



**West
Oxfordshire
Retail Needs
Assessment**

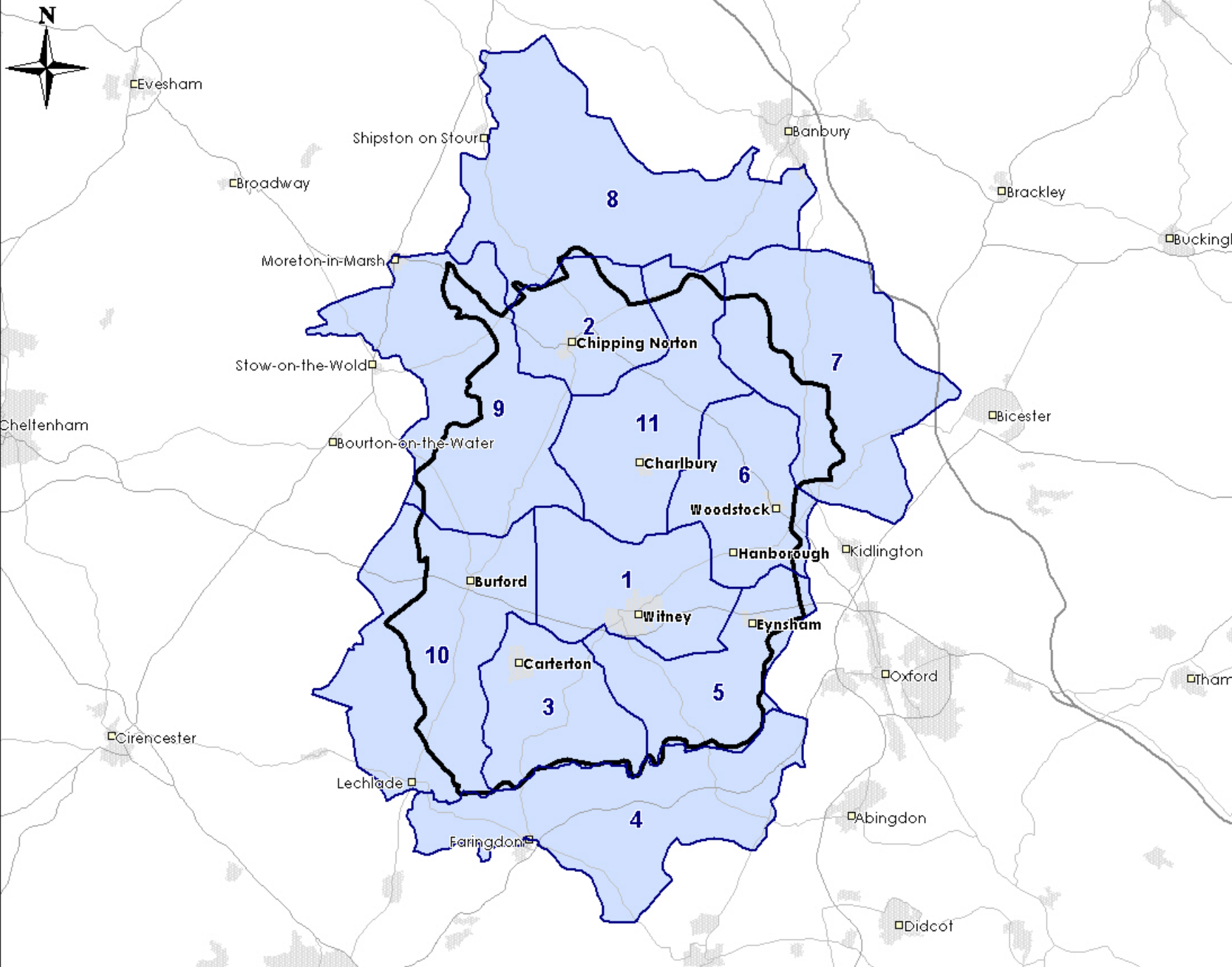
Plans and
Appendices

November 2012



West Oxfordshire Retail Needs Assessment

Plans



Plan I - Telephone Survey Area

Key

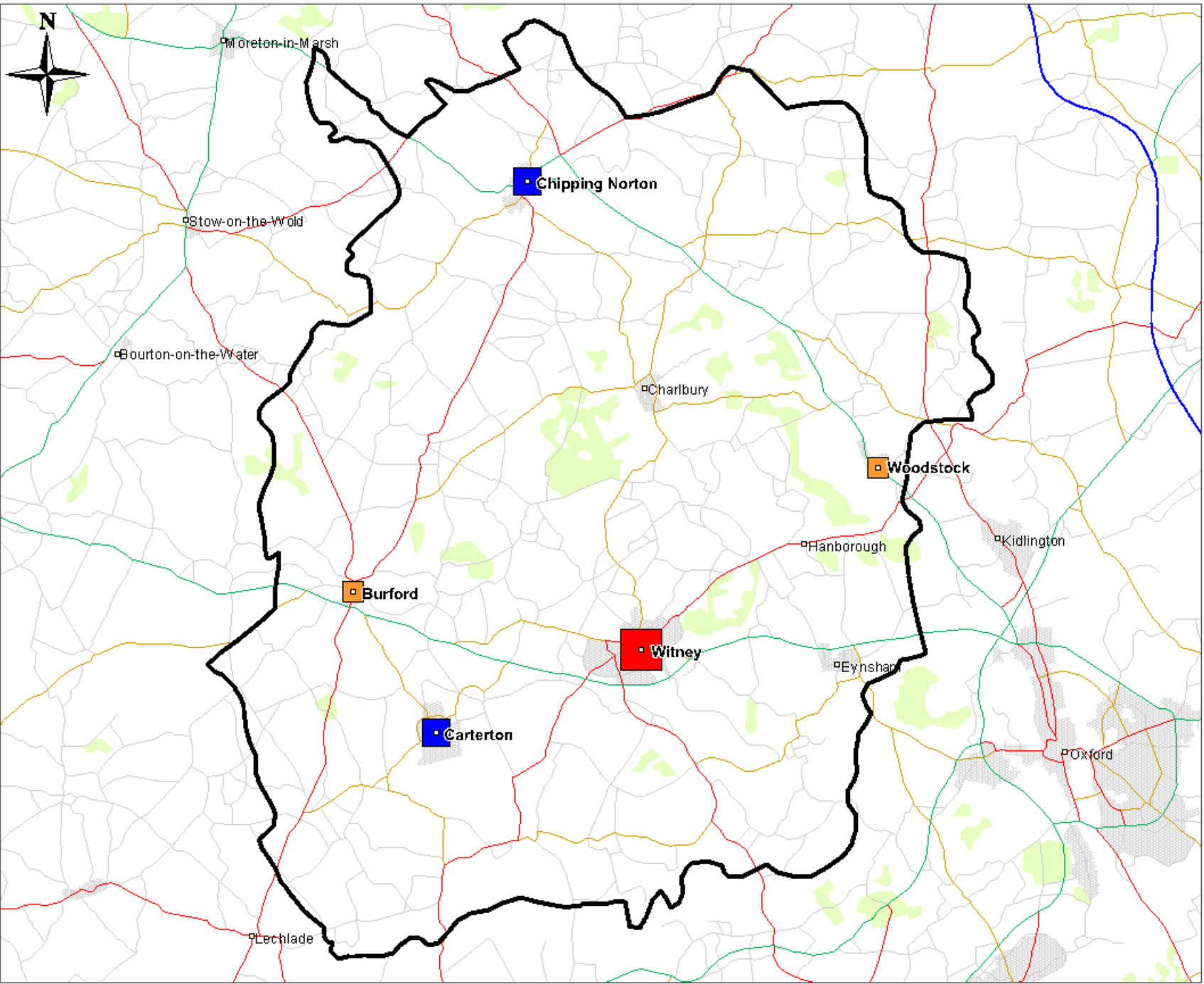
 West Oxfordshire District Boundary

 Study Area & Survey Zones

Zone Postal Sectors





- | | |
|----|-------------------------------------|
| 1 | OX28 1/2/3/4/5/6,
OX29 0/6/9 |
| 2 | OX7 5 |
| 3 | OX18 1/2/3 |
| 4 | OX13 5, SN7 8 |
| 5 | OX29 4/5/7 |
| 6 | OX20 1, OX29 8 |
| 7 | OX5 3, OX7 7, OX15 0,
OX25 4/5/6 |
| 8 | CV36 5, OX15 4/5 |
| 9 | GL56 0, OX7 6 |
| 10 | GL7 3, OX18 4 |
| 11 | OX7 3/4 |

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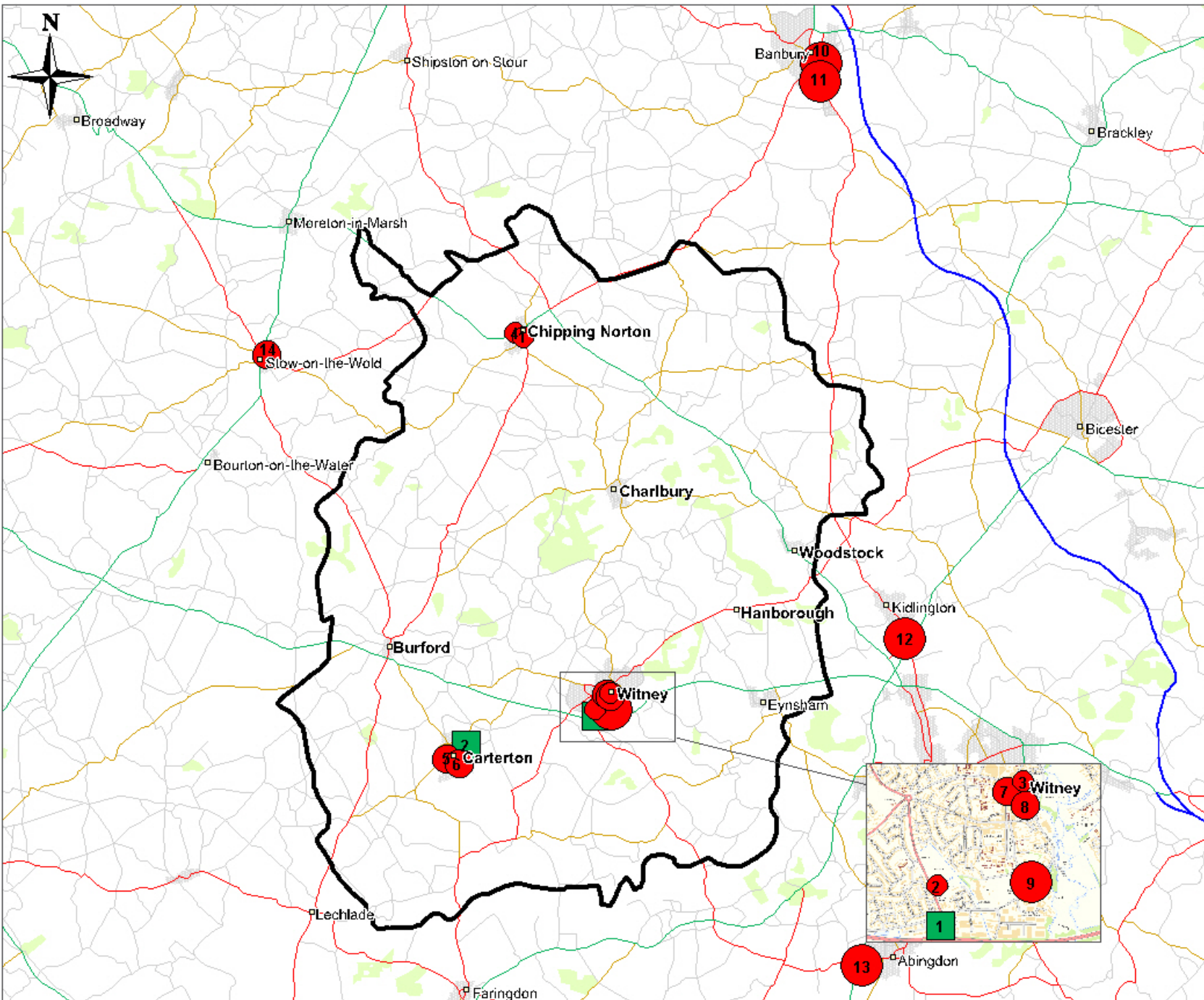


Plan II - West Oxfordshire Retail Hierarchy

Key

-  West Oxfordshire District Boundary
-  Principal Town Centre
-  Primary Town Centres
-  Secondary Town Centres

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Plan III - Existing Borough Foodstore and Retail Warehouse Provision

Key

— W. Oxford District Boundary

Foodstores

- 2,000- 5,000 sq m
- 1,000-2,000 sq m
- <1,000 sq m

- 1 Co-op, High St, Chipping Norton
- 2 Lidl, Ducklington Lane, Witney
- 3 M&S, Marriot's Close, Witney
- 4 Sainsbury's, Mkt Place, Chipping Norton
- 5 Aldi, Alvescot Road, Carterton
- 6 Co-op, Blackbourton Rd, Carterton
- 7 Co-op, High Street, Witney
- 8 Waitrose, Woolgate Centre, Witney
- 9 Sainsbury's, Witan Way, Witney

Existing Foodstores outside the District

- 10 Morrisons, Banbury
- 11 Sainsbury's Banbury
- 12 Sainsbury's, Kidlington
- 13 Tesco Extra, Abingdon
- 14 Tesco, Stow on the Wald

Retail Warehouses

- 1 B&Q, Thorney Leys Park, Ducklington, Witney
- 2 W. Oxfordshire Bus & Retail Park, Carterton

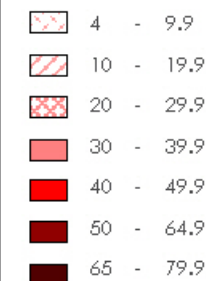
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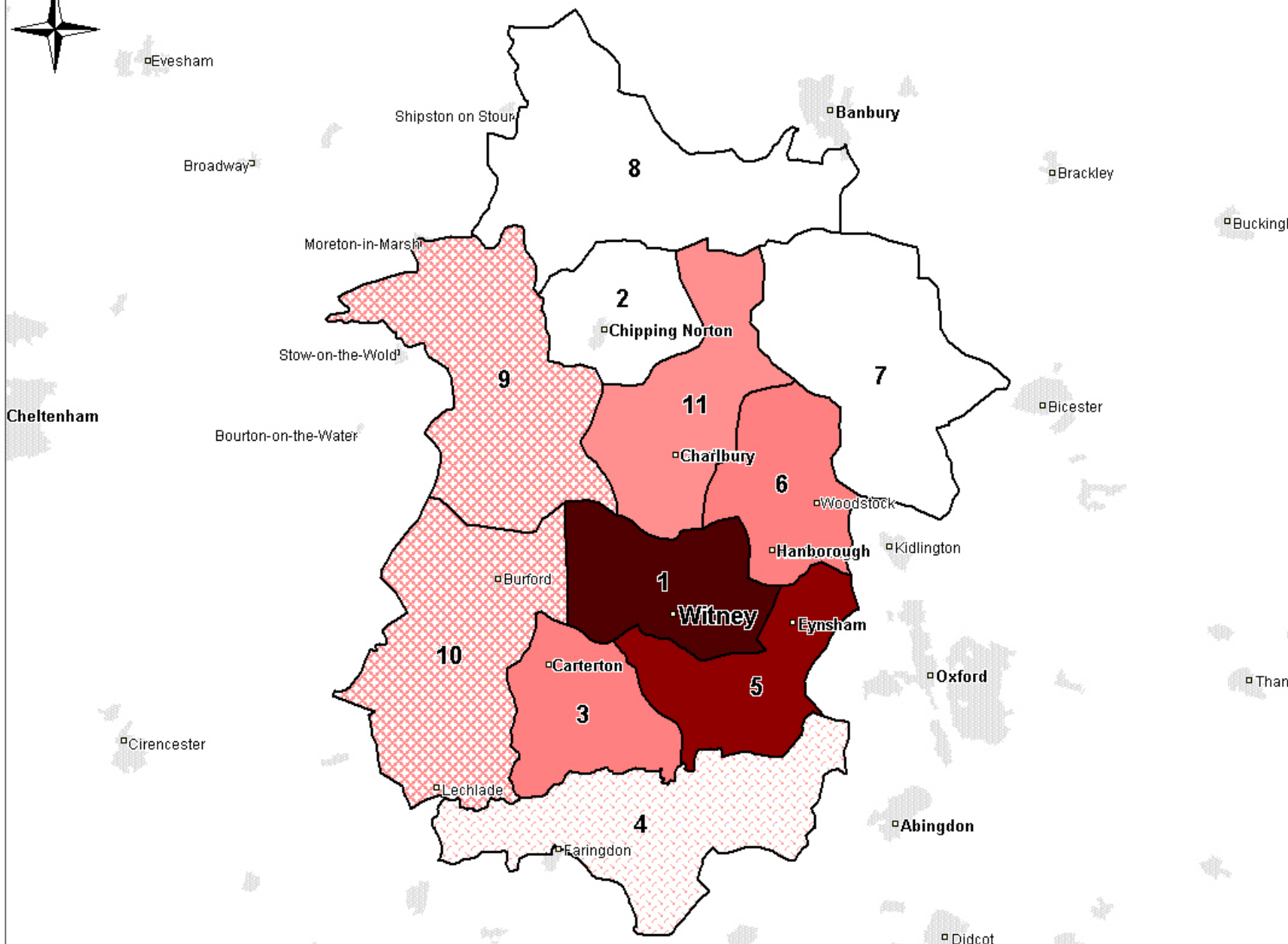
Plan IVa - Witney Convenience Goods Market Shares

Key

Convenience Goods
Market Share (%)



Note: Actual market shares are set out in Table 4, Appendix 1



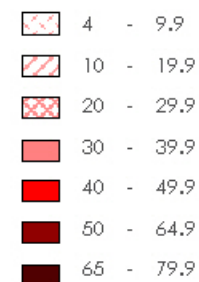
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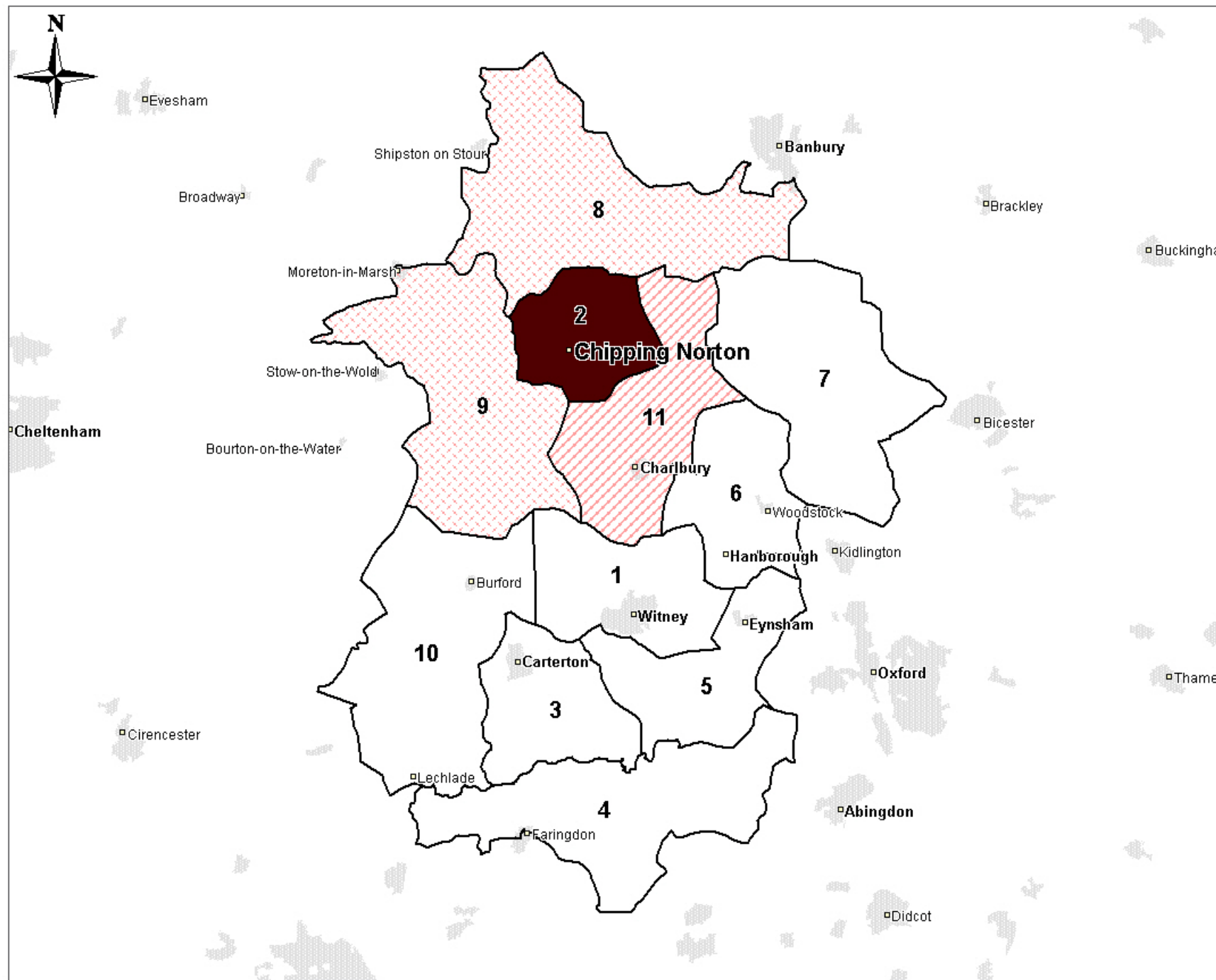
Plan IVb - Chipping Norton Convenience Goods Market Shares

Key

Convenience Goods Market Share (%)



Note: Actual market shares are set out in Table 4, Appendix 1



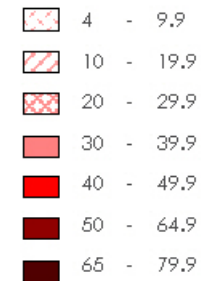
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Plan IVc - Carterton Convenience Goods Market Shares

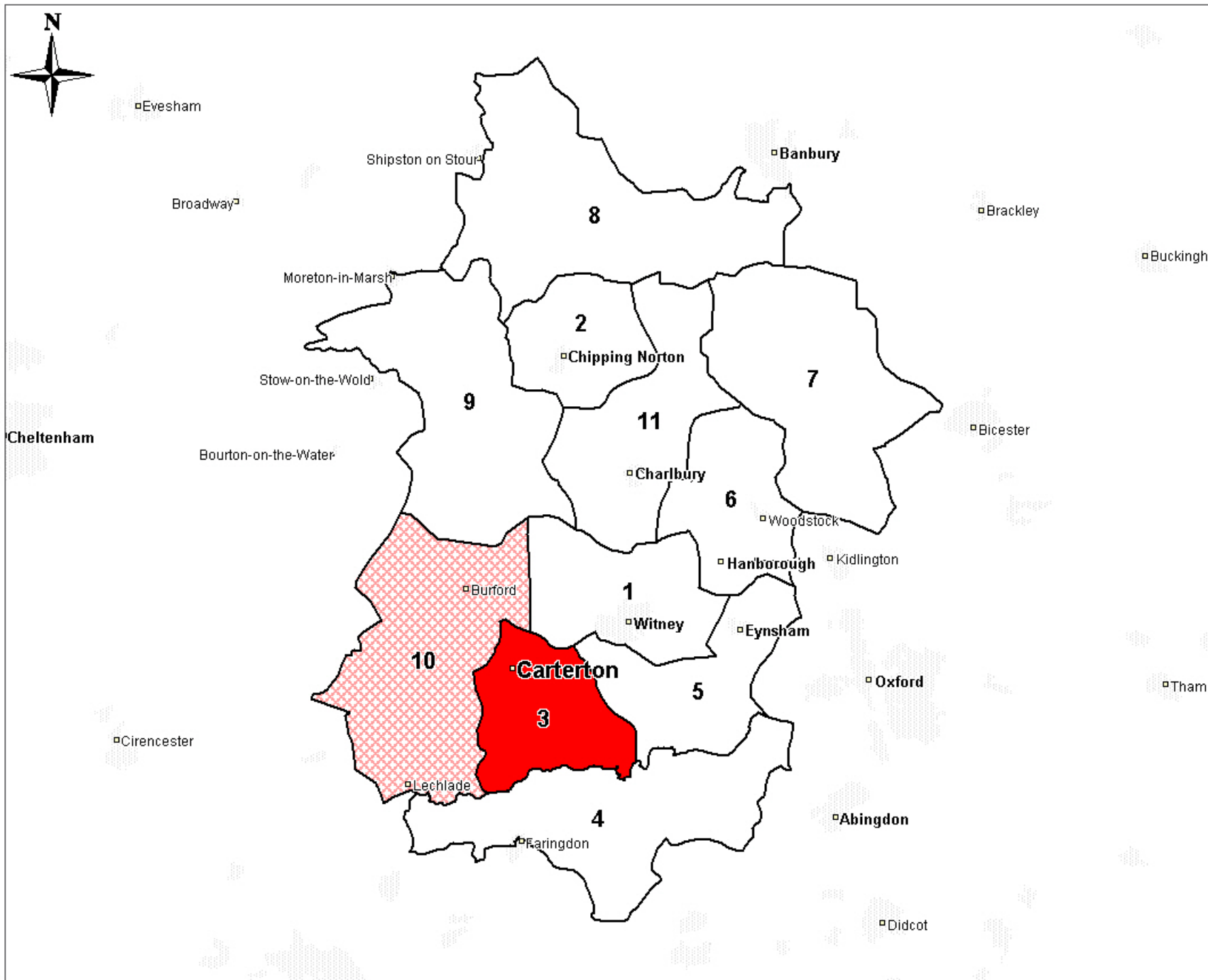
Key

Convenience Goods Market Share (%)



Note: Actual market shares are set out in Table 4, Appendix 1

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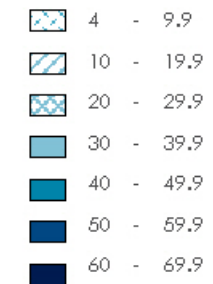




Plan V1a - Witney Comparison Goods Market Shares

Key

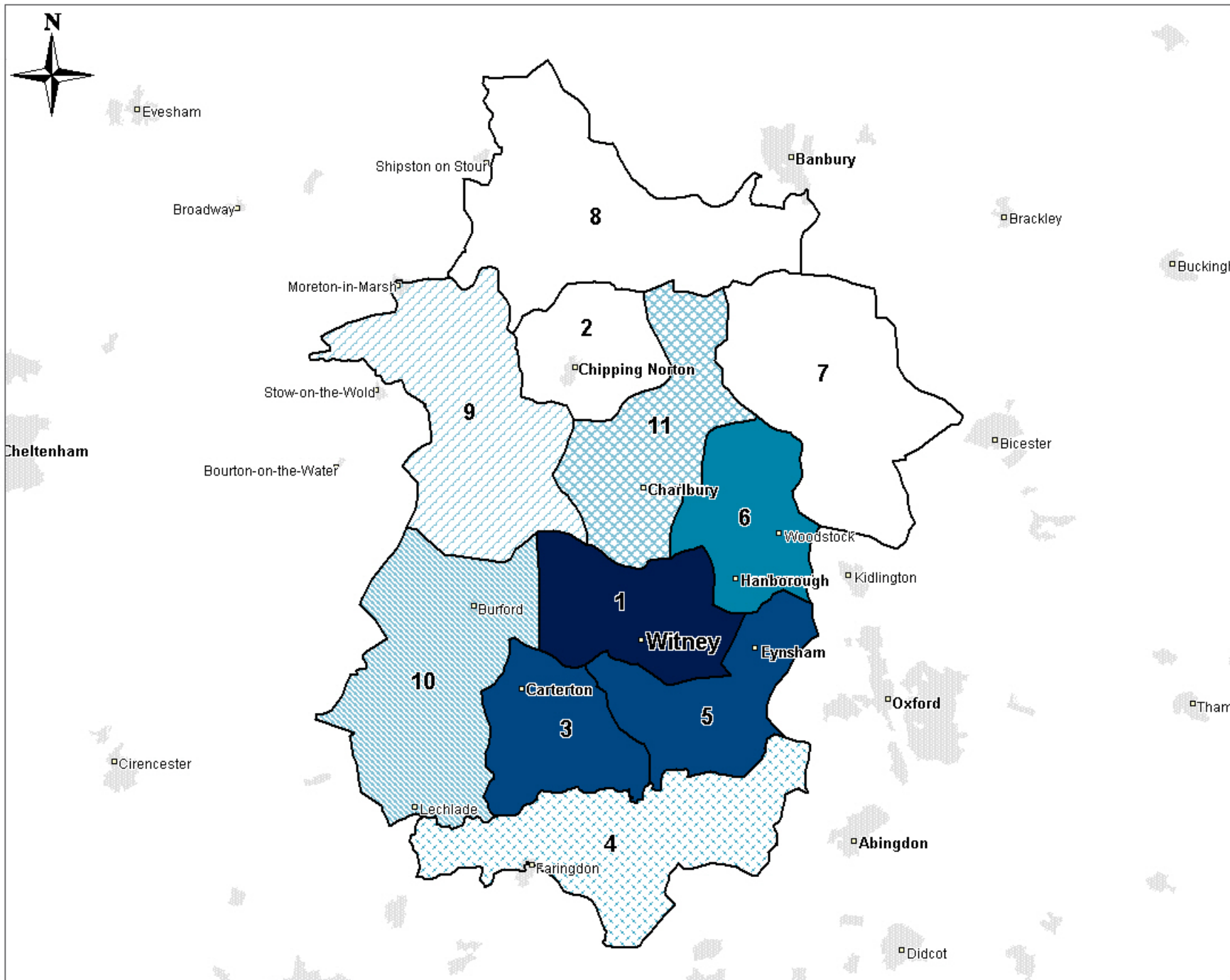
Comparison Goods Market Share (%)



Note: Witney comparison goods market shares include In-centres and out-of-centre stores

Note: Actual market shares are set out in Table 4, Appendix 2

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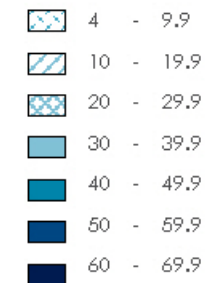




Plan V1b - Chipping Norton Comparison Goods Market Shares

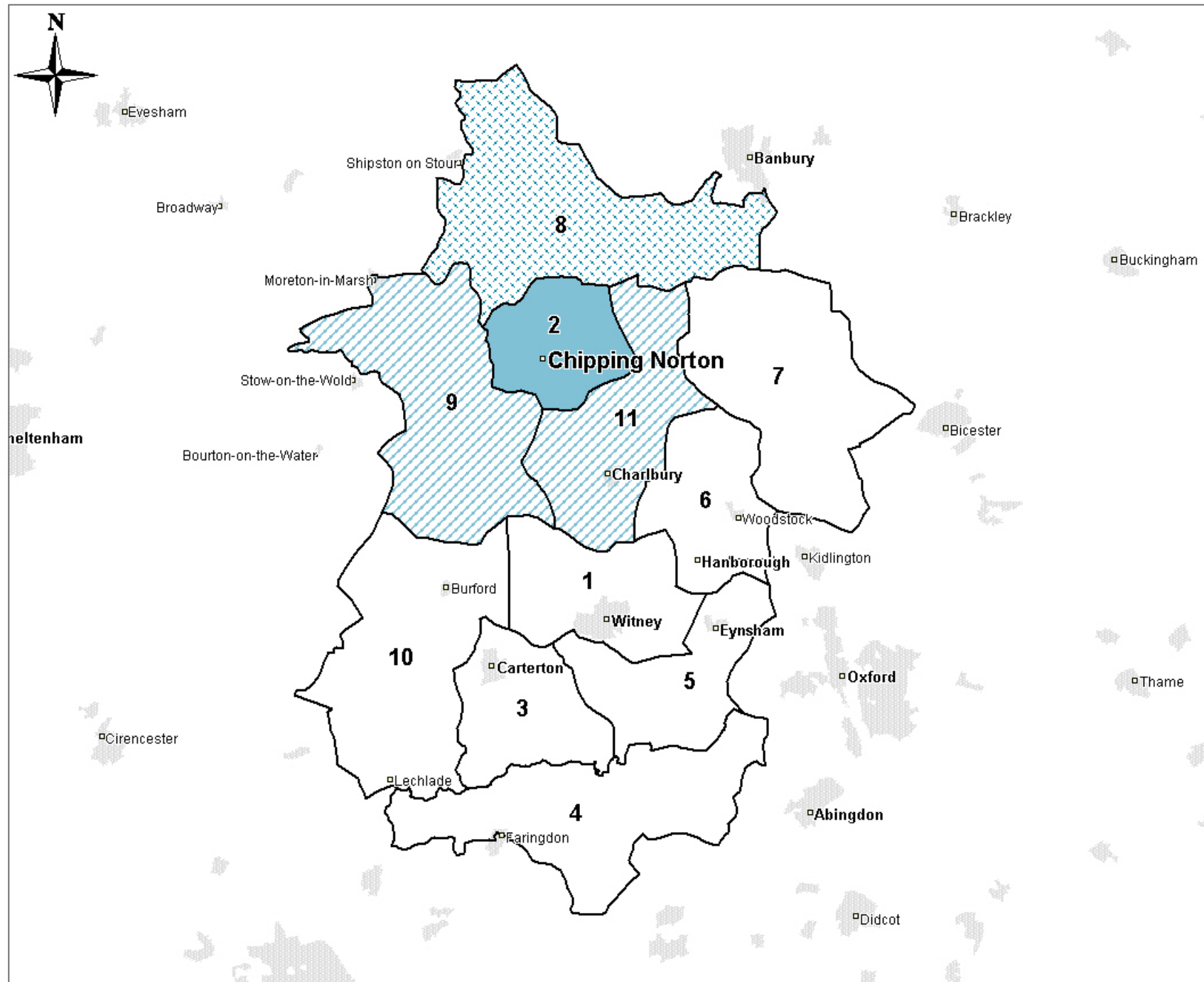
Key

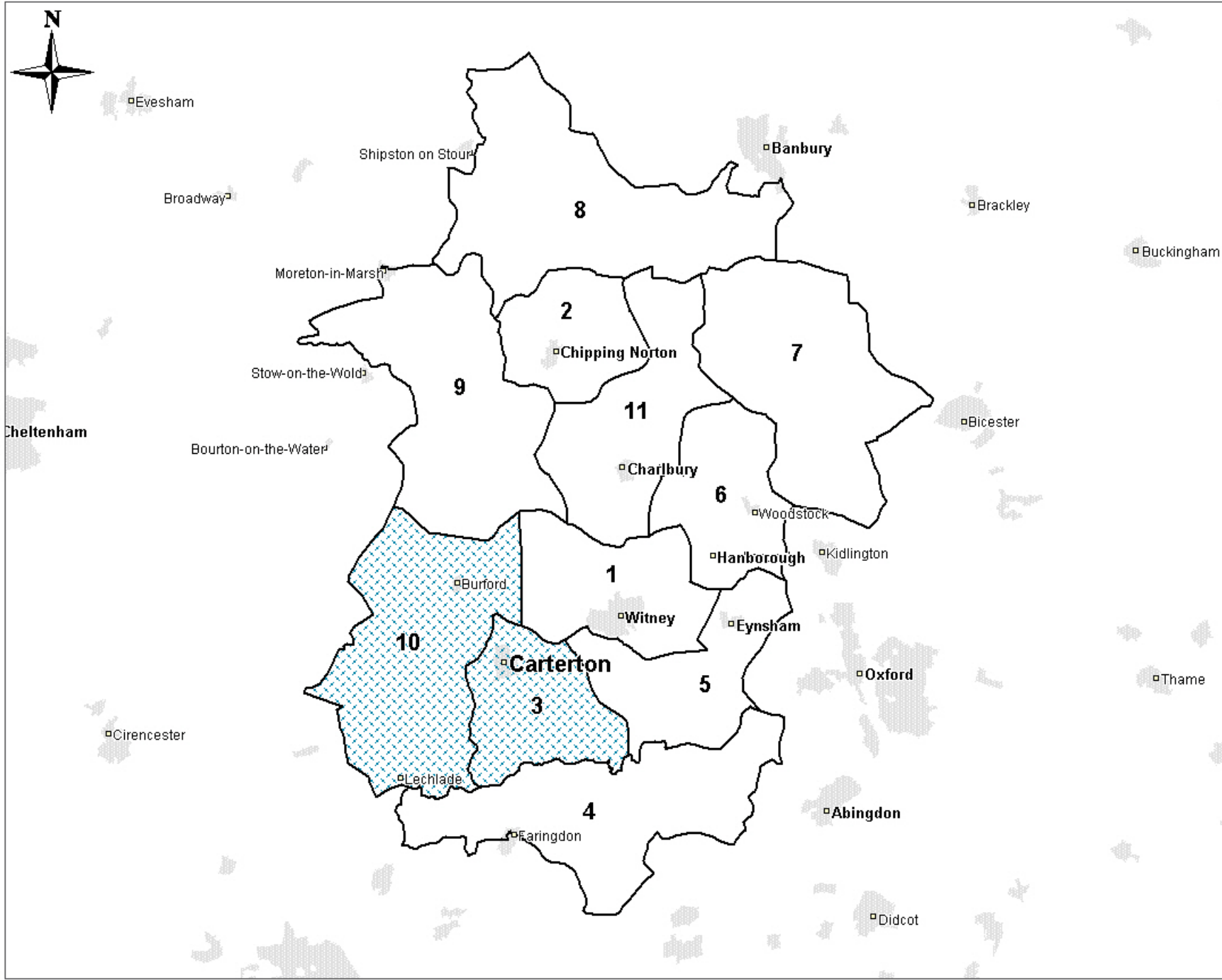
Comparison Goods Market Share (%)



Note: Actual market shares are set out in Table 4, Appendix 2

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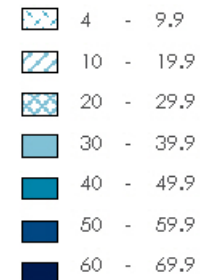




Plan VIc - Carterton Comparison Goods Market Shares

Key

Comparison Goods Market Share (%)



Note: Actual market shares are set out in Table 4, Appendix 2

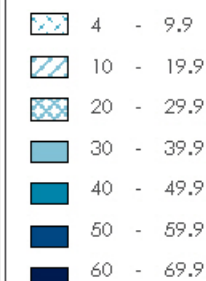
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Plan V1d - Abingdon Comparison Goods Market Shares

Key

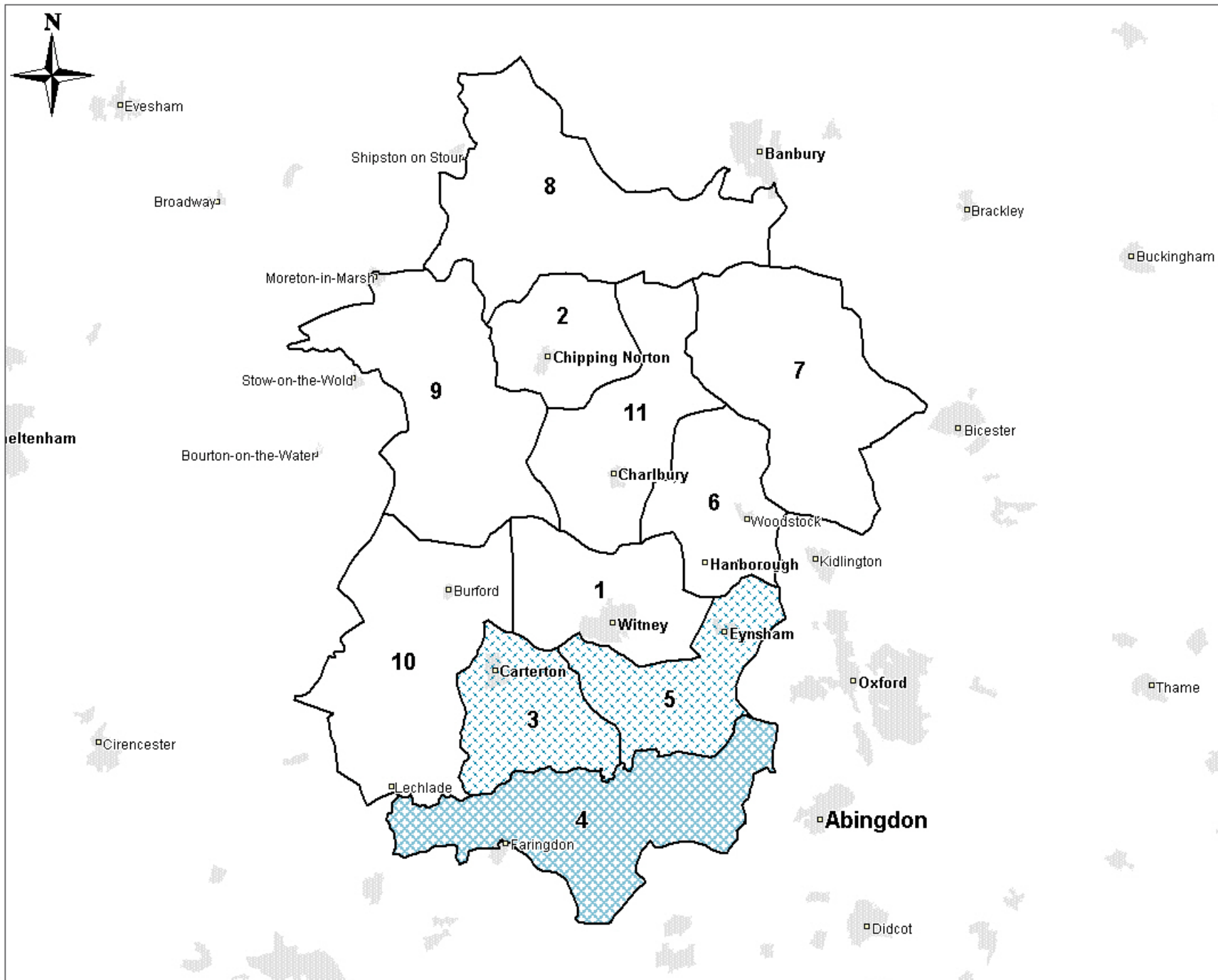
Comparison Goods Market Share (%)



Note: Actual market shares are set out in Table 4, Appendix 2

Note: Comparison goods market shares include in-centre and out-of-centre stores

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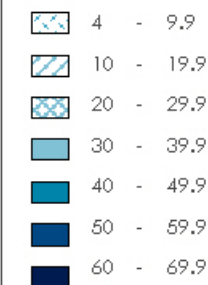




Plan V1e - Banbury Comparison Goods Market Shares

Key

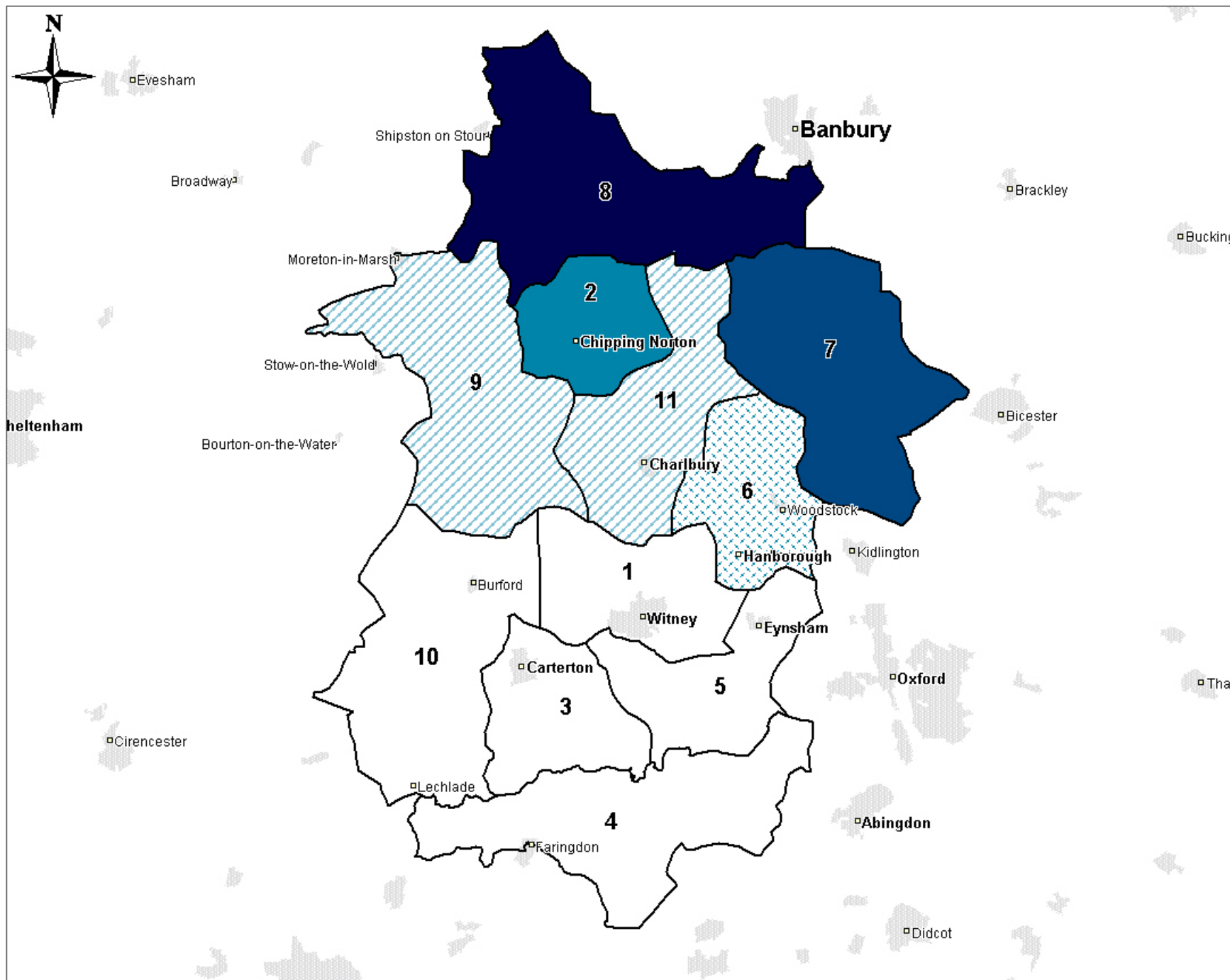
Comparison Goods Market Share (%)



Note: Actual market shares are set out in Table 4, Appendix 2

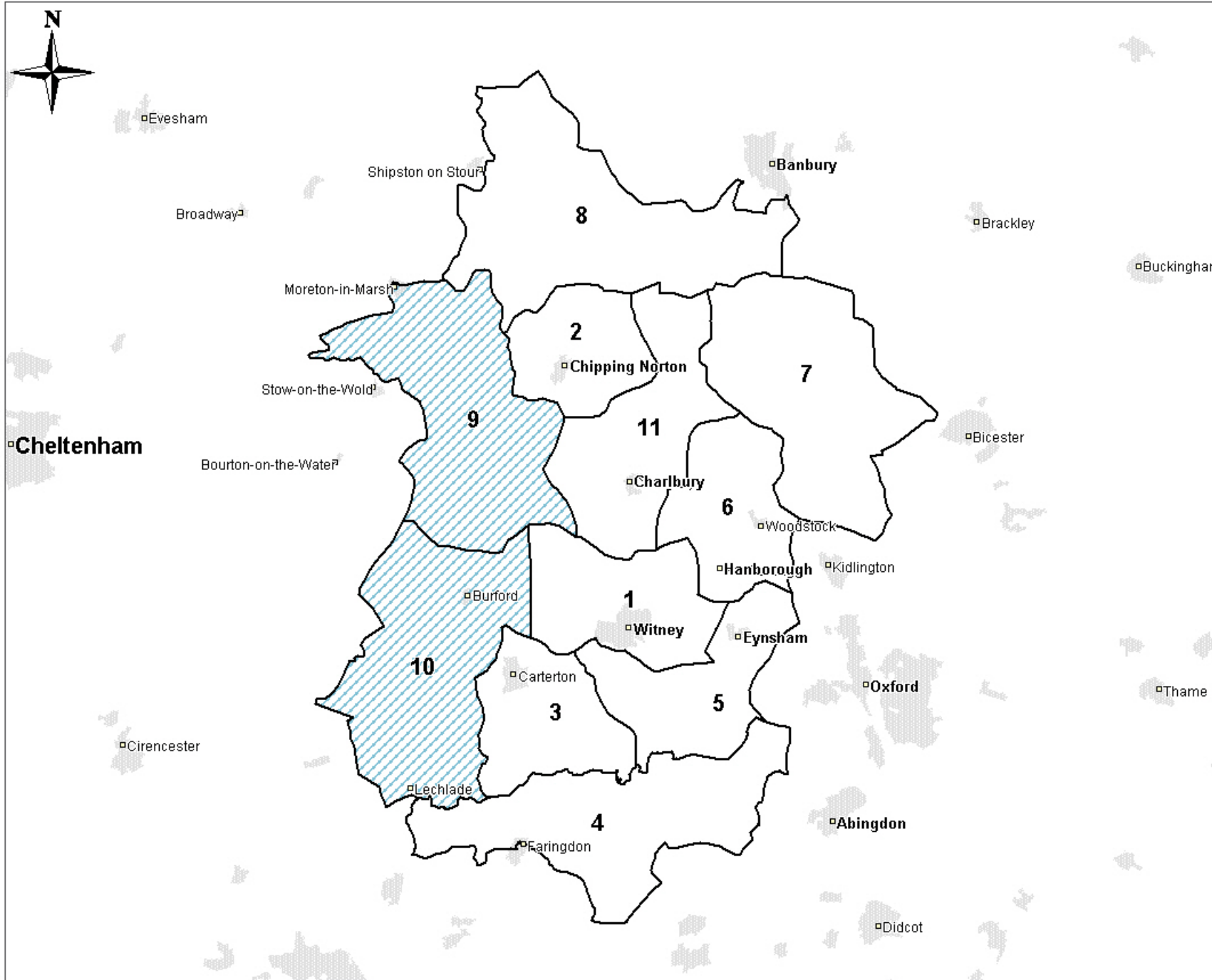
Note: Comparison goods market shares include in-centre and out-of-centre stores

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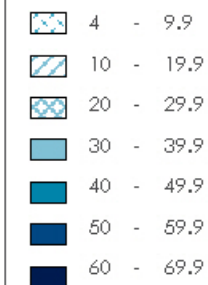


Plan Vlf - Cheltenham Comparison Goods Market Shares



Key

Comparison Goods Market Share (%)



Note: Actual market shares are set out in Table 4, Appendix 2

Note: Comparison goods market shares include in-centre and out-of-centre stores

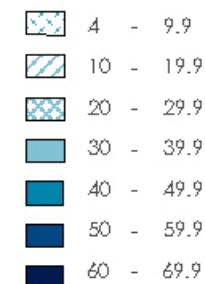
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Plan VIg - Oxford Comparison Goods Market Shares

Key

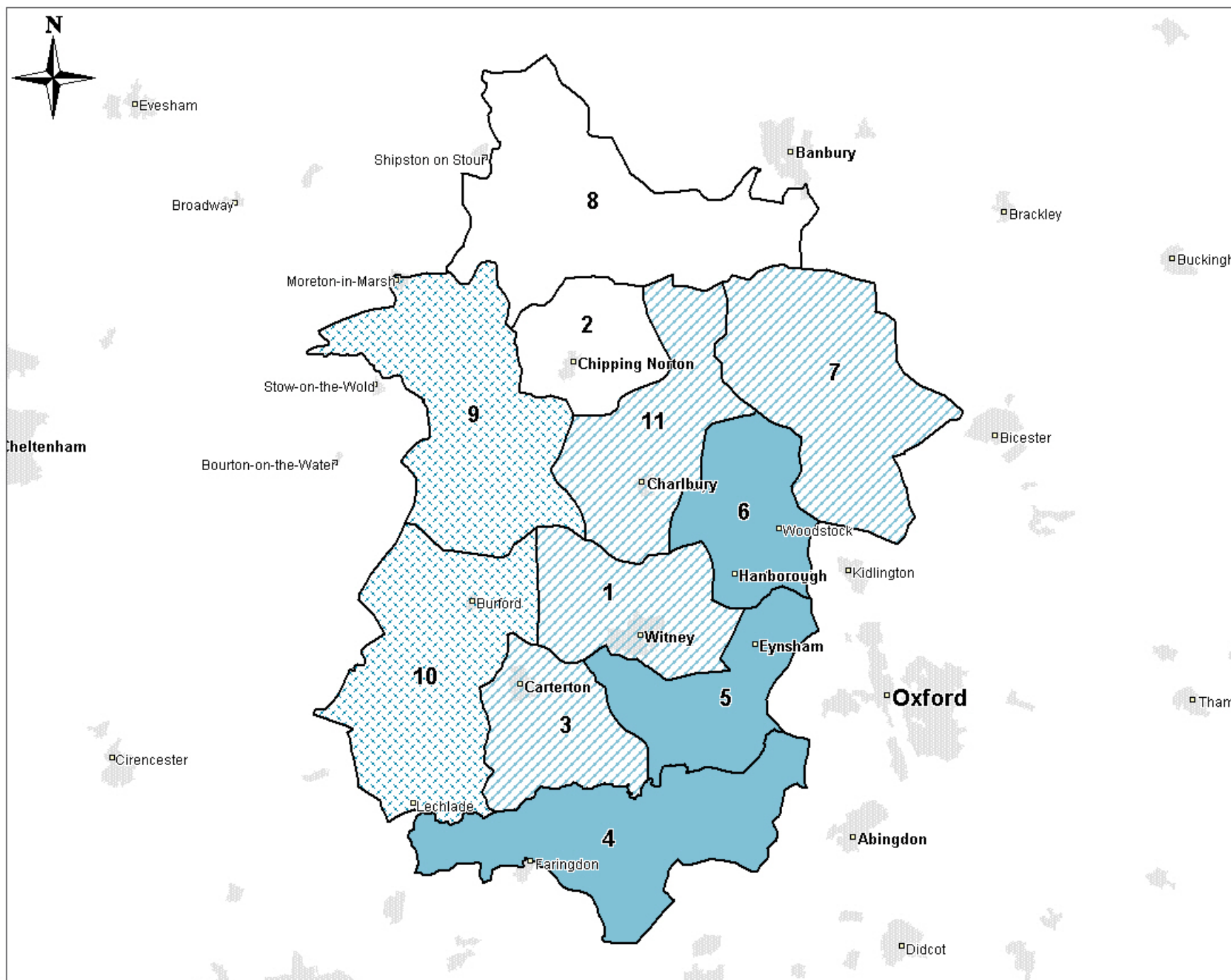
Comparison Goods
Market Share (%)



Note: Actual market shares are set out in Table 4, Appendix 2

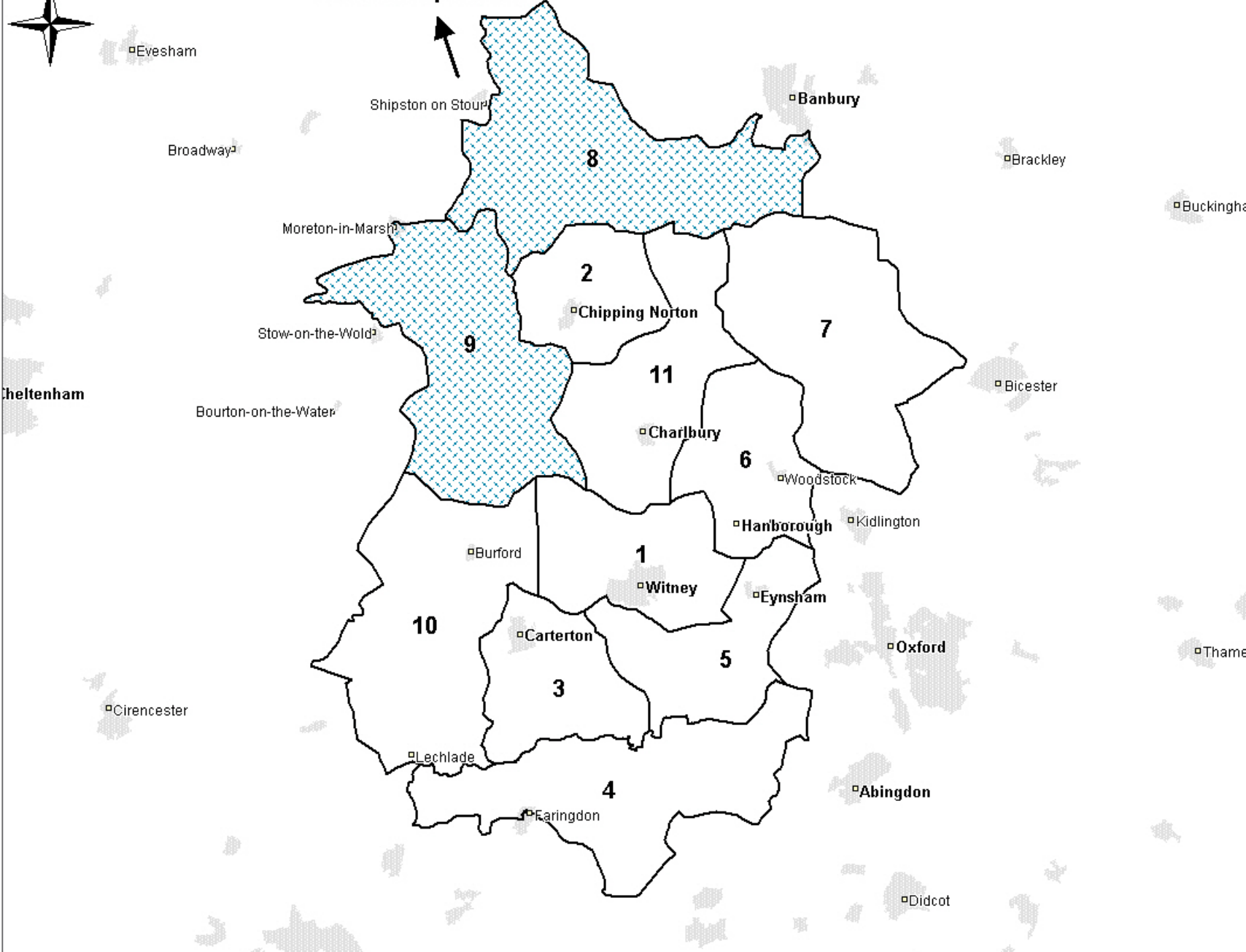
Note: Comparison goods market shares include in-centre and out-of-centre stores

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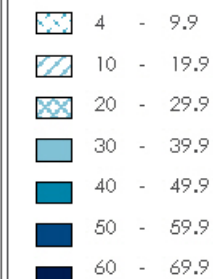
Stratford-upon-Avon



Plan Vih Stratford-upon-Avon Comparison Goods Market Shares

Key

Comparison Goods
Market Share (%)



Note: Actual market shares are set out in Table 4, Appendix 2

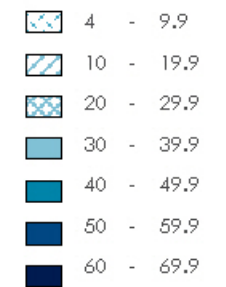
Note: Comparison goods market shares include in-centre and out-of-centre stores

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Plan Vli - Swindon Comparison Goods Market Shares

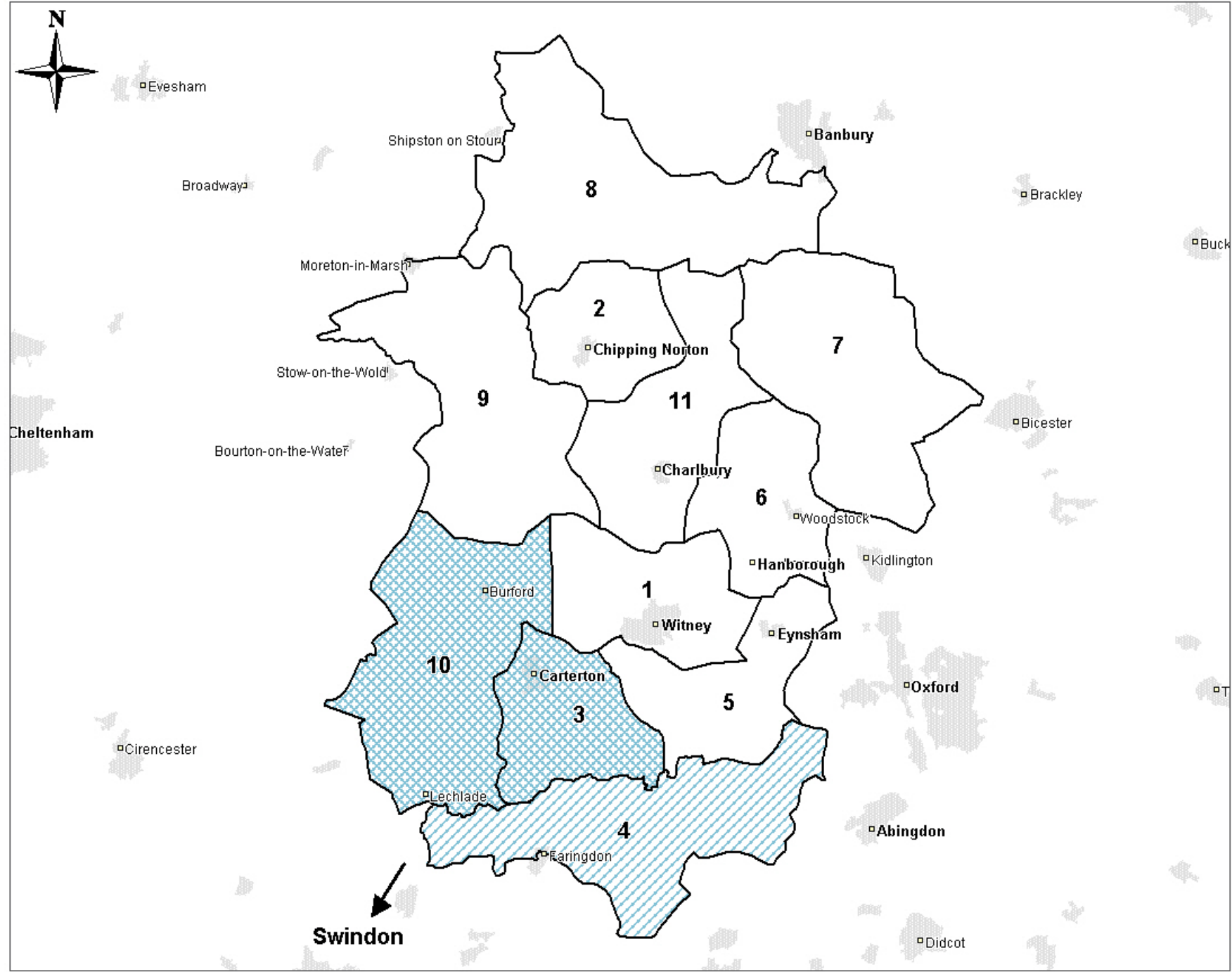
Key
Comparison Goods
Market Share (%)



Note: Actual market shares are set out in Table 4, Appendix 2

Note: Comparison goods market shares include in-centre and out-of-centre stores

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Appendix I
Convenience
Goods
Capacity
Assessment

West Oxfordshire District Council Retail Needs Assessment 2012

Table 1

Survey Area Population Forecasts

Growth in c	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
2012	32,590	8,578	22,818	8,994	8,852	10,916	12,346	15,354	12,779	8,211	7,288	148,726
2014	33,157	8,701	23,551	9,043	8,960	11,062	12,483	15,413	12,875	8,259	7,394	150,898
2019	34,940	9,016	25,215	9,219	9,221	11,404	12,706	15,658	13,116	8,410	7,580	156,485
2024	36,731	9,351	26,887	9,393	9,519	11,760	12,977	15,920	13,462	8,577	7,770	162,347
2029	38,402	9,626	28,401	9,594	9,740	12,051	13,156	16,153	13,763	8,726	7,900	167,512

Source: Experian Micromarketer (July 2012)

Table 1A

Survey Area Postal Sectors

Zone	Postal Sectors	Centres
Zone 1	OX28 1/2/3/4/5/6, OX29 0/6/9	Witney
Zone 2	OX7 5	Chipping Norton
Zone 3	OX18 1/2/3	Carterton, Bampton and Clanfield
Zone 4	OX13 5, SN7 8	Outside District (including Faringdon and Kingston Bagpuize)
Zone 5	OX29 4/5/7	Eynsham and Ducklington
Zone 6	OX20 1, OX29 8	Woodstock and Hanborough
Zone 7	OX5 3, OX7 7, OX15 0, OX25 4/5/6	The Bartons and outside District
Zone 8	CV36 5, OX15 4/5	Outside District (including Long Compton)
Zone 9	GL56 0, OX7 6	Milton, Ascott and Shipton (part outside District)
Zone 10	GL7 3, OX18 4	Burford (part outside District including Lechlade)
Zone 11	OX7 3/4	Charlbury and Finstock

West Oxfordshire District Council Retail Needs Assessment 2012

Table 2

Survey Area Retail Expenditure Forecasts Per Capita (2010 prices) - Convenience Goods

Growth in convenience goods per capita retail expenditure:											
2010 - 2011	-0.3% pa										
2011 - 2012	-0.4%pa										
2012 - 2014	0.5% pa										
2014 - 2019	0.5% pa										
2019 - 2024	0.6% pa										
2024 - 2029	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
2010	2,040	2,009	1,913	2,313	2,164	2,236	2,179	2,219	2,183	2,274	2,211
2012	2,026	1,995	1,900	2,297	2,149	2,220	2,164	2,203	2,168	2,258	2,196
2012 Minus SFT at 4.6%	1,933	1,903	1,812	2,191	2,050	2,118	2,064	2,102	2,068	2,154	2,095
2014	2,046	2,015	1,919	2,320	2,170	2,243	2,185	2,226	2,189	2,281	2,218
2014 Minus SFT at 5.4%	1,936	1,906	1,815	2,195	2,053	2,122	2,067	2,105	2,071	2,158	2,098
2019	2,098	2,066	1,967	2,378	2,225	2,299	2,241	2,282	2,245	2,338	2,274
2019 Minus SFT at 6.1%	1,970	1,940	1,847	2,233	2,089	2,159	2,104	2,143	2,108	2,196	2,135
2024	2,161	2,129	2,027	2,451	2,293	2,369	2,309	2,351	2,313	2,409	2,343
2024 Minus SFT at 6.5%	2,021	1,990	1,895	2,291	2,144	2,215	2,159	2,198	2,163	2,253	2,190
2029	2,227	2,193	2,088	2,525	2,362	2,441	2,379	2,422	2,383	2,482	2,414
2029 Minus SFT at 7%	2,071	2,040	1,942	2,348	2,197	2,270	2,212	2,253	2,216	2,309	2,245

Source: Experian E-Marketer, July 2012. Growth rates and allowance for SFT are derived from Experian Retail Planner 9

Table 3

Survey Area Retail Expenditure Forecasts (2010 prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
2012	62,982	16,326	41,352	19,707	18,147	23,123	25,485	32,276	26,427	17,688	15,265	298,779
2014	64,178	16,585	42,747	19,846	18,397	23,468	25,808	32,451	26,667	17,820	15,511	303,477
2019	68,823	17,489	46,575	20,589	19,267	24,621	26,733	33,549	27,646	18,466	16,182	319,942
2024	74,230	18,610	50,954	21,523	20,406	26,049	28,012	34,996	29,113	19,322	17,019	340,235
2029	79,536	19,634	55,161	22,530	21,399	27,357	29,105	36,391	30,503	20,146	17,734	359,494

Source: Tables 1 & 2

West Oxfordshire District Council Retail Needs Assessment 2012

2012 Baseline

Growth in convenience goods per capita retail expenditure:

Convenience Goods Allocation 2012 - % 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 (%)
WITNEY											
Co-op, High Street, Witney	1.2%	0.0%	0.0%	0.4%	3.7%	0.8%	0.0%	0.0%	0.0%	0.0%	0.8%
Marks and Spencers, Marriott's Close, Witney	2.8%	0.0%	0.7%	0.4%	1.5%	0.4%	0.0%	0.0%	1.1%	0.0%	0.0%
Waitrose, Woolgate Centre, Witney	17.1%	0.0%	4.2%	3.0%	11.7%	12.1%	0.7%	0.0%	5.2%	13.3%	17.6%
Other Witney Town Centre	1.6%	0.0%	0.0%	0.0%	1.3%	1.6%	0.0%	0.0%	0.8%	0.0%	0.4%
Total Witney In Centre	22.6%	0.0%	4.9%	3.8%	18.3%	14.9%	0.7%	0.0%	7.1%	13.3%	18.7%
Lidl, Ducklington Lane, Witney (OOC)	8.4%	0.0%	0.8%	0.0%	3.9%	0.7%	0.0%	0.0%	1.9%	0.0%	1.5%
Sainsbury's, Wilan Way, Witney (OOC)	43.5%	0.7%	29.8%	5.6%	35.0%	20.9%	1.1%	0.0%	11.6%	12.5%	19.4%
Total Witney Out of Centre	51.8%	0.7%	30.6%	5.6%	38.8%	21.6%	1.1%	0.0%	13.4%	12.5%	21.0%
Total Witney	74.4%	0.7%	35.5%	9.4%	57.1%	36.5%	1.8%	0.0%	20.5%	25.8%	39.7%
CHIPPING NORTON											
Co-op, High Street, Chipping Norton	0.0%	43.6%	0.0%	0.0%	0.0%	0.0%	0.0%	6.9%	5.3%	0.0%	8.7%
Sainsbury's, Market Place, Chipping Norton	0.4%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	4.5%	0.0%	3.2%
Other Chipping Norton Town Centre	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
Total Chipping Norton Town Centre	0.4%	66.3%	0.0%	0.0%	0.0%	0.0%	0.4%	9.6%	9.8%	0.0%	11.9%
CARTERTON											
Aldi, Alvescot Road, Carterton	1.5%	0.0%	22.6%	0.4%	1.9%	0.0%	0.0%	0.0%	1.5%	6.4%	1.5%
Co-op, Black Bourton Road, Carterton	1.6%	0.0%	17.9%	0.7%	0.7%	0.0%	0.0%	0.3%	1.5%	13.9%	0.0%
Other Carterton Town Centre	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Carterton Town Centre	3.0%	0.0%	43.0%	1.1%	2.7%	0.0%	0.0%	0.3%	3.0%	20.3%	1.5%
SMALLER CENTRES IN WEST OXFORDSHIRE											
Local Stores Burford	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.4%	8.6%	0.0%
Local Stores Charlbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	36.9%
Local Stores Hanborough	2.8%	0.0%	0.0%	0.0%	0.9%	18.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Stores Woodstock	0.0%	0.0%	0.0%	0.0%	0.0%	10.6%	2.9%	0.0%	0.0%	0.0%	0.0%
Total Smaller Centres in West Oxfordshire	2.8%	0.0%	0.0%	0.4%	0.9%	30.0%	2.9%	0.0%	0.4%	8.6%	36.9%
OUTSIDE WEST OXFORDSHIRE DISTRICT											
Morrisons, Swan Close Road, Banbury	0.7%	3.0%	0.0%	0.0%	0.7%	1.9%	14.5%	20.5%	1.5%	0.0%	2.3%
Sainsbury's, Oxford Road, Banbury	0.0%	7.8%	0.0%	0.0%	0.0%	0.7%	27.1%	23.0%	2.2%	0.0%	1.5%
Sainsbury's, Oxford Road, Kidlington	0.0%	1.5%	0.0%	0.4%	5.7%	14.6%	20.8%	0.0%	0.0%	0.8%	0.8%
Tesco Extra, Marcham Road, Abingdon	0.7%	0.0%	3.1%	22.1%	4.5%	0.7%	0.0%	0.0%	0.7%	0.8%	0.0%
Tesco, Fosse Way, Stow-on-the-Wald	0.7%	3.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.3%	21.7%	1.1%	0.8%
Total Outside West Oxfordshire District	2.2%	15.3%	3.8%	22.5%	10.9%	17.9%	62.3%	43.9%	26.1%	2.7%	5.4%
Other	17.1%	17.7%	17.6%	66.6%	28.5%	15.6%	32.6%	46.2%	40.1%	42.6%	4.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: West Oxfordshire Telephone Survey, July 2012

Table 5

Convenience Goods Allocation 2012 - Spend (£) 2010 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)	Total (£000)
WITNEY												
Co-op, High Street, Witney	724	0	0	80	670	188	0	0	0	0	116	1,778
Marks and Spencers, Marriott's Close, Witney	1,746	0	295	80	270	94	0	0	298	0	0	2,783
Waitrose, Woolgate Centre, Witney	10,740	0	1,738	587	2,132	2,801	182	0	1,378	2,353	2,681	24,593
Other Witney Town Centre	1,021	0	0	0	240	360	0	0	203	0	63	1,887
Total Witney In Centre	14,232	0	2,034	747	3,313	3,442	182	0	1,879	2,353	2,860	31,042
Lidl, Ducklington Lane, Witney (OOC)	5,284	0	318	0	701	172	0	0	495	0	232	7,202
Sainsbury's, Wilan Way, Witney (OOC)	27,370	122	12,338	1,107	6,346	4,821	281	0	3,054	2,219	2,967	60,624
Total Witney Out of Centre	32,653	122	12,656	1,107	7,047	4,994	281	0	3,549	2,219	3,199	67,826
Total Witney	46,885	122	14,690	1,854	10,360	8,435	463	0	5,428	4,572	6,058	98,868
CHIPPING NORTON												
Co-op, High Street, Chipping Norton	0	7,121	0	0	0	0	0	2,226	1,406	0	1,327	12,080
Sainsbury's, Market Place, Chipping Norton	255	3,264	0	0	0	0	0	857	1,188	0	483	6,047
Other Chipping Norton Town Centre	0	440	0	0	0	0	91	0	0	0	0	531
Total Chipping Norton Town Centre	255	10,824	0	0	0	0	91	3,083	2,593	0	1,811	18,658
CARTERTON												
Aldi, Alvescot Road, Carterton	938	0	9,361	80	350	0	0	0	394	1,135	232	12,490
Co-op, Black Bourton Road, Carterton	980	0	7,407	147	135	0	0	113	394	2,463	0	11,638
Other Carterton Town Centre	0	0	1,034	0	0	0	0	0	0	0	0	1,034
Total Carterton Town Centre	1,918	0	17,802	227	485	0	0	113	787	3,598	232	25,162
SMALLER CENTRES IN WEST OXFORDSHIRE												
Local Stores Burford	0	0	0	80	0	0	0	0	102	1,517	0	1,699
Local Stores Charlbury	0	0	0	0	0	188	0	0	0	0	5,639	5,826
Local Stores Hanborough	1,746	0	0	0	160	4,284	0	0	0	0	0	6,189
Local Stores Woodstock	0	0	0	0	0	2,455	744	0	0	0	0	3,198
Total Smaller Centres in West Oxfordshire	1,746	0	0	80	160	6,926	744	0	102	1,517	5,639	16,913
OUTSIDE WEST OXFORDSHIRE DISTRICT												
Morrisons, Swan Close Road, Banbury	469	486	0	0	135	438	3,689	6,614	394	0	348	12,574
Sainsbury's, Oxford Road, Banbury	0	1,278	0	0	0	172	6,908	7,428	590	0	232	16,609
Sainsbury's, Oxford Road, Kidlington	0	243	0	80	1,026	3,365	5,291	0	0	135	116	10,256
Tesco Extra, Marcham Road, Abingdon	469	0	1,272	4,349	811	172	0	0	197	135	0	7,404
Tesco, Fosse Way, Stow-on-the-Wald	469	486	318	0	0	0	0	113	5,727	200	125	7,438
Total Outside West Oxfordshire District	1,407	2,494	1,590	4,429	1,972	4,148	15,888	14,154	6,908	469	822	54,281
Other	10,771	2,886	7,271	13,118	5,169	3,613	8,300	14,926	10,609	7,531	703	84,897
Total	62,982	16,326	41,352	19,707	18,147	23,123	25,485	32,276	26,427	17,688	15,265	298,779

Source: Tables 3 & 4

West Oxfordshire District Council Retail Needs Assessment 2012

2014 Baseline

Table 6
Convenience Goods Allocation 2014 - Spend (£) 2010 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)	Total (£000)
WITNEY												
Co-op, High Street, Witney	738	0	0	80	680	190	0	0	0	0	118	1,807
Marks and Spencers, Marriott's Close, Witney	1,779	0	305	80	274	95	0	0	301	0	0	2,835
Waitrose, Woolgate Centre, Witney	10,944	0	1,797	591	2,162	2,843	184	0	1,390	2,371	2,724	25,006
Other Witney Town Centre	1,041	0	0	0	244	365	0	0	205	0	64	1,918
Total Witney In Centre	14,502	0	2,102	752	3,359	3,493	184	0	1,896	2,371	2,906	31,566
Lidl, Ducklington Lane, Witney (OOC)	5,384	0	329	0	710	175	0	0	500	0	236	7,334
Sainsbury's, Witlan Way, Witney (OOC)	27,889	124	12,754	1,115	6,434	4,893	284	0	3,081	2,235	3,014	61,824
Total Witney Out of Centre	33,273	124	13,083	1,115	7,144	5,068	284	0	3,581	2,235	3,250	69,158
Total Witney Town Centre	47,775	124	15,185	1,867	10,503	8,562	469	0	5,478	4,606	6,156	100,724
CHIPPING NORTON												
Co-op, High Street, Chipping Norton	0	7,234	0	0	0	0	0	2,238	1,419	0	1,349	12,240
Sainsbury's, Market Place, Chipping Norton	260	3,316	0	0	0	0	0	862	1,198	0	491	6,127
Other Chipping Norton Town Centre	0	447	0	0	0	0	92	0	0	0	0	539
Total Chipping Norton Town Centre	260	10,996	0	0	0	0	92	3,100	2,617	0	1,840	18,905
CARTERTON												
Aldi, Alvescot Road, Carterton	956	0	9,677	80	355	0	0	0	397	1,143	236	12,845
Co-op, Black Bourton Road, Carterton	998	0	7,657	148	137	0	0	113	397	2,482	0	11,932
Other Carterton Town Centre	0	0	1,069	0	0	0	0	0	0	0	0	1,069
Total Carterton Out of Centre	1,954	0	18,402	228	492	0	0	113	794	3,625	236	25,845
SMALLER CENTRES IN WEST OXFORDSHIRE												
Local Stores Burford	0	0	0	80	0	0	0	0	103	1,529	0	1,712
Local Stores Charlbury	0	0	0	0	0	190	0	0	0	0	5,730	5,920
Local Stores Hanborough	1,779	0	0	0	162	4,348	0	0	0	0	0	6,289
Local Stores Woodstock	0	0	0	0	0	2,491	753	0	0	0	0	3,245
Total Smaller Centres in West Oxfordshire	1,779	0	0	80	162	7,029	753	0	103	1,529	5,730	17,165
OUTSIDE WEST OXFORDSHIRE DISTRICT												
Morrisons, Swan Close Road, Banbury	478	494	0	0	137	445	3,736	6,650	397	0	354	12,691
Sainsbury's, Oxford Road, Banbury	0	1,299	0	0	0	175	6,995	7,468	596	0	236	16,768
Sainsbury's, Oxford Road, Kidlington	0	247	0	80	1,040	3,416	5,358	0	0	136	118	10,395
Tesco Extra, Marcham Road, Abingdon	478	0	1,315	4,379	822	175	0	0	198	136	0	7,503
Tesco, Fosse Way, Stow-on-the-Wold	478	494	329	0	0	0	0	113	5,779	202	127	7,522
Total Outside West Oxfordshire District	1,434	2,534	1,644	4,460	1,999	4,210	16,089	14,231	6,970	473	835	54,879
Other	10,975	2,932	7,516	13,210	5,241	3,667	8,405	15,007	10,705	7,587	714	85,959
Total	64,178	16,585	42,747	19,846	18,397	23,468	25,808	32,451	26,667	17,820	15,511	303,477

Source: Tables 3 & 4

West Oxfordshire District Council Retail Needs Assessment 2012

2019 Baseline

**Table 7
Convenience Goods Allocation 2019 - Spend (£) 2010 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)	Total (£000)
WITNEY												
Co-op, High Street, Witney	792	0	0	83	712	200	0	0	0	0	123	1,910
Marks and Spencers, Marriott's Close, Witney	1,908	0	333	83	287	100	0	0	312	0	0	3,023
Waitrose, Woolgate Centre, Witney	11,736	0	1,958	613	2,264	2,982	191	0	1,441	2,457	2,842	26,485
Other Witney Town Centre	1,116	0	0	0	255	383	0	0	213	0	67	2,033
Total Witney In Centre	15,552	0	2,290	780	3,518	3,665	191	0	1,966	2,457	3,031	33,450
Lidl, Ducklington Lane, Witney (OOC)	5,774	0	358	0	744	183	0	0	518	0	246	7,824
Sainsbury's, Witan Way, Witney (OOC)	29,908	130	13,896	1,157	6,738	5,134	295	0	3,195	2,316	3,145	65,913
Total Witney Out of Centre	35,682	130	14,254	1,157	7,482	5,317	295	0	3,713	2,316	3,391	73,737
Total Witney Town Centre	51,233	130	16,545	1,937	11,000	8,982	486	0	5,679	4,773	6,422	107,188
CHIPPING NORTON												
Co-op, High Street, Chipping Norton	0	7,628	0	0	0	0	0	2,314	1,471	0	1,407	12,820
Sainsbury's, Market Place, Chipping Norton	279	3,497	0	0	0	0	0	891	1,242	0	512	6,421
Other Chipping Norton Town Centre	0	471	0	0	0	0	96	0	0	0	0	566
Total Chipping Norton Town Centre	279	11,596	0	0	0	0	96	3,205	2,713	0	1,919	19,808
CARTERTON												
Aldi, Alvescot Road, Carterton	1,025	0	10,544	83	372	0	0	0	412	1,185	246	13,867
Co-op, Black Bourton Road, Carterton	1,071	0	8,342	153	144	0	0	117	412	2,572	0	12,810
Other Carterton Town Centre	0	0	1,164	0	0	0	0	0	0	0	0	1,164
Total Carterton Out of Centre	2,096	0	20,050	237	515	0	0	117	824	3,756	246	27,842
SMALLER CENTRES IN WEST OXFORDSHIRE												
Local Stores Burford	0	0	0	83	0	0	0	0	106	1,584	0	1,774
Local Stores Charlbury	0	0	0	0	0	200	0	0	0	0	5,977	6,177
Local Stores Hanborough	1,908	0	0	0	170	4,561	0	0	0	0	0	6,639
Local Stores Woodstock	0	0	0	0	0	2,614	780	0	0	0	0	3,394
Total Smaller Centres in West Oxfordshire	1,908	0	0	83	170	7,375	780	0	106	1,584	5,977	17,984
OUTSIDE WEST OXFORDSHIRE DISTRICT												
Morrisons, Swan Close Road, Banbury	513	521	0	0	144	467	3,870	6,875	412	0	369	13,169
Sainsbury's, Oxford Road, Banbury	0	1,370	0	0	0	183	7,246	7,720	618	0	246	17,383
Sainsbury's, Oxford Road, Kidlington	0	261	0	83	1,089	3,584	5,550	0	0	141	123	10,830
Tesco Extra, Marcham Road, Abingdon	513	0	1,433	4,543	861	183	0	0	206	141	0	7,879
Tesco, Fosse Way, Stow-on-the-Wold	513	521	358	0	0	0	0	117	5,991	209	133	7,842
Total Outside West Oxfordshire District	1,538	2,672	1,791	4,627	2,094	4,417	16,666	14,712	7,226	490	872	57,104
Other	11,770	3,091	8,189	13,705	5,489	3,847	8,706	15,515	11,098	7,862	745	90,018
Total	68,823	17,489	46,575	20,589	19,267	24,621	26,733	33,549	27,646	18,466	16,182	319,942

Source: Tables 3 & 4

West Oxfordshire District Council Retail Needs Assessment 2012

2024 Baseline

Table 8
Convenience Goods Allocation 2024 - Spend (£) 2010 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)	Total (£000)
WITNEY												
Co-op, High Street, Witney	854	0	0	87	754	211	0	0	0	0	129	2,036
Marks and Spencers, Marriott's Close, Witney	2,058	0	364	87	304	106	0	0	329	0	0	3,247
Waitrose, Woolgate Centre, Witney	12,658	0	2,142	641	2,398	3,155	200	0	1,518	2,571	2,989	28,272
Other Witney Town Centre	1,204	0	0	0	270	405	0	0	224	0	70	2,173
Total Witney In Centre	16,773	0	2,506	816	3,726	3,878	200	0	2,070	2,571	3,188	35,727
Lidl, Ducklington Lane, Witney (OOC)	6,227	0	392	0	788	194	0	0	546	0	259	8,406
Sainsbury's, Witan Way, Witney (OOC)	32,258	139	15,202	1,209	7,137	5,432	309	0	3,364	2,424	3,307	70,780
Total Witney Out of Centre	38,485	139	15,594	1,209	7,925	5,626	309	0	3,910	2,424	3,566	79,186
Total Witney Town Centre	55,259	139	18,100	2,025	11,650	9,503	509	0	5,980	4,995	6,754	114,913
CHIPPING NORTON												
Co-op, High Street, Chipping Norton	0	8,117	0	0	0	0	0	2,414	1,549	0	1,480	13,560
Sainsbury's, Market Place, Chipping Norton	301	3,721	0	0	0	0	0	929	1,308	0	539	6,798
Other Chipping Norton Town Centre	0	501	0	0	0	0	100	0	0	0	0	601
Total Chipping Norton Town Centre	301	12,339	0	0	0	0	100	3,343	2,857	0	2,019	20,959
CARTERTON												
Aldi, Alvescot Road, Carterton	1,106	0	11,535	87	394	0	0	0	434	1,240	259	15,054
Co-op, Black Bourton Road, Carterton	1,155	0	9,127	160	152	0	0	122	434	2,691	0	13,840
Other Carterton Town Centre	0	0	1,274	0	0	0	0	0	0	0	0	1,274
Total Carterton Out of Centre	2,261	0	21,935	247	546	0	0	122	867	3,931	259	30,168
SMALLER CENTRES IN WEST OXFORDSHIRE												
Local Stores Burford	0	0	0	87	0	0	0	0	112	1,658	0	1,857
Local Stores Charlbury	0	0	0	0	0	211	0	0	0	0	6,286	6,498
Local Stores Hanborough	2,058	0	0	0	180	4,826	0	0	0	0	0	7,063
Local Stores Woodstock	0	0	0	0	0	2,765	817	0	0	0	0	3,583
Total Smaller Centres in West Oxfordshire	2,058	0	0	87	180	7,803	817	0	112	1,658	6,286	19,001
OUTSIDE WEST OXFORDSHIRE DISTRICT												
Morrisons, Swan Close Road, Banbury	553	554	0	0	152	494	4,055	7,171	434	0	388	13,801
Sainsbury's, Oxford Road, Banbury	0	1,457	0	0	0	194	7,593	8,053	650	0	259	18,207
Sainsbury's, Oxford Road, Kidlington	0	277	0	87	1,154	3,791	5,815	0	0	147	129	11,401
Tesco Extra, Marcham Road, Abingdon	553	0	1,568	4,749	912	194	0	0	217	147	0	8,339
Tesco, Fosse Way, Stow-on-the-Wald	553	554	392	0	0	0	0	122	6,309	219	140	8,288
Total Outside West Oxfordshire District	1,659	2,843	1,960	4,837	2,217	4,673	17,463	15,347	7,609	513	917	60,038
Other	12,694	3,290	8,959	14,327	5,813	4,071	9,123	16,184	11,687	8,226	784	95,157
Total	74,230	18,610	50,954	21,523	20,406	26,049	28,012	34,996	29,113	19,322	17,019	340,235

Source: Tables 3 & 4

West Oxfordshire District Council Retail Needs Assessment 2012

2029 Baseline

Table 9
Convenience Goods Allocation 2029 - Spend (£) 2010 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)	Total (£000)
WITNEY												
Co-op, High Street, Witney	915	0	0	91	791	222	0	0	0	0	135	2,153
Marks and Spencers, Marriott's Close, Witney	2,205	0	394	91	319	111	0	0	344	0	0	3,464
Waitrose, Woolgate Centre, Witney	13,563	0	2,319	671	2,514	3,314	208	0	1,590	2,680	3,114	29,974
Other Witney Town Centre	1,290	0	0	0	283	426	0	0	235	0	73	2,306
Total Witney In Centre	17,972	0	2,713	854	3,907	4,072	208	0	2,169	2,680	3,322	37,897
Lidl, Ducklington Lane, Witney (OOC)	6,673	0	424	0	826	204	0	0	572	0	270	8,969
Sainsbury's, Witan Way, Witney (OOC)	34,563	146	16,457	1,266	7,484	5,704	321	0	3,525	2,527	3,446	75,440
Total Witney Out of Centre	41,236	146	16,882	1,266	8,310	5,908	321	0	4,096	2,527	3,716	84,408
Total Witney Town Centre	77,180	146	22,307	2,973	16,124	14,053	737	0	8,435	7,888	10,360	160,203
CHIPPING NORTON												
Co-op, High Street, Chipping Norton	0	8,564	0	0	0	0	0	2,510	1,623	0	1,542	14,238
Sainsbury's, Market Place, Chipping Norton	322	3,925	0	0	0	0	0	966	1,371	0	561	7,146
Other Chipping Norton Town Centre	0	529	0	0	0	0	104	0	0	0	0	633
Total Chipping Norton Town Centre	322	13,018	0	0	0	0	104	3,476	2,993	0	2,103	22,017
CARTERTON												
Aldi, Alvescot Road, Carterton	1,185	0	12,487	91	413	0	0	0	454	1,293	270	16,193
Co-op, Black Bourton Road, Carterton	1,237	0	9,880	168	159	0	0	127	454	2,805	0	14,831
Other Carterton Town Centre	0	0	1,379	0	0	0	0	0	0	0	0	1,379
Total Carterton Out of Centre	2,422	0	23,746	259	572	0	0	127	909	4,098	270	32,403
SMALLER CENTRES IN WEST OXFORDSHIRE												
Local Stores Burford	0	0	0	91	0	0	0	0	117	1,728	0	1,937
Local Stores Charlbury	0	0	0	0	0	222	0	0	0	0	6,550	6,772
Local Stores Hanborough	2,205	0	0	0	189	5,068	0	0	0	0	0	7,462
Local Stores Woodstock	0	0	0	0	0	2,904	849	0	0	0	0	3,754
Total Smaller Centres in West Oxfordshire	2,205	0	0	91	189	8,194	849	0	117	1,728	6,550	19,924
OUTSIDE WEST OXFORDSHIRE DISTRICT												
Morrisons, Swan Close Road, Banbury	592	585	0	0	159	518	4,213	7,457	454	0	406	14,384
Sainsbury's, Oxford Road, Banbury	0	1,538	0	0	0	204	7,889	8,374	682	0	270	18,956
Sainsbury's, Oxford Road, Kidlington	0	292	0	91	1,210	3,982	6,042	0	0	153	135	11,906
Tesco Extra, Marcham Road, Abingdon	592	0	1,697	4,972	956	204	0	0	227	153	0	8,801
Tesco, Fosse Way, Stow-on-the-Wald	592	585	424	0	0	0	0	127	6,610	228	146	8,712
Total Outside West Oxfordshire District	1,777	3,000	2,121	5,063	2,325	4,908	16,144	15,959	7,973	535	955	62,759
Other	-4,371	3,470	6,986	14,143	2,189	203	9,271	16,829	10,076	5,897	-2,505	62,187
Total	79,536	19,634	55,161	22,530	21,399	27,357	29,105	36,391	30,503	20,146	17,734	359,494

Source: Tables 3 & 4

West Oxfordshire District Council Retail Needs Assessment 2012

**Table 10
Existing Floorspace**

Growth in convenience goods per capita retail expenditure	Total Net Flsp (Note A) (sqm)	Net Conv Ratio (Note B) (%)	Net Convenience (sqm)	Co Average Sales (Note C) (\$ per sqm net)	Average Turnover 2012 (\$000s)
WITNEY					
Co-op, High Street, Witney	1,217	85%	1,034	7,530	7,789
Marks and Spencers, Marriot's Close, Witney	650	100%	650	10,833	7,041
Waitrose, Woolgate Centre, Witney	1,984	80%	1,587	11,320	17,967
Other Witney Town Centre	839	100%	839	4,000	3,357
Lidl, Ducklington Lane, Witney (OOC)	800	90%	720	2,987	2,151
Sainsbury's, Witan Way, Witney (OOC)	4,977	66%	3,285	12,526	41,146
Total Witney	10,467	-	8,116	9,790	79,452
CHIPPING NORTON					
Co-op, High Street, Chipping Norton	766	83%	636	7,530	4,787
Sainsbury's, Market Place, Chipping Norton	638	80%	510	12,526	6,393
Other Chipping Norton Town Centre	338	100%	338	4,000	1,353
Total Chipping Norton Town Centre	1,742	-	1,484	8,444	12,533
CARTERTON					
Aldi, Alvescot Road, Carterton	1,000	90%	900	7,397	6,657
Co-op, Black Bourton Road, Carterton	1,765	80%	1,412	7,530	10,632
Other Carterton Town Centre	320	100%	320	4,000	1,280
Total Carterton Town Centre	3,085	-	2,632	7,055	18,570
SMALLER CENTRES IN WEST OXFORDSHIRE					
Local Stores Burford	447	100%	447	4,000	1,787
Local Stores Charlbury	67	100%	67	4,000	268
Local Stores Hanborough	465	100%	465	4,000	1,860
Local Stores Woodstock	543	100%	543	4,000	2,174
Total Smaller Centres in West Oxfordshire	1,522	-	1,522	4,000	6,089
Total Within West Oxfordshire District	16,817	-	13,755	8,480	116,644
OUTSIDE WEST OXFORDSHIRE DISTRICT					
Morrisons, Swan Close Road, Banbury	3,036	85%	2,581	11,988	30,936
Sainsbury's, Oxford Road, Banbury	4,147	80%	3,318	12,526	41,556
Sainsbury's, Oxford Road, Kidlington	4,588	80%	3,670	12,526	45,975
Tesco Extra, Marcham Road, Abingdon	5,066	79%	4,010	12,842	51,496
Tesco, Fosse Way, Stow-on-the-Wold	1,281	95%	1,217	12,842	15,629
Total Outside West Oxfordshire District	18,118	-	14,796	12,544	185,593
TOTAL	34,935	-	28,550	10,586	302,237

Note A: Floorspace figures derived from IGD / Experian Good

Note B: Net Convenience ratio derived from Verdict Grocery Retailers 2010 / GVA assumptions

Note C: Company average turnover derived from Verdict Grocery Retailers 2010 / GVA assumptions

West Oxfordshire District Council Retail Needs Assessment 2012

**Table 11
Convenience Goods Commitments**

Growth in convenience goods per capita retail exper	Net Convenience Floorspace (Sq m)	Company Average Sales (£/sqm net)	Average Turnover 2012 (£000)
Carterton Petrol Station, Upavon Way, Carterton	368	3000	1,104
Extension to Co-op, High Street, Chipping Norton	946	3765	3,562
Majestic Wine, High Street, Witney	430	5000	2,150
Total West Oxfordshire Commitments	1,314	-	6,816

Assumes sales from the Co-op extension will trade at 50% company average sales

West Oxfordshire District Council

Retail Needs Assessment 2012

Capacity Projections: Convenience Goods

Growth in convenience goods per capita retail expenditure: Future Shop Floorspace Capacity in West Oxfordshire District

	CONVENIENCE GOODS				
	2012	2014	2019	2024	2029
Residents Spending in West Oxfordshire District (£000)	159,601	162,639	172,821	185,040	234,548
Existing Shop Floorspace (within West Oxfordshire District Only) (sq m net)	13,755	13,755	13,755	13,755	13,755
Sales per sqm net £	11,604	8,480	8,651	8,738	8,826
Sales from Existing Floorspace (£000)	159,601	116,644	118,996	120,190	121,397
Sales from Committed Floorspace (£000)	0	6,870	7,009	7,079	7,150
Residual Spending to Support new shops (£000)	0	39,125	46,816	57,771	106,000
Sales per sqm net in new shops (£) Based on large store format	12,000	12,096	12,218	12,340	12,464
Capacity for new floorspace (sqm net)	0	3,234	3,832	4,681	8,504

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

Table 13
Future Shop Floorspace Capacity in Witney

	CONVENIENCE GOODS				
	2012	2014	2019	2024	2029
Residents Spending in Witney (£000)	98,868	100,724	107,188	114,913	160,203
Existing Shop Floorspace (sq m net)	8,116	8,116	8,116	8,116	8,116
Sales per sqm net £	12,182	9,790	9,987	10,087	10,189
Sales from Existing Floorspace (£000)	98,868	79,452	81,053	81,867	82,689
Sales from Committed Floorspace (£000)	0	2,167	2,211	2,233	2,256
Residual Spending to Support new shops (£000)	0	19,105	23,923	30,813	75,258
Sales per sqm net in new shops (£) Based on large store format	12,000	12,096	12,340	12,464	12,589
Capacity for new floorspace (sqm net)	0	1,579	1,939	2,472	5,978

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

West Oxfordshire District Council
Retail Needs Assessment 2012

Capacity Projections: Convenience Goods

Table 14
Future Shop Floorspace Capacity in Chipping Norton

	CONVENIENCE GOODS				
	2012	2014	2019	2024	2029
Residents Spending in Chipping Norton (£000)	18,658	18,905	19,808	20,959	22,017
Existing Shop Floorspace (sq m net)	1,484	1,484	1,484	1,484	1,484
Sales per sqm net £	12,570	8,444	8,614	8,700	8,788
Sales from Existing Floorspace (£000)	18,658	12,533	12,786	12,914	13,044
Sales from Committed Floorspace (£000)	0	3,590	3,663	3,699	3,737
Residual Spending to Support new shops (£000)	0	2,782	3,359	4,345	5,237
Sales per sqm net in new shops (£) Based on large store format	12,000	12,096	12,340	12,464	12,589
Capacity for new floorspace (sqm net)	0	230	272	349	416

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

Table 15
Future Shop Floorspace Capacity in Carterton

	CONVENIENCE GOODS				
	2012	2014	2019	2024	2029
Residents Spending in Carterton (£000)	25,162	25,845	27,842	30,168	32,403
Existing Shop Floorspace (sq m net)	2,632	2,632	2,632	2,632	2,632
Sales per sqm net £	9,560	7,055	7,198	7,270	7,343
Sales from Existing Floorspace (£000)	25,162	18,570	18,944	19,134	19,327
Sales from Committed Floorspace (£000)	0	1,113	1,135	1,147	1,158
Residual Spending to Support new shops (£000)	0	6,163	7,762	9,887	11,919
Sales per sqm net in new shops (£) Based on large store format	12,000	12,096	12,340	12,464	12,589
Capacity for new floorspace (sqm net)	0	509	629	793	947

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



Appendix II
Comparison
Goods
Capacity
Assessment

West Oxfordshire District Council Retail Needs Assessment 2012

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	Total
2012	32,590	8,578	22,818	8,994	8,852	10,916	12,346	15,354	12,779	8,211	7,288	148,726
2014	33,157	8,701	23,551	9,043	8,960	11,062	12,483	15,413	12,875	8,259	7,394	150,898
2019	34,940	9,016	25,215	9,219	9,221	11,404	12,706	15,658	13,116	8,410	7,580	156,485
2024	36,731	9,351	26,887	9,393	9,519	11,760	12,977	15,920	13,462	8,577	7,770	162,347
2029	38,402	9,626	28,401	9,594	9,740	12,051	13,156	16,153	13,763	8,726	7,900	167,512

Source: Experian Micromarketer, July 2012

	Postal Sectors	Centres
Zone 1	OX28 1/2/3/4/5/6, OX29 0/6/9	Witney
Zone 2	OX7 5	Chipping Norton
Zone 3	OX18 1/2/3	Carterton, Bampton and Clanfield
Zone 4	OX13 5, SN7 8	Outside District (including Faringdon and Kingston Bagpuize)
Zone 5	OX29 4/5/7	Eynsham and Ducklington
Zone 6	OX20 1, OX29 8	Woodstock and Hanborough
Zone 7	OX5 3, OX7 7, OX15 0, OX25 4/5/6	The Bartons and outside District
Zone 8	CV36 5, OX15 4/5	Outside District (including Long Compton)
Zone 9	GL56 0, OX7 6	Milton, Ascott and Shipton (part outside District)
Zone 10	GL7 3, OX18 4	Burford (part outside District including Lechlade)
Zone 11	OX7 3/4	Charlbury and Finstock

West Oxfordshire District Council Retail Needs Assessment 2012

Table 2

Survey Area Retail Expenditure Forecasts Per Capita (2010 prices) - Comparison Goods

Growth in comparison goods per capita retail expenditure:											
2010 - 2011 0.5% pa											
2011 - 2012 1.6%pa											
2012 - 2014 2.8% pa											
2014 - 2019 3.0% pa											
2019 - 2024 3.0% pa											
2024 - 2029 3.0% pa											
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
2010	3,189	3,052	3,185	3,867	3,413	3,585	3,642	3,703	3,535	3,722	3,599
2012	3,256	3,116	3,252	3,949	3,485	3,661	3,719	3,781	3,610	3,800	3,675
2012 Minus SFT at 10.9%	2,901	2,777	2,898	3,518	3,105	3,262	3,313	3,369	3,216	3,386	3,274
2014	3,441	3,293	3,437	4,173	3,683	3,868	3,930	3,996	3,814	4,016	3,884
2014 Minus SFT at 12.3%	3,018	2,888	3,014	3,659	3,230	3,393	3,447	3,504	3,345	3,522	3,406
2019	3,989	3,818	3,984	4,837	4,269	4,485	4,556	4,632	4,422	4,656	4,502
2019 Minus SFT at 12.8%	3,479	3,329	3,474	4,218	3,723	3,911	3,973	4,039	3,856	4,060	3,926
2024	4,625	4,426	4,619	5,608	4,949	5,199	5,282	5,370	5,126	5,398	5,219
2024 Minus SFT at 12.8%	4,033	3,859	4,028	4,890	4,316	4,533	4,605	4,683	4,470	4,707	4,551
2029	5,361	5,131	5,354	6,501	5,738	6,027	6,123	6,225	5,943	6,257	6,050
2029 Minus SFT at 12.8%	4,675	4,474	4,669	5,669	5,003	5,255	5,339	5,428	5,182	5,456	5,276

Source: Experian E-Marketer, July 2012. Growth rates and allowance for SFT are derived from Experian Retail Planner 9

Table 3

Survey Area Retail Expenditure Forecasts (2010 prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
2012	94,553	23,818	66,119	31,642	27,486	35,603	40,908	51,726	41,098	27,804	23,863	464,621
2014	100,063	25,130	70,985	33,093	28,939	37,529	43,023	54,012	43,071	29,090	25,183	490,119
2019	121,542	30,016	87,603	38,887	34,329	44,596	50,477	63,247	50,575	34,145	29,758	585,174
2024	148,123	36,089	108,290	45,932	41,083	53,313	59,765	74,547	60,177	40,369	35,362	703,050
2029	179,527	43,068	132,606	54,387	48,732	63,333	70,240	87,685	71,322	47,612	41,680	840,193

Source: Tables 1 & 2

West Oxfordshire District Council Retail Needs Assessment 2012

Comparison Goods Market Share

Table 4
Comparison Goods Allocation 2012 - % 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 (%)
West Oxfordshire In-Centre											
Witney	63.4%	2.4%	47.7%	7.1%	47.1%	37.5%	1.2%	0.0%	17.8%	26.2%	35.1%
Chipping Norton	0.0%	36.7%	0.0%	0.0%	0.0%	0.0%	0.0%	8.7%	11.4%	0.0%	13.9%
Carterton	0.2%	0.0%	4.3%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	5.3%	0.0%
Other West Oxfordshire Centres (including Burford, Charlbury and Woodstock)	0.4%	0.2%	0.2%	0.2%	0.0%	2.8%	1.8%	0.0%	1.1%	3.7%	3.9%
West Oxfordshire Out-of-Centre											
B&Q, Thorney Leys Park, Ducklington, Witney	5.4%	0.1%	3.1%	0.1%	3.6%	2.7%	0.1%	0.0%	2.0%	2.5%	4.4%
Total West Oxfordshire	69.4%	39.4%	55.4%	7.4%	50.9%	43.1%	3.1%	8.7%	32.2%	37.7%	57.4%
Destinations outside West Oxfordshire											
Abingdon (including Fairacres Retail Park, B&Q and Homebase)	2.6%	0.5%	4.5%	22.5%	4.2%	1.9%	0.8%	0.4%	0.6%	1.2%	0.9%
Banbury (including Banbury Cross and Centrum Retail Parks and Castle Quay Shopping)	1.0%	49.4%	0.7%	0.0%	0.4%	6.5%	54.3%	67.0%	16.7%	0.0%	15.5%
Cheltenham (including Gallagher, Gateway and Kingsditch Retail Parks)	1.4%	0.2%	0.7%	0.0%	0.2%	0.5%	0.0%	0.6%	16.7%	11.7%	1.1%
Oxford (including Botley Road Retail Park and Templars Shopping Park)	16.6%	3.9%	11.8%	33.7%	30.9%	31.9%	19.4%	2.6%	5.9%	4.4%	12.4%
Stratford Upon Avon (including B&Q, Birmingham Road)	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	5.1%	6.2%	0.0%	0.0%
Swindon (including Orbital, Designer Outlet, Greenbridge, Mannington and St Margarets Retail Parks)	2.4%	0.2%	20.0%	14.0%	1.6%	0.3%	0.5%	0.2%	1.1%	22.9%	1.5%
Other	6.5%	6.2%	7.0%	22.3%	11.8%	15.7%	21.9%	15.4%	20.5%	22.0%	11.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: West Oxfordshire Telephone Survey, July 2012

Table 5
Comparison Goods Allocation 2012 - Spend (£) 2010 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)	TOTAL (\$000)
West Oxfordshire In-Centre												
Witney	59,940	542	31,517	2,245	12,935	13,352	500	0	7,310	7,282	8,377	144,021
Chipping Norton	0	8,733	0	0	0	0	0	4,485	4,670	0	3,328	21,216
Carterton	170	0	2,866	0	68	0	0	0	0	1,487	0	4,591
Other West Oxfordshire Centres (including Burford, Charlbury and Woodstock)	417	59	135	79	0	1,014	732	0	436	1,032	937	4,841
West Oxfordshire Out-of-Centre												
B&Q, Thorney Leys Park, Ducklington, Witney	5,128	19	2,082	25	998	969	32	0	830	685	1,046	11,816
Total West Oxfordshire	65,656	9,373	36,600	2,349	14,001	15,335	1,265	4,485	13,246	10,487	13,688	186,485
Destinations outside West Oxfordshire												
Abingdon (including Fairacres Retail Park, B&Q and Homebase)	2,426	129	2,966	7,130	1,156	682	318	186	236	333	213	15,777
Banbury (including Banbury Cross and Centrum Retail Parks and Castle Quay Shopping)	975	11,762	461	0	120	2,330	22,193	34,667	6,872	0	3,696	83,075
Cheltenham (including Gallagher, Gateway and Kingsditch Retail Parks)	1,335	46	489	0	52	195	0	332	6,881	3,266	272	12,869
Oxford (including Botley Road Retail Park and Templars Shopping Park)	15,691	935	7,775	10,677	8,485	11,371	7,941	1,357	2,437	1,228	2,962	70,861
Stratford Upon Avon (including B&Q, Birmingham Road)	0	59	0	0	0	0	0	2,622	2,568	0	0	5,248
Swindon (including Orbital, Designer Outlet, Greenbridge, Mannington and St Margarets Retail Parks)	2,317	40	13,222	4,417	428	101	218	104	436	6,367	353	28,001
Other	6,152	1,474	4,606	7,068	3,245	5,588	8,973	7,974	8,423	6,123	2,679	62,305
Total Survey Area	94,553	23,818	66,119	31,642	27,486	35,603	40,908	51,726	41,098	27,804	23,863	464,621

Source: Tables 3 & 4

West Oxfordshire District Council Retail Needs Assessment 2012

Comparison Goods Market Share

Table 6
Comparison Goods Allocation 2014 - Spend (£) 2010 Prices

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
Centre / Store	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
West Oxfordshire In-Centre												
Witney	63,433	593	33,836	2,348	13,619	14,074	526	0	7,661	7,619	8,841	152,550
Chipping Norton	0	9,214	0	0	0	0	0	4,683	4,895	0	3,512	22,304
Carterton	180	0	3,077	0	71	0	0	0	0	1,555	0	4,884
Other West Oxfordshire Centres (including Burford, Charlbury and Woodstock)	442	62	145	82	0	1,069	770	0	456	1,080	989	5,096
West Oxfordshire Out-of-Centre												
B&Q, Thorney Leys Park, Ducklington, Witney	5,427	20	2,235	27	1,051	1,021	34	0	870	717	1,104	12,506
Destinations outside West Oxfordshire												
Abingdon (including Fairacres Retail Park, B&Q and Homebase)	2,568	137	3,184	7,457	1,218	719	335	195	248	348	225	16,632
Banbury (including Banbury Cross and Centrum Retail Parks and Castle Quay Shopping Centre)	1,032	12,410	495	0	126	2,456	23,341	36,199	7,201	0	3,900	87,159
Cheltenham (including Gallagher, Gateway and Kingsditch Retail Parks)	1,413	49	525	0	55	206	0	346	7,211	3,417	287	13,510
Oxford (including Botley Road Retail Park and Templars Shopping Park)	16,606	987	8,348	11,167	8,933	11,986	8,352	1,417	2,554	1,285	3,126	74,760
Stratford Upon Avon (including B&Q, Birmingham Road)	0	62	0	0	0	0	0	2,738	2,691	0	0	5,491
Swindon (including Orbital, Designer Outlet, Greenbridge, Mannington and St Margarets Retail Parks)	2,452	42	14,195	4,620	451	106	229	108	456	6,662	372	29,693
Other	6,511	1,555	4,945	7,392	3,417	5,891	9,437	8,326	8,827	6,406	2,827	65,534
Total Survey Area	100,063	25,130	70,985	33,093	28,939	37,529	43,023	54,012	43,071	29,090	25,183	490,119

Source: Tables 3 & 4

West Oxfordshire District Council Retail Needs Assessment 2012

Comparison Goods Market Share

Table 7
Comparison Goods Allocation 2019 - Spend (£) 2010 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)	TOTAL (£000)
West Oxfordshire In-Centre												
Witney	77,049	709	41,757	2,759	16,155	16,724	617	0	8,996	8,943	10,447	184,156
Chipping Norton	0	11,006	0	0	0	0	0	5,484	5,747	0	4,150	26,387
Carterton	219	0	3,798	0	85	0	0	0	0	1,826	0	5,927
Other West Oxfordshire Centres (including Burford, Charlbury and Woodstock)	536	74	179	97	0	1,270	904	0	536	1,268	1,168	6,032
West Oxfordshire Out-of-Centre												
B&Q, Thorney Leys Park, Ducklington, Witney	6,592	24	2,759	31	1,247	1,214	40	0	1,021	842	1,305	15,074
Destinations outside West Oxfordshire												
Abingdon (including Fairacres Retail Park, B&Q and Homebase)	3,119	163	3,930	8,763	1,444	855	393	228	291	409	265	19,859
Banbury (including Banbury Cross and Centrum Retail Parks and Castle Quay Shopping Centre)	1,253	14,822	610	0	149	2,918	27,385	42,388	8,456	0	4,609	102,592
Cheltenham (including Gallagher, Gateway and Kingsditch Retail Parks)	1,717	58	648	0	65	245	0	406	8,468	4,011	340	15,956
Oxford (including Botley Road Retail Park and Templars Shopping Park)	20,170	1,179	10,302	13,122	10,597	14,243	9,799	1,659	2,999	1,508	3,694	89,272
Stratford Upon Avon (including B&Q, Birmingham Road)	0	74	0	0	0	0	0	3,206	3,160	0	0	6,440
Swindon (including Orbital, Designer Outlet, Greenbridge, Mannington and St Margarets Retail Parks)	2,978	50	17,518	5,429	534	126	269	127	536	7,819	440	35,826
Other	7,909	1,858	6,102	8,686	4,053	7,000	11,072	9,750	10,365	7,519	3,341	77,654
Total Survey Area	121,542	30,016	87,603	38,887	34,329	44,596	50,477	63,247	50,575	34,145	29,758	585,174

Source: Tables 3 & 8

West Oxfordshire District Council Retail Needs Assessment 2012

Comparison Goods Market Share

Table 8
Comparison Goods Allocation 2024 - Spend (£) 2010 Prices

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
Centre / Store	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
West Oxfordshire In-Centre												
Witney	93,899	852	51,618	3,259	19,334	19,994	731	0	10,703	10,573	12,414	223,377
Chipping Norton	0	13,233	0	0	0	0	0	6,463	6,839	0	4,931	31,466
Carterton	267	0	4,695	0	101	0	0	0	0	2,158	0	7,221
Other West Oxfordshire Centres (including Burford, Charlbury and Woodstock)	654	89	221	114	0	1,519	1,070	0	638	1,499	1,388	7,192
West Oxfordshire Out-of-Centre												
B&Q, Thorney Leys Park, Ducklington, Witney	8,034	29	3,410	37	1,492	1,451	47	0	1,215	995	1,550	18,260
Destinations outside West Oxfordshire												
Abingdon (including Fairacres Retail Park, B&Q and Homebase)	3,801	196	4,858	10,350	1,729	1,022	465	269	346	483	315	23,833
Banbury (including Banbury Cross and Centrum Retail Parks and Castle Quay Shopping Centre)	1,527	17,821	755	0	179	3,489	32,424	49,962	10,062	0	5,477	121,695
Cheltenham (including Gallagher, Gateway and Kingsditch Retail Parks)	2,092	70	800	0	77	293	0	478	10,076	4,742	403	19,032
Oxford (including Botley Road Retail Park and Templars Shopping Park)	24,582	1,417	12,734	15,499	12,682	17,027	11,602	1,955	3,569	1,783	4,390	107,240
Stratford Upon Avon (including B&Q, Birmingham Road)	0	89	0	0	0	0	0	3,779	3,760	0	0	7,628
Swindon (including Orbital, Designer Outlet, Greenbridge, Mannington and St Margarets Retail Parks)	3,629	60	21,655	6,412	640	151	318	150	638	9,244	523	43,419
Other	9,638	2,233	7,543	10,260	4,851	8,368	13,109	11,492	12,333	8,890	3,970	92,687
Total Survey Area	148,123	36,089	108,290	45,932	41,083	53,313	59,765	74,547	60,177	40,369	35,362	703,050

Source: Tables 3 & 10

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Comparison Goods Market Share

Table 9
Comparison Goods Allocation 2029 - Spend (£) 2010 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)	TOTAL (£000)
West Oxfordshire In-Centre												
Witney	113,807	1,017	63,209	3,859	22,933	23,752	859	0	12,686	12,470	14,632	269,223
Chipping Norton	0	15,791	0	0	0	0	0	7,602	8,105	0	5,812	37,311
Carterton	324	0	5,749	0	120	0	0	0	0	2,546	0	8,738
Other West Oxfordshire Centres (including Burford, Charlbury and Woodstock)	792	106	271	135	0	1,804	1,258	0	756	1,768	1,637	8,527
West Oxfordshire Out-of-Centre												
B&Q, Thorney Leys Park, Ducklington, Witney	9,737	34	4,176	44	1,769	1,723	55	0	1,440	1,174	1,827	21,981
Destinations outside West Oxfordshire												
Abingdon (including Fairacres Retail Park, B&Q and Homebase)	4,607	234	5,948	12,256	2,050	1,214	547	316	410	570	372	28,523
Banbury (including Banbury Cross and Centrum Retail Parks and Castle Quay Shopping Centre)	1,851	21,267	924	0	212	4,145	38,107	58,767	11,925	0	6,455	143,653
Cheltenham (including Gallagher, Gateway and Kingsditch Retail Parks)	2,536	84	980	0	92	348	0	562	11,941	5,593	476	22,612
Oxford (including Botley Road Retail Park and Templars Shopping Park)	29,793	1,691	15,594	18,353	15,043	20,228	13,635	2,300	4,229	2,103	5,174	128,143
Stratford Upon Avon (including B&Q, Birmingham Road)	0	106	0	0	0	0	0	4,444	4,456	0	0	9,007
Swindon (including Orbital, Designer Outlet, Greenbridge, Mannington and St Margarets Retail Parks)	4,398	72	26,518	7,593	759	179	374	176	756	10,903	616	52,343
Other	11,682	2,665	9,237	12,149	5,754	9,941	15,407	13,517	14,617	10,485	4,679	110,132
Total Survey Area	179,527	43,068	132,606	54,387	48,732	63,333	70,240	87,685	71,322	47,612	41,680	840,193

Source: Tables 3 & 12

West Oxfordshire District Council Retail Needs Assessment 2012

Table 10: Existing Comparison Goods Floorspace (In-Centre)

	Net Floorspace (sqm)
Witney	15,296
Chipping Norton	4,738
Carterton	1,758
Other West Oxfordshire Centres	4,160
Total In-Centre Floorspace	25,952

Note: Includes comparison floorspace in major foodstores.

Table 10A: Existing Comparison Goods Floorspace (Out-of-Centre)

	Net Floorspace (sqm)	Sales Density (\$ per sqm)	Benchmark Turnover (\$000)
Witney			
B&Q, Thorney Leys Park, Ducklington, Witney	2,232	1,866	4,166
Total Out of Centre Floorspace	2,232	1,866	4,166
Total Floorspace (In and Out-of-Centre)			
	28,184	-	-

Source: Experian Good / Trevor Woods Database / Mintel / GVA

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Table 11: Comparison Goods Commitments

	Net Comparison Floorspace (sqm)	Benchmark Sales Density (£/sqm net)	Average Turnover 2012 (£000)	Average Turnover 2014 (£000)	Average Turnover 2019 (£000)	Average Turnover 2024 (£000)	Average Turnover 2029 (£000)
Extant Planning Permissions							
Poundstretcher, Station Lane, Witney (12/0782/P/FP)	819	3,000	2,457	2,541	2,765	3,008	3,272
Electricity Showrooms, Welch Way, Witney (12/0411/P/FP)	338	3,000	1,013	1,047	1,139	1,239	1,349
Extension to Beales Department Store, Chipping Norton (12/0681/P/FP)	215	3,000	645	667	726	790	859
19 Burford Road, Carterton (09/1567/P/FP)	200	3,000	600	621	675	735	799
Total	1,572		4,715	4,876	5,305	5,771	6,279

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Capacity Projections: Comparison Goods

Table 12
GLOBAL Comparison Goods Floorspace Capacity

	COMPARISON GOODS				
	2012	2014	2019	2024	2029
Total Available Expenditure (£000)	464,621	490,119	585,174	703,050	840,193
Market Share from Survey Area	40	40	41	41	41
Survey Area Residents Spending (£000)	186,485	197,340	237,575	287,516	345,780
Existing Retail Floorspace (sqm net)	28,184	28,184	28,184	28,184	28,184
Sales per sqm net £	6,617	6,843	7,445	8,100	8,812
Sales from Existing Floorspace (£000)	186,485	192,879	209,841	228,294	248,371
Sales from Commitments (£000)	0	4,876	5,305	5,771	6,279
Residual Spending to support new floorspace (£000)	0	-416	22,429	53,450	91,130
Sales per sq m net in new shops (£)	5,000	5,171	5,626	6,121	6,659
Capacity for new floorspace (sqm net)	0	-80	3,987	8,732	13,685

Assumes 1.7% pa growth in sales efficiency 2012-2027

Table 13
Witney Comparison Goods Floorspace Capacity

	COMPARISON GOODS				
	2012	2014	2019	2024	2029
Total Available Expenditure (£000)	464,621	490,119	585,174	703,050	840,193
Market Share from Survey Area	34	34	34	34	35
Survey Area Residents Spending (£000)	155,836	165,056	199,229	241,637	291,204
Existing Retail Floorspace (sqm net)	17,528	17,528	17,528	17,528	17,528
Sales per sqm net £	8,891	9,195	10,004	10,884	11,841
Sales from Existing Floorspace (£000)	155,836	161,180	175,354	190,774	207,551
Sales from Commitments (£000)	0	3,588	3,904	4,247	4,621
Residual Spending to support new floorspace (£000)	0	288	19,972	46,615	79,032
Sales per sq m net in new shops (£)	5,000	5,171	5,626	6,121	6,659
Capacity for new floorspace (sqm net)	0	56	3,550	7,616	11,868

Assumes 1.7% pa growth in sales efficiency 2012-2027

West Oxfordshire District Council Retail Needs Assessment 2012

Capacity Projections: Comparison Goods

Table 14
Chipping Norton Comparison Goods Floorspace Capacity

	COMPARISON GOODS				
	2012	2014	2019	2024	2029
Total Available Expenditure (£000)	464,621	490,119	585,174	703,050	840,193
Market Share from Survey Area	5	5	5	4	4
Survey Area Residents Spending (£000)	21,216	22,304	26,387	31,466	37,311
Existing Retail Floorspace (sqm net)	4,738	4,738	4,738	4,738	4,738
Sales per sqm net £	4,477	4,631	5,038	5,481	5,963
Sales from Existing Floorspace (£000)	21,216	21,944	23,874	25,973	28,257
Sales from Commitments (£000)	0	667	726	790	859
Residual Spending to support new floorspace (£000)	0	-307	1,787	4,703	8,195
Sales per sq m net in new shops (£)	5,000	5,171	5,626	6,121	6,659
Capacity for new floorspace (sqm net)	0	-59	318	768	1,231

Assumes 1.7% pa growth in sales efficiency 2012-2027

Table 15
Carterton Comparison Goods Floorspace Capacity

	COMPARISON GOODS				
	2012	2014	2019	2024	2029
Total Available Expenditure (£000)	464,621	490,119	585,174	703,050	840,193
Market Share from Survey Area	1	1	1	1	1
Survey Area Residents Spending (£000)	4,591	4,884	5,927	7,221	8,738
Existing Retail Floorspace (sqm net)	1,758	1,758	1,758	1,758	1,758
Sales per sqm net £	2,612	2,702	2,939	3,198	3,479
Sales from Existing Floorspace (£000)	4,591	4,749	5,166	5,620	6,115
Sales from Commitments (£000)	0	621	675	735	799
Residual Spending to support new floorspace (£000)	0	-485	86	866	1,824
Sales per sq m net in new shops (£)	5,000	5,171	5,626	6,121	6,659
Capacity for new floorspace (sqm net)	0	-94	15	142	274

Assumes 1.7% pa growth in sales efficiency 2012-2027