



# Oxford Retail, Leisure and Town Centre Needs Study

## Appendices to Main Report

Project Ref: 332010815 | Rev: - | Date: June 2023

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## Document Control Sheet

**Project Name:** Oxford Retail, Leisure and Town Centre Needs Study

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**Report Title:** Main Report

**Date:** June 2023

	Name	Position	Signature	Date
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<b>For and on behalf of Stantec UK Limited</b>				

Revision	Date	Description	Prepared	Reviewed	Approved

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## Appendices

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## **APPENDIX A      GOAD SURVEY DATA**

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SPREADSHEET 1 - Oxford City Centre Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
<i>Number (and %) of Convenience Goods Outlets</i>									
G1A	Bakers	12	2.71%	2.05%	132	1,550	1.30%	1.10%	118
G1B	Butchers	0	0.00%	0.66%	0	0	0.00%	0.36%	0
G1C	Greengrocers & fishmongers	1	0.23%	0.53%	43	4,450	3.72%	1.15%	324
G1D	Grocery and frozen foods	9	2.04%	2.97%	69	810	0.68%	13.04%	5
G1E	Off-licences and home brew	2	0.45%	0.47%	96	140	0.12%	0.28%	42
G1F	CTN & convenience	11	2.49%	3.45%	72	4,990	4.17%	2.88%	145
	<b>TOTAL</b>	<b>35</b>	<b>7.92%</b>	<b>10.13%</b>	<b>78</b>	<b>11,940</b>	<b>9.98%</b>	<b>18.81%</b>	<b>53</b>
<i>Number (and %) of Comparison Goods Outlets</i>									
G2A	Footwear & repair	12	2.71%	1.29%	210	2,270	1.90%	1.01%	188
G2B	Men's & boys' wear	7	1.58%	0.60%	264	1,500	1.25%	0.47%	267
G2C	Women's, girls, children's clothing	15	3.39%	1.74%	195	3,890	3.25%	1.34%	243
G2D	Mixed and general clothing	28	6.33%	3.78%	168	15,070	12.60%	6.43%	196
G2E	Furniture, carpets & textiles	2	0.45%	2.86%	16	300	0.25%	3.18%	8
G2F	Booksellers, arts/crafts, stationers/copy bureaux	18	4.07%	3.11%	131	4,040	3.38%	2.53%	134
G2G	Electrical, home entertainment, telephones and video	12	2.71%	3.04%	89	2,360	1.97%	1.89%	104
G2H	DIY, hardware & household goods	3	0.68%	2.26%	30	230	0.19%	4.23%	5
G2I	Gifts, china, glass and leather goods	17	3.85%	1.56%	247	1,690	1.41%	0.80%	177
G2J	Cars, motorcycles & motor accessories	0	0.00%	1.01%	0	0	0.00%	1.64%	0
G2K	Chemists, toiletries & opticians	17	3.85%	3.80%	101	4,170	3.49%	3.88%	90
G2L	Variety, department & catalogue showrooms	5	1.13%	0.52%	218	16,330	13.65%	4.58%	298
G2M	Florists and gardens	0	0.00%	0.71%	0	0	0.00%	0.34%	0
G2N	Sports, toys, cycles and hobbies	5	1.13%	1.72%	66	1,370	1.15%	2.14%	54
G2O	Jewellers, clocks & repair	8	1.81%	1.67%	108	1,280	1.07%	0.82%	131
G2P	Charity shops, pets and other comparison	7	1.58%	4.33%	37	680	0.57%	3.34%	17
	<b>TOTAL</b>	<b>156</b>	<b>35.29%</b>	<b>34.00%</b>	<b>104</b>	<b>55,180</b>	<b>46.14%</b>	<b>38.62%</b>	<b>119</b>
<i>Number (and %) of Service Uses</i>									
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	107	24.21%	18.52%	131	20,240	16.92%	13.30%	127
G3B	Hairdressers, beauty parlours & health centres	19	4.30%	13.18%	33	8,560	7.16%	6.49%	110
G3C	Laundries & drycleaners	0	0.00%	0.74%	0	0	0.00%	0.34%	0
G3D	Travel agents	4	0.90%	0.73%	124	1,920	1.61%	0.48%	334
G3E	Banks & financial services	13	2.94%	2.57%	114	3,390	2.83%	2.85%	99
G3F	Building societies	3	0.68%	0.43%	158	550	0.46%	0.36%	128
G3G	Estate agents & auctioneers	3	0.68%	3.42%	20	350	0.29%	1.93%	15
	<b>TOTAL</b>	<b>149</b>	<b>33.71%</b>	<b>39.59%</b>	<b>85</b>	<b>35,010</b>	<b>29.27%</b>	<b>25.75%</b>	<b>114</b>
<i>Number (and %) of Miscellaneous Uses</i>									
G4A	Employment, careers, Post Offices and information	2	0.45%	1.01%	45	650	0.54%	0.68%	80
G4B	Vacant units	100	22.62%	15.27%	148	16,820	14.06%	16.13%	87
	<b>TOTAL</b>	<b>102</b>	<b>23.08%</b>	<b>16.28%</b>	<b>142</b>	<b>17,470</b>	<b>14.61%</b>	<b>16.81%</b>	<b>87</b>
	<b>GRAND TOTAL</b>	<b>442</b>	<b>100%</b>	<b>100%</b>		<b>119,600</b>	<b>100%</b>	<b>100%</b>	

Source: Experian GOAD (December 2022)

SPREADSHEET 2 - Cowley Centre District Centre Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
<i>Number (and %) of Convenience Goods Outlets</i>									
G1A	Bakers	1	1.08%	2.05%	52	130	0.43%	1.10%	39
G1B	Butchers	1	1.08%	0.66%	163	80	0.27%	0.36%	74
G1C	Greengrocers & fishmongers	0	0.00%	0.53%	0	0	0.00%	1.15%	0
G1D	Grocery and frozen foods	6	6.45%	2.97%	217	6,240	20.83%	13.04%	160
G1E	Off-licences and home brew	1	1.08%	0.47%	229	100	0.33%	0.28%	119
G1F	CTN & convenience	3	3.23%	3.45%	94	220	0.73%	2.88%	25
	<b>TOTAL</b>	<b>12</b>	<b>12.90%</b>	<b>10.13%</b>	<b>127</b>	<b>6,770</b>	<b>22.60%</b>	<b>18.81%</b>	<b>120</b>
<i>Number (and %) of Comparison Goods Outlets</i>									
G2A	Footwear & repair	1	1.08%	1.29%	83	210	0.70%	1.01%	69
G2B	Men's & boys' wear	1	1.08%	0.60%	179	70	0.23%	0.47%	50
G2C	Women's, girls, children's clothing	5	5.38%	1.74%	309	900	3.00%	1.34%	224
G2D	Mixed and general clothing	2	2.15%	3.78%	57	3,100	10.35%	6.43%	161
G2E	Furniture, carpets & textiles	2	2.15%	2.86%	75	1,530	5.11%	3.18%	161
G2F	Booksellers, arts/crafts, stationers/copy bureaux	3	3.23%	3.11%	104	690	2.30%	2.53%	91
G2G	Electrical, home entertainment, telephones and video	4	4.30%	3.04%	141	380	1.27%	1.89%	67
G2H	DIY, hardware & household goods	1	1.08%	2.26%	48	990	3.30%	4.23%	78
G2I	Gifts, china, glass and leather goods	0	0.00%	1.56%	0	0	0.00%	0.80%	0
G2J	Cars, motorcycles & motor accessories	0	0.00%	1.01%	0	0	0.00%	1.64%	0
G2K	Chemists, toiletries & opticians	5	5.38%	3.80%	141	910	3.04%	3.88%	78
G2L	Variety, department & catalogue showrooms	3	3.23%	0.52%	620	4,400	14.69%	4.58%	321
G2M	Florists and gardens	0	0.00%	0.71%	0	0	0.00%	0.34%	0
G2N	Sports, toys, cycles and hobbies	2	2.15%	1.72%	125	1,330	4.44%	2.14%	207
G2O	Jewellers, clocks & repair	1	1.08%	1.67%	64	80	0.27%	0.82%	33
G2P	Charity shops, pets and other comparison	10	10.75%	4.33%	248	2,340	7.81%	3.34%	234
	<b>TOTAL</b>	<b>40</b>	<b>43.01%</b>	<b>34.00%</b>	<b>127</b>	<b>16,930</b>	<b>56.51%</b>	<b>38.62%</b>	<b>146</b>
<i>Number (and %) of Service Uses</i>									
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	11	11.83%	18.52%	64	1,470	4.91%	13.30%	37
G3B	Hairdressers, beauty parlours & health centres	10	10.75%	13.18%	82	1,100	3.67%	6.49%	57
G3C	Laundries & drycleaners	0	0.00%	0.74%	0	0	0.00%	0.34%	0
G3D	Travel agents	1	1.08%	0.73%	147	170	0.57%	0.48%	118
G3E	Banks & financial services (incl. accountants)	1	1.08%	2.57%	42	240	0.80%	2.85%	28
G3F	Building societies	1	1.08%	0.43%	250	120	0.40%	0.36%	111
G3G	Estate agents & auctioneers	2	2.15%	3.42%	63	230	0.77%	1.93%	40
	<b>TOTAL</b>	<b>26</b>	<b>27.96%</b>	<b>39.59%</b>	<b>71</b>	<b>3,330</b>	<b>11.11%</b>	<b>25.75%</b>	<b>43</b>
<i>Number (and %) of Miscellaneous Uses</i>									
G4A	Employment, careers, Post Offices and information	2	2.15%	1.01%	213	280	0.93%	0.68%	137
G4B	Vacant units (all categories)	13	13.98%	15.27%	92	2,650	8.85%	16.13%	55
	<b>TOTAL</b>	<b>15</b>	<b>16.13%</b>	<b>16.28%</b>	<b>99</b>	<b>2,930</b>	<b>9.78%</b>	<b>16.81%</b>	<b>58</b>
	<b>GRAND TOTAL</b>	<b>93</b>	<b>100%</b>	<b>100%</b>		<b>29,960</b>	<b>100%</b>	<b>100%</b>	

Source: Experian GOAD (December 2022)

**SPREADSHEET 3 - Cowley Road District Centre Diversity of Uses**

Goad Code	Operator Type	No. of Units			
		No. of units	% of Total	UK Average %	Index (UK=100)
<i>Number (and %) of Convenience Goods Outlets</i>					
G1A	Bakers	2	1.31%	2.05%	64
G1B	Butchers	1	0.65%	0.66%	99
G1C	Greengrocers & fishmongers	0	0.00%	0.53%	0
G1D	Grocery and frozen foods	3	1.96%	2.97%	66
G1E	Off-licences and home brew	1	0.65%	0.47%	139
G1F	CTN & convenience	18	11.76%	3.45%	341
	<b>TOTAL</b>	<b>25</b>	<b>16.34%</b>	<b>10.13%</b>	<b>161</b>
<i>Number (and %) of Comparison Goods Outlets</i>					
G2A	Footwear & repair	0	0.00%	1.29%	0
G2B	Men's & boys' wear	0	0.00%	0.60%	0
G2C	Women's, girls, children's clothing	0	0.00%	1.74%	0
G2D	Mixed and general clothing	1	0.65%	3.78%	17
G2E	Furniture, carpets & textiles	1	0.65%	2.86%	23
G2F	Booksellers, arts/crafts, stationers/copy bureaux	2	1.31%	3.11%	42
G2G	Electrical, home entertainment, telephones and video	7	4.58%	3.04%	150
G2H	DIY, hardware & household goods	0	0.00%	2.26%	0
G2I	Gifts, china, glass and leather goods	2	1.31%	1.56%	84
G2J	Cars, motorcycles & motor accessories	0	0.00%	1.01%	0
G2K	Chemists, toiletries & opticians	3	1.96%	3.80%	52
G2L	Variety, department & catalogue showrooms	1	0.65%	0.52%	126
G2M	Florists and gardens	0	0.00%	0.71%	0
G2N	Sports, toys, cycles and hobbies	6	3.92%	1.72%	228
G2O	Jewellers, clocks & repair	0	0.00%	1.67%	0
G2P	Charity shops, pets and other comparison	3	1.96%	4.33%	45
	<b>TOTAL</b>	<b>26</b>	<b>16.99%</b>	<b>34.00%</b>	<b>50</b>
<i>Number (and %) of Service Uses</i>					
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	62	40.52%	18.52%	219
G3B	Hairdressers, beauty parlours & health centres	20	13.07%	13.18%	99
G3C	Laundries & drycleaners	3	1.96%	0.74%	265
G3D	Travel agents	0	0.00%	0.73%	0
G3E	Banks & financial services (incl. accountants)	1	0.65%	2.57%	25
G3F	Building societies	0	0.00%	0.43%	0
G3G	Estate agents & auctioneers	5	3.27%	3.42%	96
	<b>TOTAL</b>	<b>91</b>	<b>59.48%</b>	<b>39.59%</b>	<b>150</b>
<i>Number (and %) of Miscellaneous Uses</i>					
G4A	Employment, careers, Post Offices and information	0	0.00%	1.01%	0
G4B	Vacant units (all categories)	11	7.19%	15.27%	47
	<b>TOTAL</b>	<b>11</b>	<b>7.19%</b>	<b>16.28%</b>	<b>44</b>
	<b>GRAND TOTAL</b>	<b>153</b>	<b>100%</b>	<b>100%</b>	

Source: Experian GOAD (December 2022)

SPREADSHEET 4 - Headington District Centre Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
<i>Number (and %) of Convenience Goods Outlets</i>									
G1A	Bakers	2	2.02%	2.05%	99	210	1.17%	1.10%	106
G1B	Butchers	0	0.00%	0.66%	0	0	0.00%	0.36%	0
G1C	Greengrocers & fishmongers	0	0.00%	0.53%	0	0	0.00%	1.15%	0
G1D	Grocery and frozen foods	4	4.04%	2.97%	136	3,290	18.26%	13.04%	140
G1E	Off-licences and home brew	0	0.00%	0.47%	0	0	0.00%	0.28%	0
G1F	CTN & convenience	9	9.09%	3.45%	264	2,320	12.87%	2.88%	447
	<b>TOTAL</b>	<b>15</b>	<b>15.15%</b>	<b>10.13%</b>	<b>150</b>	<b>5,820</b>	<b>32.30%</b>	<b>18.81%</b>	<b>172</b>
<i>Number (and %) of Comparison Goods Outlets</i>									
G2A	Footwear & repair	0	0.00%	1.29%	0	0	0.00%	1.01%	0
G2B	Men's & boys' wear	0	0.00%	0.60%	0	0	0.00%	0.47%	0
G2C	Women's, girls, children's clothing	1	1.01%	1.74%	58	80	0.44%	1.34%	33
G2D	Mixed and general clothing	0	0.00%	3.78%	0	0	0.00%	6.43%	0
G2E	Furniture, carpets & textiles	1	1.01%	2.86%	35	230	1.28%	3.18%	40
G2F	Booksellers, arts/crafts, stationers/copy bureaux	2	2.02%	3.11%	65	320	1.78%	2.53%	70
G2G	Electrical, home entertainment, telephones and video	3	3.03%	3.04%	100	410	2.28%	1.89%	120
G2H	DIY, hardware & household goods	1	1.01%	2.26%	45	140	0.78%	4.23%	18
G2I	Gifts, china, glass and leather goods	1	1.01%	1.56%	65	140	0.78%	0.80%	97
G2J	Cars, motorcycles & motor accessories	1	1.01%	1.01%	100	310	1.72%	1.64%	105
G2K	Chemists, toiletries & opticians	4	4.04%	3.80%	106	710	3.94%	3.88%	102
G2L	Variety, department & catalogue showrooms	0	0.00%	0.52%	0	0	0.00%	4.58%	0
G2M	Florists and gardens	1	1.01%	0.71%	142	100	0.55%	0.34%	163
G2N	Sports, toys, cycles and hobbies	2	2.02%	1.72%	117	230	1.28%	2.14%	60
G2O	Jewellers, clocks & repair	0	0.00%	1.67%	0	0	0.00%	0.82%	0
G2P	Charity shops, pets and other comparison	8	8.08%	4.33%	187	1,420	7.88%	3.34%	236
	<b>TOTAL</b>	<b>25</b>	<b>25.25%</b>	<b>34.00%</b>	<b>74</b>	<b>4,090</b>	<b>22.70%</b>	<b>38.62%</b>	<b>59</b>
<i>Number (and %) of Service Uses</i>									
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	25	25.25%	18.52%	136	3,630	20.14%	13.30%	151
G3B	Hairdressers, beauty parlours & health centres	13	13.13%	13.18%	100	1,800	9.99%	6.49%	154
G3C	Laundries & drycleaners	3	3.03%	0.74%	410	210	1.17%	0.34%	343
G3D	Travel agents	0	0.00%	0.73%	0	0	0.00%	0.48%	0
G3E	Banks & financial services (incl. accountants)	1	1.01%	2.57%	39	240	1.33%	2.85%	47
G3F	Building societies	1	1.01%	0.43%	235	90	0.50%	0.36%	139
G3G	Estate agents & auctioneers	7	7.07%	3.42%	207	970	5.38%	1.93%	279
	<b>TOTAL</b>	<b>50</b>	<b>50.51%</b>	<b>39.59%</b>	<b>128</b>	<b>6,940</b>	<b>38.51%</b>	<b>25.75%</b>	<b>150</b>
<i>Number (and %) of Miscellaneous Uses</i>									
G4A	Employment, careers, Post Offices and information	1	1.01%	1.01%	100	60	0.33%	0.68%	49
G4B	Vacant units (all categories)	8	8.08%	15.27%	53	1,110	6.16%	16.13%	38
	<b>TOTAL</b>	<b>9</b>	<b>9.09%</b>	<b>16.28%</b>	<b>56</b>	<b>1,170</b>	<b>6.49%</b>	<b>16.81%</b>	<b>39</b>
	<b>GRAND TOTAL</b>	<b>99</b>	<b>100%</b>	<b>100%</b>		<b>18,020</b>	<b>100%</b>	<b>100%</b>	

Source: Experian GOAD (December 2022)



SPREADSHEET 5 - Summertown District Centre Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
<i>Number (and %) of Convenience Goods Outlets</i>									
G1A	Bakers	2	2.25%	2.05%	110	310	1.98%	1.10%	180
G1B	Butchers	0	0.00%	0.66%	0	0	0.00%	0.36%	0
G1C	Greengrocers & fishmongers	0	0.00%	0.53%	0	0	0.00%	1.15%	0
G1D	Grocery and frozen foods	4	4.49%	2.97%	151	2,170	13.88%	13.04%	106
G1E	Off-licences and home brew	2	2.25%	0.47%	478	370	2.37%	0.28%	845
G1F	CTN & convenience	2	2.25%	3.45%	65	890	5.69%	2.88%	198
	<b>TOTAL</b>	<b>10</b>	<b>11.24%</b>	<b>10.13%</b>	<b>111</b>	<b>3,740</b>	<b>23.93%</b>	<b>18.81%</b>	<b>127</b>
<i>Number (and %) of Comparison Goods Outlets</i>									
G2A	Footwear & repair	1	1.12%	1.29%	87	90	0.58%	1.01%	57
G2B	Men's & boys' wear	0	0.00%	0.60%	0	0	0.00%	0.47%	0
G2C	Women's, girls, children's clothing	3	3.37%	1.74%	194	410	2.62%	1.34%	196
G2D	Mixed and general clothing	1	1.12%	3.78%	30	190	1.22%	6.43%	19
G2E	Furniture, carpets & textiles	4	4.49%	2.86%	157	480	3.07%	3.18%	97
G2F	Booksellers, arts/crafts, stationers/copy bureaux	4	4.49%	3.11%	145	720	4.61%	2.53%	182
G2G	Electrical, home entertainment, telephones and video	2	2.25%	3.04%	74	280	1.79%	1.89%	95
G2H	DIY, hardware & household goods	1	1.12%	2.26%	50	160	1.02%	4.23%	24
G2I	Gifts, china, glass and leather goods	0	0.00%	1.56%	0	0	0.00%	0.80%	0
G2J	Cars, motorcycles & motor accessories	0	0.00%	1.01%	0	0	0.00%	1.64%	0
G2K	Chemists, toiletries & opticians	4	4.49%	3.80%	118	560	3.58%	3.88%	92
G2L	Variety, department & catalogue showrooms	0	0.00%	0.52%	0	0	0.00%	4.58%	0
G2M	Florists and gardens	0	0.00%	0.71%	0	0	0.00%	0.34%	0
G2N	Sports, toys, cycles and hobbies	1	1.12%	1.72%	65	150	0.96%	2.14%	45
G2O	Jewellers, clocks & repair	0	0.00%	1.67%	0	0	0.00%	0.82%	0
G2P	Charity shops, pets and other comparison	4	4.49%	4.33%	104	650	4.16%	3.34%	125
	<b>TOTAL</b>	<b>25</b>	<b>28.09%</b>	<b>34.00%</b>	<b>83</b>	<b>3,690</b>	<b>23.61%</b>	<b>38.62%</b>	<b>61</b>
<i>Number (and %) of Service Uses</i>									
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	15	16.85%	18.52%	91	2,170	13.88%	13.30%	104
G3B	Hairdressers, beauty parlours & health centres	11	12.36%	13.18%	94	1,150	7.36%	6.49%	113
G3C	Laundries & drycleaners	3	3.37%	0.74%	456	210	1.34%	0.34%	395
G3D	Travel agents	0	0.00%	0.73%	0	0	0.00%	0.48%	0
G3E	Banks & financial services (incl. accountants)	0	0.00%	2.57%	0	0	0.00%	2.85%	0
G3F	Building societies	0	0.00%	0.43%	0	0	0.00%	0.36%	0
G3G	Estate agents & auctioneers	12	13.48%	3.42%	394	1,670	10.68%	1.93%	554
	<b>TOTAL</b>	<b>41</b>	<b>46.07%</b>	<b>39.59%</b>	<b>116</b>	<b>5,200</b>	<b>33.27%</b>	<b>25.75%</b>	<b>129</b>
<i>Number (and %) of Miscellaneous Uses</i>									
G4A	Employment, careers, Post Offices and information	0	0.00%	1.01%	0	0	0.00%	0.68%	0
G4B	Vacant units (all categories)	13	14.61%	15.27%	96	3,000	19.19%	16.13%	119
	<b>TOTAL</b>	<b>13</b>	<b>14.61%</b>	<b>16.28%</b>	<b>90</b>	<b>3,000</b>	<b>19.19%</b>	<b>16.81%</b>	<b>114</b>
	<b>GRAND TOTAL</b>	<b>89</b>	<b>100%</b>	<b>100%</b>	<b>90</b>	<b>15,630</b>	<b>100%</b>	<b>100%</b>	<b>114</b>

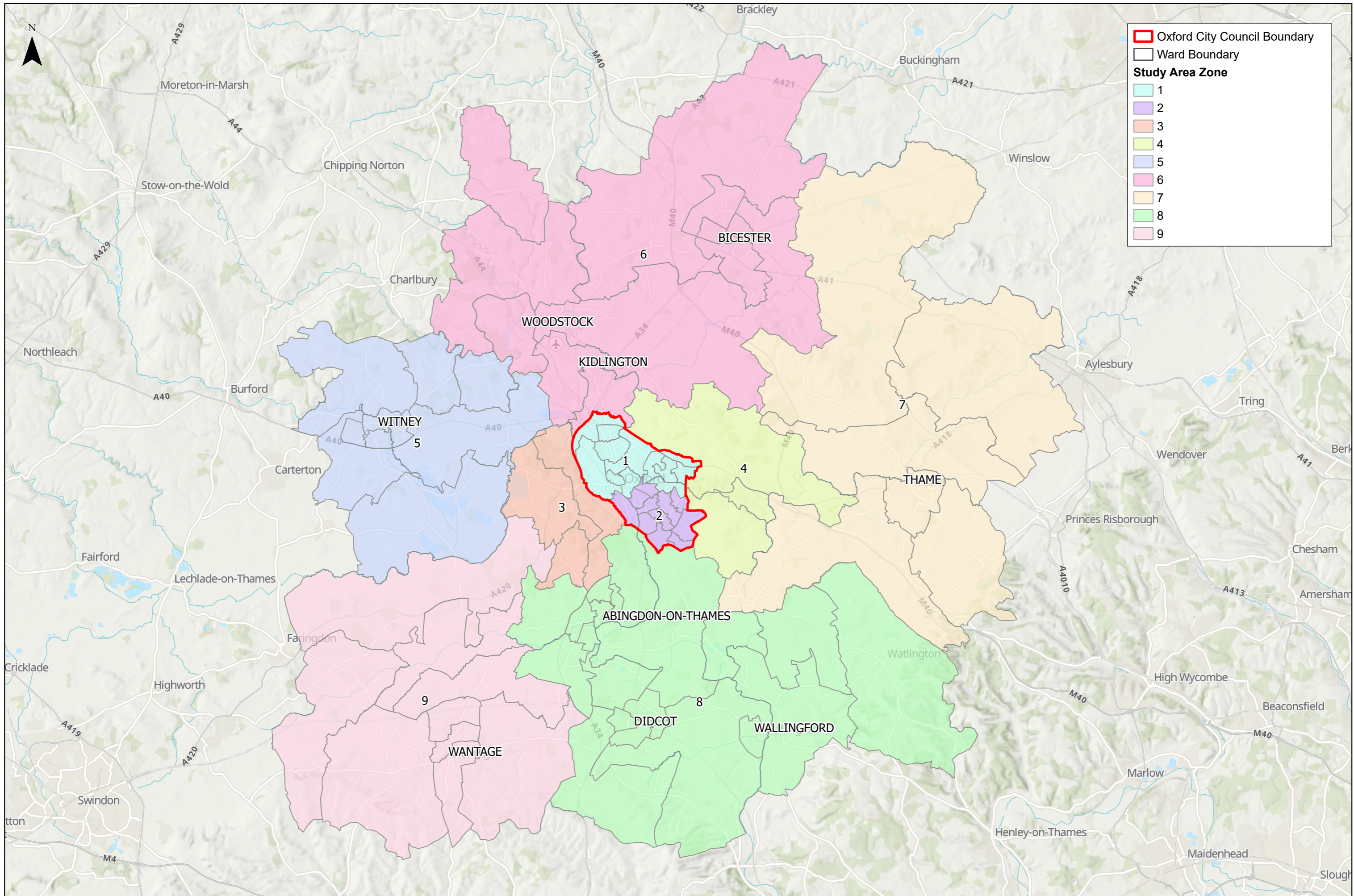
Source: Experian GOAD (December 2022)

**SPREADSHEET 6 - Blackbird Leys District Centre Diversity of Uses**

Goad Code	Operator Type	No. of Units			
		No. of units	% of Total	UK Average %	Index (UK=100)
<i>Number (and %) of Convenience Goods Outlets</i>					
G1A	Bakers	1	9.09%	2.05%	443
G1B	Butchers	0	0.00%	0.66%	0
G1C	Greengrocers & fishmongers	0	0.00%	0.53%	0
G1D	Grocery and frozen foods	0	0.00%	2.97%	0
G1E	Off-licences and home brew	0	0.00%	0.47%	0
G1F	CTN & convenience	3	27.27%	3.45%	791
	<b>TOTAL</b>	<b>4</b>	<b>36.36%</b>	<b>10.13%</b>	<b>359</b>
<i>Number (and %) of Comparison Goods Outlets</i>					
G2A	Footwear & repair	0	0.00%	1.29%	0
G2B	Men's & boys' wear	0	0.00%	0.60%	0
G2C	Women's, girls, children's clothing	0	0.00%	1.74%	0
G2D	Mixed and general clothing	0	0.00%	3.78%	0
G2E	Furniture, carpets & textiles	0	0.00%	2.86%	0
G2F	Booksellers, arts/crafts, stationers/copy bureaux	0	0.00%	3.11%	0
G2G	Electrical, home entertainment, telephones and video	0	0.00%	3.04%	0
G2H	DIY, hardware & household goods	0	0.00%	2.26%	0
G2I	Gifts, china, glass and leather goods	0	0.00%	1.56%	0
G2J	Cars, motorcycles & motor accessories	0	0.00%	1.01%	0
G2K	Chemists, toiletries & opticians	1	9.09%	3.80%	239
G2L	Variety, department & catalogue showrooms	0	0.00%	0.52%	0
G2M	Florists and gardens	0	0.00%	0.71%	0
G2N	Sports, toys, cycles and hobbies	0	0.00%	1.72%	0
G2O	Jewellers, clocks & repair	0	0.00%	1.67%	0
G2P	Charity shops, pets and other comparison	0	0.00%	4.33%	0
	<b>TOTAL</b>	<b>1</b>	<b>9.09%</b>	<b>34.00%</b>	<b>27</b>
<i>Number (and %) of Service Uses</i>					
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	4	36.36%	18.52%	196
G3B	Hairdressers, beauty parlours & health centres	2	18.18%	13.18%	138
G3C	Laundries & drycleaners	0	0.00%	0.74%	0
G3D	Travel agents	0	0.00%	0.73%	0
G3E	Banks & financial services (incl. accountants)	0	0.00%	2.57%	0
G3F	Building societies	0	0.00%	0.43%	0
G3G	Estate agents & auctioneers	0	0.00%	3.42%	0
	<b>TOTAL</b>	<b>6</b>	<b>54.55%</b>	<b>39.59%</b>	<b>138</b>
<i>Number (and %) of Miscellaneous Uses</i>					
G4A	Employment, careers, Post Offices and information	0	0.00%	1.01%	0
G4B	Vacant units (all categories)	0	0.00%	15.27%	0
	<b>TOTAL</b>	<b>0</b>	<b>0.00%</b>	<b>16.28%</b>	<b>0</b>
	<b>GRAND TOTAL</b>	<b>11</b>	<b>100%</b>	<b>100%</b>	

Source: Experian GOAD (December 2022)

# **APPENDIX B      STUDY AREA**



**Legend**

- Oxford City Council Boundary
- Ward Boundary
- Study Area Zone**
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9



Client  
Oxford City Council

**OXFORD RETAIL STUDY**  
Study Area Plan

0 10 20 Km

Contains OS data © Crown Copyright and database right 2022  
Contains data from OS Zoomstack, Contains OS data © Crown Copyright and database right 2019

1:225,000 @ A3	Date: 09/11/2022
Drawn: SJ	Checked: JP
Figure: 001	Rev: A

# **APPENDIX C      SURVEY QUESTIONNAIRE**

Job No. 118A22

## Oxford Household Survey

Good morning / afternoon / evening, I am ..... from NEMS market research and we are conducting a short survey in your area for Oxford City Council about shopping and leisure activities. Do you have time to answer some questions ? It will take about six minutes.

**QA Are you the main, or joint main shopper in your household?**

Yes

No - Ask if main / joint main shopper is available if not - close

**PC Could you please provide your post code?**

RECORD POSTCODE

**READ OUT:** We now have a few questions about where you go Food shopping. In answering these questions the location may be a store, a town, village or city, a specific road or area, or it could be the internet.

**Q01 Where did your household last undertake its main food and grocery shopping?**

DO NOT PROMPT. ONE ANSWER ONLY.

IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#Food Food Shopping List

(Don't know / can't remember)

(Don't do this type of shopping)

CLOSE

CLOSE

**IF 'Internet / delivery' at Q01:**

**Q01a How much did you spend on that occasion?**

DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)

Y (Don't know / varies)

Z (Refused)

**Q02 Where did you do a main food shop the time before that (was it the same, or different, and if so, please**

DO NOT PROMPT. ONE ANSWER ONLY.

IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#Food Food Shopping List

**IF 'Internet / delivery' at Q02:**

**Q02a How much did you spend on that occasion?**

DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)

Y (Don't know / varies)

Z (Refused)

**Not those who said 'Internet / delivery' at Q01:**

**Q03 How do you normally travel to (STORE / LOCATION MENTIONED AT Q01) when main food shopping?**

DO NOT PROMPT. ONE ANSWER ONLY.

1 Car / van - driver

2 Car / van - passenger

3 Bus

4 Motorcycle, scooter or moped

5 Bicycle

6 Disabled vehicle (e.g. mobility scooter)

7 Taxi

8 Train

9 Walk

A Other (PLEASE WRITE IN)

B (Don't know / varies)

**Q04 Thinking more generally, how much does your household spend on average on main food and grocery shopping in a week?**

DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)

Y (Don't know / varies)

Z (Refused)

**Q05 And still thinking more generally, how often does your household do a main food and grocery shop?**  
DO NOT READ OUT. ONE ANSWER ONLY.

- 1 7 times a week
- 2 5 - 6 times a week
- 3 3 - 4 times a week
- 4 Twice a week
- 5 Once a week
- 6 Once every two weeks
- 7 Once every three weeks
- 8 Once a month
- 9 Less often
- A (Don't know / varies)

Not those who said 'Internet / delivery' at Q01:

**Q06 When your household undertakes its main food and grocery shopping at (STORE / LOCATION MENTIONED AT Q01), does it visit any other shops, services, or leisure facilities on the same shopping trip, i.e. do you do any other activities?**  
DO NOT READ OUT. CAN BE MULTICODED.

- 1 Yes - **NON-FOOD** shopping
- 2 Yes - other **FOOD** shopping
- 3 Yes - visiting the market
- 4 Yes - visiting the Post Office
- 5 Yes - visiting financial service such as bank / building society etc.
- 6 Yes - visiting health service such as doctor, dentist, hospital
- 7 Yes - other service (e.g. hairdresser, travel agent, laundrette, estate agent, recycling, etc.)
- 8 Yes - leisure activity (e.g. leisure centre, gym, cinema, park, etc)
- 9 Yes - buy fuel
- A Yes - travelling to / from school / college / university
- B Yes - travelling to / from work
- C Yes - go for a walk / walk the dog
- D Yes - visiting church / place of worship
- E Yes - visiting family / friends
- F Yes - visiting library
- G Yes - visiting pubs / bars / cafés / restaurants
- H Yes - window shopping / browsing
- I Yes - Other (PLEASE WRITE IN)
- J No
- K (Don't know / can't remember)

**Q07 Where did your household last undertake its 'top-up' food and grocery shopping? (i.e smaller/ 'basket' shopping purchases which are not part of your main food and groceries shop)**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#Food Food Shopping List  
(Don't know / can't remember)  
(Don't do this type of shopping)

**GO TO Q11**  
**GO TO Q11**

IF 'Internet / delivery' at Q07:

**Q07a How much did you spend on that occasion?**  
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

- X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)
- Y (Don't know / varies)
- Z (Refused)

Not those that said '(Don't do this type of shopping)' or '(Don't know / can't remember)' at Q07

**Q08 And where did you shop for top-up food shopping the time before that (was it the same, or different, and if so, please specify)?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#Food Food Shopping List

IF 'Internet / delivery' at Q08:

**Q08a** How much did you spend on that occasion?  
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

- X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)
- Y (Don't know / varies)
- Z (Refused)

Not those that said '(Don't do this type of shopping)' or '(Don't know / can't remember)' at Q07

**Q09** Thinking more generally how much does your household spend on average on 'top up' food and grocery shopping in a week?  
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

- X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)
- Y (Don't know / varies)
- Z (Refused)

Not those that said '(Don't do this type of shopping)' or '(Don't know / can't remember)' at Q07

**Q10** And still thinking more generally, how often does your household do a top-up food and grocery shop?  
DO NOT READ OUT. ONE ANSWER ONLY.

- 1 7 times a week
- 2 5 - 6 times a week
- 3 3 - 4 times a week
- 4 Twice a week
- 5 Once a week
- 6 Once every two weeks
- 7 Once every three weeks
- 8 Once a month
- 9 Less often
- A (Don't know / varies)

**Q11** Does your household also spend money on food and groceries in small shops, i.e. NOT supermarkets - for example, butchers, greengrocers, bakers, corner shops etc.?  
DO NOT PROMPT. ONE ANSWER ONLY. IF LOCATION IS NOT ON LIST - USE THE OTHER BOX TO RECORD THE INFORMATION.

- 1 Yes
- 2 No

GO TO Q12  
GO TO Q14

Those who shop in small shops at Q11:

**Q12** Where are these small shops located?  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF THE STORE OR LOCATION IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#Small Small Shops List

Those who shop in small shops at Q11:

**Q13** Approximately how much money does your household spend PER WEEK on food and groceries in these small shops?  
PLEASE WRITE IN TO THE NEAREST £

- X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)
- Y (Don't know / varies)
- Z (Refused)



**READ OUT: "We now have a few questions about where you go for non-food shopping. In answering these questions the location may be a town centre, a retail park, a free standing store, or it could be facilities such as the internet, TV shopping or catalogue."**

**Q14 Where did you or a member of your household last make a purchase of clothes, shoes or other fashion items?**

DO NOT PROMPT. ONE ANSWER ONLY.

IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#NFood Non Food List

(Don't know / can't remember)

(Don't do this type of shopping)

**GO TO Q18**

**GO TO Q18**

**IF 'Internet / delivery' at Q14:**

**Q14a How much did you spend on that occasion?**

DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)

Y (Don't know / varies)

Z (Refused)

**Not those that said '(Don't do this type of shopping)' or '(Don't know / can't remember)' at Q14**

**Q15 How often does your household shop at (STORE / LOCATION MENTIONED AT Q14) for clothes or shoes shopping?**

DO NOT READ OUT. ONE ANSWER ONLY.

- 1 7 times a week
- 2 5 - 6 times a week
- 3 3 - 4 times a week
- 4 Twice a week
- 5 Once a week
- 6 Once every two weeks
- 7 Once every three weeks
- 8 Once a month
- 9 Once every two months
- A 3 or 4 times a year
- B Twice a year
- C Once a year
- D Less often
- E (Don't know / varies)

**Not those that said '(Don't do this type of shopping)', '(Don't know / can't remember)' or 'Internet / delivery' at Q14**

**Q16 How does your household normally travel to (STORE / LOCATION MENTIONED AT Q14)?**

DO NOT READ OUT. ONE ANSWER ONLY.

- 1 Car / van - driver
- 2 Car / van - passenger
- 3 Bus
- 4 Motorcycle, scooter or moped
- 5 Bicycle
- 6 Disabled vehicle (e.g. mobility scooter)
- 7 Taxi
- 8 Train
- 9 Walk
- A Other (PLEASE WRITE IN)
- B (Don't know / varies)

Not those that said '(Don't do this type of shopping)', '(Don't know / can't remember)' or 'Internet / delivery' at Q14

**Q17** When you or your household buy clothes, shoes or other fashion items at (STORE / LOCATION MENTIONED AT Q14), does it visit any other shops, services, or leisure facilities on the same shopping trip, i.e. do you do any other activities?

DO NOT READ OUT. CAN BE MULTICODED.

- 1 Yes - **other NON-FOOD** shopping
- 2 Yes - **FOOD** shopping
- 3 Yes - visiting the market
- 4 Yes - visiting the Post Office
- 5 Yes - visiting financial service such as bank / building society etc.
- 6 Yes - visiting health service such as doctor, dentist, hospital
- 7 Yes - other service (e.g. hairdresser, travel agent, laundrette, estate agent, recycling, etc.)
- 8 Yes - leisure activity (e.g. leisure centre, gym, cinema, park, etc)
- 9 Yes - buy fuel
- A Yes - travelling to / from school / college / university
- B Yes - travelling to / from work
- C Yes - go for a walk / walk the dog
- D Yes - visiting church / place of worship
- E Yes - visiting family / friends
- F Yes - visiting library
- G Yes - visiting pubs / bars / cafés / restaurants
- H Yes - window shopping / browsing
- I Yes - Other (PLEASE WRITE IN)
- J No
- K (Don't know / can't remember)

**Q18** Where did you or a member of your household last make a purchase of furniture, furnishings, carpets or floor coverings, or household textiles?

DO NOT PROMPT. ONE ANSWER ONLY.

IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#NFood Non Food List  
(Don't know / can't remember)  
(Don't do this type of shopping)

IF 'Internet / delivery' at Q18:

**Q18a** How much did you spend on that occasion?

DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

- X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)
- Y (Don't know / varies)
- Z (Refused)

**Q19** Where did you or a member of your household last make a purchase of DIY goods, decorating supplies or products for the garden?

DO NOT PROMPT. ONE ANSWER ONLY.

IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#NFood Non Food List  
(Don't know / can't remember)  
(Don't do this type of shopping)

IF 'Internet / delivery' at Q19:

**Q19a** How much did you spend on that occasion?

DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

- X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)
- Y (Don't know / varies)
- Z (Refused)

**Q20** Where did you or a member of your household last make a purchase of domestic appliances, such as washing machines, fridges, cookers, kettles or toasters?

DO NOT PROMPT. ONE ANSWER ONLY.

IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#NFood Non Food List  
(Don't know / can't remember)  
(Don't do this type of shopping)

IF 'Internet / delivery' at Q20:

**Q20a How much did you spend on that occasion?**  
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

- X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)
- Y (Don't know / varies)
- Z (Refused)

**Q21 Where did you or a member of your household last make a purchase of a television, audio equipment, photographic equipment, a mobile phone or tablet, or computer equipment?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#NFood Non Food List  
(Don't know / can't remember)  
(Don't do this type of shopping)

IF 'Internet / delivery' at Q21:

**Q21a How much did you spend on that occasion?**  
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

- X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)
- Y (Don't know / varies)
- Z (Refused)

**Q22 Where did you or a member of your household last make a purchase of items for personal care, such as soaps or shower gel, health and beauty products or medicine?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#NFood Non Food List  
(Don't know / can't remember)  
(Don't do this type of shopping)

IF 'Internet / delivery' at Q22:

**Q22a How much did you spend on that occasion?**  
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

- X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)
- Y (Don't know / varies)
- Z (Refused)

**Q23 Where did you or a member of your household last make a purchase of general recreation items such as toys and games, pets and pets products, books or stationery, sports equipment, bicycles or musical instruments?**  
  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#NFood Non Food List  
(Don't know / can't remember)  
(Don't do this type of shopping)

IF 'Internet / delivery' at Q23:

**Q23a How much did you spend on that occasion?**  
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

- X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)
- Y (Don't know / varies)
- Z (Refused)

**Q24 Where did you or a member of your household last make a purchase of other non-food items including jewellery and watches, china, tableware and household utensils and other personal items such as travel goods?**  
DO NOT PROMPT. ONE ANSWER ONLY.  
IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#NFood Non Food List  
(Don't know / can't remember)  
(Don't do this type of shopping)

**IF 'Internet / delivery' at Q24:**

**Q24a How much did you spend on that occasion?**  
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)  
Y (Don't know / varies)  
Z (Refused)

**READ OUT: I would now like to ask you some questions about your views on Oxford City Centre as a place for shopping, leisure activities, and using other services.**

**Q25 Have you visited Oxford City centre for shopping purposes in the past year / 12 months?**  
ONE ANSWER ONLY

1 Yes GO TO Q26  
2 No GO TO Q31

**ASKED TO THOSE WHO HAVE VISITED OXFORD CITY FOR RETAIL AT Q25**

**Q26 How often do you usually visit Oxford City Centre for shopping purposes?**  
DO NOT READ OUT. ONE ANSWER ONLY.

1 7 times a week  
2 5 - 6 times a week  
3 3 - 4 times a week  
4 Twice a week  
5 Once a week  
6 Once every two weeks  
7 Once every three weeks  
8 Once a month  
9 Once every two months  
A 3 or 4 times a year  
B Twice a year  
C Once a year  
D Less often  
E (Don't know / varies)

**ASKED TO THOSE WHO HAVE VISITED OXFORD CITY FOR RETAIL AT Q25**

**Q27 How do you usually travel to Oxford City Centre for shopping purposes?**  
DO NOT READ OUT. ONE ANSWER ONLY.

1 Car / van - driver  
2 Car / van - passenger  
3 Bus  
4 Motorcycle, scooter or moped  
5 Bicycle  
6 Disabled vehicle (e.g. mobility scooter)  
7 Taxi  
8 Train  
9 Walk  
A Other (PLEASE WRITE IN)  
B (Don't know / varies)

**ASKED TO THOSE WHO HAVE VISITED OXFORD CITY FOR RETAIL AT Q25**

**Q28 What do you like most about Oxford City Centre?**

DO NOT READ OUT. ONE ANSWER ONLY.

- 001 Attractive environment / nice place
- 002 Clean streets / well maintained
- 003 Close to home
- 004 Close to work / en route to work
- 005 Easy to get to by bus
- 006 Easy to get to by car
- 007 Easy to get to by train
- 008 Familiar / know where everything is
- 009 Good cafés / restaurants
- 010 Good disabled access
- 011 Good for a day out
- 012 Good for financial services (e.g. banks / building societies)
- 013 Good layout / shops close together
- 014 Good leisure facilities (e.g. leisure centres, cinema, health and fitness clubs, etc)
- 015 Good market
- 016 Good pubs / bars
- 017 Good range of other services (e.g. library, hairdresser, vets etc.)
- 018 Has undercover shopping
- 019 Nice atmosphere / friendly people
- 020 Parking - it's cheap
- 021 Parking - it's easy to find a space
- 022 Parking - it's free
- 023 Quiet / not busy
- 024 Shops - good opening hours / open on Sundays
- 025 Shops - good range of affordable shops
- 026 Shops - good range of bakers / butchers / greengrocers
- 027 Shops - good range of clothing shops
- 028 Shops - good range of 'high street' retailers
- 029 Shops - good range of independent shops
- 030 Shops - good range of non-food shops generally
- 031 Shops - good range of quality shops
- 032 Shops - good range of supermarkets
- 033 Traditional / quaint
- 034 Traffic free areas / pedestrianisation
- 035 You can get everything you need there
- 500 Other (PLEASE WRITE IN)
- 505 (Don't know)
- 509 (Nothing)

**ASKED TO THOSE WHO HAVE VISITED OXFORD CITY FOR RETAIL AT Q25**

**Q29 What do you like least about Oxford City Centre?**

DO NOT READ OUT. ONE ANSWER ONLY.

- 001 Dirty streets / poorly maintained
- 002 Hard to get to by bus
- 003 Hard to get to by train
- 004 Lack of pedestrianised areas
- 005 Lack of security / don't feel safe
- 006 Lack of undercover shopping
- 007 Needs an update / revamp
- 008 Not attractive / poor environment
- 009 Not enough / poor quality cafés / restaurants
- 010 Not enough / poor quality public toilets
- 011 Not enough / poor quality pubs / bars
- 012 Not enough / poor quality seating areas
- 013 Not enough financial services (e.g. banks / building societies)
- 014 Not enough leisure facilities (e.g. leisure centres, cinema, health and fitness clubs, etc)
- 015 Not enough other services (e.g. library, hairdresser, vets etc.)
- 016 Parking - expensive parking
- 017 Parking - no free parking
- 018 Parking - not enough spaces available
- 019 Poor atmosphere / unfriendly people
- 020 Poor disabled access
- 021 Poor layout / shops too far apart
- 022 Poor market
- 023 Poor nightlife

- 024 Shops - need longer opening hours / more open on Sundays
- 025 Shops - need more / better clothes shops
- 026 Shops - need more / better range of non-food shops generally
- 027 Shops - need more / better range of supermarkets
- 028 Shops - need more affordable shops
- 029 Shops - need more bakers / butchers / greengrocers
- 030 Shops - need more 'high street' retailers
- 031 Shops - need more independent shops
- 032 Shops - need more quality shops
- 033 Too busy / noisy
- 034 Too many betting shops
- 035 Too many charity shops
- 036 Too many empty shops
- 037 Too many takeaways
- 038 Traffic congestion
- 500 Other (PLEASE WRITE IN)
- 505 (Don't know)
- 509 (Nothing)

**ASKED TO THOSE WHO HAVE VISITED OXFORD CITY FOR RETAIL AT Q25**

**Q30 Are there any measures that would encourage you to visit Oxford City Centre, more often?**  
DO NOT PROMPT. CODE FIRST 3 MENTIONS

- 1 Better environment
- 2 Better security
- 3 Cheaper parking
- 4 Cheaper public transport
- 5 Discount foodstores within the town centre
- 6 Improved food shops within the town centre
- 7 Improved leisure facilities
- 8 Improved non-food shops within the town centre
- 9 Improved quality of shops
- A Improved street cleaning
- B Increased general choice and range of shops
- C Increased public transport
- D Longer opening hours
- E More parking
- F Other (PLEASE WRITE IN)
- G (Nothing / Nothing else)
- H (Don't know)

**READ OUT: "We now have a few questions about a range of different social and leisure activities."**

**Q31 Which of these leisure activities do you participate in?**  
READ OUT. CAN BE MULTICODED.

- |   |  |           |
|---|--|-----------|
| 1 | Indoor sports or health and fitness activity, e.g. gyms, leisure centres, etc.   | GO TO Q32 |
| 2 | Restaurants  | GO TO Q33 |
| 3 | Pub / bars / nightclubs / social clubs   | GO TO Q34 |
| 4 | Theatres / concert halls / museums / art galleries and other cultural facilities | GO TO Q35 |
| 5 | Cinema   | GO TO Q36 |
| 6 | Ten pin bowling  | GO TO Q37 |
| 7 | Bingo  | GO TO Q38 |
| 8 | Casino   | GO TO Q39 |
| 9 | (None mentioned)   | GO TO Q40 |

**ASKED TO THOSE WHO PARTICIPATE IN HEALTH AND FITNESS OR LEISURE CENTRE ACTIVITIES AT Q32**

**Q32 Which centre / facility did you last visit for an indoor sports or health and fitness activity?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Health Health List

**ASKED TO THOSE WHO GO TO RESTAURANTS AT Q32**

**Q33 Which centre / facility did you last visit to go to a restaurant?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Social Social List

ASKED TO THOSE WHO GO TO PUB/BARS, NIGHTCLUBS OR A SOCIAL CLUB AT Q32

**Q34 Which centre / facility did you last visit to go to pubs, bars and nightclubs?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Social Social List

ASKED TO THOSE WHO VISIT THEATRE/CONCERT HALL/MUSEUM/ART GALLERIES AT Q32

**Q35 Which centre / facility did you last visit for theatres / concert halls / museums / art galleries and other cultural facilities?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Culture Culture list

ASKED TO THOSE WHO GO TO THE CINEMA AT Q32

**Q36 Which cinema did you last visit?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Cinema Cinema List

ASKED TO THOSE WHO GO TEN PIN BOWLING AT Q32

**Q37 Which ten-pin bowling venue did you last visit?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#TenPin Bowling List

ASKED TO THOSE WHO GO TO BINGO AT Q32

**Q38 Which bingo hall did you last visit?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Bingo Bingo List

ASKED TO THOSE WHO VISIT CASINO AT Q32

**Q39 Which casino did you last visit?**  
DO NOT PROMPT. ONE ANSWER ONLY.

#Casino Casino List

**Q40 Which of these neighbourhood centres do use the most (for any purpose)?**  
READ OUT. ONE ANSWER ONLY.

1	Cowley	GO TO Q41
2	Headington	GO TO Q41
3	Summertown	GO TO Q41
4	East Oxford – Cowley Road	GO TO Q41
5	Blackbird Leys	GO TO Q41
6	Cherwell Drive Shops (Headley Way)	GO TO Q41
7	North Parade	GO TO Q41
8	Walton Street	GO TO Q41
9	Little Clarendon Street	GO TO Q41
A	Rose Hill Shops (Henley Avenue)	GO TO Q41
B	St Clements	GO TO Q41
C	(None of these)	GO TO GEN

ASKED TO THOSE WHO USE A NEIGHBOURHOOD CENTRE AT Q40

**Q41 When you visit ..... (NEIGHBOURHOOD CENTRE MENTIONED AT Q40), which of the following do you ever use ?**  
DO NOT PROMPT. ONE ANSWER ONLY.

1	Local shop/s	GO TO Q42
2	Café/s	GO TO Q43
3	Pub/s & Bar/s	GO TO Q44
4	Free leisure facilities (e.g. park / greenspace)	GO TO Q45
5	Paid-for leisure facilities (e.g. sports centre, cinema / theatre, etc)	GO TO Q46
6	(None of these)	GO TO GEN

ASKED TO THOSE WHO USE LOCAL SHOPS AT Q41

**Q42 How often do you use the local shops at ..... (NEIGHBOURHOOD CENTRE MENTIONED AT Q40) ?**  
DO NOT READ OUT. ONE ANSWER ONLY.

1	7 times a week
2	5 - 6 times a week
3	3 - 4 times a week
4	Twice a week
5	Once a week
6	Once every two weeks

- 7 Once every three weeks
- 8 Once a month
- 9 Once every two months
- A 3 or 4 times a year
- B Twice a year
- C Once a year
- D Less often
- E (Don't know / varies)

**ASKED TO THOSE WHO USE CAFES AT Q41**

**Q43 How often do you use the cafes at ..... (NEIGHBOURHOOD CENTRE MENTIONED AT Q40) ?**  
DO NOT READ OUT. ONE ANSWER ONLY.

- 1 7 times a week
- 2 5 - 6 times a week
- 3 3 - 4 times a week
- 4 Twice a week
- 5 Once a week
- 6 Once every two weeks
- 7 Once every three weeks
- 8 Once a month
- 9 Once every two months
- A 3 or 4 times a year
- B Twice a year
- C Once a year
- D Less often
- E (Don't know / varies)

**ASKED TO THOSE WHO USE PUB/S & BAR/S AT Q41**

**Q44 How often do you use the pub/s and bar/s at ..... (NEIGHBOURHOOD CENTRE MENTIONED AT Q40) ?**  
DO NOT READ OUT. ONE ANSWER ONLY.

- 1 7 times a week
- 2 5 - 6 times a week
- 3 3 - 4 times a week
- 4 Twice a week
- 5 Once a week
- 6 Once every two weeks
- 7 Once every three weeks
- 8 Once a month
- 9 Once every two months
- A 3 or 4 times a year
- B Twice a year
- C Once a year
- D Less often
- E (Don't know / varies)

**ASKED TO THOSE WHO USE FREE LEISURE FACILITIES AT Q41**

**Q45 How often do you use the free leisure facilities at ..... (NEIGHBOURHOOD CENTRE MENTIONED AT Q40) ?**  
DO NOT READ OUT. ONE ANSWER ONLY.

- 1 7 times a week
- 2 5 - 6 times a week
- 3 3 - 4 times a week
- 4 Twice a week
- 5 Once a week
- 6 Once every two weeks
- 7 Once every three weeks
- 8 Once a month
- 9 Once every two months
- A 3 or 4 times a year
- B Twice a year
- C Once a year
- D Less often
- E (Don't know / varies)



**ASKED TO THOSE WHO USE PAID FOR LEISURE FACILITIES AT Q41**

**Q46** How often do you use the paid for leisure facilities at ..... (NEIGHBOURHOOD CENTRE MENTIONED AT Q40) ?  
DO NOT READ OUT. ONE ANSWER ONLY.

- 1 7 times a week
- 2 5 - 6 times a week
- 3 3 - 4 times a week
- 4 Twice a week
- 5 Once a week
- 6 Once every two weeks
- 7 Once every three weeks
- 8 Once a month
- 9 Once every two months
- A 3 or 4 times a year
- B Twice a year
- C Once a year
- D Less often
- E (Don't know / varies)

**GEN** Gender of respondent  
DO NOT READ OUT. CODE FROM OBSERVATION

- 1 Male
- 2 Female

**AGE** Could I ask, how old are you?  
ONE ANSWER ONLY. DO NOT READ OUT.

- 1 18 to 24
- 2 25 to 34
- 3 35 to 44
- 4 45 to 54
- 5 55 to 64
- 6 65 +
- 7 (Refused)

**Thank & Close**

# **APPENDIX D      COMPARISON RETAIL CAPACITY**

**Spreadsheet 1 - Population Projections**

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All Zones Total
2023	84,651	70,197	17,734	11,805	55,349	90,454	51,839	137,726	46,308	566,063
2028	83,607	69,753	18,464	11,949	56,446	92,930	53,183	142,003	48,703	577,038
2033	83,135	69,948	18,938	12,002	57,320	94,963	54,061	145,037	50,555	585,959
2038	82,049	69,333	19,328	12,054	58,356	96,916	54,824	147,752	52,039	592,651
2042	81,188	68,891	19,659	12,122	59,132	98,539	55,583	149,988	53,313	598,415
<b>Change in population</b>										
Numeric change	-3,463	-1,306	1,925	317	3,783	8,085	3,744	12,262	7,005	32,352
Percentage change	-4%	-2%	11%	3%	7%	9%	7%	9%	15%	6%

**Notes**

1. Population data is derived from Experian MMG3

## Spreadsheet 2 - Comparison Goods Expenditure Per Capita (£)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
2023	4,130	3,760	5,590	5,476	4,981	4,784	5,420	4,845	5,226
2028	4,400	4,005	5,956	5,834	5,307	5,097	5,774	5,162	5,568
2033	4,983	4,536	6,745	6,607	6,010	5,772	6,539	5,846	6,306
2038	5,693	5,182	7,706	7,548	6,866	6,595	7,471	6,679	7,204
2042	6,333	5,765	8,572	8,397	7,638	7,336	8,311	7,430	8,014

### Notes

1. 2023-based per capita comparison expenditure data were sourced from Experian MMG3.
2. The 2023-based per capita comparison expenditure data were rolled forward to the base year and forecast years using the forecasts contained within Experian Retail Planner Briefing Note 20 (February 2023).

All monetary values are held constant at 2023 prices.

**Spreadsheet 3 - Total Comparison Goods Expenditure and Expenditure Growth (£m)**

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All Zones Total
<b>Total expenditure 2023</b>	<b>349.61</b>	<b>263.91</b>	<b>99.14</b>	<b>64.64</b>	<b>275.70</b>	<b>432.74</b>	<b>280.95</b>	<b>667.30</b>	<b>242.02</b>	<b>2,676.01</b>
Spending on SFT in 2023 29.8%	104.18	78.64	29.54	19.26	82.16	128.96	83.72	198.86	72.12	<b>797.45</b>
Total expenditure excluding SFT 2023	245.43	185.26	69.60	45.38	193.54	303.79	197.23	468.45	169.90	<b>1,878.56</b>
<b>Total expenditure 2028</b>	<b>367.87</b>	<b>279.38</b>	<b>109.97</b>	<b>69.71</b>	<b>299.54</b>	<b>473.65</b>	<b>307.08</b>	<b>733.00</b>	<b>271.18</b>	<b>2,911.39</b>
Spending on SFT in 2028 33.3%	122.45	93.00	36.60	23.20	99.71	157.66	102.21	243.99	90.26	<b>969.09</b>
Total expenditure excluding SFT 2028	245.42	186.39	73.36	46.50	199.84	315.99	204.86	489.02	180.91	<b>1,942.30</b>
<b>Total expenditure 2033</b>	<b>414.26</b>	<b>317.28</b>	<b>127.73</b>	<b>79.29</b>	<b>344.48</b>	<b>548.14</b>	<b>353.50</b>	<b>847.85</b>	<b>318.78</b>	<b>3,351.31</b>
Spending on SFT in 2033 35.0%	144.88	110.96	44.67	27.73	120.47	191.70	123.63	296.52	111.49	<b>1,172.05</b>
Total expenditure excluding SFT 2033	269.38	206.32	83.06	51.56	224.01	356.44	229.87	551.33	207.29	<b>2,179.26</b>
<b>Total expenditure 2038</b>	<b>467.10</b>	<b>359.30</b>	<b>148.94</b>	<b>90.98</b>	<b>400.68</b>	<b>639.12</b>	<b>409.57</b>	<b>986.79</b>	<b>374.89</b>	<b>3,877.38</b>
Spending on SFT in 2038 35.9%	167.56	128.89	53.43	32.64	143.73	229.27	146.92	353.98	134.48	<b>1,390.91</b>
Total expenditure excluding SFT 2038	299.54	230.41	95.51	58.34	256.94	409.85	262.65	632.80	240.41	<b>2,486.47</b>
<b>Total expenditure 2042</b>	<b>514.18</b>	<b>397.16</b>	<b>168.53</b>	<b>101.79</b>	<b>451.66</b>	<b>722.90</b>	<b>461.93</b>	<b>1,114.37</b>	<b>427.26</b>	<b>4,359.77</b>
Spending on SFT in 2042 36.3%	186.76	144.26	61.21	36.97	164.05	262.57	167.78	404.76	155.19	<b>1,583.57</b>
Total expenditure excluding SFT 2042	327.42	252.90	107.32	64.82	287.61	460.33	294.15	709.60	272.07	<b>2,776.20</b>
Growth in total expenditure 2023 - 2028	18.26	15.47	10.83	5.07	23.85	40.91	26.13	65.70	29.16	<b>235.38</b>
Growth in total expenditure 2028 - 2033	46.38	37.90	17.77	9.58	44.94	74.48	46.42	114.84	47.60	<b>439.92</b>
Growth in total expenditure 2033 - 2038	52.84	42.02	21.21	11.69	56.20	90.98	56.07	138.94	56.11	<b>526.07</b>
Growth in total expenditure 2038 - 2042	47.08	37.85	19.59	10.80	50.99	83.78	52.36	127.58	52.37	<b>482.40</b>
<i>Growth in total expenditure 2023 - 2042</i>	164.57	133.25	69.39	37.15	175.97	290.16	180.98	447.07	185.24	<b>1,683.76</b>

**Notes**

1. The figures in the above table are the product of multiplying the data presented in Spreadsheet 1 (population) by Spreadsheet 2 (per capita comparison goods expenditure) and are in millions of pounds (£m).
2. The total expenditure includes a proportion of expenditure on Special Forms of Trading ('SFT') (e.g. internet shopping). The proportion of expenditure on SFT in 2023 is derived from the telephone survey of households. This headline rate has been adjusted to take account of SFT sales from store. For each of the forecast years, we have applied the rate of growth in adjusted SFT market shares implied by Experian's forecasts.

All monetary values are held constant at 2023 prices.

Spreadsheet 4 - Comparison Goods Spending Patterns in 2023 as a Percentage across the Study Area Zones

Destination	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %
<b>INSIDE STUDY AREA</b>									
<b>Zone 1</b>									
Botley Road Retail Park, Oxford	14.7%	19.1%	25.8%	11.4%	15.0%	12.3%	2.4%	11.7%	7.4%
Headington District Centre	2.0%	2.2%	0.0%	1.0%	0.2%	0.4%	0.0%	0.0%	0.0%
Marks & Spencer (M&S), Queen Street, City Centre, Oxford	3.8%	0.3%	2.3%	5.4%	0.4%	0.9%	0.2%	0.0%	0.0%
Meadowside Retail Park	0.3%	0.7%	4.4%	1.1%	0.6%	0.0%	0.0%	3.3%	0.6%
Oxford City Centre	32.3%	34.4%	29.8%	20.6%	19.4%	15.4%	5.2%	9.8%	15.7%
Other, Zone 1	1.3%	0.2%	1.7%	0.5%	0.8%	0.1%	0.0%	0.1%	1.3%
<b>Total Zone 1</b>	<b>54.4%</b>	<b>56.8%</b>	<b>64.0%</b>	<b>39.8%</b>	<b>36.4%</b>	<b>29.1%</b>	<b>7.7%</b>	<b>24.8%</b>	<b>25.1%</b>
<b>Zone 2</b>									
Cowley District Centre	1.3%	2.6%	1.2%	1.5%	0.0%	0.4%	0.0%	0.0%	1.2%
Horspath Driftway Retail Park	2.7%	4.4%	0.3%	5.2%	0.9%	0.6%	0.2%	0.1%	1.3%
Oxford Retail Park	5.7%	9.8%	1.5%	2.5%	0.2%	0.8%	0.0%	1.7%	0.0%
Sainsbury's Superstore, Heyford Hill Roundabout, Littlemore, Oxford	0.7%	3.0%	1.3%	4.1%	0.0%	0.0%	0.0%	0.1%	0.0%
Temple Cowley District Centre	2.9%	6.2%	0.3%	9.3%	0.0%	1.1%	0.0%	0.5%	0.0%
Other, Zone 2	0.6%	2.9%	1.1%	2.8%	0.0%	0.0%	0.0%	0.1%	0.4%
<b>Total Zone 2</b>	<b>13.9%</b>	<b>28.9%</b>	<b>5.8%</b>	<b>25.4%</b>	<b>1.1%</b>	<b>2.9%</b>	<b>0.2%</b>	<b>2.5%</b>	<b>2.8%</b>
<b>Zone 3</b>									
Seacourt Tower Retail Park	2.1%	0.5%	1.5%	0.1%	0.3%	1.3%	0.0%	0.7%	0.2%
New Botley Village Centre	0.0%	0.0%	2.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%
Other, Zone 3	0.4%	0.4%	1.3%	0.0%	0.5%	0.0%	0.0%	0.0%	0.1%
<b>Total Zone 3</b>	<b>2.6%</b>	<b>0.8%</b>	<b>4.8%</b>	<b>0.1%</b>	<b>0.7%</b>	<b>1.9%</b>	<b>0.0%</b>	<b>0.7%</b>	<b>0.3%</b>
<b>Zone 4</b>									
Asda, London Road, Wheatley, Oxford	0.5%	0.0%	0.0%	4.3%	0.0%	0.0%	0.3%	0.0%	0.2%
Other, Zone 4	0.0%	0.2%	0.0%	1.7%	0.0%	0.0%	0.1%	0.0%	0.0%
<b>Total Zone 4</b>	<b>0.5%</b>	<b>0.2%</b>	<b>0.0%</b>	<b>6.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.4%</b>	<b>0.0%</b>	<b>0.2%</b>
<b>Zone 5</b>									
Marks & Spencer (M&S), Marriotts Walk, Witney	0.0%	0.0%	0.7%	0.6%	1.1%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Witan Way, Witney	0.0%	0.0%	0.0%	0.0%	5.9%	0.1%	0.0%	0.0%	0.0%
Witney Town Centre	0.1%	0.6%	3.4%	0.0%	32.4%	1.4%	0.0%	0.3%	3.2%
Other, Zone 5	0.0%	0.0%	0.2%	0.3%	2.9%	0.4%	0.0%	0.0%	0.0%
<b>Total Zone 5</b>	<b>0.1%</b>	<b>0.6%</b>	<b>4.2%</b>	<b>0.9%</b>	<b>42.3%</b>	<b>1.9%</b>	<b>0.0%</b>	<b>0.3%</b>	<b>3.2%</b>
<b>Zone 6</b>									
B&M, Sheep Street, Bicester	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%
Bicester Shopping Park, Bicester	0.9%	0.9%	0.0%	0.0%	0.0%	0.8%	0.4%	0.0%	0.0%
Bicester Town Centre	0.9%	0.0%	0.0%	0.0%	0.0%	12.6%	0.4%	2.2%	0.0%
Bicester Village Outlet Shopping, Pingle Drive, Bicester	1.6%	0.4%	0.0%	0.0%	1.2%	1.9%	0.0%	0.0%	0.0%
Launton Road Retail Park, Bicester	1.6%	1.1%	0.0%	0.0%	0.2%	4.1%	0.4%	0.0%	1.4%
Sainsbury's Superstore, Pioneer Square, Bure Place, Bicester	0.0%	0.0%	0.0%	0.0%	0.0%	5.4%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Oxford Road, Kidlington	0.7%	0.2%	0.0%	0.0%	0.4%	2.6%	0.0%	0.0%	0.0%
Tesco Superstore, High Street, Kidlington	3.5%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%
Tesco Superstore, Lakeview Drive, Bicester	0.2%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%
Other, Zone 6	1.3%	1.0%	0.2%	0.7%	0.4%	3.9%	0.1%	0.0%	0.0%
<b>Total Zone 6</b>	<b>10.7%</b>	<b>3.7%</b>	<b>0.2%</b>	<b>0.7%</b>	<b>2.2%</b>	<b>39.0%</b>	<b>1.4%</b>	<b>2.3%</b>	<b>1.4%</b>
<b>Zone 7</b>									
Haddenham Village Centre	0.1%	0.0%	0.0%	0.5%	0.0%	0.0%	2.5%	0.0%	0.0%
Thame Town Centre	0.2%	0.0%	0.5%	6.5%	0.0%	0.2%	16.5%	0.0%	0.0%
Other, Zone 7	0.0%	0.0%	0.0%	0.4%	0.0%	0.4%	3.6%	0.0%	0.0%
<b>Total Zone 7</b>	<b>0.3%</b>	<b>0.0%</b>	<b>0.5%</b>	<b>7.4%</b>	<b>0.0%</b>	<b>0.6%</b>	<b>22.7%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Zone 8</b>									
Abingdon Town Centre	0.5%	0.0%	4.0%	1.7%	0.1%	0.1%	0.2%	7.3%	1.4%
Abingdon Local Centre	0.1%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	1.7%	1.6%
Fairacres Retail Park, Marcham Road, Abingdon	0.7%	0.8%	4.4%	0.9%	0.3%	0.0%	0.0%	14.2%	7.2%
Tesco Extra, Marcham Road, Abingdon	0.0%	0.1%	3.1%	0.0%	0.0%	0.0%	0.0%	1.2%	1.9%
Didcot Local Centre	0.1%	0.0%	0.2%	0.0%	0.0%	0.0%	0.5%	14.0%	7.0%
The Orchard Centre, Station Road, Didcot	0.0%	0.8%	0.0%	0.4%	0.0%	0.0%	0.0%	5.2%	1.2%
Wallingford Town Centre	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%
Other, Zone 8	0.1%	1.5%	1.2%	0.9%	0.0%	0.1%	0.3%	4.4%	2.3%
<b>Total Zone 8</b>	<b>1.4%</b>	<b>3.2%</b>	<b>13.5%</b>	<b>3.8%</b>	<b>0.5%</b>	<b>0.2%</b>	<b>1.0%</b>	<b>50.5%</b>	<b>22.7%</b>
<b>Zone 9</b>									
Wantage Town Centre	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	18.8%
Sainsbury's Superstore, Limborough Road, Wantage	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%
Kings Park, Limborough Road, Wantage	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Other, Zone 9	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%	0.2%	1.2%
<b>Total Zone 9</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.2%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.1%</b>	<b>0.0%</b>	<b>0.2%</b>	<b>25.0%</b>
<b>TOTAL INSIDE STUDY AREA</b>									
<b>TOTAL INSIDE STUDY AREA</b>	<b>84.0%</b>	<b>94.2%</b>	<b>93.3%</b>	<b>84.1%</b>	<b>83.3%</b>	<b>75.8%</b>	<b>33.4%</b>	<b>81.3%</b>	<b>80.7%</b>
<b>Aylesbury</b>									
Aylesbury Town Centre	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	8.2%	0.0%	0.0%
Aylesbury Retail Park, Cambridge Close, Aylesbury	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	6.3%	0.0%	0.0%
The Vale Hundreds Retail Park, Vale Park Drive, Aylesbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%	0.0%	0.0%
Broadfields Retail Park, Bicester Road, Aylesbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	4.9%	0.0%	0.0%
<b>Total Aylesbury</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>1.1%</b>	<b>0.0%</b>	<b>0.5%</b>	<b>25.0%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Banbury</b>									
Banbury Town Centre	3.4%	0.0%	0.0%	0.0%	0.2%	1.9%	0.0%	0.0%	0.2%
Banbury Cross Retail Park, Lockheed Close, Banbury	1.2%	1.3%	0.0%	0.0%	1.6%	3.0%	0.0%	0.1%	0.0%
Banbury Gateway Shopping Park, Acorn Way, Banbury	0.8%	0.0%	1.0%	1.5%	3.2%	2.0%	0.5%	2.1%	5.1%
Southam Road, Banbury	1.5%	0.8%	0.3%	0.0%	2.3%	2.3%	0.2%	0.0%	0.4%
<b>Total Banbury</b>	<b>6.9%</b>	<b>2.1%</b>	<b>1.3%</b>	<b>1.5%</b>	<b>7.3%</b>	<b>9.2%</b>	<b>0.7%</b>	<b>2.2%</b>	<b>5.6%</b>
<b>Bath</b>									
Bath City Centre	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.7%
<b>Total Bath</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.9%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.7%</b>



Spreadsheet 5 - Comparison Goods Spending Patterns in 2023 across the Study Area Zones

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total	All Zones Market Share
	245.4 £m	185.3 £m	69.6 £m	45.4 £m	193.5 £m	303.8 £m	197.2 £m	468.4 £m	169.9 £m	1878.6 £m	%
<b>INSIDE STUDY AREA</b>											
<b>Zone 1</b>											
Botley Road Retail Park, Oxford	36.0	35.3	18.0	5.2	29.1	37.5	4.7	54.8	12.5	233.0	12.4%
Headington District Centre	4.8	4.2	0.0	0.4	0.4	1.2	0.0	0.0	0.0	11.0	0.6%
Marks & Spencer (M&S), Queen Street, City Centre, Oxford	9.3	0.6	1.6	2.4	0.8	2.8	0.3	0.0	0.0	18.0	1.0%
Meadowside Retail Park	0.7	1.2	3.0	0.5	1.2	0.0	0.0	15.5	1.1	23.2	1.2%
Oxford City Centre	79.4	63.6	20.7	9.3	37.6	46.8	10.2	45.7	26.7	340.1	18.1%
Other, Zone 1	3.2	0.3	1.2	0.2	1.5	0.2	0.0	0.3	2.3	9.2	0.5%
<b>Total Zone 1</b>	<b>133.4</b>	<b>105.3</b>	<b>44.5</b>	<b>18.1</b>	<b>70.5</b>	<b>88.5</b>	<b>15.3</b>	<b>116.3</b>	<b>42.6</b>	<b>634.5</b>	<b>33.8%</b>
<b>Zone 2</b>											
Cowley District Centre	3.2	4.9	0.9	0.7	0.0	1.1	0.0	0.0	2.0	12.7	0.7%
Horspath Driftway Retail Park	6.7	8.1	0.2	2.4	1.7	1.7	0.3	0.6	2.2	24.0	1.3%
Oxford Retail Park	14.0	18.2	1.0	1.1	0.4	2.5	0.0	8.1	0.0	45.4	2.4%
Sainsbury's Superstore, Heyford Hill Roundabout, Littlemore, Oxford	1.6	5.5	0.9	1.8	0.0	0.1	0.0	0.3	0.0	10.3	0.5%
Temple Cowley District Centre	7.2	11.5	0.2	4.2	0.0	3.3	0.0	2.4	0.0	28.9	1.5%
Other, Zone 2	1.5	5.4	0.8	1.3	0.0	0.0	0.0	0.6	0.7	10.3	0.5%
<b>Total Zone 2</b>	<b>34.2</b>	<b>53.6</b>	<b>4.0</b>	<b>11.5</b>	<b>2.1</b>	<b>8.8</b>	<b>0.4</b>	<b>11.9</b>	<b>4.8</b>	<b>131.4</b>	<b>7.0%</b>
<b>Zone 3</b>											
Seacourt Tower Retail Park	5.2	0.8	1.0	0.0	0.5	4.1	0.0	3.3	0.3	15.2	0.8%
New Botley Village Centre	0.0	0.0	1.4	0.0	0.0	1.8	0.0	0.0	0.0	3.2	0.2%
Other, Zone 3	1.1	0.7	0.9	0.0	0.9	0.0	0.0	0.0	0.2	3.8	14.3%
<b>Total Zone 3</b>	<b>6.3</b>	<b>1.5</b>	<b>3.3</b>	<b>0.0</b>	<b>1.4</b>	<b>5.9</b>	<b>0.0</b>	<b>3.3</b>	<b>0.5</b>	<b>22.2</b>	<b>1.2%</b>
<b>Zone 4</b>											
Asda, London Road, Wheatley, Oxford	1.2	0.0	0.0	2.0	0.0	0.0	0.6	0.0	0.3	4.1	0.2%
Other, Zone 4	0.1	0.3	0.0	0.8	0.0	0.0	0.2	0.0	0.0	1.3	0.1%
<b>Total Zone 4</b>	<b>1.3</b>	<b>0.3</b>	<b>0.0</b>	<b>2.7</b>	<b>0.0</b>	<b>0.0</b>	<b>0.8</b>	<b>0.0</b>	<b>0.3</b>	<b>5.4</b>	<b>0.3%</b>
<b>Zone 5</b>											
Marks & Spencer (M&S), Marriotts Walk, Witney	0.0	0.0	0.5	0.3	2.2	0.0	0.0	0.0	0.0	2.9	0.2%
Sainsbury's Superstore, Witan Way, Witney	0.0	0.0	0.0	0.0	11.4	0.2	0.0	0.0	0.0	11.6	0.6%
Witney Town Centre	0.3	1.1	2.4	0.0	62.6	4.3	0.0	1.2	5.4	77.3	4.1%
Other, Zone 5	0.0	0.1	0.1	0.1	5.7	1.3	0.0	0.0	0.0	7.3	0.4%
<b>Total Zone 5</b>	<b>0.3</b>	<b>1.1</b>	<b>2.9</b>	<b>0.4</b>	<b>81.9</b>	<b>5.8</b>	<b>0.0</b>	<b>1.2</b>	<b>5.5</b>	<b>99.1</b>	<b>5.1%</b>
<b>Zone 6</b>											
B&M, Sheep Street, Bicester	0.0	0.0	0.0	0.0	0.0	8.0	0.0	0.0	0.0	8.0	0.4%
Bicester Shopping Park, Bicester	2.1	1.6	0.0	0.0	0.0	2.4	0.9	0.0	0.0	7.1	0.4%
Bicester Town Centre	2.3	0.0	0.0	0.0	0.0	38.4	0.8	10.5	0.0	52.1	2.8%
Bicester Village Outlet Shopping, Pingle Drive, Bicester	4.0	0.7	0.0	0.0	2.3	5.7	0.0	0.0	0.0	12.7	0.7%
Launton Road Retail Park, Bicester	3.9	2.0	0.0	0.0	0.4	12.4	0.8	0.0	2.4	22.0	1.2%
Sainsbury's Superstore, Pioneer Square, Bure Place, Bicester	0.0	0.0	0.0	0.0	0.0	16.5	0.0	0.0	0.0	16.5	0.9%
Sainsbury's Superstore, Oxford Road, Kidlington	1.7	0.5	0.0	0.0	0.8	7.8	0.0	0.0	0.0	10.7	0.6%
Tesco Superstore, High Street, Kidlington	8.6	0.0	0.0	0.0	0.0	5.0	0.0	0.0	0.0	13.6	0.7%
Tesco Superstore, Lakeview Drive, Bicester	0.5	0.0	0.0	0.0	0.0	10.5	0.0	0.0	0.0	11.0	0.6%
Other, Zone 6	3.2	1.9	0.1	0.3	0.8	11.7	0.2	0.2	0.0	18.5	1.0%
<b>Total Zone 6</b>	<b>26.3</b>	<b>6.8</b>	<b>0.2</b>	<b>0.3</b>	<b>4.3</b>	<b>118.5</b>	<b>2.7</b>	<b>10.7</b>	<b>2.4</b>	<b>172.2</b>	<b>9.2%</b>
<b>Zone 7</b>											
Haddenham Village Centre	0.3	0.0	0.0	0.2	0.0	0.0	4.9	0.0	0.0	5.5	0.3%
Thame Town Centre	0.4	0.0	0.3	3.0	0.0	0.6	32.6	0.1	0.0	36.9	2.0%
Other, Zone 7	0.1	0.0	0.0	0.2	0.0	1.2	7.2	0.1	0.0	8.8	0.5%
<b>Total Zone 7</b>	<b>0.8</b>	<b>0.0</b>	<b>0.3</b>	<b>3.3</b>	<b>0.0</b>	<b>1.8</b>	<b>44.7</b>	<b>0.2</b>	<b>0.0</b>	<b>51.1</b>	<b>2.7%</b>
<b>Zone 8</b>											
Abingdon Town Centre	1.2	0.0	2.8	0.8	0.2	0.3	0.5	34.2	2.4	42.3	2.3%
Abingdon Local Centre	0.3	0.1	0.3	0.0	0.0	0.0	0.0	8.1	2.8	11.5	0.6%
Fairacres Retail Park, Marcham Road, Abingdon	1.6	1.5	3.1	0.4	0.7	0.0	0.0	66.7	12.3	86.2	4.6%
Tesco Extra, Marcham Road, Abingdon	0.0	0.2	2.2	0.0	0.0	0.0	0.0	5.7	3.3	11.3	0.6%
Didcot Local Centre	0.2	0.0	0.1	0.0	0.0	0.0	0.9	65.6	11.9	78.8	4.2%
The Orchard Centre, Station Road, Didcot	0.0	1.4	0.0	0.2	0.0	0.0	0.0	24.6	2.0	28.2	1.5%
Wallingford Town Centre	0.0	0.0	0.1	0.0	0.0	0.0	0.0	11.0	0.0	11.2	0.6%
Other, Zone 8	0.2	2.8	0.8	0.4	0.0	0.4	0.6	20.5	4.0	29.5	1.6%
<b>Total Zone 8</b>	<b>3.5</b>	<b>6.0</b>	<b>9.4</b>	<b>1.7</b>	<b>0.9</b>	<b>0.7</b>	<b>1.9</b>	<b>236.4</b>	<b>38.5</b>	<b>299.1</b>	<b>15.9%</b>
<b>Zone 9</b>											
Wantage Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	31.9	31.9	1.7%
Sainsbury's Superstore, Limborough Road, Wantage	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	5.2	5.4	0.3%
Kings Park, Limborough Road, Wantage	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.4	3.4	0.2%
Other, Zone 9	0.0	0.0	0.1	0.0	0.1	0.4	0.0	0.7	2.0	3.2	0.2%
<b>Total Zone 9</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.1</b>	<b>0.4</b>	<b>0.0</b>	<b>0.9</b>	<b>42.4</b>	<b>43.8</b>	<b>2.3%</b>
<b>TOTAL INSIDE STUDY AREA</b>											
	<b>206.2</b>	<b>174.6</b>	<b>64.9</b>	<b>38.2</b>	<b>161.2</b>	<b>230.2</b>	<b>65.8</b>	<b>380.9</b>	<b>137.0</b>	<b>1458.9</b>	<b>77.7%</b>
<b>Aylesbury</b>											
Aylesbury Town Centre	0.0	0.0	0.0	0.1	0.0	0.0	16.1	0.0	0.0	16.2	0.9%
Aylesbury Retail Park, Cambridge Close, Aylesbury	0.0	0.0	0.0	0.4	0.0	0.0	12.5	0.0	0.0	12.9	0.7%
The Vale Hundreds Retail Park, Vale Park Drive, Aylesbury	0.0	0.0	0.0	0.0	0.0	0.0	11.0	0.0	0.0	11.0	0.6%
Broadfields Retail Park, Bicester Road, Aylesbury	0.0	0.0	0.0	0.0	0.0	1.6	9.6	0.0	0.0	11.2	0.6%
<b>Total Aylesbury</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.5</b>	<b>0.0</b>	<b>1.6</b>	<b>49.3</b>	<b>0.0</b>	<b>0.0</b>	<b>51.4</b>	<b>2.7%</b>



Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total	All Zones Market Share
	245.4	185.3	69.6	45.4	193.5	303.8	197.2	468.4	169.9	1878.6	
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
<b>Banbury</b>											
Banbury Town Centre	8.4	0.0	0.0	0.0	0.4	5.6	0.0	0.0	0.3	14.7	0.8%
Banbury Cross Retail Park, Lockheed Close, Banbury	3.0	2.4	0.0	0.0	3.2	9.2	0.0	0.3	0.0	18.0	1.0%
Banbury Gateway Shopping Park, Acorn Way, Banbury	1.9	0.0	0.7	0.7	6.1	6.1	1.0	10.0	8.7	35.3	1.9%
Southam Road, Banbury	3.6	1.5	0.2	0.0	4.4	7.1	0.4	0.0	0.6	17.8	0.9%
<b>Total Banbury</b>	<b>16.9</b>	<b>3.9</b>	<b>0.9</b>	<b>0.7</b>	<b>14.2</b>	<b>28.0</b>	<b>1.4</b>	<b>10.3</b>	<b>9.6</b>	<b>85.8</b>	<b>4.6%</b>
<b>Bath</b>											
Bath City Centre	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	1.3	1.7	0.1%
<b>Total Bath</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>1.3</b>	<b>1.7</b>	<b>0.1%</b>
<b>Brackley</b>											
Paws & Claws, High Street, Brackley	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.7	1.9	0.1%
Tesco Superstore, Oxford Road, Brackley	8.5	0.8	0.0	0.0	0.0	6.0	0.0	0.3	0.0	15.6	0.8%
<b>Total Brackley</b>	<b>8.5</b>	<b>0.8</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>7.1</b>	<b>0.0</b>	<b>0.3</b>	<b>0.7</b>	<b>17.5</b>	<b>0.9%</b>
<b>Buckingham</b>											
Buckingham Town Centre	0.0	0.0	0.0	0.0	0.0	0.6	2.2	0.0	0.0	2.8	0.1%
<b>Total Buckingham</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>	<b>2.2</b>	<b>0.0</b>	<b>0.0</b>	<b>2.8</b>	<b>0.1%</b>
<b>Central London / West End</b>											
Central London / West End	1.9	1.1	0.0	0.0	0.0	0.0	1.8	3.6	1.2	9.5	0.5%
<b>Total Central London / West End</b>	<b>1.9</b>	<b>1.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>1.8</b>	<b>3.6</b>	<b>1.2</b>	<b>9.5</b>	<b>0.5%</b>
<b>Didcot</b>											
Hadden Hill Retail Park, Didcot	0.0	0.0	0.2	0.0	0.0	0.0	0.0	12.1	0.0	12.3	0.7%
<b>Total Didcot</b>	<b>0.0</b>	<b>0.0</b>	<b>0.2</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>12.1</b>	<b>0.0</b>	<b>12.3</b>	<b>0.7%</b>
<b>Gloucester</b>											
Gloucester City Centre	0.0	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	1.7	0.1%
<b>Total Gloucester</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>1.7</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>1.7</b>	<b>0.1%</b>
<b>High Wycombe</b>											
High Wycombe Town Centre	0.0	0.3	0.0	0.0	0.0	0.0	10.6	4.6	0.0	15.5	0.8%
Homebase, Knaves Beech Business Centre, Loudwater, Wooburn Green, High Wycombe	0.0	0.1	0.0	0.0	0.0	0.0	1.2	4.2	0.0	5.4	0.3%
John Lewis, Holmers Farm Way Cressex Centre, High Wycombe	1.6	0.6	0.6	3.4	0.6	5.0	33.6	11.6	0.0	56.9	3.0%
Next, Crest Road, High Wycombe	0.0	0.0	0.0	0.0	0.0	0.0	1.6	0.0	0.0	1.6	0.1%
Sainsbury's Superstore, Oxford Road, High Wycombe	0.0	0.0	0.0	0.0	0.0	0.0	4.1	0.0	0.0	4.1	0.2%
<b>Total High Wycombe</b>	<b>1.6</b>	<b>1.0</b>	<b>0.6</b>	<b>3.4</b>	<b>0.6</b>	<b>5.0</b>	<b>51.0</b>	<b>20.4</b>	<b>0.0</b>	<b>83.5</b>	<b>4.4%</b>
<b>Milton Keynes</b>											
IKEA, Goslington, Bletcham Way, Bletchley, Milton Keynes	1.3	0.0	0.0	1.4	0.0	2.8	0.6	0.0	0.0	6.0	0.3%
Milton Keynes Town Centre	3.0	0.7	0.0	0.0	0.4	15.7	8.1	0.0	0.0	27.9	1.5%
MK1 Shopping Park, Stadium Way, Bletchley, Milton Keynes	0.0	0.0	0.0	0.0	0.0	0.0	1.5	0.0	0.0	1.5	0.1%
Winterhill Retail Park, Cairngorn Gate, Milton Keynes	0.0	0.0	0.0	0.0	0.0	1.8	0.6	0.0	0.0	2.4	0.1%
<b>Total Milton Keynes</b>	<b>4.3</b>	<b>0.7</b>	<b>0.0</b>	<b>1.4</b>	<b>0.4</b>	<b>20.4</b>	<b>10.7</b>	<b>0.0</b>	<b>0.0</b>	<b>37.8</b>	<b>2.0%</b>
<b>Newbury</b>											
Newbury Town Centre	0.0	0.0	0.1	0.0	0.0	0.0	0.0	3.9	4.1	8.1	0.4%
Parkway Shopping Centre, Newbury	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.8	3.1	0.2%
<b>Total Newbury</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>6.2</b>	<b>4.9</b>	<b>11.2</b>	<b>0.6%</b>
<b>Reading</b>											
IKEA, Pincents Lane, Theale, Reading	2.7	0.7	0.4	0.0	1.4	0.0	1.5	8.4	2.4	17.4	0.9%
Pincents Kiln Industrial Park, Pincents Lane, Theale, Reading	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.4	0.0	4.4	0.2%
Reading Town Centre	2.1	0.0	0.0	0.1	0.0	1.3	0.0	11.7	1.1	16.3	0.9%
<b>Total Reading</b>	<b>4.8</b>	<b>0.7</b>	<b>0.4</b>	<b>0.1</b>	<b>1.4</b>	<b>1.3</b>	<b>1.5</b>	<b>24.5</b>	<b>3.4</b>	<b>38.2</b>	<b>2.0%</b>
<b>Princes Risborough</b>											
Princes Risborough Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	4.0	0.0	0.0	4.0	0.2%
<b>Total Princes Risborough</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>4.0</b>	<b>0.0</b>	<b>0.0</b>	<b>4.0</b>	<b>0.2%</b>
<b>Swindon</b>											
St Margarets Retail Park, Oxford Road, Swindon	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	1.6	0.1%
Swindon Designer Outlet, Kemble Drive, Swindon	0.0	0.7	0.7	0.0	1.8	0.0	0.0	2.4	2.5	8.0	0.4%
Swindon Town Centre	0.9	0.0	0.0	0.0	0.9	0.0	0.0	0.0	2.1	4.0	0.2%
<b>Total Swindon</b>	<b>0.9</b>	<b>0.7</b>	<b>0.7</b>	<b>0.0</b>	<b>2.7</b>	<b>0.0</b>	<b>0.0</b>	<b>2.4</b>	<b>6.1</b>	<b>13.5</b>	<b>0.7%</b>
<b>Whitney</b>											
B&Q, Thorney Leys Park, Witney	0.0	0.1	0.0	0.0	6.0	0.3	0.0	0.1	0.3	6.8	0.4%
<b>Total Whitney</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>6.0</b>	<b>0.3</b>	<b>0.0</b>	<b>0.1</b>	<b>0.3</b>	<b>6.8</b>	<b>0.4%</b>
<b>Other</b>											
Other, Outside Study Area	0.4	1.8	1.8	0.7	5.4	9.4	9.5	7.6	5.3	41.9	2.2%
<b>Total Other</b>	<b>0.4</b>	<b>1.8</b>	<b>1.8</b>	<b>0.7</b>	<b>5.4</b>	<b>9.4</b>	<b>9.5</b>	<b>7.6</b>	<b>5.3</b>	<b>41.9</b>	<b>2.2%</b>
<b>Total Outside Study Area</b>	<b>39.3</b>	<b>10.7</b>	<b>4.7</b>	<b>7.2</b>	<b>32.3</b>	<b>73.6</b>	<b>131.4</b>	<b>87.6</b>	<b>32.9</b>	<b>419.6</b>	<b>22.3%</b>
<b>Total</b>	<b>245.4</b>	<b>185.3</b>	<b>69.6</b>	<b>45.4</b>	<b>193.5</b>	<b>303.8</b>	<b>197.2</b>	<b>468.4</b>	<b>169.9</b>	<b>1878.6</b>	<b>100.0%</b>

## Spreadsheet 6 - Comparison Retail Commitments

Application Proposal	Planning Application Ref. No.	Sales Area Floorspace (sq. m)	Sales Density in Opening Year (£ / sq. m)	Turnover from Study Area in Opening Year (£m)
Clarendon Centre	21/00110/FUL	889	9685	8.6
<b>Sub-total</b>	-	<b>889</b>	-	8.6

### Notes

1. Growth in comparison retail sales area taken from planning application material or based on Stantec estimate.
2. Sales density based on Stantec estimate to reflect the average of main comparison goods retailers and to reflect nature and location of proposed development.

Spreadsheet 7 - Summary of Capacity for Comparison Goods Retail Floorspace (Constant Retention Rate)

	2023	2028	2033	2038	2042	Cumulative Change	Incremental Change			
						2023-2042	2023-28	2028-33	2033-2038	2038-2042
<b>Total Population and Expenditure</b>										
A. Total study area population (persons)	566,063	577,038	585,959	592,651	598,415	32,352	10,975	8,921	6,692	5,764
B. Total comparison goods expenditure (excluding SFT) (£m)	1,878.6	1,942.3	2,179.3	2,486.5	2,776.2	897.6	64	237	307	290
<b>Retained Expenditure</b>										
C. Comparison goods expenditure retained in study area (%)	77.7%	77.7%	77.7%	77.7%	77.7%					
D. Comparison goods expenditure retained in study area (£m)	1458.9	1508.4	1692.5	1931.1	2156.1	697.1	49.5	184.0	238.6	225.0
<b>Inflow</b>										
E. Inflow to study area at 10% (£m)	145.9	150.8	169.2	193.1	215.6	69.7	5.0	18.4	23.9	22.5
F. Growth in Inflow (£m)	0.0	5.0	18.4	23.9	22.5	22.5	5.0	13.5	5.5	-1.4
<b>Total Turnover in Study Area</b>										
G. Baseline comparison goods turnover of stores in study area (£m)	1604.8	1604.8	1604.8	1604.8	1604.8					
<b>Initial Surplus</b>										
H. Growth in retained comparison goods expenditure (£m)	0.0	54.5	256.9	519.3	766.8	766.8	54.5	202.4	262.4	247.5
<b>Claims on Expenditure</b>										
I. Sales density growth in existing stores (£m)	0.0	124.0	257.6	401.6	524.7	524.7	124.0	133.6	143.9	123.1
J. Turnover from commitments	0.0	8.6	9.3	10.0	10.6	10.6	8.6	0.7	0.7	0.6
K. Total claims on expenditure (£m)	0.0	132.6	266.9	411.6	535.3	535.3	132.6	134.3	144.7	123.7
<b>L. Residual expenditure (£m)</b>	0.0	-78.2	-10.0	107.8	231.5					
<b>Comparison Retail Floorspace Requirements<sup>(8)</sup></b>										
M. Assumed sales density (£/sq.m)	9,685	10,433	11,240	12,108	12,852	3,167	748	806	869	743
N. Floorspace requirement (sales area floorspace sq.m)	0	-7,494	-893	8,899	18,017	18,017	-7,494	6,601	9,792	9,118
O. Floorspace requirement (gross sq.m)	0	-9,367	-1,116	11,124	22,521	22,521	-9,367	8,251	12,240	11,397

Notes

- Total population of the study area taken from Spreadsheet 1. Total comparison goods expenditure (excluding SFT) taken from Spreadsheet 3.
- Retained expenditure - proportion of all comparison goods expenditure spent at retail facilities within the study area, taken from Spreadsheet 5. This is held constant throughout the assessment period.
- Inflow - additional comparison goods expenditure drawn to retail facilities within the study area from residents outside the study area. Assumed to be 10% of retained expenditure in the study area.
- Total comparison goods turnover of stores within study area in the base year taken from Spreadsheet 5.
- Initial surplus - total growth in retained comparison goods expenditure before claims on expenditure.
- Claims on expenditure - the turnover of commitments for new comparison retail floorspace in the study area taken from Spreadsheet 6. An allowance for growth in the turnover of both existing stores and committed comparison retail floorspace based on the assumption that sales densities will grow by an average of 1.5% per annum throughout the study period.
- Residual expenditure - the product of deducting claims on expenditure from the initial surplus.
- Comparison retail floorspace requirements calculated by converting the residual expenditure using a sales density estimate of £9685 / sq. m in 2023, increased by 1.5% per annum to account for anticipated sales density growth. 80% net to gross ratio assumed.
- All monetary figures are rounded to one decimal place and all floorspace figures are rounded to the nearest square metre.

All monetary values are held constant at 2023 prices.

# **APPENDIX E      CONVENIENCE RETAIL CAPACITY**

**Spreadsheet 1 - Population Projections**

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All Zones Total
2023	84,651	70,197	17,734	11,805	55,349	90,454	51,839	137,726	46,308	566,063
2028	83,607	69,753	18,464	11,949	56,446	92,930	53,183	142,003	48,703	577,038
2033	83,135	69,948	18,938	12,002	57,320	94,963	54,061	145,037	50,555	585,959
2038	82,049	69,333	19,328	12,054	58,356	96,916	54,824	147,752	52,039	592,651
2042	81,188	68,891	19,659	12,122	59,132	98,539	55,583	149,988	53,313	598,415
<b>Change in population</b>										
Numeric change	-3,463	-1,306	1,925	317	3,783	8,085	3,744	12,262	7,005	32,352
Percentage change	-4%	-2%	11%	3%	7%	9%	7%	9%	15%	6%

**Notes**

1. Population data is derived from Experian MMG3

## Spreadsheet 2 - Convenience Goods Expenditure Per Capita (£)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
2023	2,720	2,739	3,350	3,376	3,192	3,041	3,327	3,090
2028	2,690	2,709	3,313	3,339	3,157	3,007	3,291	3,056
2033	2,699	2,717	3,323	3,349	3,166	3,016	3,300	3,065
2038	2,712	2,730	3,340	3,366	3,182	3,032	3,317	3,081
2042	2,723	2,741	3,353	3,379	3,195	3,044	3,330	3,093

### Notes

1. 2023-based per capita convenience expenditure data were sourced from Experian MMG3.

All monetary values are held constant at 2023 prices.

**Spreadsheet 3 - Total Convenience Goods Expenditure and Expenditure Growth (£m)**

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All Zones Total
<b>Total expenditure 2023</b>	<b>230.28</b>	<b>192.24</b>	<b>59.41</b>	<b>39.86</b>	<b>176.66</b>	<b>275.05</b>	<b>172.47</b>	<b>425.59</b>	<b>151.48</b>	<b>1,723.04</b>
Spending on SFT in 2023	24.41	20.38	6.30	4.22	18.73	29.16	18.28	45.11	16.06	<b>182.64</b>
Total expenditure excluding SFT 2023	205.87	171.87	53.11	35.63	157.93	245.89	154.19	380.48	135.42	<b>1,540.40</b>
<b>Total expenditure 2028</b>	<b>224.94</b>	<b>188.93</b>	<b>61.18</b>	<b>39.90</b>	<b>178.19</b>	<b>279.48</b>	<b>175.00</b>	<b>434.00</b>	<b>157.57</b>	<b>1,739.18</b>
Spending on SFT in 2028	28.95	24.32	7.87	5.14	22.94	35.97	22.53	55.86	20.28	<b>223.86</b>
Total expenditure excluding SFT 2028	195.99	164.62	53.30	34.76	155.25	243.51	152.48	378.13	137.29	<b>1,515.32</b>
<b>Total expenditure 2033</b>	<b>224.34</b>	<b>190.03</b>	<b>62.93</b>	<b>40.20</b>	<b>181.49</b>	<b>286.45</b>	<b>178.42</b>	<b>444.60</b>	<b>164.05</b>	<b>1,772.52</b>
Spending on SFT in 2033	31.00	26.26	8.70	5.55	25.08	39.58	24.65	61.43	22.67	<b>244.92</b>
Total expenditure excluding SFT 2033	193.34	163.77	54.24	34.64	156.41	246.87	153.77	383.16	141.38	<b>1,527.60</b>
<b>Total expenditure 2038</b>	<b>222.52</b>	<b>189.30</b>	<b>64.55</b>	<b>40.57</b>	<b>185.69</b>	<b>293.81</b>	<b>181.85</b>	<b>455.19</b>	<b>169.71</b>	<b>1,803.21</b>
Spending on SFT in 2038	32.43	27.59	9.41	5.91	27.06	42.82	26.50	66.34	24.74	<b>262.82</b>
Total expenditure excluding SFT 2038	190.09	161.71	55.14	34.66	158.63	250.99	155.34	388.85	144.98	<b>1,540.39</b>
<b>Total expenditure 2042</b>	<b>221.07</b>	<b>188.85</b>	<b>65.92</b>	<b>40.97</b>	<b>188.92</b>	<b>299.92</b>	<b>185.10</b>	<b>463.93</b>	<b>174.56</b>	<b>1,829.25</b>
Spending on SFT in 2042	32.64	27.88	9.73	6.05	27.89	44.28	27.33	68.50	25.77	<b>270.08</b>
Total expenditure excluding SFT 2042	188.43	160.97	56.19	34.92	161.03	255.64	157.77	395.43	148.79	<b>1,559.17</b>
Growth in total expenditure 2023 - 2028	-5.33	-3.31	1.77	0.04	1.53	4.43	2.53	8.40	6.09	<b>16.15</b>
Growth in total expenditure 2028 - 2033	-0.60	1.10	1.76	0.30	3.30	6.97	3.42	10.60	6.48	<b>33.34</b>
Growth in total expenditure 2033 - 2038	-1.82	-0.73	1.62	0.38	4.21	7.36	3.42	10.59	5.66	<b>30.69</b>
Growth in total expenditure 2038 - 2042	-1.45	-0.45	1.37	0.39	3.22	6.12	3.25	8.74	4.85	<b>26.04</b>
<i>Growth in total expenditure 2023 - 2042</i>	-9.21	-3.40	6.51	1.11	12.26	24.87	12.63	38.34	23.08	<b>106.21</b>

**Notes**

1. The figures in the above table are the product of multiplying the data presented in Spreadsheet 1 (population) by Spreadsheet 2 (per capita convenience goods expenditure) and are in millions of pounds (£m).
2. The total expenditure includes a proportion of expenditure on Special Forms of Trading ('SFT') (e.g. internet shopping). The proportion of expenditure on SFT in 2023 is derived from the telephone survey of households. This headline rate has been adjusted to take account of SFT sales from stores. For each of the forecast years, we have applied the rate of growth in adjusted SFT market shares implied by Experian's forecasts.

All monetary values are held constant at 2023 prices.

Spreadsheet 4 - Convenience Goods Spending Patterns in 2023 as a Percentage across the Study Area Zones

Destination	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %
<b>INSIDE STUDY AREA</b>									
<b>Zone 1</b>									
Aldi, Botley Road, Oxford	7.3%	1.6%	11.4%	0.0%	2.4%	2.5%	0.0%	0.0%	0.4%
Co-Op Food, London Road, Headington	0.7%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	1.8%
Co-Op Food, Old Marston Road, Marston	1.8%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%
Headington District Centre	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks & Spencer (M&S), Banbury Road, Summertown	2.4%	0.7%	0.0%	0.3%	0.0%	0.3%	0.0%	0.0%	0.0%
Marks & Spencer (M&S), Queen Street, City Centre	0.2%	1.7%	1.3%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%
Oxford City Centre	2.8%	2.3%	1.3%	0.2%	0.0%	0.3%	0.0%	0.0%	0.7%
Sainsbury's Local, Suffolk House, Banbury Road, Summertown	1.8%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Banbury Road, Oxford	4.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, London Road, Headington	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Waitrose, Botley Road	1.9%	4.5%	9.6%	0.0%	1.0%	0.3%	0.0%	0.0%	0.0%
Waitrose, Old High Street, Headington	6.5%	0.6%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Other, Zone 1	9.6%	1.3%	1.4%	1.3%	0.9%	0.1%	0.2%	0.0%	0.0%
<b>Total Zone 1</b>	<b>47.9%</b>	<b>12.8%</b>	<b>28.1%</b>	<b>3.1%</b>	<b>4.3%</b>	<b>4.5%</b>	<b>0.2%</b>	<b>0.0%</b>	<b>2.9%</b>
<b>Zone 2</b>									
Aldi, Horspath Driftway Retail Park	9.7%	3.6%	0.3%	6.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op Food, Cowley Road, Oxford	0.1%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op Food, Iffley Road, Oxford	0.0%	3.1%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
Co-Op Food, Rose Hill, Oxford	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op Food, Templars Square, Cowley, Oxford	0.0%	4.8%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Cowley Road District Centre	0.2%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Templars Shopping Park, Oxford	1.3%	5.4%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Watlington Road, Oxford	0.9%	5.0%	0.0%	2.9%	0.2%	0.0%	0.5%	0.1%	0.0%
Marks & Spencer (M&S), Oxford Retail Park, Ambassador Avenue, Cowley, Oxford	0.0%	1.1%	0.6%	5.6%	0.0%	0.0%	0.0%	0.1%	0.0%
Sainsbury's Superstore, Heyford Hill Roundabout, Littlemore, Oxford	1.6%	10.8%	8.5%	10.4%	0.0%	0.0%	1.0%	1.3%	0.0%
Sainsbury's Superstore, Templars Shopping Park, Cowley, Oxford	0.2%	1.8%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Cowley Road, Oxford	0.4%	3.1%	0.0%	2.9%	0.0%	0.4%	0.0%	0.6%	0.0%
Tesco Superstore, Oxford Retail Park, Oxford	8.9%	19.6%	0.1%	15.1%	0.0%	0.0%	1.9%	0.5%	0.0%
Other, Zone 2	2.4%	12.0%	1.3%	2.1%	0.0%	0.0%	0.0%	0.6%	0.0%
<b>Total Zone 2</b>	<b>25.7%</b>	<b>77.2%</b>	<b>10.7%</b>	<b>45.9%</b>	<b>0.2%</b>	<b>1.1%</b>	<b>3.4%</b>	<b>3.1%</b>	<b>0.0%</b>
<b>Zone 3</b>									
Co-Op Food, Besselsleigh Road, Wootton	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op Food, Westway Square, Botley	1.3%	0.8%	7.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, Botley Local Centre	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Local shops, Cumnor Village Centre	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, West Way, Botley	2.5%	0.0%	4.9%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
Other, Zone 3	0.0%	0.1%	5.6%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%
<b>Total Zone 3</b>	<b>3.8%</b>	<b>1.0%</b>	<b>24.3%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.7%</b>	<b>0.0%</b>	<b>0.3%</b>	<b>1.0%</b>
<b>Zone 4</b>									
Asda, London Road, Wheatley	3.4%	1.5%	0.3%	23.0%	0.0%	0.0%	5.5%	0.0%	0.0%
Co-Op Food, Ladder Hill, Station Road, Wheatley	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, Wheatley Village Centre	0.0%	0.0%	0.0%	6.2%	0.0%	0.0%	0.2%	0.0%	0.0%
Other, Zone 4	0.2%	0.0%	0.0%	2.8%	0.0%	0.0%	0.1%	0.0%	0.0%
<b>Total Zone 4</b>	<b>3.6%</b>	<b>1.5%</b>	<b>0.3%</b>	<b>36.8%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>5.8%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Zone 5</b>									
Co-Op Food, High Street, Eynsham	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%
Co-Op Food, Main Road, Long Hanborough, Witney	0.0%	0.0%	0.0%	0.0%	1.7%	0.3%	0.0%	0.0%	0.0%
Lidl, New Close Lane, Witney	0.0%	0.0%	0.0%	0.0%	12.6%	0.0%	0.0%	0.0%	0.0%
Local shops, Eynsham Village Centre	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
M&S, Marriotts Walk, Witney	0.0%	0.0%	0.3%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Witan Way, Witney	0.0%	0.4%	0.0%	0.0%	31.5%	0.0%	0.0%	0.0%	0.9%
Spar, Spaceacre Lane, Eynsham, Witney	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%
Tesco Express (Esso), A40 East Bound, Eynsham, Witney	0.0%	0.0%	0.1%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%
Waitrose, The Woolgate Centre, Market Square, Witney	0.0%	0.4%	0.3%	0.0%	12.8%	0.1%	0.0%	0.0%	0.0%
Witney Town Centre	0.0%	0.3%	0.2%	0.3%	7.2%	0.1%	0.0%	0.0%	0.2%
Other, Zone 5	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%	0.0%	0.0%	0.5%
<b>Total Zone 5</b>	<b>0.0%</b>	<b>1.0%</b>	<b>0.8%</b>	<b>0.3%</b>	<b>84.1%</b>	<b>0.5%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>1.6%</b>
<b>Zone 6</b>									
Aldi, Launton Road, Bicester	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%	0.2%	0.0%	0.0%
Bicester Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.1%	0.0%	0.0%
Co-Op Food, High Street, Kidlington	0.1%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%
Iceland, High Street, Kidlington, Oxford	0.0%	0.0%	0.0%	0.0%	0.2%	1.9%	0.0%	0.0%	0.0%
Lidl, Launton Road Retail Park, Bicester	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	1.2%	0.0%	0.0%
Sainsbury's Local, Heyford Park, Upper Heyford RAF Station, Bicester	0.7%	1.8%	0.0%	0.5%	0.0%	0.3%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Oxford Road, Kidlington	10.9%	0.7%	1.2%	0.8%	1.2%	6.4%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Pioneer Square, Bure Place, Bicester	0.0%	0.0%	0.0%	0.0%	0.0%	12.3%	0.1%	0.0%	0.0%
Tesco Superstore, High Street, Kidlington	4.8%	0.0%	0.0%	0.0%	0.7%	4.6%	0.0%	0.0%	0.0%
Tesco Superstore, Lakeview Drive, Bicester	0.0%	0.0%	0.0%	0.3%	0.0%	19.4%	2.2%	0.0%	0.0%
Other, Zone 6	0.1%	0.1%	0.0%	0.0%	0.0%	13.3%	0.3%	0.0%	0.0%
<b>Total Zone 6</b>	<b>16.6%</b>	<b>2.6%</b>	<b>1.2%</b>	<b>1.5%</b>	<b>2.2%</b>	<b>75.7%</b>	<b>4.0%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Zone 7</b>									
Co-Op Food, Oakley Road, Chinnor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%
Local shops, Chinnor Village Centre	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	3.7%	0.1%	0.0%
Sainsbury's Superstore, High Street, Thame	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	9.6%	0.0%	0.0%
Waitrose, Greyhound Lane, Thame	0.0%	0.0%	0.0%	4.6%	0.0%	0.3%	16.0%	0.3%	0.0%
Thame Town Centre	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	3.4%	0.5%	0.0%
Other, Zone 7	0.0%	0.0%	0.0%	1.5%	0.0%	0.4%	9.3%	0.0%	0.0%
<b>Total Zone 7</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.3%</b>	<b>7.7%</b>	<b>0.0%</b>	<b>0.7%</b>	<b>46.2%</b>	<b>0.9%</b>	<b>0.0%</b>





Spreadsheet 5 - Convenience Goods Spending Patterns in 2023 across the Study Area Zones

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total	All Zones Market Share
	205.9 £m	171.9 £m	53.1 £m	35.6 £m	157.9 £m	245.9 £m	154.2 £m	380.5 £m	135.4 £m	1540.4 £m	%
<b>INSIDE STUDY AREA</b>											
<b>Zone 1</b>											
Aldi, Botley Road, Oxford	15.1	2.7	6.1	0.0	3.8	6.3	0.0	0.0	0.5	34.5	2.2%
Co-Op Food, London Road, Headington	1.5	0.0	0.0	0.3	0.0	0.0	0.0	0.0	2.4	4.2	0.3%
Co-Op Food, Old Marston Road, Marston	3.8	0.0	0.0	0.0	0.0	1.9	0.0	0.0	0.0	5.6	0.4%
Headington District Centre	7.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.1	0.5%
Marks & Spencer (M&S), Banbury Road, Summertown	4.9	1.3	0.0	0.1	0.0	0.7	0.0	0.0	0.0	7.0	0.5%
Marks & Spencer (M&S), Queen Street, City Centre	0.3	2.9	0.7	0.0	0.0	0.7	0.0	0.0	0.0	4.6	0.3%
Oxford City Centre	5.8	3.9	0.7	0.1	0.0	0.7	0.0	0.0	0.9	12.2	0.8%
Sainsbury's Local, Suffolk House, Banbury Road, Summertown	3.8	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	4.8	0.3%
Tesco Express, Banbury Road, Oxford	8.2	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	8.8	0.6%
Tesco Express, London Road, Headington	11.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.1	0.7%
Waitrose, Botley Road	3.9	7.7	5.1	0.0	1.6	0.8	0.0	0.0	0.0	19.0	1.2%
Waitrose, Old High Street, Headington	13.4	1.1	0.0	0.2	0.0	0.0	0.0	0.0	0.0	14.6	1.0%
Other, Zone 1	19.8	2.3	0.7	0.5	1.4	0.2	0.4	0.0	0.0	25.2	1.6%
<b>Total Zone 1</b>	<b>98.7</b>	<b>21.9</b>	<b>14.9</b>	<b>1.1</b>	<b>6.8</b>	<b>11.1</b>	<b>0.4</b>	<b>0.0</b>	<b>3.9</b>	<b>158.8</b>	<b>10.3%</b>
<b>Zone 2</b>											
Aldi, Horspath Driftway Retail Park	20.1	6.2	0.1	2.2	0.0	0.0	0.0	0.0	0.0	28.6	1.9%
Co-Op Food, Cowley Road, Oxford	0.2	3.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.8	0.2%
Co-Op Food, Iffley Road, Oxford	0.0	5.4	0.0	0.0	0.0	1.7	0.0	0.0	0.0	7.1	0.5%
Co-Op Food, Rose Hill, Oxford	0.0	4.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.4	0.3%
Co-Op Food, Templars Square, Cowley, Oxford	0.0	8.3	0.0	0.1	0.0	0.0	0.0	0.0	0.0	8.4	0.5%
Cowley Road District Centre	0.3	3.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.9	0.3%
Lidl, Templars Shopping Park, Oxford	2.7	9.2	0.0	0.1	0.0	0.0	0.0	0.0	0.0	12.0	0.8%
Lidl, Watlington Road, Oxford	1.9	8.7	0.0	1.0	0.4	0.0	0.7	0.4	0.0	13.1	0.9%
Marks & Spencer (M&S), Oxford Retail Park, Ambassador Avenue, Cowley	0.0	1.9	0.3	2.0	0.0	0.0	0.0	0.2	0.0	4.5	0.3%
Sainsbury's Superstore, Heyford Hill Roundabout, Littlemore, Oxford	3.4	18.6	4.5	3.7	0.0	0.0	1.5	5.1	0.0	36.7	2.4%
Sainsbury's Superstore, Templars Shopping Park, Cowley, Oxford	0.3	3.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	3.5	0.2%
Tesco Express, Cowley Road, Oxford	0.7	5.3	0.0	1.0	0.0	0.9	0.0	2.1	0.0	10.1	0.7%
Tesco Superstore, Oxford Retail Park, Oxford	18.3	33.7	0.0	5.4	0.0	0.0	3.0	1.9	0.0	62.4	4.0%
Other, Zone 2	4.9	20.5	0.7	0.8	0.0	0.0	0.0	2.1	0.0	29.1	1.9%
<b>Total Zone 2</b>	<b>52.8</b>	<b>132.6</b>	<b>5.7</b>	<b>16.4</b>	<b>0.4</b>	<b>2.6</b>	<b>5.2</b>	<b>11.9</b>	<b>0.0</b>	<b>227.6</b>	<b>14.8%</b>
<b>Zone 3</b>											
Co-Op Food, Besselsleigh Road, Wootton	0.0	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.1%
Co-Op Food, Westway Square, Botley	2.6	1.4	4.0	0.0	0.0	0.0	0.0	0.0	0.0	8.1	0.5%
Local shops, Botley Local Centre	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	1.3	1.9	0.1%
Local shops, Cumnor Village Centre	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	1.5	0.1%
Tesco Express, West Way, Botley	5.1	0.0	2.6	0.0	0.0	1.6	0.0	0.0	0.0	9.3	0.6%
Other, Zone 3	0.0	0.2	3.0	0.0	0.0	0.0	0.0	1.0	0.0	4.2	0.3%
<b>Total Zone 3</b>	<b>7.7</b>	<b>1.7</b>	<b>12.9</b>	<b>0.0</b>	<b>0.0</b>	<b>1.6</b>	<b>0.0</b>	<b>1.0</b>	<b>1.3</b>	<b>26.2</b>	<b>1.7%</b>
<b>Zone 4</b>											
Asda, London Road, Wheatley	7.1	2.6	0.1	8.2	0.0	0.0	8.5	0.0	0.0	26.5	1.7%
Co-Op Food, Ladder Hill, Station Road, Wheatley	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	1.7	0.1%
Local shops, Wheatley Village Centre	0.0	0.0	0.0	2.2	0.0	0.0	0.4	0.0	0.0	2.6	0.2%
Other, Zone 4	0.3	0.0	0.0	1.0	0.0	0.0	0.1	0.0	0.0	1.4	0.1%
<b>Total Zone 4</b>	<b>7.4</b>	<b>2.6</b>	<b>0.1</b>	<b>13.1</b>	<b>0.0</b>	<b>0.0</b>	<b>9.0</b>	<b>0.0</b>	<b>0.0</b>	<b>32.3</b>	<b>2.1%</b>
<b>Zone 5</b>											
Co-Op Food, High Street, Eynsham	0.0	0.0	0.0	0.0	3.6	0.0	0.0	0.0	0.0	3.6	0.2%
Co-Op Food, Main Road, Long Hanborough, Witney	0.0	0.0	0.0	0.0	2.7	0.6	0.0	0.0	0.0	3.3	0.2%
Lidl, New Close Lane, Witney	0.0	0.0	0.0	0.0	19.8	0.0	0.0	0.0	0.0	19.8	1.3%
Local shops, Eynsham Village Centre	0.0	0.0	0.0	0.0	1.6	0.0	0.0	0.0	0.0	1.6	0.1%
M&S, Marriotts Walk, Witney	0.0	0.0	0.1	0.0	7.0	0.0	0.0	0.0	0.0	7.2	0.5%
Sainsbury's Superstore, Witan Way, Witney	0.0	0.6	0.0	0.0	49.8	0.0	0.0	0.0	1.2	51.6	3.4%
Spar, Spaceacre Lane, Eynsham, Witney	0.0	0.0	0.0	0.0	4.9	0.0	0.0	0.0	0.0	4.9	0.3%
Tesco Express (Esso), A40 East Bound, Eynsham, Witney	0.0	0.0	0.0	0.0	3.9	0.0	0.0	0.0	0.0	4.0	0.3%
Waitrose, The Woolgate Centre, Market Square, Witney	0.0	0.6	0.1	0.0	20.2	0.3	0.0	0.0	0.0	21.4	1.4%
Witney Town Centre	0.0	0.5	0.1	0.1	11.4	0.2	0.0	0.0	0.3	12.6	0.8%
Other, Zone 5	0.0	0.0	0.0	0.0	7.8	0.0	0.0	0.0	0.6	8.4	0.5%
<b>Total Zone 5</b>	<b>0.0</b>	<b>1.8</b>	<b>0.4</b>	<b>0.1</b>	<b>132.8</b>	<b>1.2</b>	<b>0.0</b>	<b>0.0</b>	<b>2.2</b>	<b>138.5</b>	<b>9.0%</b>
<b>Zone 6</b>											
Aldi, Launton Road, Bicester	0.0	0.0	0.0	0.0	0.0	24.6	0.3	0.0	0.0	25.0	1.6%
Bicester Town Centre	0.0	0.0	0.0	0.0	0.0	7.0	0.2	0.0	0.0	7.2	0.5%
Co-Op Food, High Street, Kidlington	0.3	0.0	0.0	0.0	0.0	5.0	0.0	0.0	0.0	5.2	0.3%
Iceland, High Street, Kidlington, Oxford	0.0	0.1	0.0	0.0	0.3	4.6	0.0	0.0	0.0	5.0	0.3%
Lidl, Launton Road Retail Park, Bicester	0.0	0.0	0.0	0.0	0.0	6.8	1.8	0.0	0.0	8.5	0.6%
Sainsbury's Local, Heyford Park, Upper Heyford RAF Station, Bicester	1.5	3.0	0.0	0.2	0.0	0.6	0.0	0.0	0.0	5.3	0.3%
Sainsbury's Superstore, Oxford Road, Kidlington	22.4	1.2	0.6	0.3	1.9	15.7	0.0	0.0	0.0	42.1	2.7%
Sainsbury's Superstore, Pioneer Square, Bure Place, Bicester	0.0	0.0	0.0	0.0	0.0	30.2	0.2	0.0	0.0	30.4	2.0%
Tesco Superstore, High Street, Kidlington	9.8	0.0	0.0	0.0	1.2	11.3	0.0	0.0	0.0	22.3	1.4%
Tesco Superstore, Lakeview Drive, Bicester	0.0	0.0	0.0	0.1	0.0	47.6	3.3	0.0	0.0	51.0	3.3%
Other, Zone 6	0.3	0.2	0.0	0.0	0.0	32.8	0.4	0.0	0.0	33.6	2.2%
<b>Total Zone 6</b>	<b>34.2</b>	<b>4.5</b>	<b>0.6</b>	<b>0.5</b>	<b>3.4</b>	<b>186.2</b>	<b>6.2</b>	<b>0.0</b>	<b>0.0</b>	<b>235.7</b>	<b>15.3%</b>

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total	All Zones Market Share
	205.9 £m	171.9 £m	53.1 £m	35.6 £m	157.9 £m	245.9 £m	154.2 £m	380.5 £m	135.4 £m	1540.4 £m	%
<b>Zone 7</b>											
Co-Op Food, Oakley Road, Chinnor	0.0	0.0	0.0	0.0	0.0	0.0	6.5	0.1	0.0	6.6	0.4%
Local shops, Chinnor Village Centre	0.0	0.0	0.2	0.0	0.0	0.0	5.8	0.4	0.0	6.4	0.4%
Sainsbury's Superstore, High Street, Thame	0.0	0.0	0.0	0.1	0.0	0.0	14.8	0.0	0.0	14.9	1.0%
Waitrose, Greyhound Lane, Thame	0.0	0.0	0.0	1.6	0.0	0.7	24.6	1.0	0.0	28.0	1.8%
Thame Town Centre	0.0	0.0	0.0	0.5	0.0	0.0	5.2	1.9	0.0	7.6	0.5%
Other, Zone 7	0.0	0.0	0.0	0.5	0.0	1.0	14.3	0.0	0.0	15.9	1.0%
<b>Total Zone 7</b>	<b>0.0</b>	<b>0.0</b>	<b>0.2</b>	<b>2.8</b>	<b>0.0</b>	<b>1.7</b>	<b>71.2</b>	<b>3.4</b>	<b>0.0</b>	<b>79.3</b>	<b>5.2%</b>
<b>Zone 8</b>											
Aldi, Broadway, Didcot	0.0	0.0	0.1	0.0	0.0	0.0	0.0	14.8	6.1	21.1	1.4%
Asda, Greenwood Way, Didcot	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.6	0.0	10.6	0.7%
Budgens, Peachcroft Shopping Centre, Abingdon	0.0	0.0	0.2	0.0	0.0	0.0	0.0	12.5	0.0	12.7	0.8%
Co-Op Food, Northcourt Road, Abingdon	0.0	0.6	0.0	0.0	0.0	0.0	0.0	17.3	0.0	17.9	1.2%
Didcot Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.9	0.0	9.9	0.6%
Iceland, Market Place, Didcot	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.4	1.2	8.6	0.6%
Lidl, Lupton Road, Wallingford	0.0	0.0	0.0	0.0	0.0	0.0	0.8	11.5	0.0	12.3	0.8%
Lidl, Marcham Road, Abingdon	0.0	0.0	0.3	0.0	0.0	1.8	0.0	27.2	3.9	33.2	2.2%
Londis, Vineyard, Abingdon	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.2	0.0	8.2	0.5%
Sainsbury's Superstore, Central Drive, Didcot	0.0	0.0	0.0	0.0	0.0	0.0	0.0	53.0	1.5	54.5	3.5%
Tesco Express, Oxford Road, Abingdon	0.0	0.6	0.0	0.0	0.0	0.0	0.0	22.4	0.1	23.1	1.5%
Tesco Express, Wooton Road, Abingdon	0.0	0.0	0.1	0.0	0.0	0.8	0.0	8.0	0.0	8.9	0.6%
Tesco Extra, Marcham Road, Abingdon	0.0	0.3	9.2	0.0	2.2	0.0	0.0	39.4	13.4	64.4	4.2%
Tesco Superstore, Wallingford Road, North Moreton, Didcot	0.0	0.0	0.0	0.0	0.0	0.0	0.0	45.7	5.4	51.1	3.3%
Waitrose, Abbey Close, Abingdon	0.0	0.1	3.9	0.1	0.0	0.0	0.0	16.8	5.3	26.2	1.7%
Waitrose, St Martin's Street, Wallington	0.0	0.0	0.0	0.0	0.0	0.2	0.0	7.5	0.0	7.6	0.5%
Other, Zone 8	0.0	0.2	0.2	0.3	0.0	0.5	0.6	32.4	3.8	38.0	2.5%
<b>Total Zone 8</b>	<b>0.0</b>	<b>1.8</b>	<b>14.0</b>	<b>0.4</b>	<b>2.2</b>	<b>3.2</b>	<b>1.3</b>	<b>344.7</b>	<b>40.7</b>	<b>408.4</b>	<b>26.5%</b>
<b>Zone 9</b>											
Home Bargains, Crooks Terrace, Wantage	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.9	2.9	0.2%
Local shops, East Hanney Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	1.3	0.1%
Sainsbury's Superstore, Limborough Road, Wantage	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2	31.3	33.5	2.2%
Waitrose, Wallingford Street, Wantage	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.9	12.9	0.8%
Other, Zone 9	0.0	0.2	0.1	0.0	0.4	0.3	0.0	3.9	12.1	17.1	1.1%
<b>Total Zone 9</b>	<b>0.0</b>	<b>0.2</b>	<b>0.1</b>	<b>0.0</b>	<b>0.4</b>	<b>0.3</b>	<b>0.0</b>	<b>6.1</b>	<b>60.5</b>	<b>67.6</b>	<b>4.4%</b>
<b>TOTAL INSIDE STUDY AREA</b>	<b>200.8</b>	<b>167.1</b>	<b>49.0</b>	<b>34.4</b>	<b>146.1</b>	<b>208.0</b>	<b>93.3</b>	<b>367.1</b>	<b>108.5</b>	<b>1374.4</b>	<b>89.2%</b>
<b>Aylesbury</b>											
Aldi, Rimmington Way, Aylesbury	0.0	0.0	0.0	0.0	0.0	0.0	6.7	0.0	0.0	6.7	0.4%
Sainsbury's Superstore, Gatehouse Road, Aylesbury	0.0	0.0	0.0	0.0	0.0	0.0	6.4	0.0	0.0	6.4	0.4%
Tesco Extra, Broadfields Retail Park, Bicester Road, Aylesbury	0.0	0.0	0.0	0.0	0.0	0.8	11.7	0.0	0.0	12.4	0.8%
<b>Total Aylesbury</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.8</b>	<b>24.8</b>	<b>0.0</b>	<b>0.0</b>	<b>25.5</b>	<b>1.7%</b>
<b>Botley</b>											
Iceland, Westway Place, Botley, Oxford	1.8	0.0	2.0	0.0	0.0	0.0	0.0	0.0	0.0	3.8	0.2%
<b>Total Botley</b>	<b>1.8</b>	<b>0.0</b>	<b>2.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>3.8</b>	<b>0.2%</b>
<b>Brackley</b>											
Tesco Superstore, Oxford Road, Brackley	0.0	0.0	0.0	0.0	0.0	16.5	0.0	0.0	2.6	19.1	1.2%
Waitrose, Manor Road, Brackley	0.0	0.0	0.0	0.0	0.0	3.7	0.0	4.6	0.0	8.2	0.5%
<b>Total Brackley</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>20.2</b>	<b>0.0</b>	<b>4.6</b>	<b>2.6</b>	<b>27.3</b>	<b>1.8%</b>
<b>Buckingham</b>											
Tesco Superstore, London Road, Buckingham	0.0	0.0	0.0	0.0	0.0	0.0	8.3	0.0	0.0	8.3	0.5%
<b>Total Buckingham</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>8.3</b>	<b>0.0</b>	<b>0.0</b>	<b>8.3</b>	<b>0.5%</b>
<b>Carterton</b>											
Aldi, Alvescote Road, Carterton	0.0	0.0	0.0	0.0	4.6	0.0	0.0	0.0	0.0	4.7	0.3%
<b>Total Carterton</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>4.6</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>4.7</b>	<b>0.3%</b>
<b>Faringdon</b>											
Aldi, Henry Blake Way, Faringdon	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	16.0	16.1	1.0%
<b>Total Faringdon</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>16.0</b>	<b>16.1</b>	<b>1.0%</b>
<b>High Wycombe</b>											
Asda, Holmers Farm Way, High Wycombe	1.7	0.0	0.0	0.0	0.0	0.0	3.5	0.0	0.0	5.2	0.3%
<b>Total High Wycombe</b>	<b>1.7</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>3.5</b>	<b>0.0</b>	<b>0.0</b>	<b>5.2</b>	<b>0.3%</b>
<b>Princes Risborough</b>											
Tesco Superstore, Longwick Road, Princes Risborough	0.0	0.0	0.0	0.0	0.0	0.0	6.2	0.0	0.0	6.2	0.4%
<b>Total Princes Risborough</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>6.2</b>	<b>0.0</b>	<b>0.0</b>	<b>6.2</b>	<b>0.4%</b>
<b>Westgate</b>											
Sainsbury's Superstore, Westgate, Oxford	1.6	4.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.4	0.4%
<b>Total Westgate</b>	<b>1.6</b>	<b>4.7</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>6.4</b>	<b>0.4%</b>
<b>Other</b>											
Other, Outside Study Area	0.0	0.0	1.9	1.2	7.2	17.0	18.1	8.8	8.3	62.4	4.1%
<b>Total Other</b>	<b>0.0</b>	<b>0.0</b>	<b>1.9</b>	<b>1.2</b>	<b>7.2</b>	<b>17.0</b>	<b>18.1</b>	<b>8.8</b>	<b>8.3</b>	<b>62.4</b>	<b>4.1%</b>
<b>TOTAL OUTSIDE STUDY AREA</b>	<b>5.1</b>	<b>4.7</b>	<b>4.1</b>	<b>1.2</b>	<b>11.8</b>	<b>37.9</b>	<b>60.9</b>	<b>13.3</b>	<b>26.9</b>	<b>166.0</b>	<b>10.8%</b>
<b>TOTAL</b>	<b>205.9</b>	<b>171.9</b>	<b>53.1</b>	<b>35.6</b>	<b>157.9</b>	<b>245.9</b>	<b>154.2</b>	<b>380.5</b>	<b>135.4</b>	<b>1540.4</b>	<b>100.0%</b>

**Spreadsheet 6 - Convenience Retail Commitments**

<b>Application Proposal</b>	<b>Planning Application Ref. No.</b>	<b>Sales Area Floorspace (sq. m)</b>	<b>Sales Density in Opening Year (£ / sq. m)</b>	<b>Turnover from Study Area in Opening Year (£m)</b>
Clarendon Centre	21/00110/FUL	2057	11,500	23.7
<b>Sub-total</b>	-	<b>2,057</b>	-	<b>23.7</b>

**Notes**

1. Growth in convenience retail sales area taken from planning application material or based on Stantec estimate.
2. Sales density based on Stantec estimate to reflect the average of main convenience goods retailers and to reflect nature and location of proposed development.

**Spreadsheet 7 - Summary of Capacity for Convenience Goods Retail Floorspace (Constant Retention Rate)**

	2023	2028	2033	2038	2042	Cumulative Change 2023-2042	Incremental Change			
							2023-28	2028-33	2033-2038	2038-2042
<b>Total Population and Expenditure</b>										
A. Total study area population (persons)	566,063	577,038	585,959	592,651	598,415	32,352	10,975	8,921	6,692	5,764
B. Total convenience goods expenditure (excluding SFT) (£m)	1,540.4	1,515.3	1,527.6	1,540.4	1,559.2	18.8	-25	12	13	19
<b>Retained Expenditure</b>										
C. Convenience goods expenditure retained in study area (%)	89.2%	89.2%	89.2%	89.2%	89.2%					
D. Convenience goods expenditure retained in study area (£m)	1374.4	1352.0	1363.0	1374.4	1391.2	16.8	-22.4	10.9	11.4	16.8
<b>Inflow</b>										
E. Inflow to study area at 10% (£m)	137.4	135.2	136.3	137.4	139.1	1.7	-2.2	1.1	1.1	1.7
F. Growth in Inflow (£m)	0.0	-2.2	1.1	1.1	1.7	1.7	-2.2	3.3	0.0	0.5
<b>Total Turnover in Study Area</b>										
G. Baseline convenience goods turnover of stores in study area (£m)	1511.8	1511.8	1511.8	1511.8	1511.8					
<b>Initial Surplus</b>										
H. Growth in retained convenience goods expenditure (£m)	0.0	-24.6	-12.6	0.0	18.4	18.4	-24.6	12.0	12.6	18.4
<b>Claims on Expenditure</b>										
I. Sales density growth in existing stores (£m)	0.0	116.8	242.7	378.3	494.3	494.3	116.8	125.9	135.6	116.0
J. Turnover from commitments	0.0	23.7	25.5	27.5	29.1	29.1	23.7	1.8	2.0	1.7
K. Total claims on expenditure (£m)	0.0	140.5	268.2	405.8	523.4	523.4	140.5	127.7	137.6	117.7
<b>L. Residual expenditure (£m)</b>										
	0.0	-165.1	-280.8	-405.8	-505.0					
<b>Convenience Retail Floorspace Requirements</b>										
M. Assumed sales density (£/sq.m)	11,500	12,389	13,346	14,378	15,260	3,760	889	957	1,031	882
N. Floorspace requirement (sales area floorspace sq.m)	0	-13,327	-21,037	-28,222	-33,094	-33,094	-13,327	-7,710	-7,186	-4,871
O. Floorspace requirement (gross sq.m)	0	-19,038	-30,052	-40,318	-47,277	-47,277	-19,038	-11,014	-10,265	-6,959

**Notes**

- Total population of the study area taken from Spreadsheet 1. Total convenience goods expenditure (excluding SFT) taken from Spreadsheet 3.
- Retained expenditure - proportion of all convenience goods expenditure spent at retail facilities within the study area, taken from Spreadsheet 5. This is held constant throughout the assessment period.
- Inflow - additional convenience goods expenditure drawn to retail facilities within the study area from residents outside the study area. Assumed to be 10% of retained expenditure in the study area.
- Total convenience goods turnover of stores within study area in the base year taken from Spreadsheet 5.
- Initial surplus - total growth in retained convenience goods expenditure before claims on expenditure.
- Claims on expenditure - the turnover of commitments for new convenience retail floorspace in the study area taken from Spreadsheet 6. An allowance for growth in the turnover of both existing stores and committed convenience retail floorspace based on the assumption that sales densities will grow by an average of 1.5% per annum throughout the study period.
- Residual expenditure - the product of deducting claims on expenditure from the initial surplus.
- convenience retail floorspace requirements calculated by converting the residual expenditure using a sales density estimate of £11,500 / sq.m in 2023, increased by 1.5% per annum to account for anticipated sales density growth. 70% net to gross ratio assumed.
- All monetary figures are rounded to one decimal place and all floorspace figures are rounded to the nearest square metre.

All monetary values are held constant at 2023 prices.

# **APPENDIX F      LEISURE CAPACITY**

Spreadsheet 7 - Indicative Capacity for Food & Beverage Uses in the Defined Centres

<b>Available Expenditure, and Expenditure Retained by Defined Centres</b>		2023	2028	2033	2038	2042	2023-28	2028-33	2033-38	2038-42
A	Total Study Area Expenditure on Food and Drink (£m)	642.37	639.64	679.90	719.11	739.19	-2.73	40.26	39.20	20.08
B	Current Market Share Achieved by the Defined Centres (%)	59.3%	59.3%	59.3%	59.3%	59.3%	-	-	-	-
C	Expenditure Retained by the Defined Centres (£m) (= A*B)	381.23	379.61	403.50	426.77	438.69	-1.62	23.90	23.27	11.92
D	Expenditure Inflow to the Defined Centres (£m)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Claim on Expenditure from Turnover</b>										
E	Turnover of the Defined Centres (£m) (= C+D)	381.23	379.61	403.50	426.77	438.69	-1.62	23.90	23.27	11.92
F	Growth in Turnover of the Defined Centres (£m)	0.00	7.69	15.49	23.94	31.20	7.69	7.81	8.45	7.25
<b>Claim on Expenditure from Commitments for New Floorspace</b>										
G	Sales Density Growth in Existing Units (£m)	0.00	11.25	-2.78	-15.92	-19.56	11.25	-14.03	-13.15	-3.64
H	Turnover from Commitments	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
I	Total Claims on Expenditure (£m)	0.00	11.25	-2.78	-15.92	-19.56	11.25	-14.03	-13.15	-3.64
<b>Residual Expenditure Available to Support New Floorspace</b>										
J	Residual Expenditure (£m) (=C+D-E-F-I)	0.00	-18.93	-12.72	-8.02	-11.63	-18.93	6.22	4.70	-3.62

Spreadsheet 2 - Per Capita Spending on Leisure Services, 2023-2042

2023	£ Zone 1	£ Zone 2	£ Zone 3	£ Zone 4	£ Zone 5	£ Zone 6	£ Zone 7	£ Zone 8	£ Zone 9	£ Average
Accommodation services per person	188	147	245	228	192	181	222	188	205	199
Cultural services per person	259	227	350	343	300	292	350	297	332	306
Games of chance per person	181	218	246	266	271	267	250	271	266	248
Hairdressing salons and personal grooming establishments per person	83	63	122	117	99	93	115	96	106	99
Recreational and sporting services per person	203	139	283	247	198	191	246	202	221	214
Restaurants cafés etc per person	1,198	1,069	1,332	1,217	1,121	1,080	1,190	1,111	1,153	1,164
<b>Total</b>	<b>2,113</b>	<b>1,862</b>	<b>2,578</b>	<b>2,418</b>	<b>2,181</b>	<b>2,104</b>	<b>2,372</b>	<b>2,164</b>	<b>2,283</b>	<b>2,231</b>

2028	£ Zone 1	£ Zone 2	£ Zone 3	£ Zone 4	£ Zone 5	£ Zone 6	£ Zone 7	£ Zone 8	£ Zone 9	£ Average
Accommodation services per person	184	143	239	223	188	177	217	183	200	195
Cultural services per person	253	222	342	335	293	285	342	290	325	299
Games of chance per person	177	213	240	259	264	260	244	265	260	243
Hairdressing salons and personal grooming establishments per person	81	61	120	114	97	91	112	94	104	97
Recreational and sporting services per person	198	135	276	241	194	187	241	197	216	209
Restaurants cafés etc per person	1,171	1,044	1,301	1,189	1,095	1,055	1,162	1,085	1,126	1,137
<b>Total</b>	<b>2,065</b>	<b>1,819</b>	<b>2,518</b>	<b>2,362</b>	<b>2,131</b>	<b>2,056</b>	<b>2,317</b>	<b>2,114</b>	<b>2,230</b>	<b>2,179</b>

2033	£ Zone 1	£ Zone 2	£ Zone 3	£ Zone 4	£ Zone 5	£ Zone 6	£ Zone 7	£ Zone 8	£ Zone 9	£ Average
Accommodation services per person	193	150	250	233	196	185	227	192	209	204
Cultural services per person	265	232	358	351	306	299	358	303	340	312
Games of chance per person	185	222	252	272	277	273	256	277	272	254
Hairdressing salons and personal grooming establishments per person	85	64	125	119	101	95	117	98	109	102
Recreational and sporting services per person	207	142	289	252	203	196	252	207	226	219
Restaurants cafés etc per person	1,225	1,093	1,362	1,245	1,147	1,105	1,216	1,136	1,179	1,190
<b>Total</b>	<b>2,161</b>	<b>1,904</b>	<b>2,636</b>	<b>2,472</b>	<b>2,231</b>	<b>2,152</b>	<b>2,426</b>	<b>2,213</b>	<b>2,335</b>	<b>2,281</b>

2038	£ Zone 1	£ Zone 2	£ Zone 3	£ Zone 4	£ Zone 5	£ Zone 6	£ Zone 7	£ Zone 8	£ Zone 9	£ Average
Accommodation services per person	201	157	262	244	205	194	237	201	219	213
Cultural services per person	277	243	375	367	321	312	374	317	355	327
Games of chance per person	194	233	263	284	290	285	268	290	284	266
Hairdressing salons and personal grooming establishments per person	89	67	131	125	106	100	123	102	114	106
Recreational and sporting services per person	217	148	303	264	212	205	264	216	236	229
Restaurants cafés etc per person	1,282	1,144	1,424	1,302	1,199	1,155	1,272	1,188	1,233	1,244
<b>Total</b>	<b>2,260</b>	<b>1,991</b>	<b>2,757</b>	<b>2,586</b>	<b>2,333</b>	<b>2,251</b>	<b>2,537</b>	<b>2,314</b>	<b>2,441</b>	<b>2,386</b>

2042	£ Zone 1	£ Zone 2	£ Zone 3	£ Zone 4	£ Zone 5	£ Zone 6	£ Zone 7	£ Zone 8	£ Zone 9	£ Average
Accommodation services per person	209	163	271	253	213	201	246	208	227	221
Cultural services per person	288	252	388	381	332	324	388	329	368	339
Games of chance per person	201	241	273	294	300	295	277	300	295	275
Hairdressing salons and personal grooming establishments per person	92	69	136	129	110	103	127	106	118	110
Recreational and sporting services per person	225	154	314	274	220	212	273	224	245	238
Restaurants cafés etc per person	1,305	1,164	1,450	1,325	1,221	1,176	1,295	1,210	1,255	1,267
<b>Total</b>	<b>2,319</b>	<b>2,043</b>	<b>2,832</b>	<b>2,656</b>	<b>2,396</b>	<b>2,311</b>	<b>2,606</b>	<b>2,377</b>	<b>2,508</b>	<b>2,450</b>

Notes

1. Source: Experian MMG3 for per capita leisure expenditure data



Spreadsheet 3 - Total Leisure Services Spending available to Study Area Residents, 2023-42

<b>2023</b>	<b>£m Zone 1</b>	<b>£m Zone 2</b>	<b>£m Zone 3</b>	<b>£m Zone 4</b>	<b>£m Zone 5</b>	<b>£m Zone 6</b>	<b>£m Zone 7</b>	<b>£m Zone 8</b>	<b>£m Zone 9</b>	<b>£m Total</b>	<b>% Total</b>
Accommodation services per person	15.95	10.30	4.34	2.70	10.63	16.37	11.51	25.84	9.47	107.10	8.8%
Cultural services per person	21.96	15.93	6.21	4.05	16.59	26.42	18.12	40.85	15.39	165.52	13.5%
Games of chance per person	15.34	15.27	4.36	3.13	14.99	24.11	12.97	37.30	12.31	139.79	11.4%
Hairdressing salons and personal grooming establishments per person	7.06	4.39	2.17	1.38	5.49	8.43	5.94	13.19	4.93	52.97	4.3%
Recreational and sporting services per person	17.15	9.73	5.02	2.91	10.98	17.31	12.78	27.84	10.22	113.95	9.3%
Restaurants cafés etc per person	101.45	75.06	23.62	14.37	62.07	97.71	61.67	153.04	53.39	642.37	52.6%
<b>Total</b>	<b>178.91</b>	<b>130.69</b>	<b>45.72</b>	<b>28.54</b>	<b>120.73</b>	<b>190.35</b>	<b>122.98</b>	<b>298.06</b>	<b>105.72</b>	<b>1,221.71</b>	<b>100.0%</b>

<b>2028</b>	<b>£m Zone 1</b>	<b>£m Zone 2</b>	<b>£m Zone 3</b>	<b>£m Zone 4</b>	<b>£m Zone 5</b>	<b>£m Zone 6</b>	<b>£m Zone 7</b>	<b>£m Zone 8</b>	<b>£m Zone 9</b>	<b>£m Total</b>	<b>% Total</b>
Accommodation services per person	15.38	10.00	4.41	2.67	10.59	16.43	11.53	26.02	9.73	106.77	8.8%
Cultural services per person	21.19	15.46	6.32	4.01	16.53	26.51	18.16	41.14	15.81	165.12	13.6%
Games of chance per person	14.80	14.82	4.44	3.10	14.93	24.20	12.99	37.57	12.65	139.50	11.5%
Hairdressing salons and personal grooming establishments per person	6.81	4.26	2.21	1.36	5.47	8.46	5.96	13.28	5.07	52.87	4.3%
Recreational and sporting services per person	16.55	9.45	5.10	2.88	10.93	17.38	12.80	28.04	10.50	113.63	9.3%
Restaurants cafés etc per person	97.87	72.86	24.02	14.21	61.83	98.06	61.80	154.14	54.85	639.64	52.5%
<b>Total</b>	<b>172.61</b>	<b>126.85</b>	<b>46.50</b>	<b>28.22</b>	<b>120.27</b>	<b>191.03</b>	<b>123.25</b>	<b>300.19</b>	<b>108.61</b>	<b>1,217.54</b>	<b>100.0%</b>

<b>2033</b>	<b>£m Zone 1</b>	<b>£m Zone 2</b>	<b>£m Zone 3</b>	<b>£m Zone 4</b>	<b>£m Zone 5</b>	<b>£m Zone 6</b>	<b>£m Zone 7</b>	<b>£m Zone 8</b>	<b>£m Zone 9</b>	<b>£m Total</b>	<b>% Total</b>
Accommodation services per person	16.01	10.50	4.74	2.80	11.25	17.57	12.27	27.83	10.58	113.56	8.8%
Cultural services per person	22.05	16.23	6.79	4.21	17.57	28.36	19.33	43.99	17.18	175.71	13.6%
Games of chance per person	15.41	15.56	4.77	3.26	15.87	25.88	13.83	40.17	13.75	148.49	11.5%
Hairdressing salons and personal grooming establishments per person	7.09	4.47	2.37	1.43	5.81	9.05	6.34	14.20	5.50	56.27	4.3%
Recreational and sporting services per person	17.22	9.92	5.48	3.03	11.62	18.59	13.63	29.98	11.41	120.88	9.3%
Restaurants cafés etc per person	101.88	76.48	25.79	14.94	65.73	104.90	65.76	164.81	59.60	679.90	52.5%
<b>Total</b>	<b>179.67</b>	<b>133.17</b>	<b>49.93</b>	<b>29.67</b>	<b>127.86</b>	<b>204.36</b>	<b>131.15</b>	<b>320.97</b>	<b>118.02</b>	<b>1,294.81</b>	<b>100.0%</b>

<b>2038</b>	<b>£m Zone 1</b>	<b>£m Zone 2</b>	<b>£m Zone 3</b>	<b>£m Zone 4</b>	<b>£m Zone 5</b>	<b>£m Zone 6</b>	<b>£m Zone 7</b>	<b>£m Zone 8</b>	<b>£m Zone 9</b>	<b>£m Total</b>	<b>% Total</b>
Accommodation services per person	16.53	10.88	5.06	2.94	11.98	18.76	13.01	29.64	11.38	120.20	8.8%
Cultural services per person	22.76	16.83	7.24	4.43	18.70	30.27	20.50	46.86	18.50	186.09	13.6%
Games of chance per person	15.91	16.13	5.09	3.42	16.90	27.63	14.67	42.79	14.80	157.33	11.5%
Hairdressing salons and personal grooming establishments per person	7.32	4.64	2.53	1.50	6.19	9.66	6.72	15.13	5.93	59.61	4.4%
Recreational and sporting services per person	17.78	10.28	5.85	3.18	12.38	19.84	14.45	31.94	12.28	127.98	9.3%
Restaurants cafés etc per person	105.16	79.28	27.53	15.69	69.98	111.97	69.75	175.59	64.17	719.11	52.5%
<b>Total</b>	<b>185.45</b>	<b>138.04</b>	<b>53.29</b>	<b>31.17</b>	<b>136.13</b>	<b>218.12</b>	<b>139.10</b>	<b>341.96</b>	<b>127.05</b>	<b>1,370.32</b>	<b>100.0%</b>

<b>2042</b>	<b>£m Zone 1</b>	<b>£m Zone 2</b>	<b>£m Zone 3</b>	<b>£m Zone 4</b>	<b>£m Zone 5</b>	<b>£m Zone 6</b>	<b>£m Zone 7</b>	<b>£m Zone 8</b>	<b>£m Zone 9</b>	<b>£m Total</b>	<b>% Total</b>
Accommodation services per person	16.95	11.21	5.33	3.07	12.59	19.77	13.67	31.19	12.09	125.87	8.9%
Cultural services per person	23.35	17.33	7.64	4.61	19.65	31.90	21.54	49.31	19.64	194.96	13.7%
Games of chance per person	16.31	16.61	5.36	3.57	17.75	29.11	15.41	45.03	15.72	164.87	11.6%
Hairdressing salons and personal grooming establishments per person	7.51	4.77	2.67	1.57	6.50	10.18	7.07	15.92	6.29	62.47	4.4%
Recreational and sporting services per person	18.23	10.59	6.16	3.32	13.00	20.91	15.19	33.61	13.04	134.05	9.4%
Restaurants cafés etc per person	105.93	80.20	28.50	16.07	72.19	115.90	71.99	181.47	66.92	739.19	52.0%
<b>Total</b>	<b>188.29</b>	<b>140.72</b>	<b>55.67</b>	<b>32.20</b>	<b>141.67</b>	<b>227.77</b>	<b>144.87</b>	<b>356.52</b>	<b>133.70</b>	<b>1,421.40</b>	<b>100.0%</b>

Spreadsheet 4 - Growth in Leisure Services Spending, 2023-2042

	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
<b>2023-28</b>	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Zone 5</b>	<b>Zone 6</b>	<b>Zone 7</b>	<b>Zone 8</b>	<b>Zone 9</b>	<b>Total</b>
Accommodation services per person	-0.56	-0.30	0.07	-0.03	-0.04	0.06	0.02	0.19	0.26	-0.33
Cultural services per person	-0.77	-0.47	0.11	-0.05	-0.06	0.09	0.04	0.29	0.42	-0.40
Games of chance per person	-0.54	-0.45	0.07	-0.04	-0.06	0.09	0.03	0.27	0.34	-0.29
Hairdressing salons and personal grooming establishments per person	-0.25	-0.13	0.04	-0.02	-0.02	0.03	0.01	0.09	0.13	-0.10
Recreational and sporting services per person	-0.60	-0.29	0.09	-0.03	-0.04	0.06	0.03	0.20	0.28	-0.31
Restaurants cafés etc per person	-3.57	-2.20	0.40	-0.16	-0.24	0.35	0.13	1.10	1.46	-2.73
<b>Total</b>	<b>-6.30</b>	<b>-3.84</b>	<b>0.78</b>	<b>-0.32</b>	<b>-0.46</b>	<b>0.68</b>	<b>0.26</b>	<b>2.14</b>	<b>2.89</b>	<b>-4.17</b>

	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
<b>2028-33</b>	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Zone 5</b>	<b>Zone 6</b>	<b>Zone 7</b>	<b>Zone 8</b>	<b>Zone 9</b>	<b>Total</b>
Accommodation services per person	0.63	0.50	0.33	0.14	0.67	1.15	0.74	1.80	0.84	6.79
Cultural services per person	0.87	0.77	0.47	0.21	1.04	1.85	1.16	2.85	1.37	10.58
Games of chance per person	0.61	0.74	0.33	0.16	0.94	1.69	0.83	2.60	1.10	8.99
Hairdressing salons and personal grooming establishments per person	0.28	0.21	0.16	0.07	0.34	0.59	0.38	0.92	0.44	3.40
Recreational and sporting services per person	0.68	0.47	0.38	0.15	0.69	1.21	0.82	1.94	0.91	7.25
Restaurants cafés etc per person	4.01	3.63	1.77	0.73	3.90	6.84	3.96	10.67	4.75	40.26
<b>Total</b>	<b>7.07</b>	<b>6.31</b>	<b>3.43</b>	<b>1.45</b>	<b>7.58</b>	<b>13.33</b>	<b>7.90</b>	<b>20.78</b>	<b>9.41</b>	<b>77.27</b>

	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
<b>2033-38</b>	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Zone 5</b>	<b>Zone 6</b>	<b>Zone 7</b>	<b>Zone 8</b>	<b>Zone 9</b>	<b>Total</b>
Accommodation services per person	0.51	0.38	0.32	0.14	0.73	1.18	0.74	1.82	0.81	6.64
Cultural services per person	0.71	0.59	0.46	0.21	1.14	1.91	1.17	2.88	1.31	10.38
Games of chance per person	0.50	0.57	0.32	0.16	1.03	1.74	0.84	2.63	1.05	8.84
Hairdressing salons and personal grooming establishments per person	0.23	0.16	0.16	0.07	0.38	0.61	0.38	0.93	0.42	3.34
Recreational and sporting services per person	0.55	0.36	0.37	0.15	0.75	1.25	0.83	1.96	0.87	7.10
Restaurants cafés etc per person	3.28	2.80	1.74	0.75	4.25	7.06	3.98	10.78	4.56	39.20
<b>Total</b>	<b>5.78</b>	<b>4.88</b>	<b>3.36</b>	<b>1.49</b>	<b>8.27</b>	<b>13.76</b>	<b>7.95</b>	<b>20.99</b>	<b>9.03</b>	<b>75.51</b>

	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
<b>2028-42</b>	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Zone 5</b>	<b>Zone 6</b>	<b>Zone 7</b>	<b>Zone 8</b>	<b>Zone 9</b>	<b>Total</b>
Accommodation services per person	0.42	0.33	0.27	0.12	0.60	1.01	0.66	1.55	0.70	5.67
Cultural services per person	0.58	0.50	0.39	0.19	0.94	1.63	1.04	2.45	1.14	8.87
Games of chance per person	0.41	0.48	0.28	0.14	0.85	1.49	0.75	2.23	0.92	7.54
Hairdressing salons and personal grooming establishments per person	0.19	0.14	0.14	0.06	0.31	0.52	0.34	0.79	0.37	2.86
Recreational and sporting services per person	0.46	0.31	0.32	0.13	0.62	1.07	0.73	1.67	0.76	6.07
Restaurants cafés etc per person	0.78	0.92	0.98	0.37	2.21	3.93	2.24	5.88	2.76	20.08
<b>Total</b>	<b>2.83</b>	<b>2.67</b>	<b>2.38</b>	<b>1.03</b>	<b>5.54</b>	<b>9.65</b>	<b>5.77</b>	<b>14.56</b>	<b>6.65</b>	<b>51.08</b>

	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
<b>2023-42</b>	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Zone 5</b>	<b>Zone 6</b>	<b>Zone 7</b>	<b>Zone 8</b>	<b>Zone 9</b>	<b>Total</b>
Accommodation services per person	1.01	0.91	0.99	0.37	1.96	3.40	2.17	5.35	2.62	18.77
Cultural services per person	1.39	1.40	1.42	0.56	3.06	5.48	3.42	8.46	4.25	29.44
Games of chance per person	0.97	1.34	1.00	0.43	2.76	5.00	2.44	7.73	3.40	25.08
Hairdressing salons and personal grooming establishments per person	0.45	0.39	0.50	0.19	1.01	1.75	1.12	2.73	1.36	9.49
Recreational and sporting services per person	1.08	0.86	1.15	0.40	2.02	3.59	2.41	5.77	2.82	20.10
Restaurants cafés etc per person	4.49	5.14	4.89	1.70	10.13	18.19	10.32	28.42	13.53	96.81
<b>Total</b>	<b>9.38</b>	<b>10.03</b>	<b>9.95</b>	<b>3.66</b>	<b>20.94</b>	<b>37.41</b>	<b>21.88</b>	<b>58.46</b>	<b>27.98</b>	<b>199.69</b>

Spreadsheet 5 - Leisure Commitments

Application Proposal	Planning Application Ref. No.	Gross Floorspace (sq.m)	Sales Density in Opening Year (£ / sq.m)	Turnover from Study Area in Opening Year (£m)
				0.0
				0.0
				0.0
				0.0
				0.0
				0.0
<b>Sub-total</b>	-	0	-	0.0

Application Proposal	Planning Application Ref. No.	Gross Floorspace (sq.m)	Sales Density in Opening Year (£ / sq.m)	Turnover from Study Area in Opening Year (£m)
<b>Sub-total</b>	-	0	-	0.0

Spreadsheet 6 - Summary of Food & Beverage Market Shares Achieved by the Defined Centres

<b>Restaurants / Cafés</b>	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Zone 5</b>	<b>Zone 6</b>	<b>Zone 7</b>	<b>Zone 8</b>	<b>Zone 9</b>
Abingdon Town Centre	0.00%	0.00%	6.93%	0.00%	0.00%	0.00%	0.00%	19.36%	2.66%
Bicester Town Centre	0.00%	0.00%	5.01%	0.00%	0.00%	34.85%	0.73%	2.83%	0.00%
Central London / West End	0.00%	6.97%	2.21%	0.78%	0.82%	2.74%	3.84%	0.00%	0.00%
Cowley Road District Centre	5.06%	4.13%	0.00%	1.73%	0.00%	0.00%	0.00%	0.00%	1.40%
Didcot Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	18.41%	13.66%
Headington District Centre	12.33%	0.00%	0.00%	3.93%	0.00%	0.00%	0.00%	0.00%	0.00%
Oxford City Centre	19.29%	57.42%	17.86%	22.40%	11.93%	24.37%	6.24%	21.69%	11.63%
Thame Town Centre	2.23%	0.00%	0.00%	13.96%	0.00%	1.16%	34.90%	0.00%	0.00%
Wantage Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	15.25%
Witney Town Centre	0.00%	1.76%	3.20%	0.00%	44.97%	2.22%	0.00%	1.25%	2.80%
Abroad	5.46%	0.79%	2.21%	0.00%	0.00%	5.76%	3.87%	0.00%	0.63%
Eynsham Village Centre	0.00%	0.00%	2.21%	0.00%	10.43%	0.00%	0.00%	0.00%	0.00%
<b>Total</b>	<b>44.37%</b>	<b>71.07%</b>	<b>39.63%</b>	<b>42.80%</b>	<b>68.15%</b>	<b>71.10%</b>	<b>49.58%</b>	<b>63.54%</b>	<b>48.03%</b>

<b>Pubs / bars</b>	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Zone 5</b>	<b>Zone 6</b>	<b>Zone 7</b>	<b>Zone 8</b>	<b>Zone 9</b>
Abingdon Town Centre	0.00%	0.00%	19.64%	0.00%	0.00%	0.00%	0.00%	27.69%	6.90%
Bicester Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	48.42%	0.00%	0.00%	0.00%
Central London / West End	1.37%	4.34%	0.00%	0.00%	0.00%	0.95%	2.27%	0.00%	0.00%
Cowley Road District Centre	0.00%	4.34%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Didcot Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	13.95%	7.61%
Headington District Centre	20.94%	3.05%	1.34%	3.01%	0.00%	0.00%	0.00%	0.00%	0.00%
Oxford City Centre	23.22%	41.60%	11.35%	20.38%	7.83%	0.95%	1.02%	14.12%	1.68%
Thame Town Centre	0.00%	0.00%	0.00%	4.36%	0.00%	2.12%	27.02%	0.00%	0.00%
Wantage Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	31.80%
Witney Town Centre	3.05%	0.00%	4.34%	0.00%	56.06%	4.07%	0.00%	1.43%	1.68%
Abroad	9.98%	0.00%	0.00%	0.00%	0.00%	0.00%	1.02%	0.00%	0.00%
Eynsham Village Centre	0.00%	0.00%	1.34%	0.00%	5.46%	0.00%	0.00%	0.00%	0.00%
<b>Total</b>	<b>58.56%</b>	<b>53.33%</b>	<b>38.01%</b>	<b>27.75%</b>	<b>69.35%</b>	<b>56.51%</b>	<b>31.33%</b>	<b>57.19%</b>	<b>49.67%</b>

Spreadsheet 7 - Indicative Capacity for Food & Beverage Uses in the Defined Centres

Available Expenditure, and Expenditure Retained by Defined Centres		2023	2028	2033	2038	2042	2023-28	2028-33	2033-38	2038-42
A	Total Study Area Expenditure on Food and Drink (£m)	642.37	639.64	679.90	719.11	739.19	-2.73	40.26	39.20	20.08
B	Current Market Share Achieved by the Defined Centres (%)	59.3%	59.3%	59.3%	59.3%	59.3%	-	-	-	-
C	Expenditure Retained by the Defined Centres (£m) (= A*B)	381.23	379.61	403.50	426.77	438.69	-1.62	23.90	23.27	11.92
D	Expenditure Inflow to the Defined Centres (£m)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Claim on Expenditure from Turnover</b>										
E	Turnover of the Defined Centres (£m) (= C+D)	381.23	379.61	403.50	426.77	438.69	-1.62	23.90	23.27	11.92
F	Growth in Turnover of the Defined Centres (£m)	0.00	7.69	15.49	23.94	31.20	7.69	7.81	8.45	7.25
<b>Claim on Expenditure from Commitments for New Floorspace</b>										
G	Sales Density Growth in Existing Units (£m)	0.00	11.25	-2.78	-15.92	-19.56	11.25	-14.03	-13.15	-3.64
H	Turnover from Commitments	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
I	Total Claims on Expenditure (£m)	0.00	11.25	-2.78	-15.92	-19.56	11.25	-14.03	-13.15	-3.64
<b>Residual Expenditure Available to Support New Floorspace</b>										
J	Residual Expenditure (£m) (=C+D-E-F-I)	0.00	-18.93	-12.72	-8.02	-11.63	-18.93	6.22	4.70	-3.62