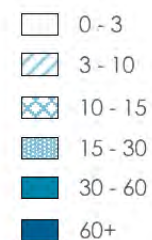
Plan 8 Tesco, Didcot, Convenience Goods Market Share



Plan 8. Tesco, Didcot Convenience Goods Market Share

Key

Convenience Goods Market
Share (%)



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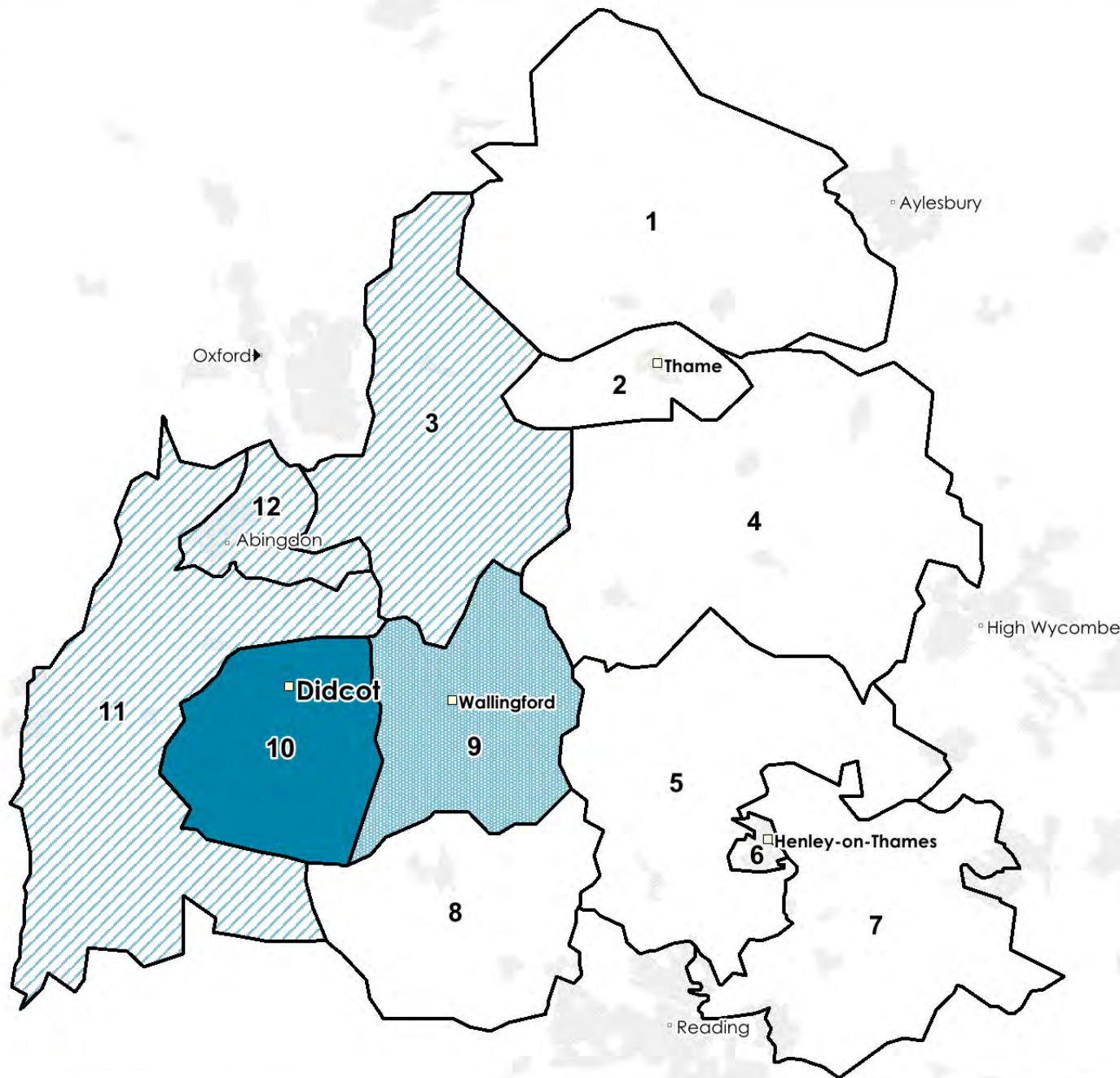
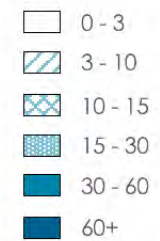
**Plan 9
Didcot Town
Centre
Comparison
Goods Market
Share**



Plan 9. Didcot Town Centre Comparison Goods Market Share

Key

Comparison Goods Market
Share (%)



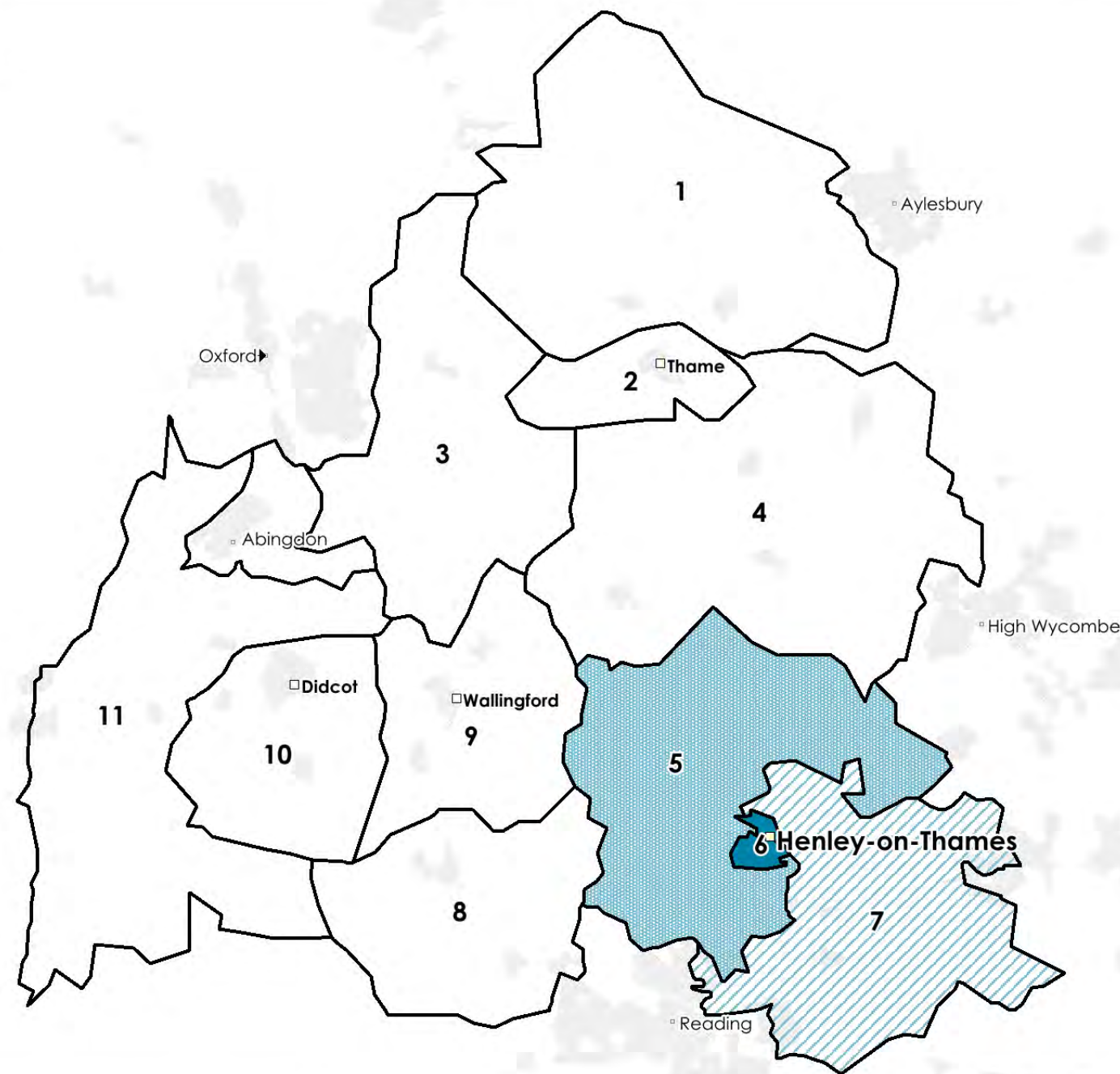
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Report

Plan 10
Henley-on-
Thames Town
Centre
Comparison
Goods Market
Share



Plan 10. Henley-on-Thames Town Centre Comparison Goods Market Share

Key

Comparison Goods Market
Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+

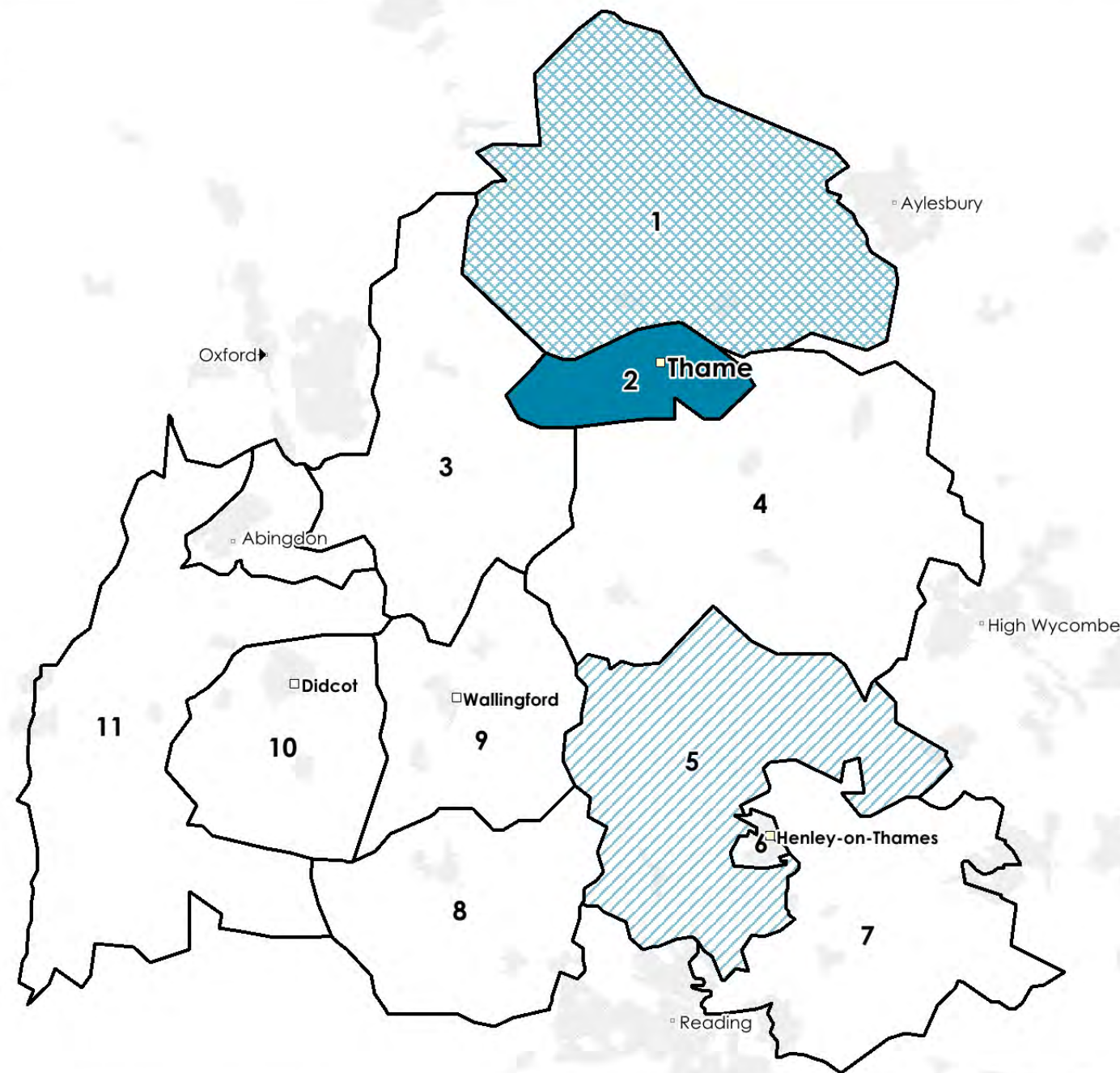
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**Plan 11
Thame Town
Centre
Comparison
Goods Market
Share**



Plan 11. Thame Town Centre Comparison Goods Market Share

Key

Comparison Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+

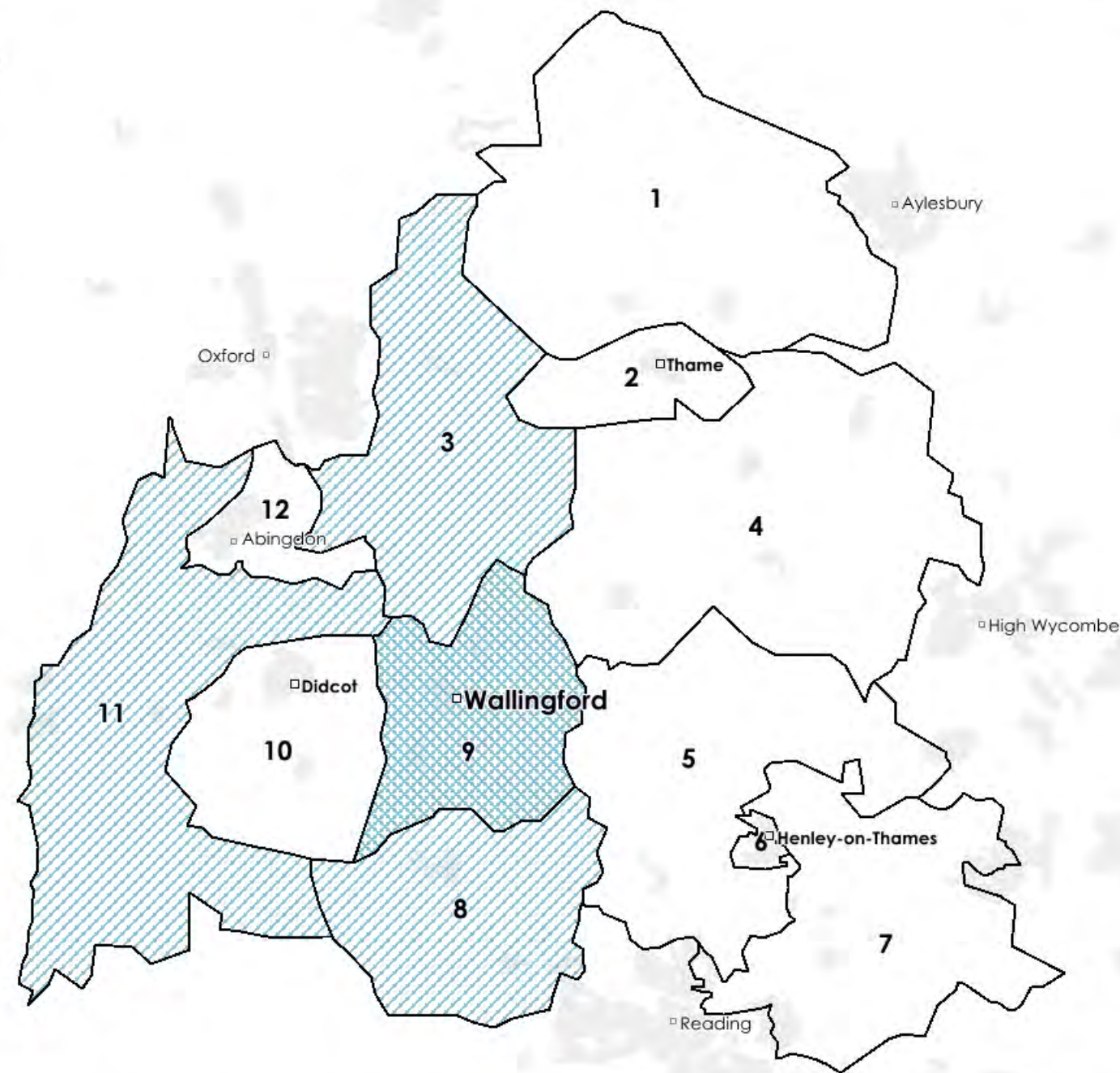
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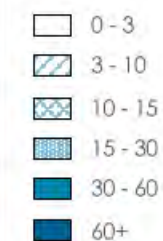
**Plan 12
Wallingford
Town Centre
Comparison
Goods Market
Share**



Plan 12. Wallingford Town Centre Comparison Goods Market Share

Key

Comparison Goods Market
Share (%)



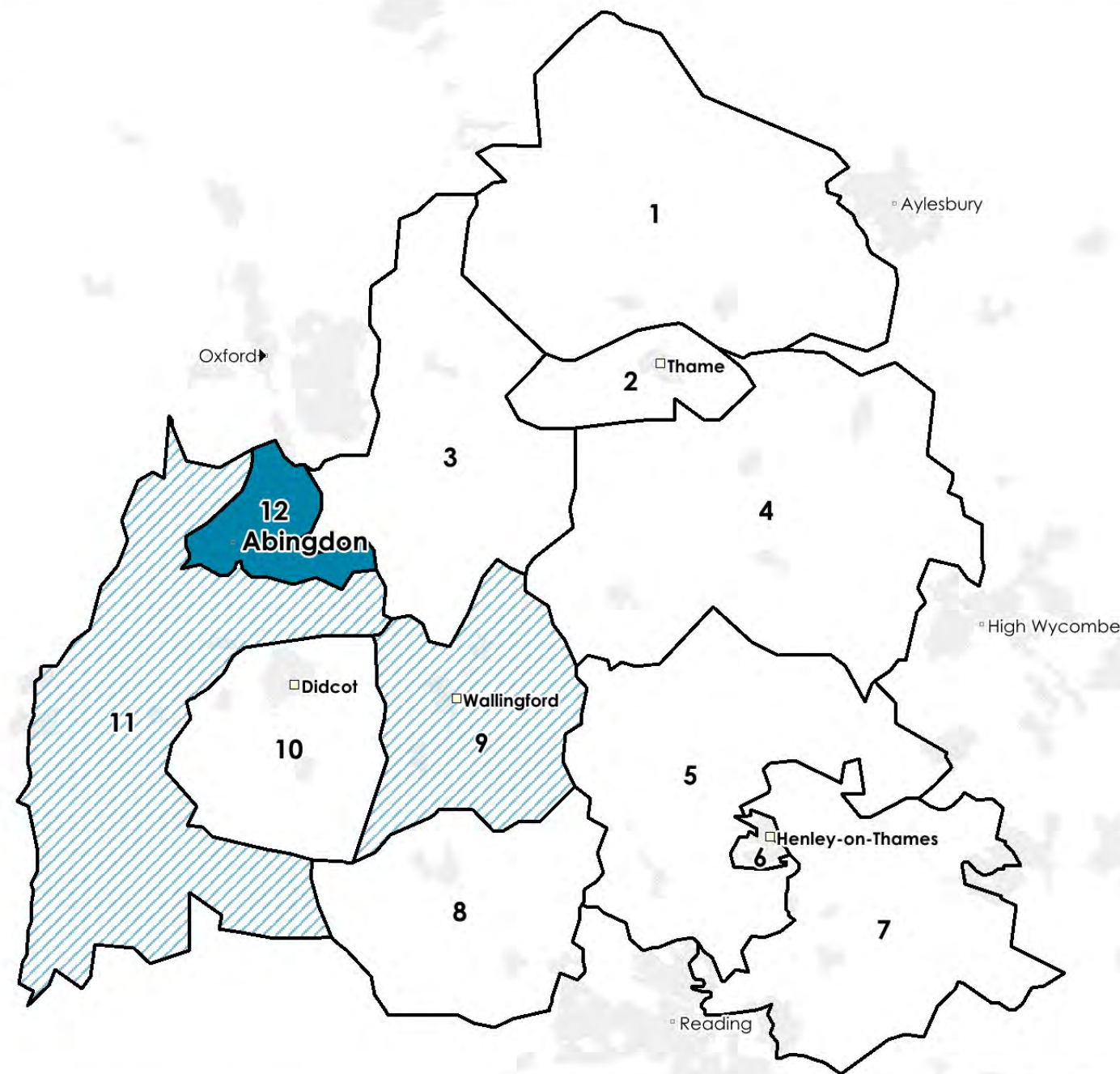
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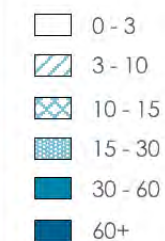
**Plan 13 - 17
Competing
Centre
Comparison
Goods Market
Share**



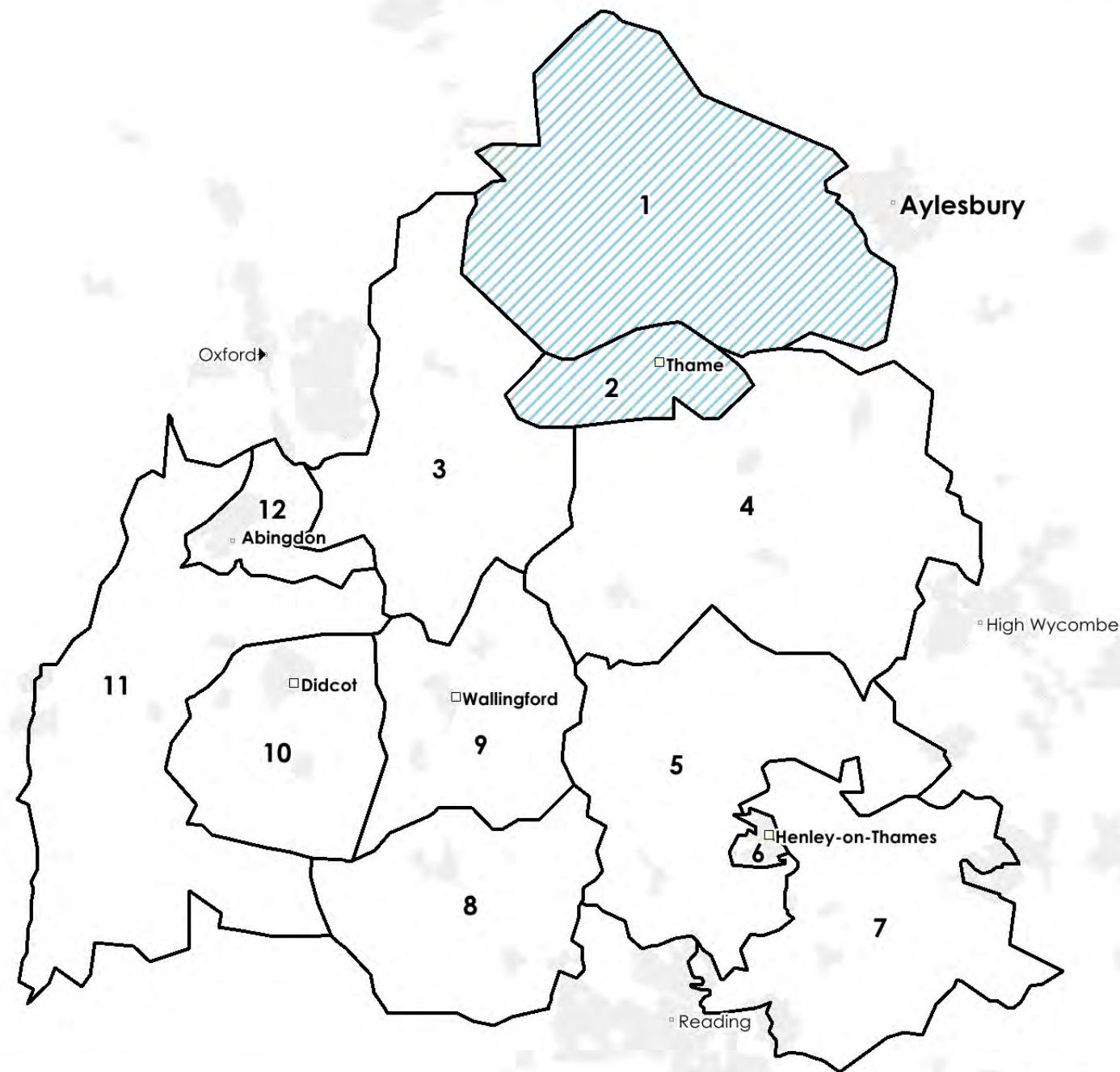
Plan 13. Abingdon Town Centre Comparison Goods Market Share

Key

Comparison Goods Market
Share (%)



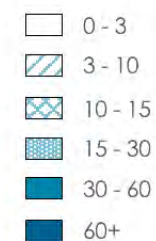
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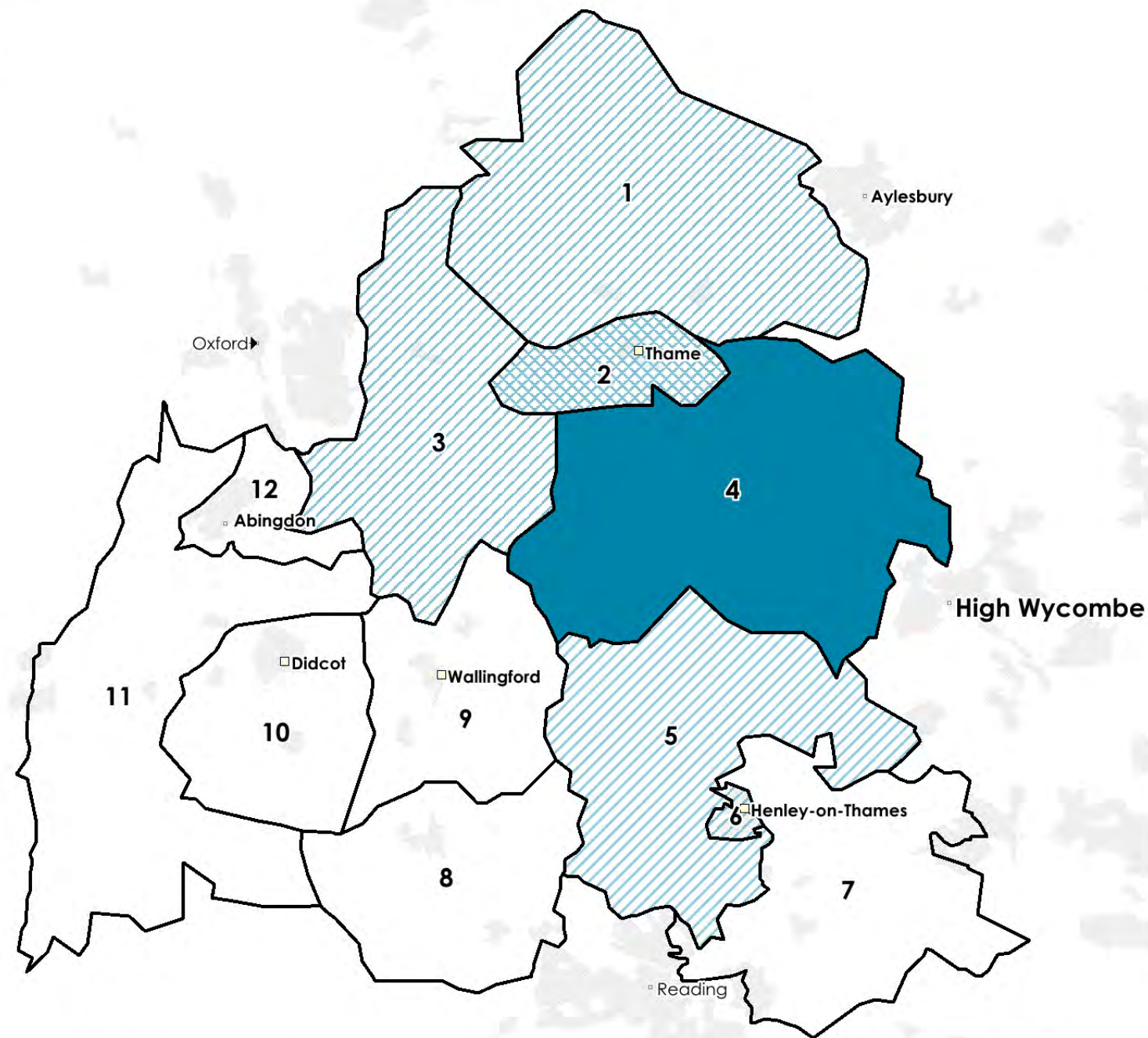
Plan 14. Aylesbury Town Centre Comparison Goods Market Share

Key

Comparison Goods Market
Share (%)



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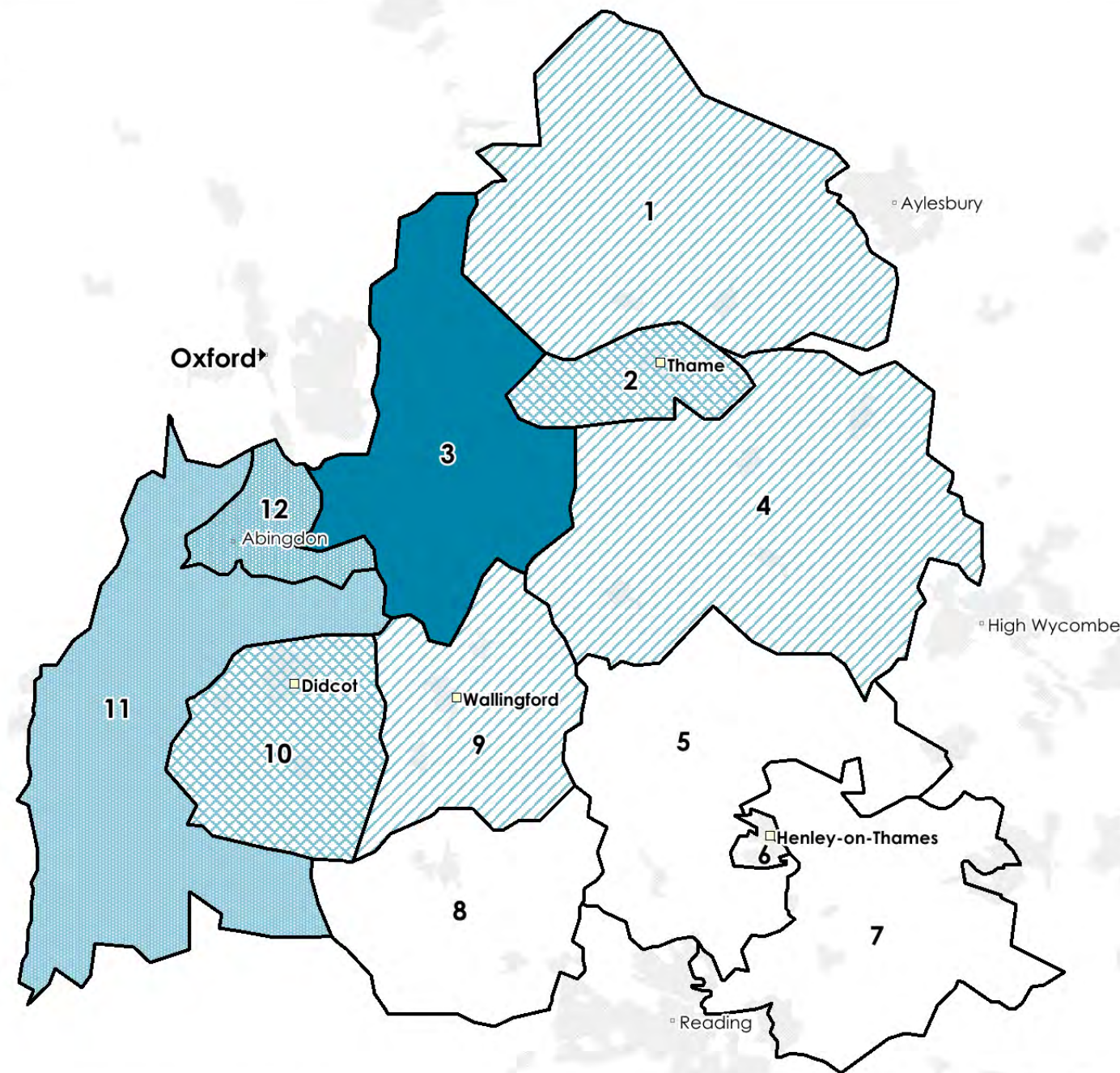
Plan 15. High Wycombe Town Centre Comparison Goods Market Share

Key

Comparison Goods Market Share (%)



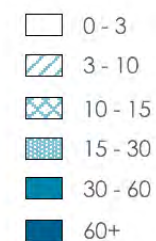
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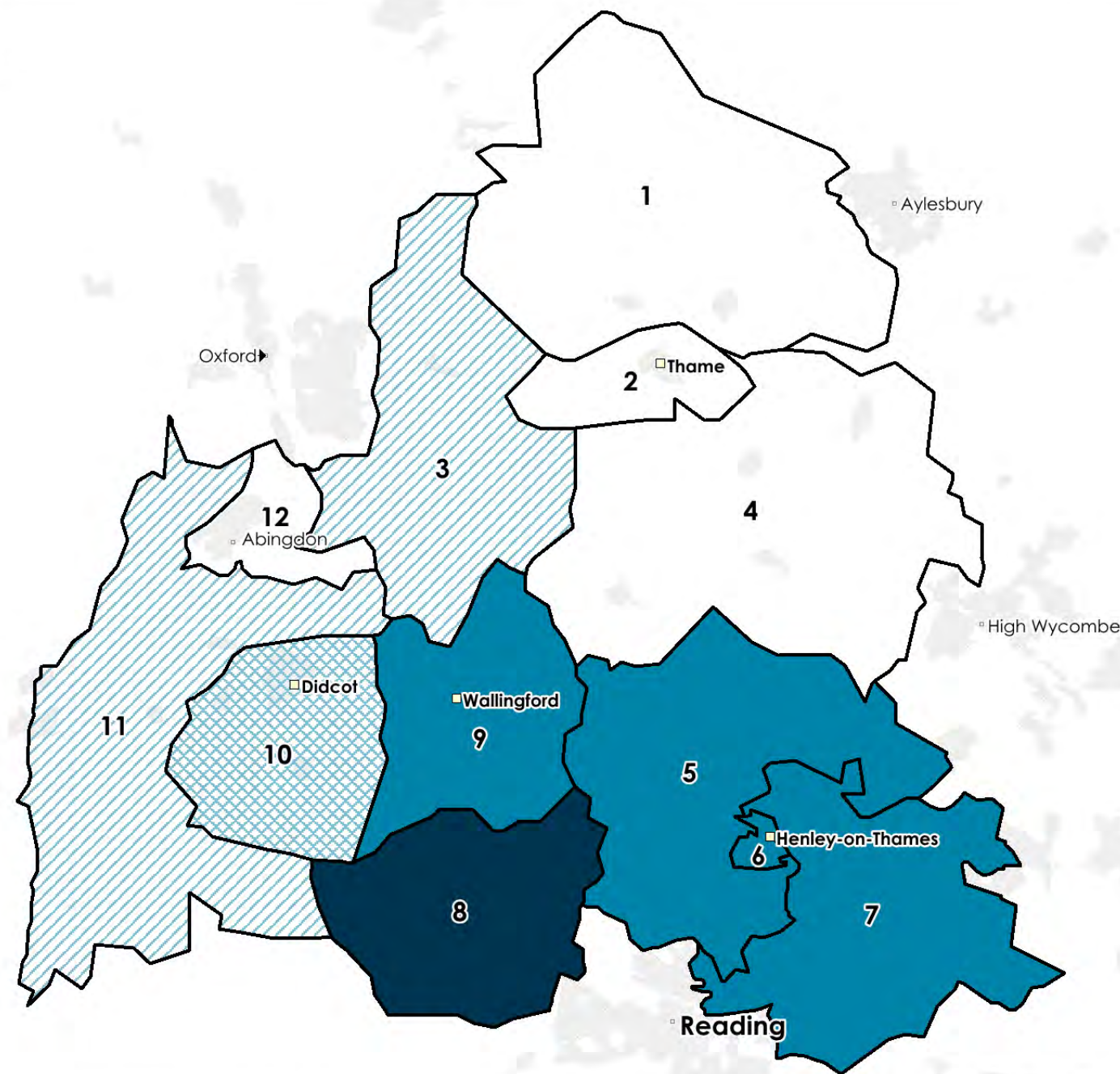
Plan 16. Oxford Town Centre Comparison Goods Market Share

Key

Comparison Goods Market
Share (%)



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Plan 17. Reading Town Centre Comparison Goods Market Share

Key

Comparison Goods Market Share (%)

- 0 - 3
- 3 - 10
- 10 - 15
- 15 - 30
- 30 - 60
- 60+

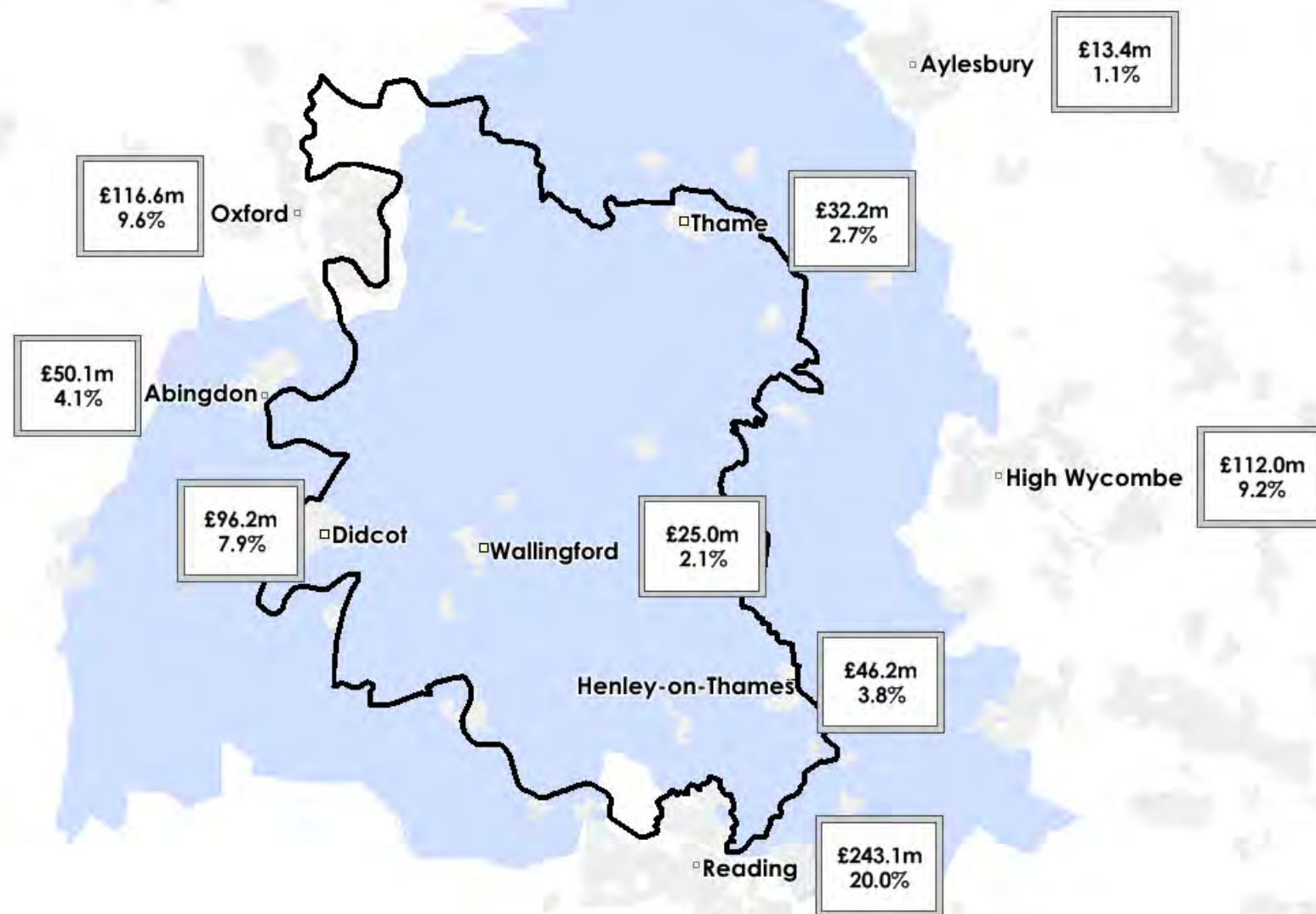
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Report

Plan 18
Comparison
Goods
Expenditure
Leakage



Plan 18. Comparison Goods Expenditure Leakage Plan

Key

— South Oxfordshire

Study Area

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