

## RETAIL IMPACT ASSESSMENT

Table 8  
Convenience Goods Retail Impact Assessment 2018

Growth in Expenditure in Oxford (post commitments) 2011 to 2018 apportioned between existing stores/centres in the city (£m):								23.80		from Table 3
1	2	3	4	5	6	7	8	9	10	
Store/Centre	Conv Goods Net Sales Area (sq m net)	Conv Goods Sales Density 2011 (£ per sq m net)	Conv Goods Sales 2011 before impact (£m)	Conv Goods Sales 2018 before impact (£m)	Trade Draw to Barton Local Centre (%)	Trade Draw to Barton Local Centre (£m)	Conv Goods Sales post impact (£m)	Impact (%)	Difference between 2018 post-impact & 2011 sales (%)	
<b>Headington District Centre in the PCA:</b>										
Co-op	751	9,687	7.27	8.02	3.5	0.50	7.52	6.2%	3.4%	
Waitrose	1,070	12,079	12.92	14.25	5.0	0.71	13.54	5.0%	4.8%	
Iceland	271	7,059	1.91	2.11	0.5	0.07	2.04	3.4%	6.5%	
<b>Total Headington District Centre</b>			<b>22.11</b>	<b>24.39</b>	<b>9.0</b>	<b>1.29</b>	<b>23.10</b>	<b>5.3%</b>	<b>4.5%</b>	
<b>Local Centres in the PCA:</b>										
Underhill Circus	188	6,000	1.13	1.24	0.4	0.06	1.19	4.6%	5.2%	
The Roundway	96	4,000	0.38	0.42	-	-	0.42	0.0%	10.3%	
Girdlestone Rd, New Headington	80	4,000	0.32	0.35	-	-	0.35	0.0%	10.3%	
Westlands Drive	182	4,500	0.82	0.90	0.2	0.03	0.87	3.2%	6.8%	
Old Marston Road	635	8,500	5.40	5.95	1.3	0.19	5.77	3.1%	6.8%	
Marston (Cherwell Drive)	234	7,000	1.64	1.81	0.4	0.06	1.75	3.2%	6.8%	
<b>Summertown District Centre:</b>										
M&S, Summertown	1,014	11,192	11.35	12.52	1.5	0.21	12.30	1.7%	8.4%	
Co-op, Summertown	437	9,687	4.23	4.67	0.5	0.07	4.60	1.5%	8.6%	
Tesco Express	316	13,960	4.41	4.86	1.0	0.14	4.72	2.9%	7.0%	
Sainsburys Local	230	12,288	2.83	3.12	1.0	0.14	2.97	4.6%	5.2%	
<b>Total Summertown District Centre</b>			<b>22.82</b>	<b>25.17</b>	<b>4.00</b>	<b>0.57</b>	<b>24.59</b>	<b>2.3%</b>	<b>7.8%</b>	
<b>Templars Square, Cowley:</b>										
Co-op	744	9,687	7.21	7.95	0.5	0.07	7.88	0.9%	9.3%	
Iceland	453	7,059	3.20	3.53	0.1	0.01	3.51	0.4%	9.8%	
<b>Total Templars Square, Cowley</b>			<b>10.40</b>	<b>11.47</b>	<b>0.6</b>	<b>0.09</b>	<b>11.39</b>	<b>0.7%</b>	<b>9.5%</b>	
<b>Cowley Road:</b>										
Tesco Metro	1,297	13,960	18.11	19.97	2.5	0.36	19.61	1.8%	8.3%	
Co-op	130	9,687	1.26	1.39	0.1	0.01	1.37	1.0%	9.1%	
Sainsburys Local	272	13,415	3.65	4.02	0.2	0.03	4.00	0.7%	9.5%	
<b>Total Cowley Road</b>			<b>23.01</b>	<b>25.38</b>	<b>2.8</b>	<b>0.40</b>	<b>24.98</b>	<b>1.6%</b>	<b>8.5%</b>	
<b>Oxford City Centre:</b>										
M&S, Queen Street	1,487	11,192	16.64	18.35	1.5	0.21	18.14	1.2%	9.0%	
Sainsburys, Westgate	1,042	13,415	13.98	15.42	2.7	0.39	15.03	2.5%	7.5%	
Sainsburys Local, Magdalen Street	407	13,415	5.46	6.02	-	-	6.02	0.0%	10.3%	
<b>Total Oxford City Centre</b>			<b>36.08</b>	<b>39.79</b>	<b>4.2</b>	<b>0.60</b>	<b>39.19</b>	<b>1.5%</b>	<b>8.6%</b>	
<b>Other Stores in Oxford:</b>										
Tesco superstore, Oxford Retail Park	2,916	13,960	40.71	44.89	17.5	2.50	42.39	5.6%	4.1%	
M&S, Oxford Retail Park	772	11,192	8.64	9.53	4.0	0.57	8.96	6.0%	3.7%	
Sainsburys superstore, Heyford Hill	3,463	13,415	46.46	51.23	12.5	1.79	49.45	3.5%	6.4%	
Aldi, Botley Road	656	7,314	4.80	5.29	-	-	5.29	0.0%	10.3%	
Co-op, Walton Street	201	9,687	1.95	2.15	-	-	2.15	0.0%	10.3%	
Co-op, Iffley Road	159	9,687	1.54	1.70	-	-	1.70	0.0%	10.3%	
Co-op, Rose Hill	173	9,687	1.68	1.85	-	-	1.85	0.0%	10.3%	
Co-op, Atkyns Road	159	9,687	1.54	1.70	-	-	1.70	0.0%	10.3%	
<b>Total Oxford Stores</b>			<b>231.42</b>	<b>255.22</b>	<b>56.9</b>	<b>8.13</b>	<b>247.09</b>	<b>3.2%</b>	<b>6.8%</b>	
<b>Kidlington:</b>										
Sainsburys superstore, Oxford Road	3,532	13,415	47.38	52.25	17.5	2.50	49.75	4.8%	5.0%	
<b>Kidlington Town Centre:</b>										
Tesco Metro	1,029	13,960	14.36	15.84	1.8	0.26	15.58	1.6%	8.5%	
Co-op	599	9,687	5.80	6.40	1.0	0.14	6.26	2.2%	7.8%	
Iceland	232	7,059	1.64	1.81	0.2	0.03	1.78	1.6%	8.5%	
<b>Total Kidlington Town Centre</b>			<b>21.81</b>	<b>24.05</b>	<b>3.0</b>	<b>0.43</b>	<b>23.62</b>	<b>1.8%</b>	<b>8.3%</b>	
<b>Wheatley:</b>										
Co-op	191	9,687	1.85	2.04	0.1	0.01	2.03	0.7%	9.5%	
Asda	2,666	14,606	38.94	42.94	12.5	1.79	41.16	4.2%	5.7%	
<b>Other Stores/Centres outside Oxford</b>					<b>10.0</b>	<b>1.43</b>				
<b>TOTALS</b>					<b>100.0</b>	<b>14.28</b>				

Sources: VOA Rating List & IGD for floorspace, with estimation of net to gross ratios for some stores by Jonathan Baldock. Convenience goods space allocations estimated by Jonathan Baldock.  
Sales densities estimated from data published by Verdict Research Limited.  
Trade draws to new Barton Local Centre estimated by Jonathan Baldock.

## Notes:

Old Marston Road includes the permitted Tesco Express at 2 Old Marston Road.

Sales densities are as at 2009/10; and it is assumed that these will be maintained until 2021. If sales densities rise, pre-impact sales would rise and impacts would be less than indicated.

Assumes that there will be direct bus, pedestrian and cycle access from areas south of the Northern Relief Road to the new Barton Local Centre via a new junction on the Northern Relief Road; but there would be no direct car access from these areas to the new Barton Local Centre.

Assumes that the new Barton Local Centre will be located off the Northern Relief Road, close to the new junction.

Assumes that sales in the stores in Kidlington and Wheatley will grow over the period 2011 to 2018 at the same rate as in the Oxford stores.