PROPOSED FOODSTORE

RETAIL ASSESSMENT

COTEFIELD BUSINESS PARK, BODICOTE, OX15 4AQ

ON BEHALF OF ROWLAND BRATT

Date: October 2020

Pegasus Reference: (JB/P20-1296/R001v5)

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APPENDICES

1. EXECUTIVE SUMMARY

1.1 This Retail Assessment has been prepared in support of the proposed foodstore at Cotefield Business Park, Bodicote, OX15 4AQ, which will deliver a gross floorspace of around 1,235m^2. Although a final end-occupier for the foodstore has not been confirmed, the foodstore will serve a mix of main food and top-up food shopping needs of the local area and the surrounding rural areas to the south. This includes serving the new urban extension developments to the west of Oxford Road and the Longford Park development

1.2 This application has been submitted following the withdrawal of a previous application for the same development proposals (application ref. 20/00123/OUT) and deals with the issues raised within the 'React Report' prepared by DPDS on behalf of Cherwell District Council in relation to the previously submitted Retail Statement prepared by RPS and dated June 2019.

1.3 A detailed sequential assessment has been prepared assessing a range of sites located within and on the edge of Banbury town centre. All of the sites have been demonstrated to be unsuitable and/or unavailable to accommodate the proposed foodstore even allowing for flexibility.

1.4 To inform the assessment of impact, a household survey was carried out supported by updated population and expenditure data and a health check of Banbury town centre. The health check highlights that the town centre remains a vital and viable centre that will benefit from new development/investment in the form of Castle Quay Waterfront and Lock29. The convenience goods offer of the town centre is limited and does not form a key attractor of the centre.

1.5 In terms of the impact on the town centre, the vast majority of the development's turnover will be diverted from stores and destinations located outside of Banbury town centre. This reflects local convenience retail provision which is predominantly located in out of centre locations. Whilst a small amount of trade will be diverted from the town centre, including the planned Lidl store, this would be limited and would not affect the viability of any existing foodstore or planned investment. As such, the direct impact resulting from the trade diversion would clearly not result in a significant adverse impact on Banbury town centre.

1.6 This statement provides the appropriate and necessary evidence demonstrating that the proposed development accords with the relevant impact and sequential tests as set out at NPPF paragraph 90 and Local Plan Part 1 Policy SLE 2.

2. INTRODUCTION & PROPOSED DEVELOPMENT

2.1 This Retail Assessment has been prepared on behalf of Cotefield Holdings Limited in support of full planning application to deliver a foodstore at Cotefield Business Park, Bodicote. This Assessment deals with matters relating to the retail impact and sequential test only and should be read alongside the submitted Planning Statement.

2.2 This application has been submitted following the withdrawal of a previous application for the same development proposals (application ref. 20/00123/OUT). This Assessment deals with the issues raised within the 'React Report' prepared by DPDS on behalf of Cherwell District Council in relation to the previously submitted Retail Statement prepared by RPS and dated June 2019.

Proposed Development

2.3 The proposals are for a new foodstore providing around 1,235m^2 of gross floorspace with associated car parking for around 86 cars. Although a final end-occupier has not been confirmed, the small foodstore will serve a mix of main food and top-up food shopping needs of the local area and the surround rural areas to the south. This includes serving the new urban extension developments to the west of Oxford Road and the Longford Park development.

Structure of Report

2.4 The report is split into the following sections:

- Retail Planning Policy;
- Sequential Assessment Methodology;
- Sequential Assessment;
- Impact Assessment Methodology;
- Health Check;
- Impact Assessment; and,
- Conclusions.

3. RETAIL PLANNING POLICY

3.1 This subsection briefly summarises the key policy considerations in respect of the retail impact and sequential tests in relation to the proposed foodstore.

NPPF

3.2 Chapter 7 of the NPPF sets out policies relating to town centres and main town centre uses. The glossary at Annex 2 confirms that main town centre uses include retail development, leisure, entertainment and more intensive sport and recreation uses (including restaurants and health and fitness centres), offices and arts, culture, and tourism development.

3.3 Paragraph 86 requires proposals for main town centre uses to demonstrate accordance with the sequential test where they are located in an out-of-centre location and are not in accordance with an up-to-date plan (i.e. not allocated for such uses). In applying the sequential test, Para. 86 confirms that main town centre uses should be located in **town centres** then in edge of centre locations, and only if suitable sites are not available (or not expected to become available within a 'reasonable period') should out of centre locations be considered.

3.4 Paragraph 87 goes on to confirm that when considering edge and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre. Para. 87 also requires applicants to demonstrate flexibility on issues such as format and scale through the application of the test.

3.5 Paragraph 89 requires the preparation of an impact assessment when assessing applications for retail and leisure development outside **town centres** where they are not in accordance with an up-to-date plan, considering the impact of the proposal on planned public and private investment in centres and on **town centre** vitality and viability. An impact assessment is only required where the proposals exceed a locally set threshold or, in the absence of any such threshold, for proposals over 2,500m^2 of gross floorspace.

3.6 Paragraph 90 confirms that where an application fails the sequential test or is likely to have a significant adverse impact on one or more of the impact considerations set out at paragraph 89, it should be refused.

3.7 In terms of what is meant as town centres within Paragraphs 86-90, the NPPF Glossary at Annex 2 confirms that town centres are:

> *'Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in the development plan, existing out-of-*

centre developments, comprising or including main town centre uses, do not constitute town centres.'

3.8 Whilst a definition of what is meant as 'in-centre' or 'within a town centre' is not provided in the glossary, it does provide definitions of both edge-of-centre and out-of-centre. This clarifies that for the purposes of A1 retail uses, in-centre relates to sites located within the designated Primary Shopping Area or, where no Primary Shopping Area is identified, within the centre boundary.

Planning Practice Guidance (PPG)

3.9 The PPG provides guidance relating to the application of the sequential test highlighting the need for any assessments to be proportionate and appropriate to the proposed development and reiterating the need to demonstrate flexibility in the format and scale of the proposed development.

3.10 The PPG also provides advice as to the application of the impact test confirming that:

- Impact should be tested over an appropriate period of up to 5 years from application submission (or up to 10 years for major/complex schemes);
- The impact test should be undertaken in a proportionate and locally appropriate way; and
- Providing details on the general approach/methodology for the application of the impact test.

Local Plan

3.11 For the purposes of this application, the Local Plan forms the Cherwell Local Plan 2011-2031 Part 1 (Local Plan Part 1) and the saved policies of the Cherwell Local Plan (1996).

3.12 Cherwell Local Plan Part 1 Policy SLE 2 identities three defined centres within the district; namely Banbury town centre, Bicester town centre and Kidlington village centre and seeks to direct retail and other main town centre uses to these locations. This policy goes on to confirm the application of the sequential test and impact test as set out in the NPPF and supports the delivery of new local centres within the strategic housing allocations identified in the plan.

3.13 Policy SLE 2 goes on to confirm that an impact assessment is required for proposals over 2,000m^2 (gross) in Banbury and 350m^2 elsewhere in the District (except Banbury). The policy does not confirm the extent of Banbury in determining whether an impact assessment is required for sites located in Bodicote. Nevertheless, the Cherwell Retail Study (2012) which recommended these thresholds highlighted that this should be applied to the 'area around Banbury town centre' and confirmed that the lower threshold of 350m^2 is applied to other areas noting the vulnerability of Kidlington village centre, and other centres, all of which are located a considerable distance from Bodicote. As such, at best the wording is unclear as to when an impact assessment is required in locations such as Bodicote.

3.14 There are no relevant saved policies within the saved policies of the Cherwell Local Plan 1996. The DPDS React Report prepared in relation to the withdrawn application makes reference to saved Policy S29, this is not relevant to the application proposals as the proposals will not involve the loss of any existing village services noting that the application site has no such services on it. Further comment is provided on this matter in Section 8 of this assessment.

Policy Requirement Conclusions

3.15 As the site is located in an out-of-centre location and given the lack of clarity in the impact assessment threshold, there is a requirement to demonstrate accordance with the sequential and impact tests and for the application to be supported by a retail impact assessment.

4. SEQUENTIAL ASSESSMENT METHODOLOGY

4.1 As highlighted in the previous section, the proposed development is for a main town centre use in an out-of-centre location and therefore it is necessary to prepare a sequential assessment in respect of this. The following sets out the proposed methodology for the assessment.

The Application of the Sequential Test – Relevant Decisions and Case Law

4.2 Before moving on to consider the specific methodology for the sequential assessment, it is important to consider the significant and pertinent case law and Secretary of State decisions which provide guidance and clarification on how the sequential test should be applied in respect of the need to demonstrate flexibility, the consideration of availability, and the requirement to consider the disaggregation of a proposed development. A note considering these matters and providing a brief summary of relevant decisions is provided at Appendix 1.

4.3 Taking the decisions identified in Appendix 1 into account, whilst these provide useful guidance in terms of the application of the sequential test, it is clear that the matter of flexibility and suitability is primarily a matter of planning judgement for the local planning authority that should be considered in the context of the relevant circumstances relating to the development site and the development proposals.

4.4 In respect of the specific point on the need to consider disaggregation, the identified decisions clearly highlight that in determining whether this is required it is important that careful consideration is given to the specific circumstance of the development site and development proposal. However, what is clear is that there is no policy requirement to consider the disaggregation of schemes within the NPPF or PPG and this should only be considered where there are specific circumstances which require it.

4.5 In terms of availability, whether a site can be considered to be available, or available within a reasonable period, is a matter of planning judgement based upon the specifics of the proposed development and the complexities of the scheme.

Methodology

4.6 The following sets out the methodology and approach used in the application of the sequential test for the proposed development having regard to the requirements of the NPPF, Local Plan Part 1 Policy SLE 2 and the various case law and decisions referred to. The following matters are considered in turn;

- Locational Requirements and Area of Search;
- Identification of Sites;
- The Proposed Development – Site Requirements & Flexibility; and,
- Availability.

Locational Requirements and Area of Search

4.7 As already highlighted, the NPPF requires the consideration of 'suitability' through the sequential test. The consideration of whether or not a site is suitable relates, in part, to whether or not a sequentially preferable site would be able to meet and serve the same market as the application proposals. This will therefore influence the area of search for any sequential assessment. Put simply, if a site or location would fail to serve the same market as the application proposals/site then it cannot be considered suitable and therefore cannot be considered as a suitable and available sequentially preferable site through the sequential test. It is therefore necessary to consider the market that the proposed foodstore will serve.

4.8 As detailed in Section 8 of the report, given the scale of the store it will act as a main food shopping destination, as well as providing opportunities for top-up food shopping trips. Whilst the store is notably smaller than other main food shopping facilities in the local area, smaller foodstores have become increasingly popular in recent years following changes in the way people undertake convenience goods shopping trips. This has seen a decline in the popularity of once weekly large food shopping trips and a rise in customers choosing to undertake multiple smaller main food shopping trips, regularly to different stores/destinations

4.9 As set out in Section 8, taking into account the detailed assessment of local shopping provision and shopping patterns, as well as local geography, the primary catchment area for the proposed foodstore will cover roughly a five-minute drivetime to the north, and a ten-minute drivetime to the south. Given the lack of foodstore provision with the rural areas to the south (Zones 1 and 2), save for small convenience stores, the proposed foodstore will undoubtedly attract trade from much further afield to the south, with the ten-minute drivetime making up the majority of Zones 1 and 2. Given the presence of other foodstore provision within the central and northern areas of Banbury (Zones 3 and 4), which are more easily accessible to residents living there, it is expected that the catchment of the proposed foodstore would extend no further than the 5 minute drivetime to the north.

4.10 As such, the primary catchment area is identified covering Zones 1 and 2 of the Study Area which is entirely appropriate and supported by empirical evidence through the responses to the household survey as detailed in Section 8. As such, the proposed foodstore will principally serve the village of Bodicote, the rural areas and villages south of Banbury and, to a lesser degree, existing residential areas of south Banbury as well as the new development being delivered in the local area through urban extensions. Any site that would fail to serve the same catchment area will clearly not serve the same market as the application site and cannot be considered sequentially preferable.

4.11 Whilst there is no defined centres within the primary catchment area, the closest centre to it is Banbury town centre which is located around 2 miles to the north of the application site. As such, the area of search focuses solely on sites within and around Banbury town centre as the only defined centre in the local area.

Identification of Sites

4.12 Sites requiring further consideration have been identified following a review of the originally submitted Retail Statement, map-based searches, and a review of vacant and/or actively marketed units/sites within and around the town centre. Sites were considered which are within, on the edge of and around the defined 'Town Centre Shopping Area (Extended)' as defined by Policy Banbury 7 which, whilst not expressly stated, is considered to be the primary shopping area (PSA) for the purposes of the sequential test having regard to the definitions contained within the NPPF glossary (Annex 2). In considering edge-of-centre sites, these must be within 300m **and** well connected to the PSA. Any sites that are not well connected to, or over 300m from the PSA are considered out of centre for the purposes of the sequential test. When considering out-of-centre locations, for these to be sequentially preferable they must be accessible and well connected to the town centre.

The Proposed Development – Site Requirements and Flexibility

4.13 Case law and Secretary of State decisions have confirmed that there is no requirement to consider the disaggregation of any of the floorspace from the proposed development. As such, when considering suitable sites, they must be able to accommodate the whole of the proposed foodstore with associated car parking whilst allowing for an appropriate degree of flexibility.

4.14 Given this, the sequential site search is focused on those sites which could accommodate the proposed foodstore of 1,235m^2 floorspace with around 86 car parking spaces to serve the store. A development of this scale would need a site of around 0.71 hectares[1].

4.15 Having regard to the various case law and appeal/Secretary of State decisions and the scale of the proposed development, the sequential site search will consider sites which are capable of accommodating a development 20% larger and 20% smaller than that proposed noting that the application is submitted in outline and no end occupier has yet been contracted to the scheme. Car Parking would be provided on a pro-rata basis. As such, the sequential site search considers sites of accommodating a new foodstore of between 988m^2 and 1,482m^2 which would require a site of between 0.57 hectares and 0.85 hectares. This is a significant degree of flexibility.

4.16 In considering suitability, it is important to note that foodstores are carefully designed and planned to help guide shoppers around the store and create an easy and attractive shopping experience for customers, as well as assisting with stock replenishment. Given this, foodstores generally are built to very specific layouts to ensure appropriate aisle widths and lengths and to provide easy access for those with trollies. Therefore, in considering suitability, regard has been had to the ability to create a suitable and appropriate store layout.

4.17 In addition to this, only sites capable of accommodating the proposed floorspace on a single level can be considered suitable. Splitting the proposed foodstore, and/or sales area, is not suitable to

[1] This is smaller than the application site area as it excludes the proposed access road which would not necessarily be required on another site subject to access arrangements.

accommodate the proposed foodstore owing to the significant trading difficulties and challenges that multiple floor foodstores create. This includes difficulties creating an easily navigable 'retail circuit' around the store, the difficulties getting trollies between different levels and the difficulties with restocking shelves. Whilst some superstores do trade over multiple floors it is only very large superstores that typically split trading floors, and then only when they have a large comparison goods offer unrelated to the 'main food shop' which clearly is not the case for the proposed foodstore. Given the ease of access and ease of shopping is a key determining factor in where people choose to shop, clearly a layout that does not deliver an easily navigable and operable foodstore could not be considered suitable.

4.18 Comment on these matters are provided through the site assessments.

Availability

4.19 In considering whether a site is available, the sequential assessment considers this on a site-by-site basis taking into account whether the site is in active use, whether it is being actively marketed and whether planning permission exists on the site for alternative uses/redevelopment.

4.20 In considering whether sites will become available within a 'reasonable period', again this is considered on a site-by-site basis having regard to the fact that the application site is available for development now with it being vacant, free from any built development and with a proposed occupier identified. As such, the site could come forward and be trading within 18-24 months allowing for future reserved matters submission. Any site that would not become available for development within this time period, and would be trading within or around the same period cannot be considered to be available within a 'reasonable period'.

Conclusions

4.21 This methodology will ensure a robust and detailed sequential assessment is prepared that accords with all relevant guidance and takes into account further guidance provided by key case law and Secretary of State/appeal decisions on the application of the test.

5. SEQUENTIAL TEST

5.1 This section considers the proposed development against the requirements of the sequential test as set out at NPPF Paras. 86-88 and Local Plan Part 1 Policy SLE 2 based on the methodology set out at Section 4.

5.2 Having regard to the previous assessment, and our own site search exercise in accordance with the methodology set out at Section 4, the following sites have been identified as being worthy of further detailed consideration:

- Site 1 – The Spiceball site;
- Site 2 – Land at Bolton Road;
- Site 3 – Canalside area;
- Site 4 – Former Marks and Spencer store; and,
- Site 5 – Former BHS store (36-37 Castle Quay Shopping Centre).

5.3 Each of these sites are considered in turn with detailed assessments provided for each at Appendix 2.

Site 1 – The Spiceball site

5.4 The site relates to the area to the east of Spiceball Park Road which is currently under construction to deliver a new Lidl foodstore with associated car parking as part of the wider mixed use Castle Quay 2/Castle Quay Waterfront development. The foodstore being delivered will provide 2,942m^2 of gross floorspace with undercroft and deck level parking. As set out in the detailed assessment at Appendix 2, the site is not considered to be suitable or available to accommodate the proposed foodstore.

5.5 Given that the site is already under construction to deliver a foodstore, when considering suitability this must be considered against the development that is currently being delivered, rather than considering the potential for a wholly new development noting that the demolition of existing construction works and their replacement with something completely different would not be a viable or suitable option. Clearly given that the store being delivered is over double that required to accommodate the proposed foodstore it is too large to accommodate the proposed development and therefore the assessment considers opportunities to subdivide the floorspace to accommodate the proposed foodstore.

5.6 The ability to subdivide the store under construction is very challenging given its siting on a podium level, which means it only has a single retail frontage with the deck level car park, and the requirement to deliver a useable layout for the proposed foodstore. Sketch plans have been produced and included within the detailed assessment at Appendix 2 which illustrate how the unit being constructed cannot be subdivided in a manner that would be able to accommodate the proposed foodstore and ensure the remaining floorspace is useable and accessible for an alternative use. Clearly the creation of unlettable or unoccupied floorspace would not be a viable proposition.

5.7 In terms of availability, whilst the site is to be occupied by Lidl, and will therefore become unavailable upon occupation which is expected in early 2021, it is accepted that until such a time that the store is occupied, it may be considered to be available for retail uses, noting that generally the identity of the end occupier is not relevant through the application of the sequential test as confirmed in the Mansfield decision. However, clearly the site is not available to accommodate a scheme that is markedly different to the proposals currently being implemented and as such for the purposes of the sequential assessment and accommodating the proposed development, the site must be considered unavailable.

5.8 In summary, the site is not considered to be suitable or available for the proposed development. The site is currently under construction to deliver a foodstore considerably larger than the proposed development and there is no potential to subdivide the floorspace to accommodate the proposed development given the lack of frontage and servicing arrangements owing to the store being built on a podium.

Site 2 – Land at Bolton Road

5.9 This site is the Bolton Road Development Area identified by Local Plan Part 1 Policy Banbury 8 which is located within the Town Centre Shopping Area (Extended) and is therefore considered to be an in-centre site for the purposes of the sequential test. The site is bound by Castle Street to the north, North Bar Street to the west, existing retail units on Parson's Street to the south and Castle Quay shopping centre to the east. Bolton Road runs through the centre of the area. The site is currently occupied by a public car park, Gala Bingo, Land Tyre Service, some small scale commercial units, and Cornhill community centre.

5.10 Initial work was carried out in 2011 to produce a masterplan for the site in the form of an SPD and a draft was prepared but this was not progressed any further following some opposition. It is understood that no further work has been carried on the SPD to date. It is understood that work on this was indefinitely paused to focus on the delivery of development in other areas of the town centre. Nevertheless, Policy Banbury 8 seeks the comprehensive redevelopment of the area to include a mix of uses including; 200 dwellings and employment, retail (including small scale A1 and A3), hotel, leisure uses, and car parking.

5.11 In terms of suitability, based purely on site size, at 2ha the Bolton Road site is too large to accommodate the proposed development and as such, the proposal would either need to come forward as part of a larger comprehensive development as envisaged by Policy Banbury 8, or through piecemeal development of part of the site.

5.12 In terms of the potential for the site to come forward as part of a comprehensive development, clearly any such development will need to incorporate a mix of uses in order to be policy compliant and secure the aims of the policy. Delivering a foodstore of the scale proposed with associated car parking is unlikely to be delivered alongside those mix of uses or come forward in a coherent manner.

5.13 Dealing with the ability to subdivide the site and deliver the foodstore on a piecemeal basis, it is assumed that this could be done in a manner that would create a site suitable of accommodating the proposed foodstore layout. However, it is clear that a foodstore in this location would serve a markedly different market to the application site, particularly given its location on the northern edge of the town centre which would effectively require customers travelling from the primary catchment area to travel past two other foodstores to access the site which as highlighted in the shopping pattern analysis at Section 8, is unlikely to occur.

5.14 Turning to availability, the site is fully in use, save for a few small scale commercial units, all of which are far too small to accommodate the proposed foodstore and we have been unable to identify any evidence of any of the site being actively marketed for development. As such, it can be reasonably concluded that the site is not available to accommodate development.

5.15 However, it is noted that the existing surface car park is the only part of the site principally free from built development having been formerly occupied by a multi-storey car park that was demolished in September 2016 due to structural issues with the building. As such, it is worth considering the availability of this part of the site. It is understood that this car park is well used and provides important parking provision to serve the town centre, particularly following the loss of other car parks to the east of the town centre. The draft SPD for the site in 2011 suggested that this car park would need to be replaced as part of any development of the Bolton Road area and this need for replacement car parking was again highlighted within the 2016 Banbury Vision and Masterplan SPD.

5.16 As such, and noting that the site is not being actively marketed, even if the site could come forward on a piecemeal basis, the loss of this car park without replacement facilities being provided would clearly conflict with the Banbury Vision SPD and also significantly decrease car parking provision in the town centre, having a negative impact on the vitality and viability of the town centre by making it more difficult for customers to visit by car. Therefore, this part of the site cannot be considered available to accommodate the proposed development.

5.17 Overall, the site is not considered to be suitable or available for the proposed development. The piecemeal development of the site would comprise the wider delivery of the allocation whilst the only part of the site not accommodated by built form is in active use and would require the delivery of replacement car parking. In addition, the site's location to the north of the town centre will mean it would serve a markedly different market than the application site. Therefore the site is not considered to be a sequentially preferable site capable of accommodating the proposed development.

Site 3 – Land at Canalside

5.18 The site extends eastwards from the town centre and incorporates a large area west of Banbury Rail Station. The site contains a number of active uses including industrial and commercial units, Banbury rail station and Banbury United Football Club. The site is considered as an edge-of-centre site being located outside the primary shopping area and is identified as a major mixed use regeneration site by Local Plan Policy Banbury 1. Whilst a specific masterplan or SPD has not been prepared for the area to date, the Banbury Vision and Masterplan SPD sets out the key development framework for the site.

5.19 The site is a significant area of redevelopment that would need to be brought forward comprehensively in accordance with an overarching masterplan. It is significantly larger than the site required to accommodate the foodstore. The piecemeal development of the site could compromise the redevelopment of the wider site.

5.20 As identified in Policy Banbury 1, the northern part of the site has been designated as an area of search for an extension to the town centre however this seeks to deliver small units to attract small specialist leisure and niche retailers which combine to create a destination and specifically states that larger scale convenience floorspace will not be supported. As such, a development of this nature would not accord with the site's allocation and could prevent the delivery of the development of the wider town centre extension part of site. On this basis the site must be considered as unsuitable to accommodate the proposed foodstore.

5.21 The site is currently in active use split across multiple sites, uses and land ownerships. We have been unable to find any evidence of any parts of the wider site being actively marketed and whilst there are some industrial units that are vacant and being marketed for rent, these are small scale units providing less than 500m^2 of floorspace.

5.22 Within the northern area there are a wide range of active uses and multiple landownership which highlights that there are no available sites for development in this area. Whilst one site benefits from outline consent for residential development (18/00293/OUT), this site is of an insufficient size and shape to accommodate the proposed foodstore. In any case, it is coming forward for an alternative form of development.

5.23 In terms of the availability of the wider site, clearly for the comprehensive redevelopment to come forward this will require significant land assembly, likely to require compulsory purchase orders, and will take a number of years to come forward. Clearly it will not come forward and be available within an appropriate timescale to accommodate the proposed development. The site can therefore be considered as unavailable on this basis.

Site 4 – Former Marks and Spencer store

5.24 The site is located within the Castle Quay Shopping Centre and was formerly occupied by Marks and Spencer, until it closed in August 2020. Given its location within the primary shopping area, the site is considered as an 'in-centre' location.

5.25 Dealing first with the suitability of the site, clearly at 5,270m^2 the current unit is too large to accommodate the proposed foodstore. Nevertheless, it is important to consider if there is any ability to subdivide the unit to create a unit of an appropriate size to accommodate the proposed foodstore.

5.26 We understand that a Building Control application has been submitted for the subdivision of the unit into two retail units and a new pedestrian link to provide access between Castle Mall and the Quay (south) Mall (ref: 20/0455/FP). A planning application (ref: 20/01130/CDC) was recently approved for external elevation alterations the Bridge Street frontage. This application confirmed how the proposed floorspace would be split, with these plans provided in the detailed assessment at Appendix 2. The subdivision of the units will create two units of 2,949m^2 (Unit 1) and 1,613m^2 (Unit 2) split across multiple floors.

5.27 Both of the units to be created are too large to accommodate the proposed foodstore and would require floorspace to be split across multiple floors, something that is not attractive to foodstore operators given the difficulties it creates in navigating the store for customers, particularly for those using trollies.

5.28 Whilst the ground floor of proposed unit 1 on its own could be considered to be of a sufficient scale allowing for flexibility, this would result in vacant and unoccupied/inaccessible floorspace being created above which would clearly not be a viable solution to the reuse of the floorspace. In any case, the lack of any on-site parking would make it unsuitable to accommodate the proposed development (noting the need for customers to easily access their cars using a trolley when shopping at the store).

5.29 Furthermore, these units are considered to be unsuitable due to how they are serviced, which would not be suitable for the proposed use. The units are serviced from a shared roof area and lack any dedicated service yards. Whilst this may be appropriate for non-food units, which have less frequent deliveries, this is unlikely to be acceptable to support a dedicated foodstore on the site.

5.30 In terms of availability, Marks and Spencer previously occupied the floorspace however the unit closed in August 2020 and is now vacant. Whilst the floorspace does not appear to have been actively marketed yet, given the previous use ended recently it can be reasonably assumed that the unit is available.

5.31 As such, whilst the floorspace is considered to be available, it is clearly not suitable to accommodate the proposed foodstore.

Site 5 – Former BHS store (36-37 Castle Quay Shopping Centre).

5.32 The site is the former BHS store located within the Castle Quay Shopping Centre. Castle Quay Car Park (south) is located to the north west and Castle Quay Car Park (north) to the north. This unit is located within the primary shopping area.

5.33 The unit measures 3,816m^2 and therefore is far too large to accommodate the proposed development. However, the unit has recently been subdivided to create a mixed use building providing small scale retail and food and drink floorspace split across a number of units and food/market hall area. A copy of the floor plan is provided at the end of this assessment. None of the units created would be of a sufficient scale to accommodate the proposed development and therefore the unit must be discounted as being unsuitable to accommodate the proposed foodstore.

5.34 A change of use application to a sui generis/mixed use (at the ground floor only); comprising use classes A1, A3, A4, A5, D1 and D2 was approved in September 2019 (19/01478/CDC) to create an independent food, drink and offer known as Lock29. Lock29 opened in August 2020 and therefore the unit is no longer available to accommodate the proposed foodstore.

Sequential Assessment Conclusions

5.35 A detailed sequential assessment has been prepared and a number of sites assessed located within, on the edge of and close to Banbury town centre. The sites have been assessed and no site is considered to be suitable **and** available to accommodate the proposed foodstore, even when disaggregated from the rest of the local centre scheme, therefore satisfying the sequential test as set out at NPPF para. 86 and Local Plan Policy SLE 2.

6. RETAIL IMPACT ASSESSMENT METHODOLOGY

6.1 This section sets out the methodology used in assessing the retail impact of the proposed development noting the guidance contained within the PPG in respect of such assessments. This provides details on the following matters in turn:

- Price Base and Design Year;
- Study Area;
- Population and Expenditure Data;
- Household Survey;
- Market Share and Main / Top-up convenience shopping trip splits;
- Benchmark Turnover;
- Turnover to be assessed;
- Inflow Assumptions;
- Trade Diversion; and,
- Committed and Planned Investment.

6.2 At the outset it should be noted that this study is based upon new up-to-date base data derived from various sources as set out in the following sub-sections. This decision to source new base data was taken given the age of the most recent Cherwell Retail Study (2012) and noting the very large zones covered by the Study Area which do not allow for any finer grain analysis of local shopping patterns around Bodicote/Banbury.

Price Base and Design Year

6.3 The price base for the assessment is 2018 to accord with the new expenditure data that has been sourced from Experian Micromarketer G3 data.

6.4 The Design Year (i.e. the year at which impact is considered) for the impact assessment will be 2023 taking into account guidance within the PPG which requires impact to be tested at the point where the retail development reaches a 'mature' trading pattern which is conventionally taken as the second full calendar year of trading after opening. Given that the application is submitted in outline, it is expected that the 2^{nd} full calendar year after opening would be 2023 at the earliest.

Study Area

6.5 The Study Area for the purposes of this assessment is four zones which we have identified based upon postcode sectors. A plan showing the location of these zones is provided at Appendix 3. These zones are as follows:

- **Zone 1 – Rural South East:** this covers the rural areas and villages to the south and east of Banbury taking into the villages of Adderbury, Twyford and Kings Sutton.
- **Zone 2 – Bodicote and Rural South West:** this includes the village of Bodicote and part of the southern areas of Banbury, as well as taking in some of the less populated rural areas along the A381.
- **Zone 3 – Banbury East:** this zone covers the central and eastern areas of Banbury extending as far as the M40.
- **Zone 4 – Banbury North and West:** this zone principally includes the residential areas to the north and west of Banbury.

6.6 These zones have been defined to provide a finer grain analysis of local shopping patterns and generally all fall within Zone 3 identified within the Cherwell Retail Study 2012.

Population and Expenditure Data

6.7 Population data has been taken on a zonal basis from Experian Micromarketer G3 data (2018 base).

6.8 Base per capita data (at 2018) is taken from Experian Micromarketer G3 data. This base data has then been updated using the most up-to-date expenditure growth rates and projections, including making an allowance for special forms of trading, as provided in the Experian Retail Planner Briefing Note 18 October 2020).

6.9 Micromarketer G3 data does not take into account population growth associated with planned residential developments. Planned developments are clearly relevant in the local area with planned/partly completed urban extensions at Longford Park and Wykham Farm which will significantly increase the local resident population around the application site. However, the assessment does not build this population growth, or the expenditure growth associated with this, into the assessment given the difficulties associated with this and the need to avoid double counting when considering population growth. As such, the assessment is very much a worst case scenario as it assumes that the population and expenditure growth associated with these planned developments is not fully taken into account.

Household Survey

6.10 A household survey was commissioned by the applicant and carried out by NEMS Market Research in July 2020. This survey was carried out across the four zones that made up the study area and surveyed a total of 400 people/households. The household survey principally sought to obtain respondents convenience goods shopping patterns as well as customer behaviour and views of the stores and centres they visit. In addition to this, a more general question aimed to get a broad understanding of comparison goods shopping patterns was also included.

6.11 Given the timing of the household survey, carried out during the COVID-19 pandemic, and shortly after the lockdown in the area ended, the questions and interviews were worded to ensure that typical pre-lockdown shopping patterns and behaviours were identified noting that shopping patterns will have undoubtedly changed significantly during the lockdown period due to the restrictions imposed and need for social distancing.

Market Share and Main / Top-up convenience shopping trip splits

6.12 The household survey asked four specific questions on respondents convenience goods shopping habits asking two questions regarding main food shopping trips and two questions regarding smaller top-up food shopping trips in order to get a more accurate picture of where people shop. For the purposes of calculating market share for main food and top-up food shopping trips we have combined the responses for each question relating to main food or top-up food trips and excluded those that responded don't know, don't do that type of shopping and internet/online to give a total market share for main food and top-up food shopping trips. This approach is used to take into account that many people will shop at more than one destination for each type of food shopping trip.

6.13 Those that stated they use internet/online shopping for their food trip are excluded from the market share as it is not possible to determine where their internet order will actually have been derived from, noting that many retailers use 'bricks and mortar' stores to serve online shopping purchases thereby creating a demand for retail floorspace and turnover for those retail stores. Instead an allowance for expenditure on internet shopping, excluding turnover directed to retail stores, has been made having regard to the guidance set out within the Experian Retail Planner Briefing Note 18 (October 2020).

6.14 In order to calculate estimated turnover of these destinations, there is a requirement to understand the split of household expenditure between main food and top-up food shopping trips. In order to calculate this, the household survey asked respondents how often they undertook each type of shopping trip and how much they spent during that type of shopping trip. This raw data was used to calculate the split in main food and top-up food shopping expenditure across the study area as set out in Table 1 below.

Table 1 - Main Food and Top-up Food Expenditure split

Response	Main Food	Top-up Food
Average trips per week[2]	1.187	1.821

[2] Number of trips divided by response using the assumed split of responses as follows:

- Everyday = 7 trips per week (p/w)
- 5 - 6 times a week – 5.5 trips p/w
- 3 - 4 times a week – 3.5 trips p/w
- Twice a week – 2.0 trips p/w
- Once a week – 1.0 trips p/w
- Once every two weeks – 0.5 trips p/w
- Once a month – 0.25 trips p/w

Response	Main Food	Top-up Food
Average expenditure per trip[3]	£81.36	£15.71
Average weekly household expenditure [4]	£96.59	£28.61
Total Average Annual Household expenditure[5]	£5,022.90	£1,487.57
Split of Expenditure[6]	77.2%	22.8%

6.15 As can be seen, based on the household survey around 77% of expenditure is spent on main food shopping trips. This is lower than estimated through the Council's previous Retail Study (2012) which assumed an 80/20 split however it is understood that figure was purely an estimate and not based on any empirical evidence.

6.16 Given this evidence, we have assumed a 75/25 split of convenience expenditure between main food and top-up food shopping trips when estimating the convenience goods turnover of existing facilities.

Benchmark Turnover

6.17 In order to understand the current trading performance of existing stores within the local area, we have relied upon their gross/net floorspace figures and multiplied these by the average sales densities for the named store as derived from Global Data's Convenience and Comparison Goods Sales Densities of Major Grocers 2019, or where the retailer is not included in this list; Retail Rankings. Net floorspace has been taken from the Cherwell Retail Study (2012) where available. Where the store is not included we have calculated net floorspace based on application documents (where available) and for smaller stores; floorspace published by the Valuation Office Agency (VOA) data, with this being converted to a net floorspace figure.

Turnover to be Assessed

6.18 At present there is no confirmed end occupier for the proposed foodstore with a number of foodstores operating from stores of this size, many of which are not currently represented in the local area. In the absence of a confirmed operator at this stage the turnover to be assessed through the impact assessment has been calculated based upon a 70% gross to net floorspace ratio, typical for foodstores of this scale, and an assumption that at least 90% of the net floorspace would be used for the display and sale of convenience goods.

6.19 This net floorspace has then been multiplied by an average sales density (£ per m^2). This average sales density for both convenience and comparison goods has been taken as the average for major grocers as identified by Global Data's Convenience and Comparison Goods Sales Densities of Major Grocers 2019 at 2018 prices, but excluding the 'big 4' retailers[7] all of which have significantly higher sales densities. As such, the average has been calculated based on the remaining 'major grocers'

[3] Total expenditure divided by responses calculated using mid-point for each expenditure range (e.g. £10-£19 = £15, £20-£29 = £25, etc.)
[4] Average trips per week multiplied by average expenditure per trip.
[5] Average expenditure per week multiplied by 52 weeks.
[6] Sub-total of each type of shopping trip divided by total
[7] ASDA, Tesco, Sainsbury's and Morrisons.

included within the Global Data database[8] which still provides a high sales density and one that far exceeds the sales densities achieved by a number of potential occupiers. As such, the use of this sales density represents a worst-case scenario.

Inflow Assumptions

6.20 Given that the Study Area has been tightly defined and focused around the application site/proposals, it is inevitable that the household survey will not pick up some trade that is currently being drawn to some existing retail destinations, particularly to the north within Banbury, noting that these destinations, either as a result of their location of offer, will draw trade from further afield. As such, an allowance has been made for inflow, where appropriate, having regard to the location and offer of these destinations and Cherwell Retail Study findings.

Trade Diversion

6.21 Trade diversion has been calculated based upon the guiding principle of like affects like noting the scale of the proposed store and its ability to serve main food shopping uses. Trade diversion patterns are presented on a study area basis.

Committed and Planned Investment

6.22 The following retail commitments have been identified and built into the assessment:

- Wykham Park Farm, South of Salt Way - 14/01932/OUT;
- Longford Park – 05/10337/OUT; and,
- Castle Quay 2 development - 16/02366/OUT.

6.23 As the Wykham Park Farm development is in its early phases, and details of any future retail uses on the site unconfirmed, this has not been built into the cumulative impact assessment as it can reasonably be assumed that the trade associated with any retail provision within the development will principally serve the development itself, rather than drawing trade from existing facilities.

6.24 This is not the case for the Longford Park development which is largely complete and therefore the household survey would have picked up shopping patterns associated with the population living within the development therefore the delivery of any subsequent retail floorspace within the development would draw trade from existing facilities. As such the Longford Park development is built into the impact assessment as a commitment.

6.25 Whilst there are some other proposed extensions to the town centre, included as allocations in the Cherwell Local Plan Part 1, these have not been progressed and are therefore not considered as planned investment for the purposes of the impact test (save for the Castle Quay 2 development).

[8] Aldi, Co-op, Iceland, Lidl, M&S Food and Waitrose

In this regard, the Planning Practice Guidance and Cribbs Causeway Secretary of State decision[9] provide helpful guidance in determining what should be considered as planned investment.

6.26 Whilst the site has an allocation for development is a first important consideration, as highlighted at paragraph 663 of the Cribbs Causeway inspector's report in considering whether a scheme should be treated as planned investment;

> *"The second key consideration is the progress made towards securing the investment, in other words the progress in terms of the planning of the investment up to the point of commitment."*

6.27 Clearly in the case of the allocations within Banbury town centre, very limited progress has been made at this stage towards securing the investment noting that the sites have not progressed beyond the initial allocation with no planning application submitted to date. In addition a developer, or development partner has not been identified, nor has a scheme been prepared and it is likely that significant land assembly will be required to deliver any scheme. In comparison, the scheme considered as planned investment through the Cribbs Causeway scheme had an allocation for development supported by evidence base, had outline planning permission subject to a s106 agreement and the council had undertaken land assembly for large parts of the site and had resolved in principle to make a CPO if required.

Conclusion

6.28 This methodology ensures that the impact assessment prepared will be a robust and worst case assessment of impact based upon up-to-date base data.

[9] APP/P0119/V/17/3170627

7. HEALTH CHECK

7.1 Before moving on to consider the likely impact of the proposed development, it is necessary to assess the current vitality and viability of Banbury town centre to understand how the centre may be impacted by any trade diversion as a result of the proposed development. As such, the following provides 'health check' of the town centre drawing upon a range of data sources taking into account the guidance on preparing such assessment as set out in the PPG. Given the COVID-19 lockdown and restrictions on retail openings a site visit to update unit count and occupancy data was not carried out.

7.2 Banbury town centre is one of two main town centres in Cherwell District providing an important retail and service hub attracting people from a broad catchment of towns and villages. The designated town centre shopping area reaches as far north as Cherwell Drive, south to Calthorpe Street, Horsefair Road to the west and Cherwell Street to the east.

Accessibility

7.3 The town centre is well served by public transport with both rail and bus links. There is a bus station located in the town centre providing regular bus services around Banbury and beyond including services to Brackely, Oxford, Chipping Norton, Stratford-upon-Avon and Daventry. The train station is located on the edge of the town centre and provides services to Birmingham, London, Reading, Manchester, Stratford stopping at local smaller towns and villages such as Kings Sutton, Heyford, Tackley and Bicester.

7.4 There are good pedestrian and cycling links to the town centre along the canal whilst the High Street, Church Lane and Parson's Street in the town centre benefit from being pedestrianised. Banbury has good accessibility by car from the local and national road network due to its proximity to Junction 11 of the M40 connecting Birmingham to London. The town centre has a large amount of surface car parks in and on the edge of the town centre e.g. Bolton Road, Market Place Carpark. There is a large multi-storey adjacent to Castle Quay shopping centre.

State of Town Centre Environmental Quality

7.5 The environmental quality of the town centre is considered to be good. The layout of the town centre is a typical of a historical market town, with the winding and some narrow streets leading away from the market area. The majority of the town centre is within Banbury Conservation Area. The buildings in the town centre are generally in good repair with some vacant units requiring some upgrading.

7.6 The high street benefits from pedestrianisation, planters/hanging baskets and historic style signage. Cafes and restaurants along the high street provide outdoor seating providing active frontages. Other parts of the town centre are also pedestrianised such as Parson Street and Church Lane, they are narrower than the high street but retain their historical features.

7.7 In the centre of the town there is an outdoor market which takes place every Thursday and Saturday within the Market Place. In addition to this, there is a farmer's market on the first Friday of every month offering a range of produce such as meat, fruit and vegetables, pies, cakes and plants. This adds to the historical market town nature and provides a vibrant attraction for people to visit.

7.8 Castle Quay shopping centre is located close to the pedestrianised High Street and Parson's Street fitting in well with the surroundings. Adjoining the opposite side is the canal, museum, arts centre, car parking and Spiceball development site. The development makes use of pedestrianised across the canal making the centre a pleasant place for pedestrians to access. The centre has a range of high street retailers. Inside the centre, the council's Retail Study describes the centre as clean, easy to navigate and well maintained.

7.9 The site adjacent to Castle Quay is under construction to deliver a mixed-use retail and leisure project to provide a new food store, hotel, cinema, restaurants and altered pedestrian access across the canal to Castle Quay shopping centre. The site is located in the town centre and will improve the public realm, pedestrian accessibility to the town centre and railway station and increase the overall attractiveness of the town centre for visitors of all ages.

7.10 Bolton Road is in the north west of the town centre, to the north of Parson's Street, south of Castle Street and Castle Quay shopping centre to the east. The site includes car parks, a bingo hall and provides a service area for the units on Parson's Street and is not in keeping with other attractive parts of the town centre. Parts of the site fall within the conservation area. A draft Supplementary Planning Document was prepared by the council in 2011 to show the development opportunity to improve the site for further town centre uses including a hotel, public square and leisure facility. This has not been progressed further.

7.11 Overall, in terms of the environmental quality of the town centre is good supported by attractive historical buildings within a Conservation Area. Existing characteristics and redevelopment projects help attract visitors and tourists to the town centre.

Diversity of Uses

7.12 The most up-to-date GOAD Category Report is based on a survey of the town centre uses in May 2019 and been relied upon as the most recent up-to-date audit given the lockdown associated with COVID-19.

7.13 Table 2 sets out the diversity of uses (by unit type) and national UK averages based on the Experian GOAD data as of May 2019.

Table 2 - Diversity of Uses in Banbury Town Centre (May 2019)

Use	Number of Units	Proportion of Units	National Average
Comparison	144	27.9%	29.0%
Convenience	41	7.9%	9.2%
Retail	87	16.8%	15.2%
Leisure	108	20.9%	24.6%

Use	Number of Units	Proportion of Units	National Average
Finance	66	12.8%	9.7%
Vacant	71	13.7%	12.0%
Total	**517**	**100%**	**100%**

7.14 As can be seen in Table 2, the town centre has a strong mix of uses with some above the national average. Comparison units are the largest proportion of units in the town centre with the proportion being similar to the national average. The number of convenience units is below the national average, this is the same for leisure, however the development around the Spiceball site will improve the number of leisure facilities and provide a new Lidl foodstore. Vacancy rates are slightly higher than the national average.

7.15 However, the proportion of units is only one factor when considering the makeup of the town centre. It is also necessary to consider the amount of floorspace dedicated to each type of use. Table 3 sets out the mix of floorspace as of May 2019 in Banbury town centre.

7.16 Table 3 - Diversity of Floorspace in Banbury town centre (May 2019)

Use	Floorspace (m^2)	Proportion of Floorspace	National Average
Comparison	46,172	41.6%	33.4%
Convenience	11,223	10.1%	15.3%
Retail	8,250	7.4%	7.1%
Leisure	20,504	18.5%	25.7%
Finance	10,721	9.7%	7.3%
Vacant	14,158	12.8%	10.7%
Total	**111,027**	**100%**	**100%**

7.17 As highlighted in Table 3, the proportion of comparison goods floorspace is significantly higher than the national average, despite the similar number of units suggesting that the town centre has a higher average comparison goods unit size, and a number of larger comparison goods stores that is typically seen across the country. Convenience and leisure are slightly lower and again Banbury will benefit from future development proposals that will boost both of these figures. Vacancy figures are slightly higher than the national average. It is worth noting that at the time of the GOAD survey in May 2019, the former BHS store within Castle Quay Shopping Centre covering two floors was vacant representing 2,220m^2, however, this re-opened in August 2020 as Lock29. This would increase the overall leisure floorspace, bringing the figure closer to the national average. However, these figures do assume the occupation of the large Marks and Spencer store which became vacant in August 2020 and as such the vacancy floorspace figures may actually be higher now.

Change in Uses Over Time

7.18 Whilst it is important to consider current use/floorspace data, it is also necessary to consider how this has changed over time and how this compares to what has been seen nationally. In order to consider this, we have relied upon data provided within previous Retail Studies dating back to 2006. The data is summarised in Table 4.

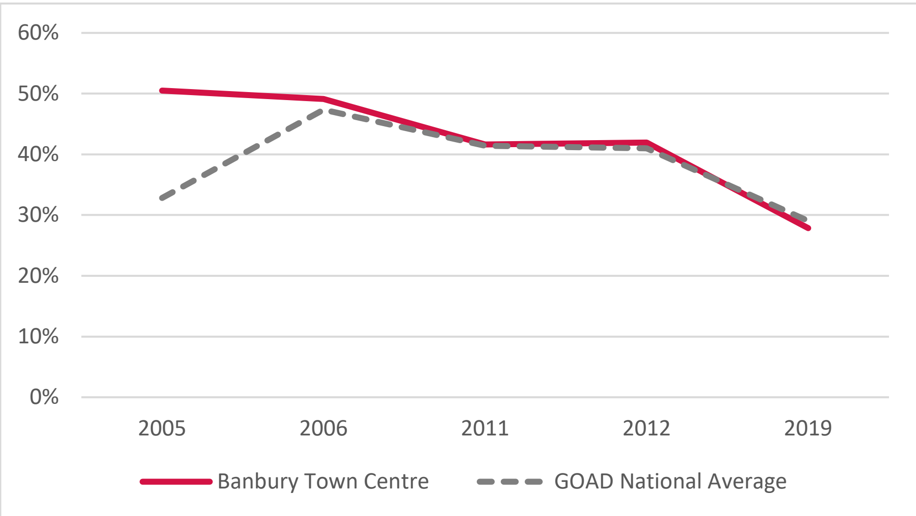
Table 4 - Town Centre Change in Uses 2005 – 2019

<table>
<tr><th rowspan="2">Use</th><th>2005</th><th>2006</th><th>2011</th><th colspan="2">2012</th><th colspan="2">2019</th></tr>
<tr><th>%</th><th>%</th><th>%</th><th>Units</th><th>%</th><th>Units</th><th>%</th></tr>
<tr><td>Comparison</td><td>50.5%</td><td>49.1%</td><td>41.6%</td><td>172</td><td>42.0%</td><td>144</td><td>27.9%</td></tr>
<tr><td>Convenience</td><td>7.5%</td><td>8.0%</td><td>6.4%</td><td>32</td><td>7.8%</td><td>41</td><td>7.9%</td></tr>
<tr><td>Retail</td><td rowspan="3">29.5%</td><td rowspan="3">31.4%</td><td rowspan="3">32.9%</td><td>45</td><td>11.0%</td><td>87</td><td>16.8%</td></tr>
<tr><td>Leisure</td><td>59</td><td>14.4%</td><td>108</td><td>20.9%</td></tr>
<tr><td>Finance</td><td>42</td><td>10.2%</td><td>66</td><td>12.8%</td></tr>
<tr><td>Vacant</td><td>10.5%</td><td>9.5%</td><td>16.8%</td><td>50</td><td>12.2%</td><td>71</td><td>13.7%</td></tr>
<tr><td>Miscellaneous/ Other</td><td>2.0%</td><td>2.0%</td><td>0.0%</td><td>10</td><td>2.4%</td><td>0</td><td>0.0%</td></tr>
</table>

7.19 As can be seen there has been a large reduction in the number of comparison units between 2012 – 2019, however, this is a common theme that has occurred across the country owing to changes in shopping patterns and retail business models. There have been some minor fluctuations of the proportion of convenience units but they have stayed within a similar range. Other key principle changes have been the significant increase in retail and leisure units. There has been a slight increase in the number of financial and business services and Banbury remains above the UK national average of 10.7% for financial and business services.

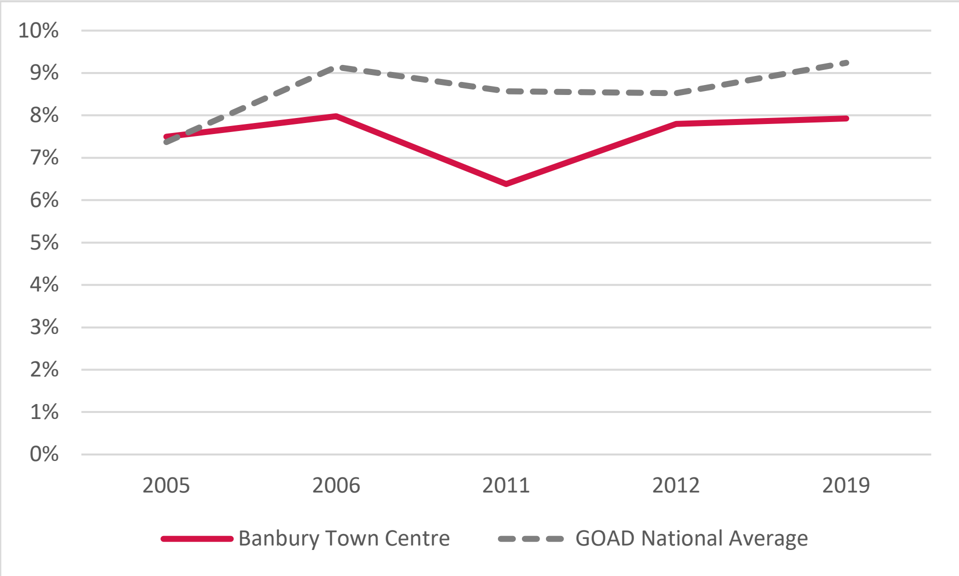
7.20 The unit changes for comparison and convenience between 2005 and 2012 against the GOAD national average figure at that time is displayed in Figure 1 & 2.

Figure 1 - Comparison Change in Units in Banbury Town Centre (2005 – 2019)



7.21 As can be seen in Figure 1, the change in comparison units for Banbury town centre has followed the national average trend. The trend nationally has seen a reduction in the number of comparison units in the town centre, this is partially due to change in shopping habits and shifting to online purchases.

Figure 2 - Change in Convenience Units in Banbury Town Centre (2005 - 2019)



7.22 Figure 2 highlights that between 2005 and 2019, convenience units in Banbury town centre have stayed at a similar quantity, excluding 2011 where there was a notable fall, however this picked back up again the following reporting year. It is unclear what caused this fall. The amount of convenience stores in Banbury has been below the national average from 2006 onwards but is not materially different from national trends.

7.23 It is necessary to consider how the amount of floorspace has changed within the town centre over time. Data from the same retail studies has been used however figures for 2005 and 2006 are not available.

Table 5 - Change in Town Centre Floorspace 2011 - 2019

Use	2011		2012		2019	
	Floorspace (m²)	%	Floorspace (m²)	%	Floorspace (m²)	%
Comparison	50,641	60.0%	49,239	60.7%	46,172	41.6%
Convenience	3,623	4.3%	4,199	5.2%	11,223	10.1%
Retail	17,419	20.6%	3,446	4.2%	8,250	7.4%
Leisure			8,547	10.5%	20,504	18.5%
Finance			7,264	9.0%	10,721	9.7%
Vacant	12,756	15.1%	6,921	8.5%	14,158	12.8%
Miscellaneous	0	0.0%	1,496	1.8%	0	0.0%
Total	**84,439**	**100%**	**81,112**	**100%**	**111,027**	**100%**

7.24 Floorspace data in Table 5 shows that the figures for comparison has reduced in line with the reduction of units. However, despite there being only being a slight increase in the percentage of convenience units between 2012 and 2019 the floorspace for convenience has doubled during these times. For the quantity of leisure units there was a sharp increase between 2012 and 2019 however, when looking at floorspace figures this has only increased by a difference of 8%.

Proportion of Vacant Street Level Property

7.25 As part of the audit of units, we have reviewed the proportion of vacant properties in Banbury town centre to allow comparison with the national average. The AMR data available from the council was limited only showing rates for 2017/18 and 2016/17 and the methodology of how the rates were calculated was unclear. Therefore the data taken from previous retail studies has been relied upon and is displayed in Table 6.

Table 6 - Vacancy Rate Changes 2005 -2019 GOAD Data

Year	Banbury Town Centre	National Average
2005	10.50%	7.99%
2006	9.48%	10.08%
2011	16.78%	13.64%
2012	12.20%	13.77%
2019	13.73%	12.02%

7.26 As can be seen, the vacancy rates have increased since 2005, this is replicates what has been seen nationally. Vacancy rates in 2011 were slightly higher than the national average however data from the following year shows that they were significantly reduced. The GOAD vacancy unit plan in Appendix 4 shows that vacant units are evenly distributed across the town centre with no real concentration of vacancies.

Commercial Rent

7.27 Using letting agent details from Property Link and Rightmove for retail units within the town centre, the average market rent was calculated by summing the total available floorspace figure and price per annum figure to devise an average. The average market rent for units in the town centre of Banbury is around £20 per sq.ft per annum.

Customers' Views and Behaviour

7.28 A household survey was commissioned to support this Retail Assessment and the views and shopping patterns of local residents and consumers were sought. Details of customer behaviour in terms of shopping patterns is provided within the Impact Assessment.

7.29 As part of this household survey, respondents were asked what they did and did not like about Banbury town centre. In terms of what respondents like about Banbury town centre, the responses received are set out within Table 7 with the most popular response was that there is nothing/very little however this response would account for individuals who did not fully answer the question. The main attraction/like for respondents was the good range of non-food shops and independent shops, attractive environment of the town centre and the accessibility (i.e. close to home).

Table 7 - Table showing what respondents like about Banbury Town Centre

What Respondents Like About Banbury Town Centre	% of Responses
Nothing / very little	39.91%
Good retail offer	20.09%
Close to home	11.71%
Attractive environment / nice place	8.75%
Compact/ Traditional/ Quiet	9.78%
Good pubs, cafés or restaurants	2.12%
Easy to park	1.58%
Habit / familiarity	1.20%
Other	4.86%

7.30 In terms of what respondents dislike about Banbury town centre, as shown in Table 8, the most popular answer was again that there was 'nothing in particular'. The main concern raised by respondents is being able to park and the price of parking in the town centre followed by the retail offer.

Table 8 - What respondents dislike about Banbury town centre

What Respondents Dislike About Banbury Town Centre	% of Responses
Nothing in particular	17.52%
Parking too expensive / difficulty to get parked	14.59%
Poor choice / range of non-food shops	14.46%
Too many vacant units	11.76%
Poor variety of shops generally	9.73%
Unpleasant atmosphere / environment	8.19%
Poor choice / range of boutiques / independent shops	7.84%
Lack of quality retailers / too many charity shops	4.02%
Poor choice / range of food shops	3.87%
Poor choice / range of cafés / restaurants / public houses	2.70%
Poor number of events / entertainment	1.89%
Don't feel safe	1.64%
Other	1.79%

Retailer Representation and Intentions to Change Representation

7.31 Banbury has a variety of national, independent retailers complemented by Banbury Market which operates 2 days a week (Thursday and Saturday), alongside a monthly farmers market. The Market Place and High Street provide services such as banks, travel agents and hair and beauty salons. The Cherwell Centre and Malthouse Walk provide Banbury town centre with some discount retailers such as Wilkos and Poundland. Adjacent to the Cherwell Centre, on the edge of town centre, is a Matalan store.

7.32 Within the west part of town centre are other discount retail stores such as a TK Maxx, Iceland and Farmfoods, located on Calthorpe Street off the High Street. The units on the corner of the South Bar Street and the High Street are mainly takeaways, estate agents and comparison good stores. Parson's Street and Church Lane are mainly independent smaller units with Parson's Street extending on to North Bar Street on the edge of centre which has bars, restaurants and cafes providing a focus on the evening economy.

7.33 Castle Quay Shopping Centre performs an anchor function attracting people from the surrounding towns and villages. The centre is well integrated with the main High Street and Market Place. The centre includes mostly national retailers (Boots, Clarks, Debenhams. H&M and JD Sports). However it is noted that the Marks and Spencer and BHS have both closed their stores in the Castle Quay Centre. Replacing the former BHS store is a flexible street food style food and drink space, pop-up cinema, bar, educational space and outdoor seating known as 'Lock29'. The venue opened in August 2020 and accommodates a variety of independent food and drink retailers.

7.34 Lock29 will link the leisure-led redevelopment of the former Spiceball site and development known as Castle Quay Waterfront. The development is expected to deliver a hotel and leisure uses including a cinema, restaurant units and a multi-storey car park. In the south part of the site there is a proposed Lidl food store. The site will create a strong sense of place, with a mix of uses that will maximise the sites potential building on existing leisure features such as a museum and arts centre.

7.35 It is worth noting that as of 2017 Banbury town centre has been rated in the top 200 retail venues in the UK by Javelin Group Venue Score[10]. A score in the top 200 highlights Banbury as a desirable market and location for new stores to locate.

7.36 Banbury town centre is one of 300 Business Improvement Districts across the country (BID). The BID launched in 2017 and runs for five years, the BID follows the town centre boundary. Using money generated from businesses within the area, town centre projects and priorities can be delivered. Some examples of the priorities in the Banbury BID Business Plan are: improving the appearance of units, attracting new businesses and visitors and providing additional car parking. A BID is beneficial for a town centre when attracting new businesses.

Pedestrian Flows

7.37 The main footfall is along the pedestrianised areas of Parson's Street and High Street leading to the Market Place and Castle Quay Centre although no footfall count data is available for these areas. The edge of town centre along South Bar Street is likely to be quieter due to less public transport options and the types of retail offer e.g. night-time economy that are located there. The Council's retail study reported that this west end of Parson's Street and High Street had little footfall.

[10] https://www.javelingroup.com/wp-content/uploads/2017/01/Javelin_Group_Executive_Summary_VENUESCORE_2017-1.pdf

Perception of Safety and Occurrence of Crime

7.38 The household survey did not highlight any concerns in respect of safety or occurrence of crime within Banbury town centre. In terms of the actual occurrence of crime, Table 9 summarises crimes reported over the past 12 months (June 2019 – June 2020). This data has been taken from the Police.UK website and has focused specifically reported crimes within the Banbury town centre.

Table 9 - Reported crimes between June 2020 - June 2019 in Banbury Town Centre

Crime type	Total Crimes Report	Proportion of Crimes
Violence and Sexual Offences	158	27%
Shoplifting	116	20%
Anti-Social Behaviour	89	15%
Other Theft	56	10%
Criminal Damage and Arson	29	5%
Public Order	27	5%
Vehicle Crime	12	2%
Theft from the Person	11	2%
Burglary	9	2%
Drugs	10	2%
Possession of Weapons	3	1%
Bicycle Theft	5	1%
Robbery	1	0%
Other	62	11%
Total	**588**	**100%**

7.39 This data highlights that a total of 588 crimes were reported over the last 12 month, around an average of 49 crimes per month. Violence and sexual offences and shoplifting were the most common crimes reported, it is unsurprising that shoplifting was one of the most common due to the size and offer of the town centre with a high concentration of retail use. Overall, the perception and occurrence of crime in the town centre is not a factor that is adversely affecting the vitality and viability of the town centre.

Conclusions

7.40 In summary it is considered that the town centre remains vital and viable serving an important role as a local retail and service destination for Banbury and the surrounding rural area. There are a mix of convenience and comparison retailers on both a national and independent scale. The town centre remains an attractive place to visit and increasing investment within the town centre will continue to attract more and new visitors.

8. IMPACT ASSESSMENT

8.1 This section sets out the trade diversion and subsequent impact of the proposed development taking into account its proposed function and location. The following matters are considered in turn:

- Policy Position
- Existing Provision;
- Trade Draw;
- Trade Diversion;
- Impact on Planned Investment;
- Impact on Town Centre Investment and Vitality and Viability; and,
- Impact Conclusions.

Policy Position

8.2 Before moving on to consider the impact of the proposal on the defined town centre, it is important to fully consider what impact must be tested against. This is relevant as the React Report prepared by DPDS in respect of the previous withdrawn application appears to afford some policy protection to existing and proposed out of centre facilities having regard to the Local Plan Part 1 Policies Banbury 4 and Banbury 17 and 1996 Local Plan Policy S29. We deal with each of the policies in turn.

Policies Banbury 4 and Banbury 17

8.3 Dealing first with the up-to-date Local Plan Part 1 Policies Banbury 4 and Banbury 17. The DPDS report commented on this and appears to suggest that these planned developments benefit from some policy protection stating that:

> *4.34 The RS has not considered the impact on the local centres proposed on the Longford Park and the South of Salt Way housing developments. We consider that the proposal would pose a significant risk to the implementation of these centres. After many years' domination by the large out of town supermarkets, there has been a well-publicised shift in shopping patterns and market interest has turned to small local stores. There has been considerable market interest in the right sites, but retailers are selective and will look for suitable catchment populations and prominent locations.*
>
> *4.37 The proposals have policy status in the Local Plan and have planning permission. We consider that this application is likely to undermine these planned developments. Local centres like these are important for a sense of place, for social cohesion as a place to meet neighbours and for sustainability. The proposed development is not in convenient walking distance of these developments and would be likely to lead greater car use if they do not go ahead.'*

8.4 At the outset, it is acknowledged that these two sites have policy support for the delivery of local facilities, however they benefit from no policy protection based upon the site specific policy wording, or the relevant impact policy set out in Local Plan Part 1 Policy SLE 2, or the NPPF.

8.5 Dealing first with the site specific policy wording, Banbury Policy 4 seeks to deliver; *'Community facilities – local centre*.' whilst Policy Banbury 17 seeks to deliver; *'Community –on-site provision including community and/or local retail'* uses. Neither policy actually requires the delivery of retail uses on the site, nor does it expressly support or require the delivery of a foodstore (of any scale) to be delivered as part of any potential local centre.

8.6 Critically neither policy seeks to afford any protection to the planned uses on the site from competition. Turning to how this is considered in Local Plan Part 1 Policy SLE 2, this merely states that; *'the Council will support the provision of new local centres containing a small number of shops of a limited size within the strategic housing allocations on strategic sites set out in this Local Plan.'* Clearly this policy provides no direct protection from the impact of other proposals for these 'local centres'.

8.7 As such, it is necessary to consider what locations actually benefit from policy protection through the application of the impact test. To do this, it is necessary to understand what is a defined 'town centre' as identified in the local retail hierarchy and also what specific impact assessment requirements are set out in the Local Plan. This is set out in Cherwell Local Plan Policy SLE 2.

8.8 Policy SLE 2 confirms the retail hierarchy is limited to the town centres of Banbury and Bicester and the village centre of Kidlington. The policy clearly does not consider these local centres part of the retail hierarchy or state that they will be protected. Given that the retail hierarchy is clearly established within Policy SLE 2, it is necessary to confirm how the impact test will be applied locally. In this regard Policy SLE 2 confirms that the impact test will be considered against; "the factors in the NPPF".

8.9 Paragraph 89 of the NPPF states that when assessing applications for retail development outside of town centres, which are not in accordance with an up-to-date plan and which exceeds the appropriate threshold; an impact assessment will be required which includes an assessment of:

> *'a) the impact of the proposal on existing, committed and planned public and private investment* ***in a centre or centres*** *in the catchment area of the proposal; and*
>
> *b) the impact of the proposal on* ***town centre*** *vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).'* ***[our emphasis]***

8.10 NPPF Paragraph 90 goes on to confirm that where the proposal is likely to have a significant adverse impact on one or more of these considerations, it should be refused.

8.11 Clearly from the reading of paragraph 89, the test is on 'centres' or 'town centres' and investment within them. To understand what is meant by this, the NPPF annex confirms that town centres are defined as:

> '***Area defined on the local authority's policies map****, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres* ***apply to city centres, town centres, district centres and local centres*** *but exclude small parades of shops of purely neighbourhood significance****. Unless they are identified as centres in the development plan****, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.'* ***[our emphasis]***

8.12 Given this, it is clear that the focus of the test, and the only areas that benefit from policy protection are 'town centres' or 'centres' identified in the development plan (i.e. the Cherwell Local Plans). As already highlighted by Policy SLE 2, there are only 3 'centres' within the district, namely Banbury, Bicester and Kidlington.

8.13 As such, for planned investments (such as those 'local centres' within urban extensions) to benefit from any policy protection, they must be located within one of these three defined town centre as identified in the Local Plan and on the Local Plan proposals map. Clearly this is not the case for the planned local centres and as such they can only be treated as being in out-of-centre locations with no policy protection. If the intention of either Policy SLE 2, or Policies Banbury 4 or Banbury 17 was to designate the local centres as defined centres for the purposes of the impact test, then it would have done so. Mere policy support for a potential use through a site specific policy allocation does not afford that use any protection through the impact test. Any alternative view would clearly be in conflict with the policies set out in the Local Plan and the NPPF.

1996 Local Plan Policy SL 29

8.14 DPDS also appear to suggest that out of centre local stores benefit from policy protection through Policy S29 stating in their response that:

> *'2.9... Policy S29 seeks to resist development which would lead to the loss of local services including village shops.'*
>
> *'6.8... an analysis of the likely trade draw indicates that there should be considerable concern for the continued operation of the Spar in Bodicote. It is in our view almost inevitable that this shop would lose a significant amount of trade. Small independent shops are not resilient to losses to and there is a significant loss of closure, contrary to policy S29 on the 1996 Local Plan.'*

8.15 It is considered that this view is a misapplication of Policy S29. The policy is clearly drafted and intended to deal with proposals which will directly result in the loss of local services through their change of use or redevelopment. The Policy wording and explanatory text states that:

> *'S29 Proposals that will involve the loss of existing village services which serve the basic needs of the local community will not normally be permitted.*
>
> *4.72 The District Council recognises the importance of village services, particularly the local shop and pub, to the local community and will seek to resist the loss of such facilities whenever possible. However, it is also recognised that it will be difficult to resist the loss of such facilities when they are proven to be no longer financially viable in the long term.'*

8.16 The wording of the policy is therefore quite specific noting that it relates to "proposals that will involve the loss of existing village services". Clearly a proposal which is located away from an existing village service would not 'involve the loss of' such a facility. This is further highlighted by the explanatory text which refers to the financial viability of existing services, and the ability to "resist their loss". Clearly if the intention of the policy were to protect existing facilities from competition, the wording of the policy would have expressly stated this.

8.17 Whilst the wording of the policy is clear, to provide further certainty regarding the application of Policy S29, it is necessary to consider the aim of the policy. In this respect it is clear that the aim of the policy is to ensure local communities have access to facilities and services in order to meet the basic needs. As such, it would be entirely illogical for the policy to actively seek to restrict the delivery of new services/facilities by imposing a restriction on competition or affording policy protection for existing facilities where a new proposal would draw trade from it. This would actively restrict the delivery of new facilities or services to serve a local community noting that for a new store to divert trade away from an incumbent store, it would need to be able to serve the same local community.

8.18 Indeed, in the case of the application proposals, the proposals would significantly enhance local retail provision in the local area helping to meet the needs of the local community. Even if it were to result in the indirect loss of an existing store, something that is unlikely as demonstrated later in this section, the local community would still have better access to local facilities.

8.19 To understand this further we have sought to identify proposals within Cherwell where Policy S29 has been considered by the local authority. Having reviewed previous committee reports and appeal decisions it appears that this policy has only been considered against its true purpose; where application/appeal proposals would result in the direct loss of an existing service through the redevelopment or alternative use of an existing service. We have been unable to identify any occasions where Policy S29 has been applied to afford policy protection from indirect impacts on existing services.

8.20 Clearly Policy S29 is not relevant to the application proposals if read in its proper context and having regard to both the wording and aims of the policy.

8.21 As such, and having regard to the current policy position, there is only a requirement to consider the impact on defined town centres and existing/planned investment within them as identified in Local Plan Part 1 Policy SLE 2. The following sub-sections deal with these matters.

8.22 Nevertheless, the assessment does model the survey derived turnover and expected trade diversion from these smaller stores so that the impact upon them is calculated in Table 9 at Appendix 5.

8.23 In this regard, it is noted that the DPDS React Report to the previously submitted application raised concerns regarding the impact on existing Spar store at Bodicote. As set out later in this subsection, trade diversion from this existing store will be limited noting its very limited offer and the role it plays in serving very small scale top-up shopping needs for the immediate surrounding residential area, which it will continue to do so even after the proposed store is operational. In addition, the Spar store includes a Post Office counter which will undoubtedly be a key draw for a number of visitors to the store who also use the opportunity to purchase convenience goods. Clearly the absence of Post Office facilities in the proposed store will mean that the expenditure generated from visits to the Spar's post office will not be diverted to the proposed store.

8.24 As highlighted in Table 9 at Appendix 5, having regard to the Spar turnover and market share, the proposed store would divert around £0.1million of trade from the Spar store which equates to a solus impact on the store of around 9.2%. However this must be considered alongside the current trading performance of the store which, as illustrated in Table 6 at Appendix 9, is performing well above benchmark trading levels. As such, even following this level of trade diversion, the incumbent store will still be trading well above its benchmark trading position (at around 166% of its benchmark turnover) and as such the Spar store will continue to be a viable store that is resilient to any new competition.

Existing Provision and Shopping Patterns

8.25 In terms of existing foodstore provision in and around Banbury, this is principally focused on the five main foodstores of Sainsbury's, Morrisons, Waitrose, Tesco Extra and Aldi which are complemented by the smaller foodstores of Marks & Spencer and The Food Warehouse by Iceland. These stores are supported by smaller scale top-up convenience stores within Banbury and in the surrounding villages.

8.26 Details of the existing provision, their scale and trading performance is set out in Table 6 of Appendix 5 with the main foodstore provision being summarised in Table 10 for ease of reference:

Table 10 – Benchmark and Current Trading Performance of Main Foodstores in and around Banbury

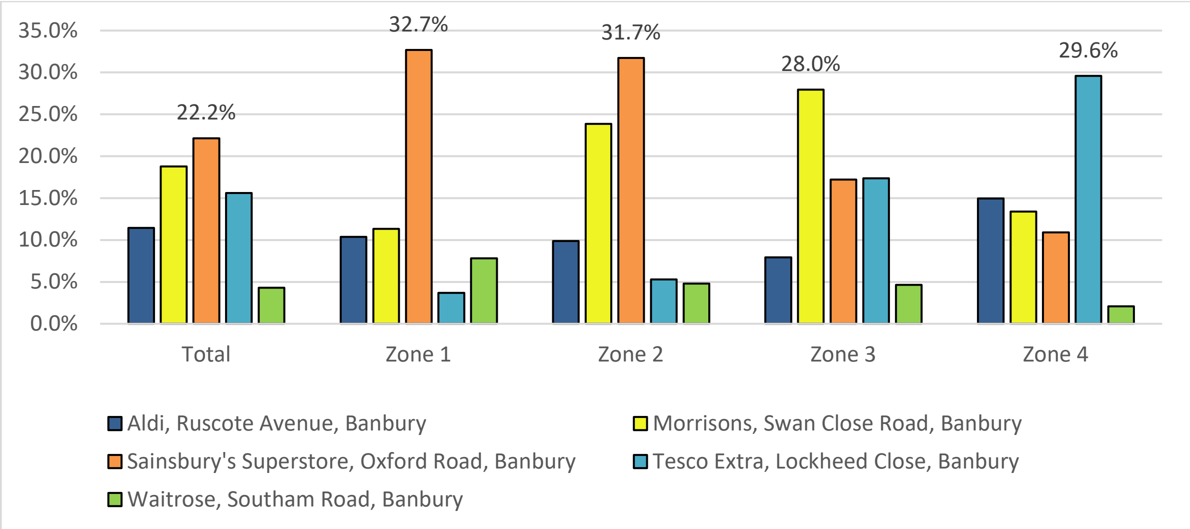
Store	Net conv floorspace (m^2)	Benchmark conv turnover (£m)	Survey Total conv turnover (£m)	Under / over trading (£m)
Morrisons, Swan Close Road, Banbury	2,408	29.13	32.72	+3.60
Sainsbury's Superstore, Oxford Road	3,110	35.13	38.63	+3.50
Tesco Extra, Lockheed Close, Banbury	3,642	47.24	29.55	-17.69

Store	Net conv floorspace (m^2)	Benchmark conv turnover (£m)	Survey Total conv turnover (£m)	Under / over trading (£m)
M&S, Gateway Retail Park, Banbury	938	9.48	6.26	-3.22
Waitrose, Southam Road	1,888	22.98	7.84	-15.14
Aldi, Ruscote Avenue, Banbury	555	5.73	19.96	+14.23
The Food Warehouse, Banbury Cross	668	5.01	1.19	-3.82

8.27 All of these foodstores are located in out of centre locations. The most popular[11] store in the town is the Sainsbury's store on Oxford Road which retains around 22% of the convenience goods turnover in the Study Area. This is followed closely by the Morrisons store on Swan Close Road and the Tesco Extra store at Lockheed Close adjacent to Banbury Cross Retail Park.

8.28 Figure 3, sets out the market share of the main foodstores in Banbury by zone as derived from data presented at Table 4f of Appendix 5 in order to provide a true understanding of existing shopping patterns in the study area.

Figure 3 - Convenience Goods Market Share to Main Foodstores in Banbury[12]



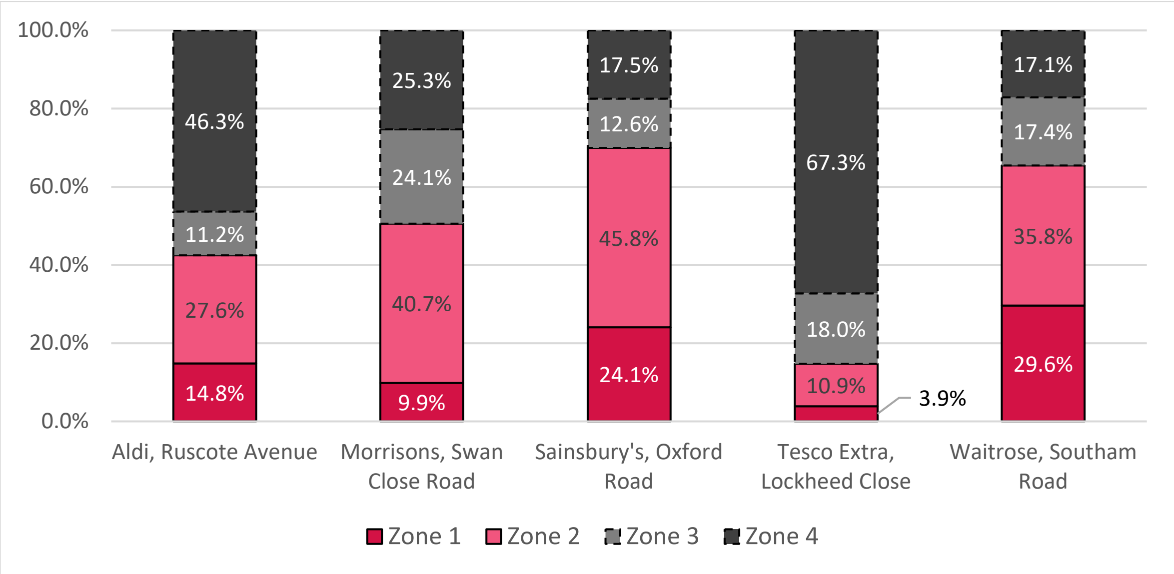
8.29 As can be seen in Figure 2, the popularity of the main foodstores varies significantly across the study area and between zones. This is unsurprising noting that customers generally are unlikely to travel a significant distance to undertake a convenience goods shopping trip, and, as a general rule are unlikely to travel past several other foodstores to visit a more distant foodstore. This is illustrated in Figure 2 which highlights that the stores retain a higher market share from those zones that they are within or closest/most accessible to. The only store that retains a reasonable proportion of trade from across the study area is the existing Aldi store at Ruscote Avenue which, despite its limited scale, draws trade from across the study area. This is undoubtedly due to the

[11] based on household survey results plus an appropriate allowance for inflow
[12] See Table 4f at Appendix 5.

specific 'discount foodstore' offer of the Aldi store and the fact that there are no other existing discount foodstores in the local area suggesting that customers are travelling further to undertake some convenience goods shopping trips in order to benefit from the specific offer of that store.

8.30 In terms of the primary catchment area of the application proposals, the most popular store by far is the Sainsbury's store which retains around 33% and 32% of the Zone 1 and Zone 2 convenience expenditure respectively. This is unsurprising as this is the closest main food shopping facility to the majority of the residential areas within these zones. The Morrisons is the next most popular store for shopping trips from the primary catchment area although much of this is being drawn from Zone 2 (23.8%) rather than Zone where trade draw is significantly lower (11.3%). Limited trade is drawn from the primary catchment area to other more distant stores save for the Aldi store (10.4% and 9.9% respectively) which is undoubtedly attracting some trade due to its specific offer as explained in the preceding paragraph.

Figure 4 - Source of Convenience Expenditure of Main Foodstores by Zone[13]



8.31 To understand this matter further, Figure 3 sets out the proportion of each main foodstores total turnover expenditure based upon where that trade is drawn from. This data is presented to give a full assessment of where the store's draw their turnover from within the study area as each zone have different levels of total available expenditure.

8.32 As can be seen, this data largely mirrors the market share information with the stores generally drawing the higher proportion of their trade from the zones that they are best connected to/most accessible from. The Sainsbury's store generates around 70% of its survey derived turnover from Zones 1 and 2 whilst the Morrisons store generates around 50% of its survey derived turnover from these zones. The Waitrose store appears to be the only store that draws trade from zones where it

[13] See Table 4e at Appendix 5.

is less well connected to, with around 65% of its survey derived turnover coming from Zones 1 and 2. However, these figures should be treated with some caution noting the very low turnover and market share identified for the Waitrose store through the household survey and noting the limited market share it actually attracts from these zones which, as set out in Table 4f at Appendix 5, amounts to just 5.8% of the available expenditure from Zones 1 and 2.

8.33 Unsurprisingly, the majority of these foodstores trade is generated through main food shopping trips based on the household survey results as set out in Table 11. These range from 88.1% of turnover being generated by main food trips for Sainsbury's and as high as 94.6% for the Tesco Extra store.

Table 11 - Proportion of Survey Derived Turnover split by main-food and top-up food shopping trips

Store	Main-food trips (2020)		Top-up food trips (2020)	
	Expenditure (£m)	Proportion	Expenditure (£m)	Proportion
Aldi, Ruscote Avenue	15.31	88.2%	2.04	11.8%
Morrisons, Swan Close Road	26.27	92.3%	2.18	7.7%
Sainsbury's, Oxford Road	29.61	88.1%	3.99	11.9%
Tesco Extra, Lockheed Close	22.36	94.6%	1.28	5.4%
Waitrose, Southam Road	5.85	89.6%	0.68	10.4%

8.34 In terms of other foodstore provision in the local area, this is provided by smaller scale foodstores, such as The Food Warehouse by Iceland and Marks & Spencer located in Banbury and small convenience stores located within Banbury, Bodicote and the surrounding rural villages.

8.35 In terms of those smaller stores that serve the primary catchment areas (Zones 1 and 2) this is principally restricted to top-up food shopping trips to small scale convenience stores including Co-op stores in Deddington, Kings Sutton, Bloxham and Banbury[14]. Some trade is drawn from outside the study area from zones 1 and 2 with this being drawn to larger stores at Bicester, Oxford and Chipping Norton.

8.36 Table 12 provides a summary of the convenience goods market share for Zones 1 and 2 as derived from Table 4f at Appendix 5. As can be seen in this table, convenience goods trade is drawn to a number of the smaller convenience stores with the greatest level of trade retention being to the Co-op stores in Deddington, Kings Sutton and Cherwell Heights which, despite their limited scale retain about 5% of either Zone 1 or Zone 2's market share. Nevertheless, and as already highlighted the main foodstores located within Banbury, particularly the Sainsbury's and Morrisons stores, draw the majority of trade from these two zones.

Table 12 - Total Convenience Goods Market Share for Primary Catchment Area

Retail Destination	Zone 1 Market Share (%)	Zone 2 Market Share (%)
Zone 1		
Co-op, Market Place, Deddington	5.1%	0%

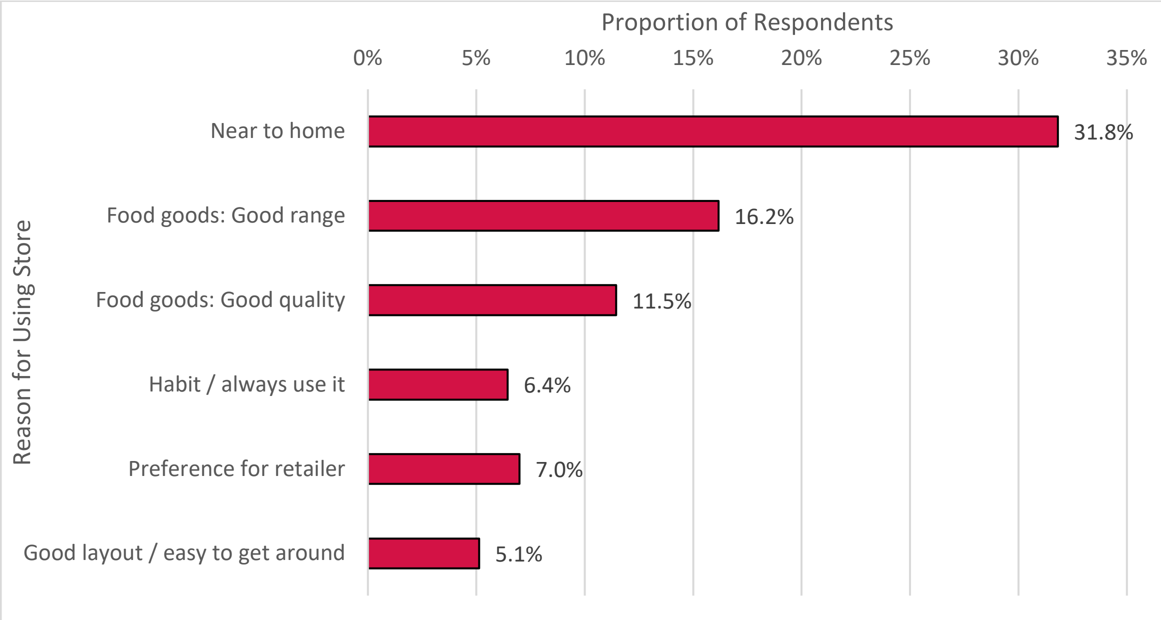
[14] Cherwell Heights and Queensway

Retail Destination	Zone 1 Market Share (%)	Zone 2 Market Share (%)
Co-op, Richmond Street, Kings Sutton	4.9%	0%
Adderbury Stores, High Street, Adderbury	1.5%	0%
Deddington	1.8%	0%
Kings Sutton	1.1%	0%
Zone 1 Sub-Total	**14.4%**	**0%**
Zone 2		
Co-op, Chatsworth Drive, Cherwell Heights	0.6%	5.4%
Co-op, High Street, Bloxham	0.7%	2.5%
Co-op, Queensway Shopping Centre, Banbury	0.0%	2.2%
Sainsbury's Superstore, Oxford Road, Banbury	32.7%	31.7%
Spar, (Euro Garages), Oxford Road, Bodicote	0%	0.2%
Spar, Molyneux Drive, Bodicote	1.6%	1.7%
Wykham Park Farm, Banbury	0.2%	2.7%
Zone 2 Sub-Total	**35.8%**	**46.4%**
Zone 3		
Banbury Town Centre Stores	0.7%	2.3%
M&S, Gateway Retail Park, Banbury	1.0%	2.9%
Morrisons, Swan Close Road, Banbury	11.3%	23.8%
Zone 3 Sub-Total	**13.0%**	**29.0%**
Zone 4		
Aldi, Ruscote Avenue, Banbury	10.4%	9.9%
Iceland, Banbury Cross Retail Park, Banbury	0.4%	0.3%
Tesco Extra, Lockheed Close, Banbury	3.7%	5.3%
Waitrose, Southam Road, Banbury	7.8%	4.8%
Banbury Cross Retail Park	0%	0.4%
Zone 4 Sub-Total	**22.3%**	**20.7%**
Outside Study Area		
Chipping Norton	4.6%	0.9%
Bicester	0.7%	2.3%
Coventry	1.6%	0%
Brackley	2.9%	0%
Oxford	3.4%	0%
Other	1.1%	0.7%
Outside Study Area Sub-Total	**14.3%**	**3.9%**

8.37 Table 12 also highlights that a significant amount of trade is drawn outside the Study Area from Zone 1, with around 14% of all trade being drawn to destinations in Chipping Norton, Oxford, Brackley and further afield.

8.38 Whilst proximity and ease of access is undoubtedly a key reason for the Morrisons and Sainsbury's store being the most popular stores for those living in Zones 1 and 2, the household survey commissioned specifically asked those that undertook their main food shopping in why they chose that store.

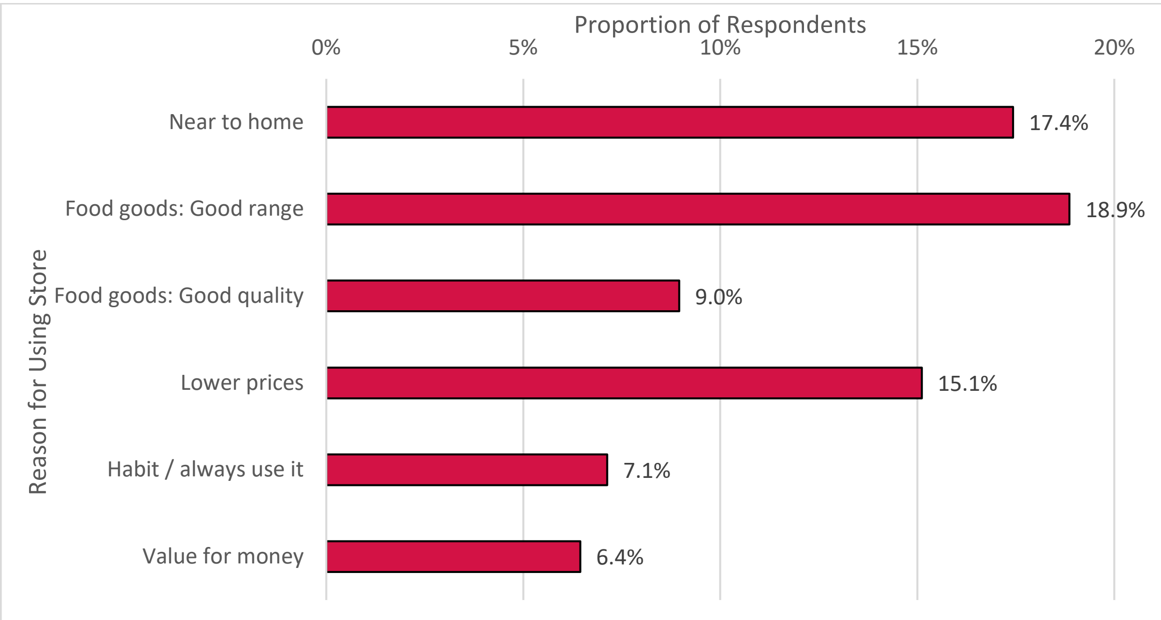
Figure 5 – Sainsbury's customers reason for using store for main food shopping



8.39 As can be seen in Figure 4, the most popular reason for customers choosing to shop at the Sainsbury's store (across the Study Area) is that the store is near to their home. This is followed by quality and range of food goods as the most popular responses.

8.40 As set out in Figure 5, the proximity to people's homes is also a key reason for people choosing to shop at the Morrisons store, along with the range of food and pricing.

Figure 6 – Morrisons customer reasons for using store for main food shopping



Trade Draw

8.41 In considering where trade will be drawn from, there are a number of factors to consider including the offer of the proposed store, the location of the site in relation to any potential customer base, and the existing retail provision/shopping patterns in the local area.

8.42 Dealing first with the offer of the proposed store, as already identified, the proposals will deliver a foodstore of around 1,235m^2. Given the scale of the store it will act as a main food shopping destination, as well as providing opportunities for top-up food shopping trips.

8.43 Although the store is notably smaller than other main food shopping facilities in the local area, smaller foodstores have become increasingly popular in recent years following changes in the way people undertake convenience goods shopping trips, with the popularity of once weekly large food shopping trips declining and a rise in customers choosing to undertake multiple smaller main food shopping trips, sometimes to different stores/destinations[15]. As noted in the Experian Retail Planner Briefing Note 18, there is an increasing popularity amongst consumers for shopping locally and frequently. There are numerous factors for this change in shopping patterns over recent years which include the rise in popularity of the discount foodstores, increased consumer awareness of food waste including both the environmental and financial implications of this, and the growth in popularity of online food shopping/deliveries. This change in shopping patterns has seen the increasing popularity of the discount foodstores and smaller foodstores with the main foodstore retailers all significantly scaling back any plans for larger superstores, instead either focusing on their existing portfolio of stores or looking at building much smaller format stores.

8.44 The preference for shopping frequently is also highlighted through the household survey responses as discussed in Section 6 which highlights that on average, respondents were undertaking around 1.2 main food shopping trips per week, and 1.8 top-up food shopping trips a week. Clearly the fact that people are, on average, undertaking around 3 convenience goods trips per week highlights a preference for more frequent and regular trips in the local area.

8.45 The relationship/accessibility of the proposed foodstore to the customer base and the existing shopping provision are interlinked when it comes to considering the areas that the application proposals will principally serve. Generally, location and ease of accessibility are key determinative factors for customers choosing where to undertake a convenience goods shopping trip with customers generally unwilling to drive past a number of foodstores in favour of travelling to a more distant store. This is clearly the case within and around Banbury and is highlighted within the previous sub-section.

8.46 The household survey found that customers generally shopped at those stores which were most accessible to their place of residence. However, given the large rural hinterland around Banbury, and the distance to other larger urban areas, the foodstores within the town undoubtedly draw

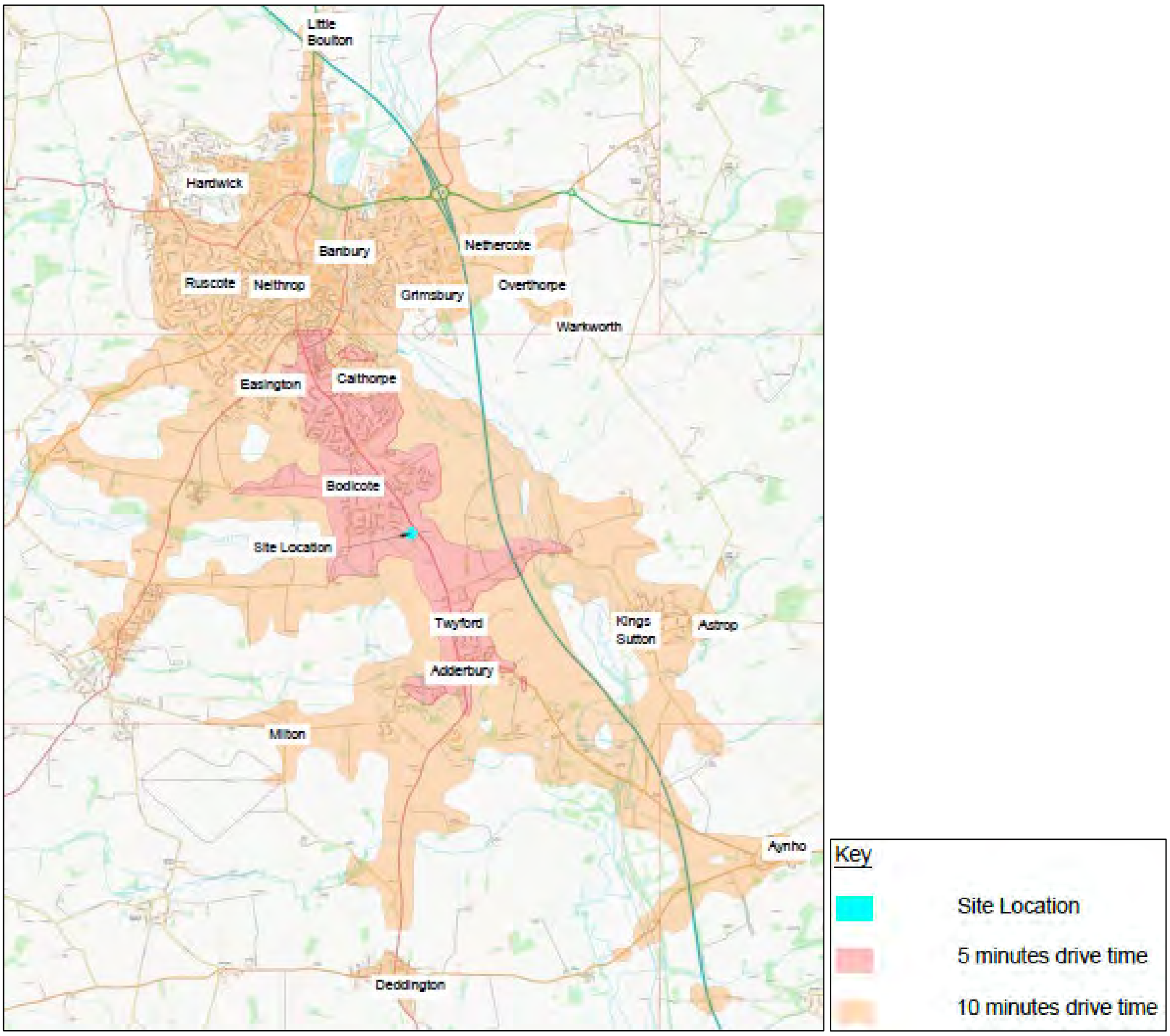
[15] As set out in Mintel Retail Rankings

trade from some distance away in order to serve the rural areas. This is highlighted by the high proportion of expenditure retained by the Sainsbury's and Morrisons stores from Zones 1 and 2 of the Study Area despite these areas extending some distance from the actual stores. However, given the local geography less trade is drawn from Zones 3 and 4 to these stores despite them being, at least in terms of distance, closer to these stores than much of Zones 1 and 2. This is due to the fact that there are several other foodstores located closer to and more easily accessed from Zones 3 and 4 than the Morrisons store and Sainsbury's store.

8.47 Given this, trade draw to the proposed foodstore, and the foodstores primary catchment area will ultimately be affected by the same consideration. In order to explore this matter further, we have prepared a drivetime plan from the application site based on Saturday peak hours to understand the driving distances within the urban area and the wider rural hinterland. This does not necessarily take into account specific local queuing and traffic delays around the town centre however it has been prepared based on the latest DfT guidance document[16]. A copy of this plan is provided at Appendix 6 and reproduced as Figure 6 for ease of reference.

[16] Journey Time Statistics: Notes and Definitions

Figure 7 - Drivetime plan from Application Site



8.48 As can be seen, the five-minute drivetime from the application site covers Bodicote, the southern edges of Banbury and the villages of Twyford and Adderbury to the south. The ten-minute drivetime extends to the main villages/rural settlements south of Banbury within Zones 1 and 2 and extends to also cover most of the urban area of Banbury, save for the north western area around Hardwick.

8.49 Given the lack of foodstore provision with the rural areas to the south (Zones 1 and 2) other than small convenience stores, the proposed foodstore will undoubtedly attract trade from the 10 minute drivetime to the south, which make up the majority of Zones 1 and 2 as per existing shopping patterns. Given the presence of other foodstore provision within the central and northern areas of Banbury (Zones 3 and 4), which are more easily accessible to residents living there, it is expected that the catchment of the proposed foodstore would extend no further than the 5 minute drivetime to the north.

8.50 Such an approach to the identification of a primary catchment area is entirely appropriate and supported by the responses to the household survey which clearly show that foodstores located to the south of the town centre, are significantly less frequently used by those living in Zones 3 and

4. In addition to this, the household survey asked respondents how long it usually takes to travel to their main food shopping store. For those that shopped at the Sainsbury's store around a ¼ travelled over 10 minutes to get to the store, with 5% of all respondents travelling for 16 to 30 minutes to get to the store. As such, taking into account the smaller scale offer and attraction of the proposed store, and the fact that the proposed foodstore would be the first foodstore those travelling from the south would reach, a primary catchment area of around 10 minutes to the rural hinterland is entirely appropriate.

8.51 As such, the proposed foodstore will principally serve the village of Bodicote, the rural areas and villages south of Banbury and, to a lesser degree, existing residential areas of south Banbury as well as the new development being delivered in the local area through urban extensions.

Trade Diversion

8.52 The estimated convenience goods trade diversion is set out at Table 9 of Appendix 5. The trade diversion patterns have been estimated based on the guiding principle of 'like affects like' taking into account; the function/offer of the proposed foodstore, existing provision, existing turnover of stores and current shopping patterns in the study area. Given that the majority of the proposed foodstore's turnover will be drawn from main food shopping trips, including those smaller main food shopping trips, the store will principally draw trade from existing stores which serve a similar function.

8.53 In the case of the proposed development, as already highlighted in this section of the report, the principal main food shopping facilities within and serving the primary catchment area, are the out-of-centre Sainsbury's and Morrisons store. These stores retain around 52% of the total convenience goods expenditure generated in the primary catchment area (Zones 1 and 2) with this being split between the Sainsbury's (32%) and Morrisons (19.6%). The closest store to the application site is the Sainsbury's located approximately 1.4 miles north from the application site and also located immediately off the A4260. This is followed by Morrisons located approximately 2 miles away.

8.54 Alongside these two stores, there are other large main food shopping facilities which currently draw a more limited amount of trade from the primary catchment area, these are Aldi Ruscote Avenue (10%), Waitrose (5.8%) and Tesco Extra (4.8%). These stores are located 3.3 miles, 2.7 miles and 3.0 miles to the north of the application site respectively. These are then complemented by the specialist or smaller foodstores of The Food Warehouse by Iceland at Banbury Cross Retail Park and Marks & Spencer at Banbury Gateway however these draw limited trade from the primary catchment area (0.3% and 2.2% respectively), undoubtedly due to their smaller offer and their distance from the primary catchment area.

8.55 It is also necessary to consider how smaller stores currently trade and the market share they attract noting that proposed foodstore will also provide opportunities for top-up food shopping trips as the other main foodstores do and noting the location of the proposed store on a key route into Banbury which means it will undoubtedly attract some pass-by trade. In this regard, and unsurprisingly, the current trade draw patterns are much more diffuse with trade being drawn to a wide range of stores/locations.

8.56 Nevertheless, smaller stores that do retain a reasonable level of market share include a number of Co-op stores located in Deddington, Kings Sutton, Cherwell Heights and Bloxham along with the Spar at Molyneux Dive and Wykham Park Farm with all of these retaining over 1% of the market share from the primary catchment area.

8.57 Some convenience goods trade is drawn to locations outside the Study area, including destinations in Bicester, Brackley and Chipping Norton. Whilst this will be partly down to customers other shopping or commuting habits, undoubtedly some of this trade will also be lost from the southern areas of Zones 1 and 2 where customers are not willing to travel further into Banbury to visit a convenience store, instead choosing to travel to stores on the edges of other towns as their most easily accessible foodstore.

8.58 In terms of the limited comparison goods turnover of the proposed store, comparison goods expenditure generated from foodstores is ancillary to the main function of a foodstore with comparison goods purchases being made at the same time as a convenience goods visit, rather than the comparison goods offer acting as a destination in its own right. As such, the vast majority of the comparison goods turnover will be diverted from existing foodstores where the convenience goods trade is being drawn from.

8.59 Table 9 at Appendix 5 sets out the detailed trade diversion patterns expected, Table 13 below summarises the main expected convenience goods trade diversion to the proposed foodstore.

Table 13 - Convenience goods trade diversion as a proportion of proposed turnover

Retail Destination	Trade Diversion (%)
Zone 1	
Other small convenience stores	2%
Zone 2	
Co-op, Chatsworth Drive, Banbury	1%
Sainsbury's, Oxford Road, Banbury	36%
Spar, Molyneux Drive, Bodicote	1.5%
Longford Farm (commitment)	2%
Other	2.5%
Zone 3	
Lidl, Spiceball site (commitment)	4%
Banbury Town Centre stores	3%
Morrisons, Swan Close Road, Banbury	26%
M&S, Banbury Gateway	4%
Zone 4	
Aldi, Ruscote Avenue, Banbury	4%
Tesco Extra, Lockheed Close, Banbury	4%
Waitrose Southam Road, Banbury	5%
Outside Study Area	
Other	5%

8.60 As shown in Table 13, a significant proportion of the foodstore's turnover increase will be diverted from the existing out-of-centre **Sainsbury's store on Oxford Road**, with 36% of the convenience goods turnover being diverted from this store. This level of trade diversion is expected noting its close proximity to the application site, with the Sainsbury's store approximately 1.4 miles away, and the significant popularity of the existing Sainsbury's store as highlighted by its very high levels of trade draw from the primary catchment area.

8.61 It is expected that up to 26% of the convenience goods turnover increase will be diverted from the existing **Morrison's store on Swan Close Road**. This is a lower figure than the expected trade diversion from Sainsbury's store however this takes account of greater distance from the application site and importantly, the lower market share of the store from the primary catchment area.

8.62 A much lower amount of trade will be diverted from the other foodstores in Banbury including **Waitrose, Tesco Extra, Marks & Spencer and Aldi** given their lower level of trade diversion from the primary catchment area and greater distance from the application site. It is expected that between 4% and 5% of the store's turnover will be diverted from each of these stores. 4% of the store's turnover is expected to be diverted from the **Lidl Spiceball site** commitment noting that this store will undoubtedly draw some of its trade from the primary catchment area.

8.63 In terms of trade diversion from in-centre provision, in addition to the trade diversion from the Lidl commitment, a small amount of trade is expected to be drawn from existing small scale convenience stores within **Banbury town centre** amounting to just 3% of the store's turnover.

8.64 The rest of the trade diversion will be dispersed across the local area noting that the store will draw its trade from the surrounding rural hinterland to the south which has limited existing convenience store provision. In terms of trade diversion from nearby stores, it is expected that around 1.5% of the stores turnover will be diverted from the nearby **Spar** store on Molyneux drive, 1% from the **Co-op** store at Chatsworth Drive and 2% from the **Longford Park commitment**.

8.65 Finally, there will be some trade diversion from destinations outside the Study Area, amounting to around 5% of the store's turnover. This trade diversion will come from two sources. Firstly, form those residents within the primary catchment area choosing to shop at the proposed foodstore rather than a more distant foodstore outside the Study Area (e.g. stores in Brackley). Secondly, a proportion of this will be drawn from pass-by trips from those living outside the Study Area who will use the store given its ease of access from a key route into Banbury.

Impact on Planned Investment

8.66 Paragraph 89 of the NPPF requires the assessment of impact on existing, committed and planned public and private investment in a centre. As such, it is necessary to identify any committed and planned investment in defined centres.

8.67 As highlighted in Section 6, the only identified scheme that can be considered as in-centre planned investment is the Castle Quay 2/Castle Quay Waterfront development within Banbury town centre. This scheme includes a new Lidl store, cinema, hotel, restaurants and a food/drink and independent retail hub known as Lock29. Lock29 opened in August 2020 whilst parts of the Castle Quay 2 development is expected to open in early 2021.

8.68 In terms of other planned investment in the town centre, whilst there are some proposed extensions to the town centre, included as allocations in the Cherwell Local Plan Part 1, these have not been progressed and are therefore not considered as planned investment for the purposes of the impact test for the reasons set out in Section 6.

8.69 As highlighted in the trade diversion sub-section, around 4% of the proposed store's convenience goods turnover is expected to be drawn from the Lidl store which forms part of the wider scheme. This results in a trade diversion of around £0.3million which amounts to an impact on the convenience goods turnover of the Lidl store of just 1.7%. Clearly such a negligible level of trade diversion from the Lidl store, which forms just part of the overall offer of the planned investment, would not prevent the development from coming forward or result in the committed development from achieving a viable trading position.

8.70 Given this, it is clear that the proposed development will not have a significant adverse impact on any planned or committed investment within the town centre.

Impact on Town Centre Vitality and Viability

8.71 This subsection considers the impact of the proposed development on town centre vitality and viability, including existing investment within Banbury town centre as the only defined centre or destination benefitting from policy protection through the impact test.

8.72 When considering the impact of the proposals, this must be assessed against the current vitality and viability of the town centre as set out in the health check at Section 7. As highlighted in the health check, the town centre remains an attractive place to visit and whilst the level of retail provision in the town centre has reduced in recent years, this replicates a trend nationally with many of the store closures coming as a result of a result of national restructuring plans by retailers responding to the changing shopping patterns, rather than a specific Banbury issue. Nevertheless, the centre remains vital and viable and will shortly benefit from significant investment in order to improve the overall offer of the centre, particularly the leisure offer, through the Castle Quay Waterfront development. In addition, it is important to note that the convenience goods offer of the town centre is relatively limited and does not form a key attractor of the centre.

8.73 An important stage of considering the impact on a centre is the quantitative impact on the existing turnover of a centre as a result of the expected level of trade diversion as set out earlier. The proposed development is expected to divert just 7% of its convenience goods turnover from the town centre, which amounts a trade diversion of just £0.5 million. The majority of this (£0.3million) will be drawn from the Lidl Spiceball site commitment, with the remaining being drawn from other small foodstores and convenience stores within the town centre including Iceland,

8.74 This level of trade diversion would amount to a solus impact on the existing town centre's convenience goods turnover of just 3.0% (excluding the trade diversion from, and increase in town centre turnover associated with, the Lidl commitment). Cumulatively, and taking into account the trade diversion from the Lidl store, the impact would be just 2.1% of the town centre's convenience goods turnover. Clearly, noting the Lidl commitment will significantly increase the convenience goods turnover of the whole town centre, the overall cumulative impact on the town centre will remain positive with the town centre turnover increasing to around 218% of its pre-development turnover.

8.75 Although these figures are very low, it should be noted that these impact figures are based solely on the convenience goods turnover of the town centre which, as already highlighted, only forms a small part of the overall offer of the town centre with the town centre principally acting as a comparison goods and leisure destination. As such, the actual overall quantitative impact on the town centre will be substantially lower.

8.76 As highlighted by previous Secretary of State decisions, there is a requirement to consider the impact on the town centre at as a whole[17] rather than on a sector basis. As such, the following considers the overall impact on retail turnover in the town centre before providing comment on the overall impact on the town centre as a whole.

8.77 As set out in the methodology, given that the proposed foodstore will have a very limited comparison goods turnover, the detailed assessment at Appendix 5 does not model the trade diversion of this. The comparison goods expenditure generated from foodstores is ancillary to the main function of a foodstore with comparison goods purchases being made at the same time as a convenience goods visit, rather than the comparison goods offer acting as a destination in its own right. As such, the vast majority of the comparison goods turnover will be diverted from existing foodstores where the convenience goods trade is being drawn from.

8.78 Table 14 below models the overall impact of the proposal on the total turnover of the town centre assuming the same level of trade diversion from the town centre for comparison goods. Whilst the household survey did not seek to identify detailed comparison goods shopping patterns in the Study Area, it does provide some information on general comparison goods trips and this has been used to estimate a rough comparison goods turnover for the town centre as a whole. Whilst this turnover is likely to be underestimated, as it does not account for inflow from beyond the Study Area, it is relied upon for the purposes of this assessment.

Table 14 - Total Convenience and Comparison Goods Impact on Banbury Town Centre

	Comparison Goods	Convenience Goods	Total
Travel Diversion (%)	7%	7%	-
Trade Diversion (£m)	£0.05m	£0.51m	£0.56m
Existing Banbury Town Centre Turnover[18]	£101.3m	£23.6m	£124.9m
Impact	**0.05%**	**2.1%**	**0.45%**

[17] Scotch Corner decision SoS letter para. 12 (ref: APP/V2723/V/15/3132873 & APP/V2723/V/16/3143678)
[18] Allowing for Lidl Commitment

8.79 As set out in Table 14, the overall impact on the town centre retail turnover is less than 1%, which in any case is likely to be an overestimation noting that this likely underestimates the town centre's comparison goods turnover.

8.80 Given this, the level of trade diversion from the town centre is negligible and would have a limited impact on any individual retailer or unit. As such, this would not amount to a 'significant adverse impact' on the town centre as a whole or on any existing investment in the town centre.

8.81 Finally, in terms of the impact on consumer choice within the town centre, this will be unaffected by the proposed development noting that the impact on individual stores will be limited and is not expected to harm the ongoing viability of any individual retailer.

Population Growth

8.82 As set out in Section 6 of this report, the population projections provided by the Experian Micromarketer G3 report do not take into account population growth associated with planned residential developments. However, the assessment has not sought to build in population growth, or the expenditure growth associated with this, to provide a worst case scenario in respect of impact and to provide a robust assessment that avoids any potential for double counting in terms of local population and expenditure.

8.83 Nevertheless, it is clear that there will be significant expenditure growth in the local area, over and above that assumed within the assessment which should be considered as a material consideration when assessing the impact of the proposals. Noting that some of the new homes have been completed within the urban extensions, particularly at Longford Park (Bankside Phase 1) it is important to note that the population growth of these should have been picked up within the base population data. Nevertheless, there remains a large number of housing to be completed within Bankside Phase 2 and land south of Salt Way in particular, the majority of which will not be accounted for in the population projections used for this impact assessment.

8.84 In order to calculate the level of expenditure associated with this, it is necessary to first understand the likely population growth with these planned urban extensions. Table 15 sets out the level of housing growth using completions projections from the reporting year 2020/21 through to 2030/31 as set out in the most recent Cherwell Housing Land Supply Update (July 2018) which assumes that housing completions in 2018/19 and 2019/20 came forward in accordance with the projections.

Table 15 - Housing Growth from planned urban extensions

Reporting Year	Bankside Phase 1	Bankside Phase 2	South of Salt Way (east)	South of Salt Way (west)	Total
2020/21	98	50	125	75	348
2021/22	32	100	150	75	357
2022/23	0	100	150	75	325
2023/24	0	100	150	25	275
Sub-Total	130	350	575	250	1,305
2024/25 – 2030/31	0	250	667	0	917
Total	130	600	1,242	250	2,222

8.85 As can be seen in Table 15, between 2020/21 and the reporting year of 2023/24, which largely reflects the impact assessment year of 2023, there are expected to be a total of 1,305 new dwellings completed in close proximity to the application site, with a further 917 being delivered beyond that up to 2031. Taking this into account, Table 16 calculates the level of expenditure that will be generated by this planned population growth.

Table 16 - Calculation of Convenience Goods Expenditure Growth through Planned Urban Extensions

Reporting Year	Dwelling Completions[19]	Population Growth[20]	Per Capita Expenditure[21]	Total Annual Additional Expenditure[22] (£m)
2020/21	348	835	2,295	1.92
2021/22	357	857	2,173	1.86
2022/23	325	780	2,178	1.70
2023/24	275	660	2,171	1.43
2020-24 Sub-Total	**1,305**	**3,132**	**2,171**	**6.80**
2024/25 – 2030/31	917	2,201	2,147	4.73
Total	**2,222**	**5,333**	**2,147**	**11.45**

8.86 As set out in Table 16, population growth up to 2023/24 is expected to be around 3,132 people as a result of the planned developments. This is compared with population growth of just 291 over the same period used in the assessment (and based upon the population projections) for Zone 2 where the sites are located which highlights the cautious estimates set out in the main assessment.

8.87 This population growth will generate in the region of £6.8million per annum of additional convenience goods expenditure by 2023/24 which will increase further by 2031 to around £11.4million per annum. Clearly such a level of increased expenditure is significant, particularly when it is noted that the total increase in expenditure is significantly greater than the expected turnover of the proposed foodstore (around £8.2million at 2023). Whilst it is noted that this increase in expenditure will undoubtedly be drawn to a range of destinations, including the planned local centres, this increase in expenditure will help to offset and trade diversion associated with the proposed foodstore from existing destinations.

Impact Conclusions

8.88 A comprehensive assessment of the impact of the proposed development has been provided using up-to-date shopping pattern data. The assessment highlights that the majority of the development's turnover will be drawn from stores and destinations located outside of Banbury town centre. The limited level of trade diversion on Banbury town centre will have a negligible impact on the overall vitality and viability of the centre. As such, the proposed development is considered to

[19] As taken from Table 15 and Cherwell Housing Land Supply Update (July 2018)
[20] Assumed 2.4 persons per dwelling as average for Cherwell taken from Census Table H01UK
[21] Taken from 2a at Appendix 5 for Zone 2 with expenditure growth rates beyond 2023 taken from Experian Retail Planner Briefing Note 18.
[22] Population growth multiplied by Expenditure Growth

accord with the relevant impact tests set out in NPPF paragraph 89 and Local Plan Policy Part 1 SLE 2.

8.89 Whilst the review of the previous application provided comment on the impact of the proposal on the planned local centres within the allocated urban extensions (Policies Banbury 4 and Banbury 17), these developments benefit from no protection through the impact test. Whilst they are designated to deliver some town centre uses they are not defined as a town centre within the Local Plan Part 1. If the intention of the Local Plan was to designate the local centres as defined centres for the purposes of the impact test, then it would have done so. As such, there is no requirement to consider the impact of the proposals on these allocations.

8.90 In addition, the review of the previous application also sought to afford other out-of-centre provision protection through the impact test through saved Local Plan Policy 29. However, this policy is clearly only relevant to proposals which will directly result in the loss of local services through their change of use or redevelopment, and does not provide protection for out-of-centre retail uses from competition. Indeed, such an interpretation would actively hamper the aims of the policy which seeks to ensure that people have access to local services, including retail uses – restricting competition would clearly prevent the delivery of new local services. As such, clearly Policy S29 is not relevant to the application proposals if read in its proper context and having regard to both the wording and aims of the policy. Nevertheless, the assessment demonstrates that the impact on these stores would not be significant, and in the case of the existing Spar store at Bodicote, the store would continue to trade above its benchmark turnover position.

8.91 Finally, the assessment has been prepared as a worst case scenario and does not make an allowance for the significant population growth, and expenditure growth, around the application site as a result of the planned urban extensions. These will generate a further increase in convenience expenditure locally, helping to support the proposed foodstore as well as offsetting the impact of it on existing retail destinations.

9. CONCLUSIONS

9.1 This Retail Assessment has been prepared in support of the proposed foodstore at Cotefield Business Park, Bodicote which will deliver a foodstore with a gross floorspace of around 1,235m². Although a final end-occupier for the foodstore has not been confirmed, the foodstore will serve a mix of main food and top-up food shopping needs of the local area and the surround rural areas to the south. This includes serving the new urban extension developments to the west of Oxford Road and the Longford Park development

9.2 A detailed sequential assessment has been prepared and a number of sites assessed located around Banbury town centre have been considered. The sites have been assessed and no site is considered to be suitable **and** available to accommodate the proposed main town centre uses therefore satisfying the sequential test as set out at NPPF para. 86 and Local Plan Part 1 Policy SLE 2.

9.3 A health check has been prepared for Banbury town centre building upon previous surveys carried out through Council retail studies. This highlights that the town centre remains a vital and viable centre that will benefit from new development/investment in the form of Castle Quay Waterfront and Lock29. The convenience goods offer of the town centre is limited and does not form a key attractor of the centre.

9.4 A comprehensive assessment of the impact of the proposed development has been carried out and is supported by up-to-date shopping pattern and expenditure data. The assessment highlights the majority of the development's turnover will be drawn from stores located outside of Banbury town centre. Only a small amount of trade will be diverted from the town centre which would be limited and not affect the viability of any existing foodstore or the planned Lidl commitment. This would clearly not result in a significant adverse impact on Banbury town centre

9.5 The review of the previous application provided comment on the impact of the proposal on the planned local centres within the allocated urban extensions (Policies Banbury 4 and Banbury 17). However, these developments benefit from no protection through the impact test as, whilst they are allocated to deliver some town centre uses, they are not defined as town centres within Cherwell Local Plan Policy SLE 2. As such, there is no policy protection for these allocations.

9.6 The review of the previous application also suggested that other out-of-centre provision should benefit from protection through the impact test through saved Local Plan Policy 29. However, this policy is only relevant to the loss of local services through their change of use or redevelopment and is not intended to protect out-of-centre retail stores from viable new development that would provide healthy market competition and increase consumer choice. Indeed, the aim of the policy is to encourage provision of better local services, including retail uses, and restricting competition would actively contradict this. As such, Policy S29 is not relevant to the application proposals if read in its proper context and does not support an objection to the application proposal.

9.7 Notwithstanding the lack of policy protection, the assessment has still considered the impact on out-of-centre stores in the area. The level of expected trade diversion from these smaller stores will be limited and would not be expected to affect the viability of any existing foodstore in the area and would not result in a significant adverse impact on these stores. This should further be considered against the backdrop of a number of existing stores identified as already over-trading and significant planned future population growth in the immediate area. Both of which help to underline that the proposal would make a sustainable and beneficial contribution to the local area by increasing the availability of retail services and improving consumer choice.

9.8 In summary this statement has provided the appropriate and necessary evidence demonstrating that the proposed development accords with the relevant impact and sequential tests as set out at NPPF paragraph 90 and Local Plan Part 1 Policy SLE 2.

APPENDIX 1 – SEQUENTIAL TEST CASE LAW & RELEVANT DECISIONS

It is important to consider the significant and pertinent case law and Secretary of State decisions which provide guidance and clarification on how the sequential test should be applied in respect of the need to demonstrate flexibility, the consideration of availability and the requirement to consider the disaggregation of a proposed development.

The following considers these matters and provides a brief summary of relevant decisions. In doing this, we make reference to the following decisions:

- Supreme Court's decision in March 2012 in Tesco Stores Ltd v Dundee City Council[23] (the 'Dundee decision');
- Appeal decision for an extension to an existing Sainsbury's store in Crawley[24] (the 'Crawley decision');
- High Court Decision involving Zurich Assurance Ltd (Threadneedle Property Investments) v North Lincolnshire Council and Simons Developments Ltd in relation to the redevelopment of a Garden Centre site for a retail park, including an M&S store in Scunthorpe[25] (the 'Scunthorpe decision');
- Secretary of State called-in decision at Rushden Lakes, Northamptonshire for a retail and leisure park development[26] (the 'Rushden Lakes decision');
- Secretary of State called-in appeal decision at Broomhills Industrial Estate, Braintree for a Sainsbury's supermarket[27] (the 'Braintree decision');
- High Court decision involving Aldergate Properties Ltd v Mansfield District Council and Regal Sherwood Oaks Ltd in relation to the development of a foodstore in Mansfield[28] (the 'Mansfield decision');
- Secretary of State called-in decision in respect of an application for a designer outlet centre at Scotch Corner, North Yorkshire[29] (the 'Scotch Corner decision');
- Secretary of State called-in appeal decision at Tollgate Village, Stanway for a mixed-use development comprising leisure and retail uses[30] (the 'Tollgate decision'); and
- Secretary of State called-in decision at The Mall, Cribbs Causeway, South Gloucestershire for a mixed-use development comprising retail, food and drink, leisure, hotel, and residential uses[31] (the 'Cribbs Causeway decision');

[23] [2012] UKSC 13
[24] APP/Q3820/A/11/2158410/NWF
[25] [2012] EWHC 3708 (Admin)
[26] APP/G2815/V/12/2190175
[27] APP/Z1510/A/14/2219101
[28] [2016] EWHC 1670 (Admin)
[29] APP/V2723/V/15/3132873 and APP/V2723/V/16/3143678
[30] APP/A1530/W/16/3147039
[31] APP/P0119/V/17/3170627

- Appeal decision for an extension to an existing retail park at Leamington Shopping Park, Leamington Spa[32] (the 'Leamington Spa decision'); and,
- Secretary of State called-in decision at land at Earl Road, Handforth Dean, Cheshire for a mixed-use retail-led out-of-centre retail park development[33] (the 'Handforth Dean decision').

Suitability - General

NPPF Paragraph 86 highlights the need to consider the suitability of sites stating that:

> *'Main town centre uses should be located in town centres, then in edge of centre locations and; only if suitable sites are not available…should out of centre sites be considered'*

Taking this into account, it is important to consider what the term "suitable" means in the application of the sequential test. In this regard, the Dundee decision, a Supreme Court decision, confirmed what "suitable" means in respect of the sequential test that applied in Scotland at the time. Lord Reed provided comment on the consideration of suitable sites at paragraph 29 of the judgement stating that:

> *'Provided the applicant has [given consideration to the scope for accommodating the development in a different form and to have thoroughly assessed sequentially preferable locations]… the question remains… whether an alternative site is suitable for the proposed development, not whether the proposed development can be altered or reduced so that it can be made to fit an alternative site.'*

As part of the same case, Lord Hope perceptively added, at paragraph 38:

> *'The context indicates that the issue of suitability is directed to the developer's proposals, not some alternative scheme which might be suggested by the planning authority. I do not think that this is in the least surprising, as developments of this kind are generated by the developer's assessment of the market that he seeks to serve. If they do not meet the sequential approach criteria, bearing in mind the need for flexibility and realism to which Lord Reed refers…, they will be rejected. But these criteria are designed for use in the real world in which developers wish to operate, not some artificial world in which they have no interest in doing so.'*

As the Dundee decision related to the sequential test which applied at that time in Scotland, it is important to consider how it should be read and understood in respect of the sequential test as set out at Paragraph 86 of the NPPF. In this respect it is important to note that the Dundee decision has been cited on numerous occasions within subsequent high court and Secretary of State/appeal decisions in England.

[32] APP/T3725/W/18/3204311
[33] APP/R0660/V/17/3179610, APP/R0660/V/17/3179605 and APP/R0660/V/17/3179609

In this respect, it is important to note the Inspector's commentary within the Crawley decision. Paragraph 85 confirms that the Dundee decision was a material consideration for planning applications made under the English planning system. The Scunthorpe decision, which is referred to later within this section of the report, also cited the Dundee decision confirming its relevance to the English planning system.

The Dundee decision clearly establishes what suitable means in relation to the sequential assessment confirming that any site must be suitable for the commercial requirements of the development and, subject to demonstrating flexibility, must be suitable for the proposed development, not whether the proposed development could be altered or reduced so that it can be made to fit a sequentially preferable site.

The Rushden Lakes decision also dealt with the issue and provided further commentary on the matter of suitability. The Inspector's Report, endorsed by the Secretary of State, highlighted at paragraph 8.43 that the key question when considering suitability must be *'suitable for what'* going on to confirm that; *'the answer to this question of law is suitable for the development proposed by the Applicant.'* Paragraphs 8.44-8.46 of the Inspector's report stated that:

> *'8.44 - The Supreme Court has told us in Dundee what "suitable" means and it has expressly rejected…that the concept relates to need and/or identified deficiencies in retail provision in the area in question; and it has expressly rejected the notion that "suitable" means that one should alter or reduce the proposal so as to fit onto an alternative site. The policy concerning the sequential approach as set out in the NPPF, and (to the extent that it is still relevant) the non-policy PG that accompanied PPS4, must be applied in a manner which complies with the legally binding case law on the meaning of the sequential approach. Plainly the case in question (Dundee) is of seminal importance.*
>
> *8.45 - In summary it [The Dundee Decision] establishes [a] that if a site is not suitable for the commercial requirements of the developer in question then it is not a suitable site for the purposes of the sequential approach; and [b] that in terms of the size of the alternative site, provided that the Applicant has demonstrated flexibility with regards to format and scale, the question is whether the alternative site is suitable for the proposed development, not whether the proposed development could be altered or reduced so that it can be made to fit the alternative site. These points although related are distinct. Although much was made of the fact that the Dundee case was a Scottish case the Supreme Court's decision applies in England (the Supreme Court is the Supreme Court for England too) as the High Court ruled in terms in the North Lincolnshire case in which it was read across and applied to the English sequential test then found in PPS4.'*
>
> *8.46 - It is important to bear in mind that the sequential test as set out in NPPF [24] require applications for main town centre uses to be located in town centres and it then runs through the sequence, edge and then out-of-centre. This makes good the very simple point that what the sequential test seeks is to see whether the application i.e. what is proposed, can be accommodated on a town centre site. There is no suggestion here that the sequential test means to refer to anything other than the application proposal. So, Dundee clearly applies to the NPPF.'*

The Secretary of State decision at paragraph 15 endorses the Inspector's Report and commentary regarding the application of the sequential test, confirming that:

> *'Furthermore, having regard to the arguments put forward by the Inspector at IR8.44-8.48, the Secretary of State agrees with his conclusion at IR8.48 that the sequential test relates entirely to the application proposal and whether it can be accommodated on an actual alternative site (e.g. a town centre site).'*

The Dundee decision and subsequent Rushden Lakes, Crawley and Scunthorpe decisions make it clear that in the application of the sequential test, the term 'suitable' relates to the development/application proposed and not another form or scale of development which could be amended to fit onto a town centre or sequentially preferable site.

Flexibility – Format & Scale

NPPF paragraph 86 states that when undertaking a sequential test assessment, applicants and local planning authorities should demonstrate flexibility on issues such as format and scale. Planning Practice Guidance (PPG) provides further advice in relation to this and how it should be applied in the decision-making process, stating that:

> *'Is there scope for flexibility in the format and/or scale of the proposal? It is not necessary to demonstrate that a potential town centre or edge of centre site can accommodate precisely the scale and form of development being proposed, but rather to consider what contribution more central sites are able to make individually to accommodate the proposal.'*

In considering the level of flexibility which must be applied, regard must be had to the Dundee decision, which we have already referred to. This decision confirms that the assessment should be:

> *'...directed to what the developer is proposing, not some other proposals which the planning authority might seek to substitute for it which for something less than that sought by the development.'*

The Scunthorpe decision cited the Dundee decision with the Judge considering flexibility at paragraph 61, stating that:

> *'It is also important to mark that developers, and planning authorities, work in the real world. Marks & Spencer had assessed the only available town centre alternative to the Site, and had concluded that a development that was smaller than that proposed, or one with a more restricted range of goods, was neither commercially viable nor suitable for their commercial requirements'.*

The Mansfield decision also considered the requirement to demonstrate flexibility. Whilst much of the judgement related to relevance of a proposed retail unit's occupier, paragraph 35 of the judgement confirmed:

'In my judgment, "suitable" and "available" generally mean "suitable" and "available" for the broad type of development which is proposed in the application by approximate size, type, and range of goods. This incorporates the requirement for flexibility in [24] NPPF, and excludes, generally, the identity and personal or corporate attitudes of an individual retailer.'

The Tollgate decision went further confirming that, in respect of flexibility, the test is whether or not a scheme that is 'closely similar to what is proposed' can be accommodated. Paragraph 12.3.20 of the Inspector's Report confirmed this:

'The sequential test therefore means that whilst a sequentially preferable site need not be capable of accommodating exactly the same as what is proposed, it must be capable of accommodating development which is closely similar to what is proposed.'

The Secretary of State in determining the Tollgate decision agreed with this approach stating at paragraph 13 of his decision that:

'The Secretary of State has carefully considered the Inspector's analysis at IR12.3.1-12.3.30. For the reasons given at IR12.3.23-12.3.26 he agrees with the Inspector that the propositions put forward by the Council and the Rule 6 parties in relation to the Vineyard Gate site would not be closely similar to the appeal scheme and cannot be considered available.'

These decisions were all based upon the wording of the sequential test within the 2012 version of the NPPF however, they remain relevant given the limited amendments to the relevant paragraphs within the 2018 NPPF (as amended in 2019). Nevertheless, the matter of suitability and the application of flexibility was considered through the Cribbs Causeway decision which post-dated the 2018 NPPF. The Secretary of State decision confirmed at paragraph 23, that in respect of a sequential site being considered:

'a ***broadly similar quantum*** *of retail and leisure uses could still be accommodated on the site'* ***[our emphasis].***

This decision was reached, citing the Inspector's Report which tackled this issue commenting that:

'566. The meaning of the sequential test is a matter of law whereas how it is applied is a matter of judgement. The Framework and the PG indicate that when looking at the suitability of potential sequential sites, flexibility should be demonstrated on issues such as format and scale. ***However, in Aldergate Properties[34] it was held that what this means is that the alternative site should be suitable for the broad type of development proposed in respect of the approximate size, type and range of goods****. This seems to me to be* ***subtly different from a consideration of whether the site would be closely similar, which was what was referred to by the Inspector in the Tollgate Village appeal decision****. I note that the Inspector in the Kingswood, Hull appeal did not think that closely similar provided sufficient flexibility.*

[34] The Mansfield Decision

> *604. … For the reasons given it is considered that the site would be suitable for the broad type of town centre development proposed at The Mall in terms of approximate size, type and range of goods.'* ***[our emphasis]***

The Cribbs Causeway decision is the most recent Secretary of State decision (October 2018) which has sought to tackle this issue. The Inspector's Report and the Secretary of State clearly favour *the 'broad type of development'* approach relied upon within the Mansfield Decision rather than the stricter interpretation of *'closely similar'* approach relied upon through the Tollgate Decision.

Given this most recent decision, when considering the requirement to demonstrate flexibility in relation to the format and scale of a development, this should seek to identify sites that can accommodate the 'broad type of development' albeit weighing this against the requirement to identify sites capable of accommodating the proposed development.

Flexibility – Disaggregation

The question of whether or not there is a requirement to consider disaggregation of a scheme through the application of the sequential test has been considered in some detail within the relevant case law and Secretary of State decisions. This matter has been the subject of much debate as the original NPPF (2012), its predecessors NPPF (2018 & 2019) and PPG is silent on the matter, despite the fact that PPS4 (which the NPPF replaced) stated a specific requirement to consider the disaggregation of application proposals.

The Rushden Lakes Secretary of State decision was unequivocal in confirming that the NPPF did not require the consideration of the disaggregation of a proposed development, or part of a development, when considering flexibility. The Inspector's Report considers this matter at paragraph 8.47 and 8.51 which stated:

> *'8.47 The last sentence of NPPF [24] states that: "Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale." This contrasts strikingly with what was said previously in PPS4 in policy EC15.1 at (d) (iv) and 15.2 which contained an explicit requirement for disaggregation. There is no longer any such requirement stated in the NPPF. It is no answer to this to refer to the words "such as" in the last sentence of NPPF [24]. These words cannot be read so as to imply that a major, and extremely controversial, part of previously stated national policy lives on by implication in the NPPF. Had the Government intended to retain disaggregation as a requirement it would and should have explicitly stated this in the NPPF. If it had been intended to carry on with the requirement then all that would have been required is the addition of the word "disaggregation" at the end of NPPF [24].*
>
> *8.51 There is no requirement to disaggregate…'*

The Secretary of State's decision agreed with the Inspector with paragraph 16 of his decision letter stating that; *'he agrees with the Inspector that there is no requirement to disaggregate'*.

The question of disaggregation was further considered through the Braintree decision. The Inspector's Report here specifically considered whether or not the comments made within the Rushden Lakes decision were specific only to that case/site or whether they were relevant to the interpretation of the NPPF as a whole. The Inspector's Report stated that:

> *'449. Was that statement [relating to disaggregation] specific to the Rushden Lakes decision as the Council suggests, given the 'unique characteristics of that site and the proposed development in that case? It was not qualified in any way other than by reference to the two report paragraphs from which it derived. While one of these paragraphs dealt with specific aspects of the proposal, the other dealt with the intention of national policy in paragraph 24 of the Framework following the demise of PPS4. And that paragraph was not specific to the site or to the proposal in any way.*
>
> *450. Moreover, the RL [Rushden Lakes] application was for a wide variety of uses including a home and garden centre, retail units, visitor centre, restaurants, boathouse, hotel, crèche and leisure club. It was described in summary as a mixed retail and leisure scheme. The retail element was of significant size, being some 31,502m^2 of retail units. If the Secretary of State had wanted to qualify his statement on disaggregation in any way, that could have been achieved very simply by the addition of words such as 'in this case'. Indeed, the variety of uses in the RL proposal and the fact that the proposal included retail units, rather than one large retail unit, would have afforded more rather than less opportunity for some disaggregation if that had been an aim.'*

The Secretary of State agreed with the Inspector confirming at paragraph 9 of his decision that:

> *'The Secretary of State agrees with the Inspector's assessment regarding the sequential test at paragraph 24 of the Framework (IR443-467).'*

The Scotch Corner decision re-affirmed this view with paragraph 11.7 of the Inspector's Report stating that:

> *'In carrying out the sequential test it is acknowledged that whilst Framework paragraph 24 indicates that applicants should demonstrate flexibility on issues such as format and scale, it does not require the applicant to disaggregate the scheme.'*

Whilst the Secretary of State did not specifically deal with this matter in the Scotch Corner decision, paragraph 11 of his decision confirmed that, for the reasons set out at paragraphs 11.7-11.9, the application passed the sequential test.

In contrast to this, it is necessary to consider the Tollgate decision which suggested that there could, in some instances, be a requirement to consider the disaggregation of a scheme through the sequential test. In considering this matter, the Inspector's Report at paragraph 12.3.11 concluded that:

> *'In this case there is no evidence that the proposed format is necessary or fundamental to the proposal. Whilst the proposal is in outline, not a single retailer has been identified, and the*

size and location of units within the site has not been established and there is no defined timescale or phasing. It is difficult to conceive of a more open ended proposal. The parameters established by plans show a greater level of gross floor space than permission has been sought for. Most importantly the Appellants have themselves disaggregated within the appeal site with three distinct zones. DZ1 and DZ3 are some distance apart. In these circumstances disaggregation within the sequential test would be justified.'

The Secretary of State's decision does not provide any comment on this matter other than stating that he had carefully considered the Inspector's analysis at IR12.3.1-12.3.30. Nevertheless, it is clear that the matter was not key to the determination and sequential test analysis as, even allowing for disaggregation, none of the sites identified could be considered suitable and available.

In addition to this, it is important to note the specific comments made by the Inspector in coming to this conclusion. The Inspector's Report refers to the open-ended nature of the application proposal which itself included a significant degree of flexibility. However, the Inspector concludes that the most important matter in the Tollgate decision was the fact that the scheme itself was disaggregated, with the proposed development site comprising three development areas all of which were separated and located some distance apart. When considering the implications of the Tollgate decision and whether there is a requirement to consider the disaggregation of the application proposals in question, it is important to note the very specific set of circumstances associated with the Tollgate proposal.

The matter of disaggregation was also considered through an appeal decision at Kingswood in Hull[35]. As with the Tollgate decision, the Inspector concluded that, there was a requirement to consider the disaggregation of the appeal proposals being considered[36]. However, and as with the Tollgate decision, this conclusion was drawn on the basis of the very specific nature of the appeal proposals and importantly, the recently adopted development plan policy in respect of the sequential test.

The specific nature of the development proposals in the Kingswood case were for a scheme that sought a range of uses and a significant degree of flexibility in terms of its floorspace and formats with no identified occupiers for the retail units and no obvious reason why the floorspace must be delivered in a single retail terrace[37]. However, more importantly the relevant Development Plan policy, which set out the requirements of the sequential test, referred to a need to demonstrate that the development proposal *'could not be accommodated in more appropriate locations'* with the Inspector noting that the term 'locations' is in the plural. This in effect requires the consideration of disaggregation through the sequential test, through the consideration of multiple sites to accommodate the proposed development[38].

Both the Tollgate decision and Kingswood appeal decision concluded that given the very specific nature of the development proposals, and/or the wording of the relevant Development Plan policy, there could be a

[35] APP/V2004/W/17/3171115
[36] Para. 52-57
[37] Para. 28 and 29.
[38] Para. 53

requirement to consider disaggregation of a development scheme through the sequential test. Neither decision disagrees with or contradicts the Secretary of State's interpretation of policy through the Rushden Lakes, Braintree, and Scotch Corner decisions.

Given this, it is helpful that the recent Cribbs Causeway decision tackled this very point. The Inspector's Report confirmed that:

> *'567. There was debate at the inquiry about whether proposals should be split into different parts so that they can be accommodated on several town centre sites.* ***Whereas past retail policy and guidance has adopted a disaggregation approach this is not embodied in either the Framework or the PG as was confirmed by the Court of Appeal in Warners Retail****. The Secretary of State reached a similar conclusion in his decisions on Rushden Lakes, Scotch Corner and Honiton Road.* ***Whilst the Inspector in the Kingswood, Hull appeal decision did endorse a disaggregated approach this seems to have been influenced by a wording of the relevant policy and the availability or two allocated sites****.*
>
> *568. In the Tollgate Village case the Inspector did consider that there was scope for disaggregating the proposals and spreading them onto different sites, even though ultimately such sites were found not to be available. However, the findings here were case specific and it is noted that they were not specifically endorsed by the Secretary of State in his decision. As a general principle an approach that involves disaggregation does not seem to me to fit well with the Aldergate Properties or Warners Retail judgements referred to above. The town centre uses in the application proposals would comprise the retail and leisure uses and to divide them up would change the broad nature of the development in this case.' [our emphasis]*

The later Leamington Spa decision again tackled the issue of disaggregation with the Inspector's Report stating that:

> *'29. The development proposed through this appeal does, however, have certain characteristics which lead me to question whether it is appropriate to consider the option of disaggregation in this case. This was the topic of much discussion at the inquiry. It is the agreed position between the parties that there is no requirement in current Government policy or guidance for disaggregation to be considered. Equally, however, there is no specific prohibition of disaggregation in either the Framework or the Planning Practice Guidance (PPG). Although I was referred to several decisions which have a bearing on this matter, made by both the Secretary of State (SoS) and by colleague Inspectors13, I find no clear consensus on this point.*
>
> *30. There has, however, been a slight change to the wording governing the sequential test in the 2018 Framework, compared to that in the 2012 version of the Framework, extant at the time of most of the other decisions drawn to my attention. This change is the additional wording which has been added at the end of paragraph 87, to provide further clarification on the purpose of demonstrating flexibility on issues such as format and scale – namely 'so that opportunities to utilise suitable town centre or edge of centre sites are fully explored'. Taking*

> *this into account, combined with the absence of a specific requirement to consider the matter within the NPPF and PPG, there is no requirement to consider the disaggregation of a development proposal through the application of the sequential test unless the specific circumstances of the development proposal, site or development plan policy suggest otherwise.*
>
> *38. Drawing all the above points together, I consider that disaggregation of the proposed scheme should not be ruled out in the particular circumstances of this case, so as to ensure that matters of flexibility regarding format and scale are properly addressed.'*

As can be seen in the extracts from the Inspector's Report, the Inspector in the Leamington Spa case suggested that the potential disaggregation of a scheme should be considered noting the amended wording in the updated NPPF (2018) to require sequential assessments to 'fully explore' potentially sequentially preferable sites and citing the specific characteristics of the proposed development.

Whilst this conclusion somewhat contradicts the Cribbs Causeway decision, which was endorsed by the Secretary of State and took account of the amended wording of the NPPF, it is important to note in making his decision, the Inspector only considered the potential to disaggregate the application proposals and did not actually require the test to be applied to a disaggregated version of the application proposals. Ultimately the Inspector concluded that the appeal proposals accorded with the sequential test despite the fact that the Inspector concluded that one sequentially preferable site could accommodate 2 of the 3 units proposed, stating at paragraph 38 that:

> *'Again, these retail units would only be able to accommodate the smaller of the 2 proposed non-food units, unless some amalgamation of units was considered. But even then, this development would not be able to accommodate the entire appeal proposal, nor would it be able to reasonably accommodate the proposed M&S Foodhall, even if all the units were to be combined. Moreover, it was made clear that this development has not been designed to accommodate food retailing and the service area would not be able to accommodate articulated vehicles. Whilst servicing by rigid vehicles would certainly be possible, this would be moving very much away from the type and form of development the appellant is seeking.'*

Clearly despite the fact that the potential for disaggregation was considered through this appeal decision, the Inspector did not go so far as to actually require the disaggregation of the scheme to accord with the sequential test.

Finally, it is important to note that the recent Handforth Dean Secretary of State decisions (June 2019) relating to a called in planning appeal and called in planning applications, which post-date the Leamington Spa decision. From reviewing the Inspector's Report relating to these conjoined inquiries, it is clear that all parties and the Inspector agreed that there was no policy requirement to consider the disaggregation of any of the application/appeal proposals. Whilst not specifically endorsed in the Secretary of State decision letters, the Secretary of State did conclude that the applications/appeal accorded with the sequential test and that there were no sequentially preferable sites to accommodate the development proposed, despite the fact that the sequential assessments did not consider the disaggregation of the schemes, or part of them.

Availability

In respect of availability, NPPF paragraph 86 asks whether sequentially preferable sites are ‘available’ or ‘expected to become available within a reasonable period’. The addition of ‘expected to become available within a reasonable period’ was added through amendments to the NPPF and published in 2018. As such, much of the case law and previous consideration on the point of availability is no longer relevant. Nevertheless, the NPPF or PPG do not qualify what is meant by these terms.

The Inspector’s Report through Cribbs Causeway decision does not deal specifically with this point as it refers to the previous version of the NPPF (para 24) however the Secretary of State’s decision refers to the amended wording and requirement to consider a ‘reasonable period’. The Secretary of State decision at paragraph 24 confirms that:

> *‘The Secretary of State has given careful consideration to the Inspector’s analysis at IR592-602. He has paid particular attention to revised Framework paragraph 86, which makes clear that the sequential test should consider whether sites are expected to become available within a reasonable period. For the reasons given at IR592-601, the Secretary of State agrees with the Inspector at IR601 that a realistic expectation is that the cleared site would be available by mid to late 2021. For the reasons given at IR602, and in paragraph 86 of the revised Framework, he further agrees with the Inspector that reasonable flexibility should be applied when considering the availability of sequential alternatives.’*

The Secretary of State decision acknowledges the analysis of the Inspector and agrees that there is a requirement to demonstrate reasonable flexibility when considering the availability of sequential alternatives. As such, whilst the commentary within the Inspector’s Report relates to paragraph 24 of the NPPF in relation to availability, a paragraph which has since been amended, it provides useful clarification, which the Secretary of State agreed with regarding how availability, including availability within a reasonable period, should be considered. The Inspector’s confirms that:

> *‘593. **What an appropriate timescale would be is a matter of planning judgement** as is made plain in Lionbrook. In exercising that judgement it is important not to lose sight of the purpose of the sequential test in promoting a town centre first approach. It is appreciated that Lionbrook related to the period when the PPS 4 Practice Guidance was extant and was addressing the need to stem the leakage of retail spending outside of Rugby Borough. Nevertheless, the Framework was also in place and it included the same words in paragraph 24 that exist today. The Rushden Lakes appeal decision pointed out that paragraph 24 does not ask whether potential sites are likely to become available during the remainder of the plan period or over a period of some years. I agree that it does not endorse those parts of the former Practice Guidance. However, **that does not mean that there is no scope for flexibility or that the circumstances of the case may not be taken into account**.’ **[our emphasis]***

The Inspector's Report therefore confirms that what is an appropriate timescale for considering availability will depend on planning judgement and the particulars of the application proposals and any sequential sites being considered. In the specific circumstances of the Cribbs Causeway decision, considerations included;

- whether the sequential site would be available before the expiry of the planning permission sought;
- the level of policy support for the redevelopment of the sequential site (in this case the site was allocated for retail/leisure redevelopment); and
- recognition of the complexity of delivering large town centre sites.

It should be noted that the Cribbs Causeway scheme was a very large scheme of around 41,000m^2 of retail (A1) and other A class uses (A2-A5) along with a hotel, 1,500 car parking spaces and around 150 dwellings. Clearly the significance of this scheme, and the length of time required to implement it, required the consideration required a greater level of flexibility to be applied when considering the availability of sites.

Case Law and Relevant Decisions Conclusions

Taking the decisions identified into account, whilst these provide useful guidance in terms of the application of the sequential test, it is clear that the matter of flexibility and suitability is primarily a matter of planning judgement for the local planning authority that should be considered in the context of the relevant circumstances relating to the development site and the development proposals.

In respect of the specific point on the need to consider disaggregation, the identified decisions clearly highlight that in determining whether this is required it is important that careful consideration is given to the specific circumstance of the development site and development proposal. However, what is clear is that there is no policy requirement to consider the disaggregation of schemes within the NPPF or PPG and this should only be considered where there are specific circumstances which require it.

In terms of availability, whether a site can be considered to be available, or available within a reasonable period, is a matter of planning judgement based upon the specifics of the proposed development and the complexities of the scheme.

APPENDIX 2 – DETAILED SEQUENTIAL SITE ASSESSMENTS

Site 1 - Land to east of Spiceball Park Road

Site Details	Comment
Site Plan	
Size	1.27 hectares
Retail Location	In-centre
General Description	The site is currently under construction to deliver a new foodstore and associated car parking. The site is bound by Cherwell Drive to the north, Spiceball Park Road to the west, the A4260 to the south and the River Cherwell to the east, with the Spiceball Leisure Centre beyond. A footbridge to the Spiceball Leisure Centre crosses through the site.
Policy Designation	Within the extended town centre (Cherwell Local Plan) and Policy 'Banbury 9: Spiceball Development Area', the latter of which allocates the site to deliver retail, food and drink, leisure and hotel uses.
Physical Constraints	The site is located within Flood Zone 3 with the River Cherwell forming the eastern boundary of the site. The Oxford Canal Conservation Area is located to the south and west of the site, approximately which runs along the southern site boundary, approximately 60m away from the site boundary.
Suitability	The site is currently being developed as part of the wider mixed use Castle Quay 2 development through outline permission (16/02366/OUT) and subsequent reserved matters consent (17/00284/RM) as amended. On this part of the site, a new foodstore of 2,942m^2 is to be delivered with under croft and deck level parking. Given that the site is currently under construction, it is clear that suitability must be considered against the development being carried out, rather than considering the potential for an alternative redevelopment on the site noting that the demolition of works already commenced would clearly not be a viable redevelopment opportunity.

The proposed foodstore is around 1,650m^2 smaller than the foodstore being delivered on the site, thereby making it some 126% larger than the proposed store. As such, in its current form; the foodstore being delivered on the site is far too large to accommodate the proposed development even when allowing for a significant amount of flexibility.

As such, it is necessary to consider whether the floorspace under construction could be subdivided to create a development suitable of accommodating the proposed foodstore. The ability to subdivide this unit is challenging noting the layout of the scheme being delivered and specifically; the requirement for the foodstore to be located on a podium, with car parking below, given the local flood risk issues.

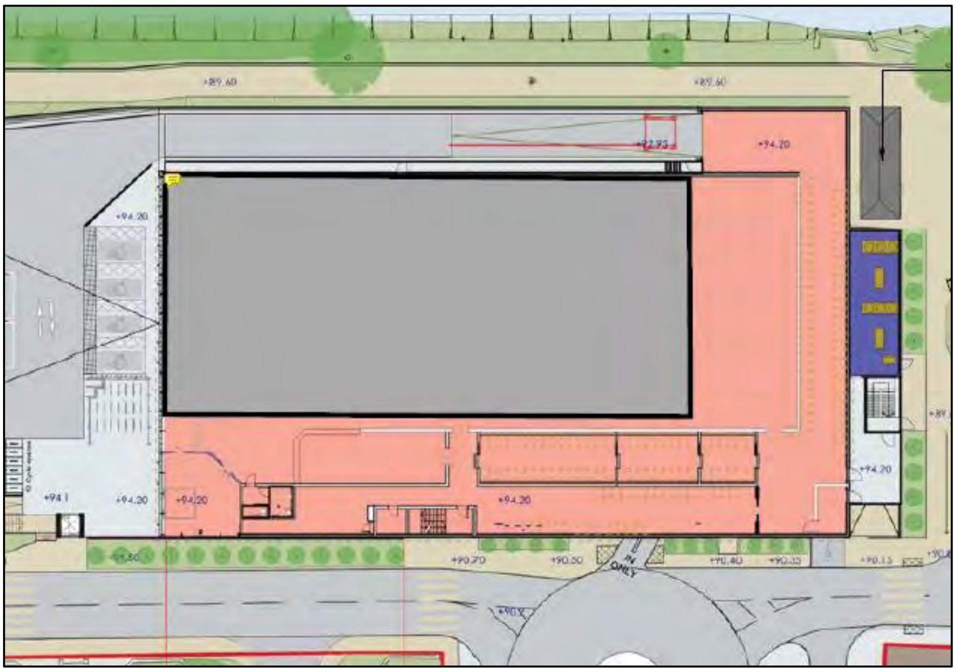
The location of the foodstore on a podium essentially means that the unit has a single frontage from which customers can access the store, with that being from the western elevation which fronts onto the deck level car park. The layout of foodstores are carefully designed and planned to help guide shoppers around the store and create an easy and attractive shopping experience for customers, as well as assisting with stock replenishment. As such, foodstores generally are built to very specific layouts to ensure appropriate aisle widths and lengths and to provide easy access for those with trollies.

Taking this into account, the subdivision of the unit to accommodate the proposed foodstore, and still create useable floorspace in the remaining floorspace (which would be attractive and lettable to another operator) is not achievable. To demonstrate this point, plans 1 and 2 below demonstrate how a foodstore of around 1,300m^2 would fit within the proposed store and the floorspace that would remain and where an alternative use would be required. Plan 1 illustrates a typical floor layout ensuring sufficient frontage and a 'rectangular' layout which would allow for appropriate store layout. Plan 2 illustrates how a much narrower store of 1,300m^2 could be located in the site, allowing for a greater level of frontage for the remaining floorspace and servicing access, however this is unlikely to actually be able to deliver an appropriate internal layout for the proposed foodstore. A layout plan has not been prepared using more of the store frontage given the lack of any other customer access to the floorspace, with a 4m difference in heights between the store and street level.

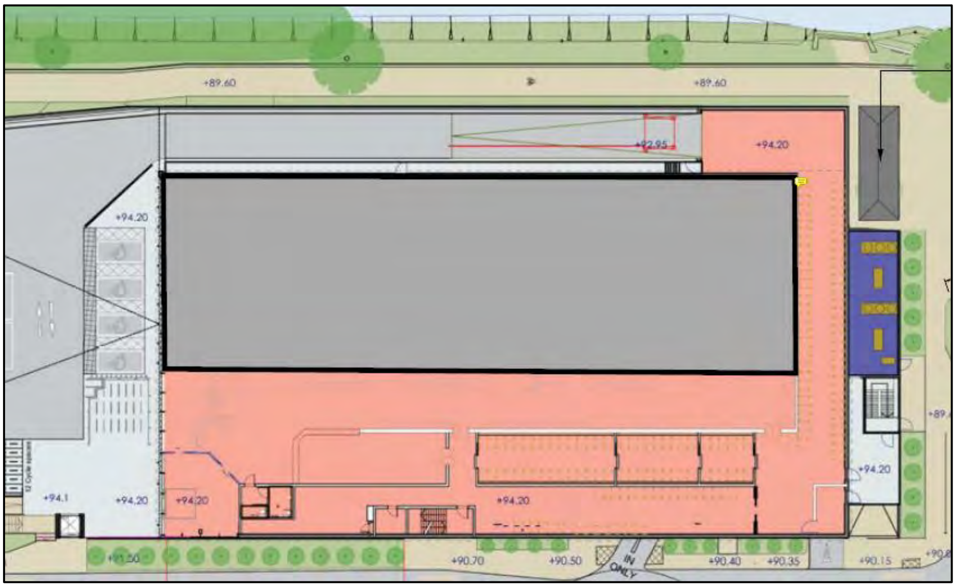
In addition, the proposed arrangement on a podium also only allows for the creation of a single point of servicing access, with this being taken from the northern elevation of the podium level. Not only would this create challenges associated with finding an alternative use, but servicing arrangements would be significantly compromised noting that this service area, with space for a single delivery vehicle would be required to serve two or more different uses.

	It is clear that the floorspace currently being delivered on the site cannot be subdivided in a manner that would be able to accommodate the proposed foodstore and ensure the remaining floorspace is useable – clearly the creation of unlettable or unoccupied floorspace would not be a viable proposition. It is therefore concluded that this site is not suitable to accommodate the proposed development.
Availability	As highlighted, the site is currently under construction to deliver a new foodstore, with this to be occupied by Lidl who are understood to be contracted to occupy the store. Whilst the site is to be occupied by Lidl, and will therefore become unavailable upon occupation, it is accepted that until such a time that the store is occupied, it may be considered to be available for retail uses, noting that, in general the identity of the end occupier is not relevant through the application of the sequential test as confirmed in the Mansfield decision. However, paragraph 42 of the Mansfield decision highlights that; '*"Available" cannot mean available to a particular retailer but must mean available for the type of retail use for which permission is sought'*. As already, highlighted given that the site is under construction for a materially different scale and format of retail floorspace than that proposed, and noting the issues regarding the suitability of this site, the site cannot be considered available to accommodate the proposed foodstore.
Conclusion	In summary, the site is not considered to be suitable or available to accommodate the proposed development. The site is currently under construction to deliver a foodstore considerably larger than the proposed development and there is no potential to subdivide the floorspace to accommodate the proposed development given the lack of frontage and servicing arrangements owing to the store being built on a podium. In addition, the site cannot be considered available to accommodate the type of retail use proposed.

Plan 1



Plan 2



Key

Proposed/Retained Floorspace

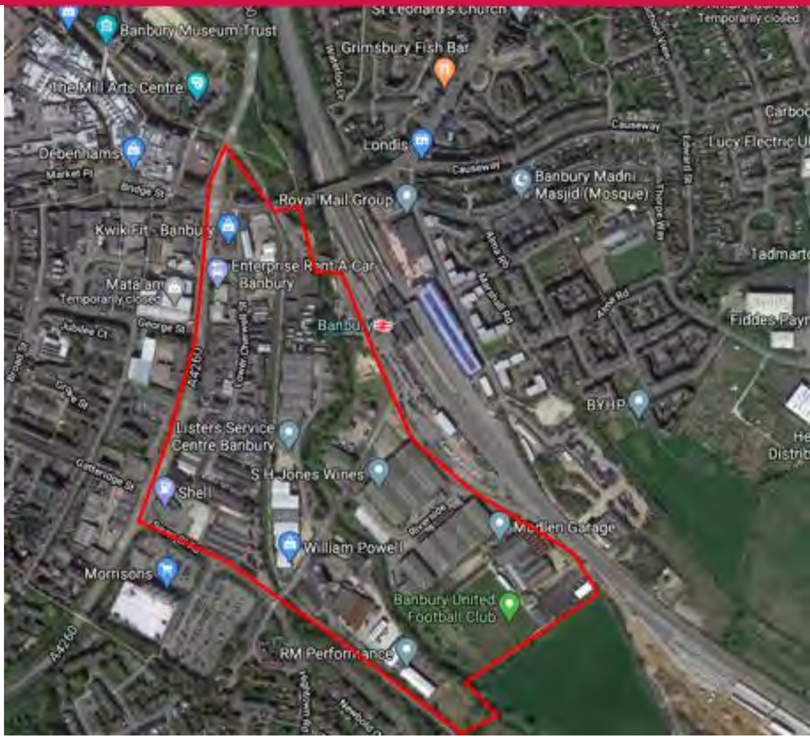
Foodstore of around 1,300m^2

Site 2 – Land at Bolton Road

Site Details	Comment
Site Plan	
Size	2 hectares
Retail Location	In Centre
General Description	The site is bound by Castle Street to the north, North Bar Street to the west, existing retail units on Parson's Street to the south and Castle Quay shopping centre to the east. Bolton Road runs through the centre of the site. The site is currently occupied by a public car park, Gala Bingo, Land Tyre Service, some small scale employment units, and Cornhill community centre. The surface public car park to the north east of the site was formerly occupied by a multi-storey car park however this was demolished in September 2016 due to structural issues with the building.
Policy Designation	The site falls within the 'expanded Town Centre' and 'Town Centre Shopping Area (Extended)' by Policy Banbury 7. The site is also allocated by Policy Banbury 8 as Bolton Road Development Area. This policy seeks the comprehensive redevelopment of the area to include a mix of uses including; 200 dwellings and employment uses, retail (including small scale A1 and A3), hotel, leisure uses, and car parking. Initial work was carried out in 2011 to produce a masterplan for the site in the form of an SPD and a draft was prepared but no further work has been carried on this to date. It is understood that work on this was indefinitely paused to focus on other areas of the town centre.
Physical Constraints	One of the buildings within this development site is a Grade II listed building (Trelawn) and therefore would need to be retained. The site is located adjacent to a significant number of listed buildings which are located along Parson's Street. Any redevelopment of this site would need to take into account the setting of the adjacent listed buildings and retain the listed building within the site.

Suitability	As noted above, the site is identified with the Local Plan as a redevelopment area. Should only part of this site come forward for redevelopment, this would compromise the wider redevelopment of the site and reduce the wider regeneration benefits that this allocation would deliver. The site needs to be brought forward comprehensively. If the proposed development was delivered on this site (a foodstore), the elements which are sought to be delivered through the policy could not be accommodated as the site is only 2 hectares (200 dwellings and employment uses (retail (small scale A1 and A3), hotel, leisure, ancillary residential C3 and car parking). The piecemeal development of the site would comprise the wider regeneration of this allocation and therefore this site is considered to be unsuitable.
Availability	The site is not being actively marketed for development and is currently in active uses. The western part of the site is currently occupied by; Gala Bingo, Land Tyre Service, and some small scale employment units. In terms of the eastern portion of the site, as noted above, the single level car park was previously a multi-storey car park. The car parking provision has been significantly reduced within the town centre. This car park appears to be well used and various documents including the most recent Banbury Vision SPD have highlighted the need for any redevelopment proposals to provide replacement parking facilities. Therefore, this part of the site, whilst clear from built development, cannot be considered to be available. The Cornhill Community Centre in the eastern section of the site is also in active use. Although there are some smaller units available to the west of the site, these are too small to accommodate the proposed development. As such, the site is considered to be available to accommodate this development.
Conclusion	Overall, the site is not considered to be suitable or available for the proposed development. The piecemeal development of the site would comprise the wider delivery of the allocation whilst the active uses on the site, and need for any scheme to provide replacement car parking means that the site cannot be considered to be suitable and available to accommodate the proposed development.

Site 3 – Land at Canalside

Site Details	Comment
Site Plan	
Size	26 hectares (3.1 hectares comprises the Area of Search)
Retail Location	Edge-of-Centre
General Description	The site extends eastwards from the town centre and incorporates Banbury Rail Station. The River Cherwell and the Oxford Canal run through the site. The site is bound by the A4260 to the north and west, Swan Close Road and the Oxford Canal to the west and the railway line to the east. The site contains a number of active uses including industrial and commercial units, Banbury rail station and Banbury United Football Club.
Policy Designation	The site represents a major mixed use regeneration site identified with the Cherwell Local Plan by Policy Banbury 1 – Banbury Canalside. This policy seeks the redevelopment of the site for the provision of new homes, retail, office and leisure uses, public open space, pedestrian and cycle routes including new footbridges over the railway line, river and canal, and multi-storey car parks to serve Banbury railway station. The northern part of the site is designated as Town Centre Extension Area of Search) by Policy 7. Within this area, retail and other main town centre uses will be supported however, as identified in Policy Banbury 1, this will not "include any significant convenience retail". The site is potentially part of a significant redevelopment area which would need to be brought forward comprehensively. Whilst a specific masterplan or SPD has not been prepared for the site to

	date, the Banbury Vision and Masterplan SPD sets out the key development framework for the site.
Physical Constraints	The site comprises a mix of Flood Zone 2, Flood Zone 3 and areas which benefit from flood defences. The Oxford Canal Conservation Area runs through the centre of the site. There is a Grade II listed building within the site (Old Town Hall).
Suitability	The site is a significant area of redevelopment that would need to be brought forward comprehensively. It is significantly larger than the site required to accommodate the foodstore. The piecemeal development of the site would compromise the redevelopment of the wider site. As noted above, the policy seeks to deliver over 700 homes as well as 15,000m^2 of employment floorspace which the piecemeal development of the site would prevent. As identified in Policy Banbury 1, the northern part of the site has been designated as an area of search for an extension to the town centre however this seeks to deliver small units to attract small specialist leisure and niche retailers which combine to create a destination and specifically states that larger scale convenience floorspace will not be supported. As such, a development of this nature would not accord with the site's allocation and would prevent the delivery of the development of the wider site. On this basis the site must be considered as unsuitable to accommodate the proposed foodstore.
Availability	The site is currently in active use split across multiple sites, uses and land ownerships. None of the wider site seems to be being actively marketed and whilst there are some industrial units that are vacant and being marketed for rent, these are small scale units providing less than 500m^2 of floorspace. Within the northern area there are a wide range of active uses and multiple landownership which highlights that there are no available sites for development in this area. Whilst one site benefits from outline consent for residential development (18/00293/OUT), this site is of an insufficient size and shape to accommodate the proposed foodstore. In any case, it is coming forward for an alternative form of development. In terms of the availability of the wider site, clearly for the comprehensive redevelopment to come forward this will require significant land assembly, likely to require compulsory purchase orders, and will take a number of years to come forward. Clearly it will not come forward and be available within an appropriate timescale to accommodate the proposed development. The site can therefore be considered as unavailable on this basis.

Conclusion	The site is note suitable or available to accommodate the proposed foodstore, taking into account the scale of the site, the site's allocation and the lack of available land for development in the short term.

Site 4 – Former Marks and Spencer store (36 Bridge Street)

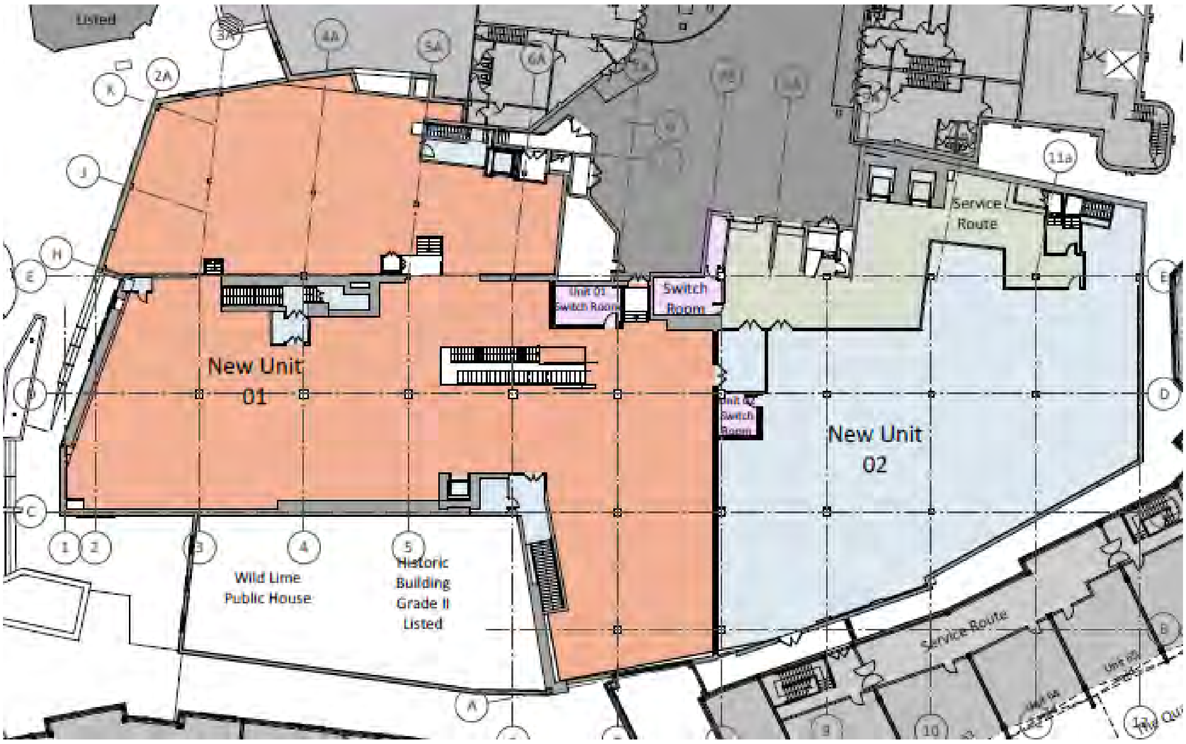
Site Details	Comment
Site Plan	
Size	5,270m^2 (Ground floor – 2450m^2, First Floor – 2,260m^2 and Second Floor – 560m^2)
Retail Location	In Centre
General Description	The site is located within the Castle Gate Shopping Centre and was formerly occupied by Marks and Spencer, until it closed in Augustl 2020.
Policy Designation	Within Banbury Town Centre shopping are and primary shopping frontage.
Physical Constraints	As the unit forms part of a larger shopping area, with units either side, redevelopment opportunities are limited. Servicing of the unit is taken from the roof level with servicing shared between multiple units. The site has no onsite car parking, with the nearest parking facilities being the very small car park at Market Place. The unit is split across three floors, with access required to the upper floor for servicing.
Suitability	Clearly, at 5,270m^2 the current unit is too large to accommodate the proposed foodstore. Nevertheless, it is important to consider if there is any ability to subdivide the unit to create a unit of an appropriate size to accommodate the proposed foodstore. We understand that a Building Control application has been submitted for the subdivision of the unit into two retail units and a new pedestrian link to provide access between Castle Mall and the Quay (south) Mall (ref: 20/0455/FP). A planning application (ref: 20/01130/CDC) was recently approved for external elevation alterations the Bridge Street frontage. This application confirms how the proposed floorspace would be split, with these plans provided in

	this assessment. The subdivision of the units will create two units of the following sizes; **Unit 1** Ground Floor Retail Floor space- **1,200m²** First Floor Retail Floor Space– **1,340m²** Second Floor (back of house) – **409m²** Total Floorspace – **2,949m²** **Unit 2** Ground Floor Retail Floor Space – **910m²** First Floor (back of house) – **703m²** Total Floorspace – **1,613m²** As can be seen from the above, both units are too large to accommodate the proposed foodstore and would require floorspace to be split across multiple floors, something that is not attractive to foodstore operators given the difficulties it creates in navigating the store for customers, particularly for those using trollies. Whilst the ground floor of proposed unit 1 on its own could be considered to be of a sufficient scale allowing for flexibility, this would result in vacant and unoccupied/inaccessible floorspace being created above which would clearly not be a viable solution to the reuse of the floorspace. In any case, the lack of any on-site parking would make it unsuitable to accommodate the proposed development (noting the need for customers to easily access their cars using a trolley when shopping at the store). Furthermore, these units are considered to be unsuitable due to how they are serviced, which would not be suitable for the proposed use. The units are serviced from a shared roof area and lack any dedicated service yards. Whilst this may be appropriate for non-food units, which have less frequent deliveries, this is unlikely to be acceptable to support a dedicated foodstore on the site.
Availability	Marks and Spencer previously occupied the floorspace however it is understood that the unit closed in August 2020 and therefore is vacant. Whilst the floorspace does not appear to have been actively marketed yet, given the previous use ended recently it can be reasonably assumed that the unit is available.
Conclusion	Overall, the site is not considered to be suitable to accommodate the proposed foodstore given the size of the unit and the fact it is split across multiple floors. Whilst there is clearly the potential to subdivide these units, as demonstrated by the recent building control and planning applications, even subdivided the floorspace would be unsuitable to accommodate the proposed development owing to its scale, servicing arrangements, lack of parking and split of floorspace across multiple floors.

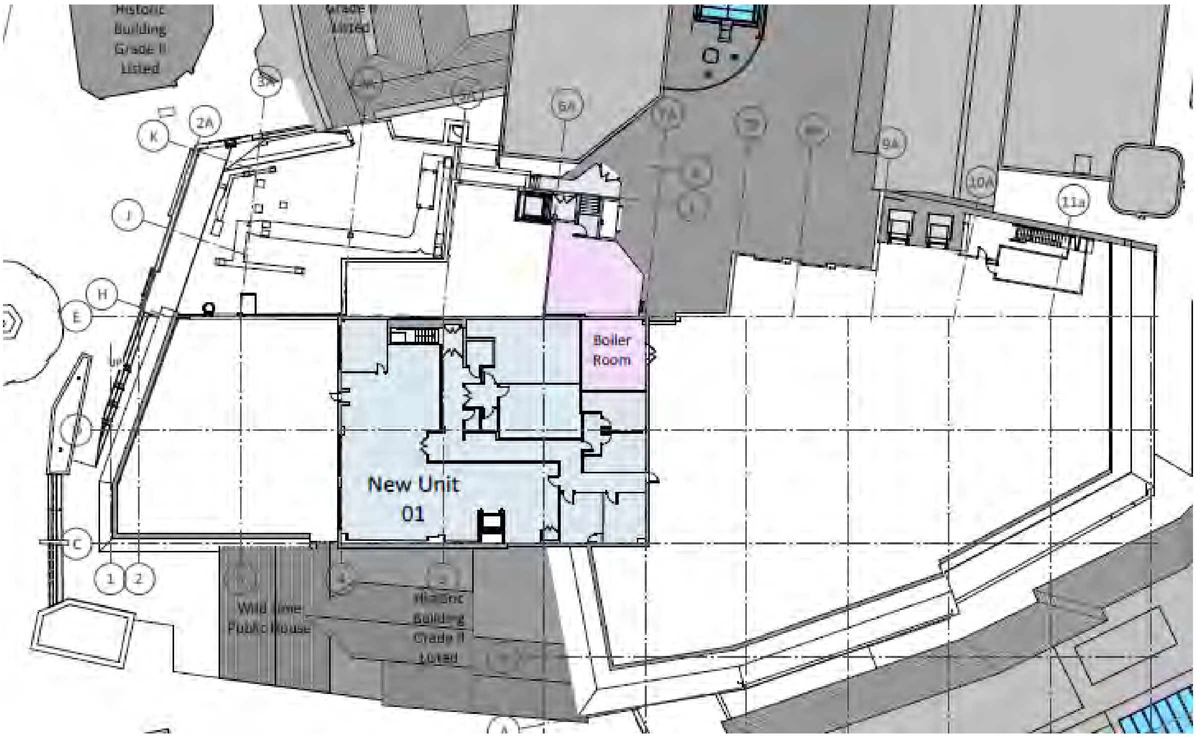
Planned Floorspace Split

Proposed Ground Floor Plan

Proposed First Floor Plan



Proposed Second Floor Plan



Key:

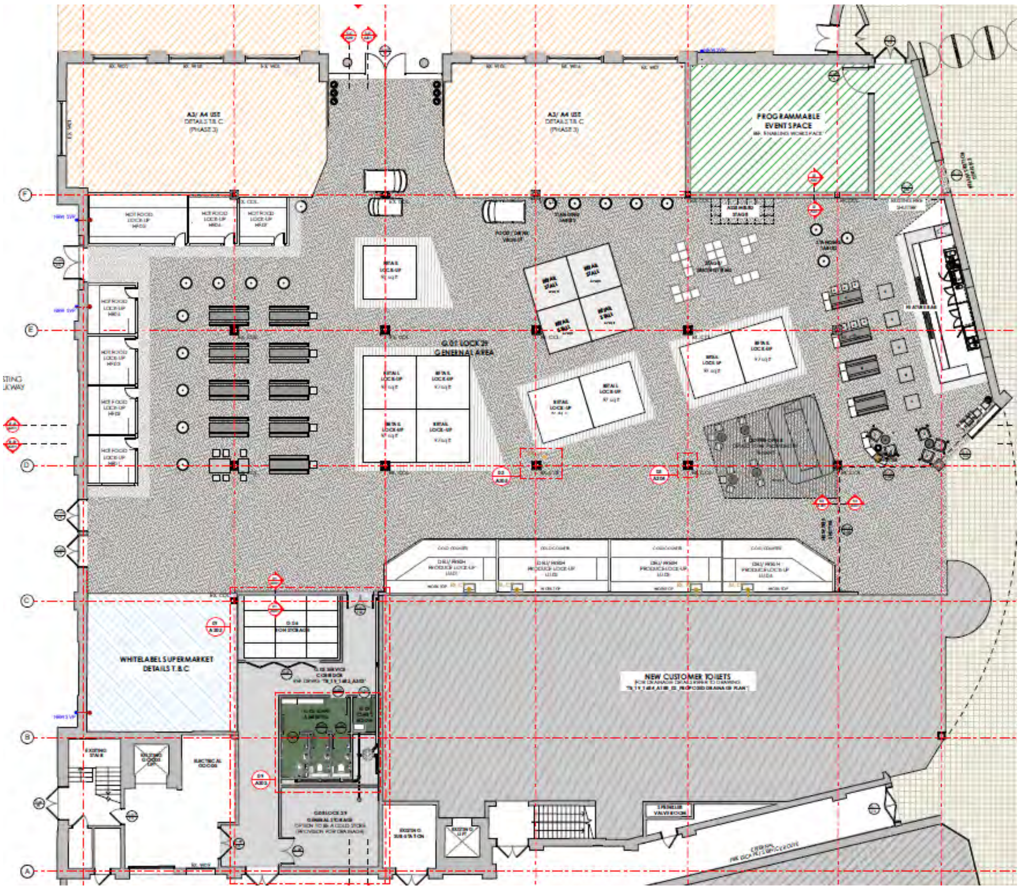
- Proposed New Mall Link
- Proposed Retail Unit
- Back of House
- Shared Back of House
- Plant

Site 5 – Former BHS (Units 36 – 37 Castle Quay Shopping Centre)

Site Details	Comment
Site Plan	
Size	3,816m^2
Retail Location	In- Centre
General Description	The site is the former BHS store located within the Castle Quay Shopping Centre. Castle Quay Car Park (south) is located to the north west and Castle Quay Car Park (north) to the north.
Policy Designation	The site is located within Banbury Town Centre Shopping Area (expanded).
Physical Constraints	The site is located within the shopping centre and therefore opportunities for redevelopment or creation of on-site parking would be very limited. Servicing arrangements are understood to be from a shared service yard accessed off the Castle Street/Cherwell Drive roundabout.
Suitability	The unit measures 3,816m^2 and therefore is far too large to accommodate the proposed development. However, as set out in the availability section, the unit has recently been subdivided to create a mixed use building providing small scale retail and food and drink floorspace split across a number of units and food/market hall area. A copy of the floor plan is provided at the end of this assessment. None of the units created would be of a sufficient scale to accommodate the proposed development and therefore the unit must be discounted as being unsuitable to accommodate the proposed foodstore.
Availability	A change of use application to a sui generis/mixed use (at the ground floor only); comprising use classes A1, A3, A4, A5, D1 and D2 was approved in September 2019 (19/01478/CDC) to create an independent food, drink and offer known as Lock29. It is understood that the new development was to open in March 2020 however this was delayed following the Convid19 lockdown and is understood that this opened in August 2020 and therefore the unit is no longer available to accommodate the proposed foodstore.

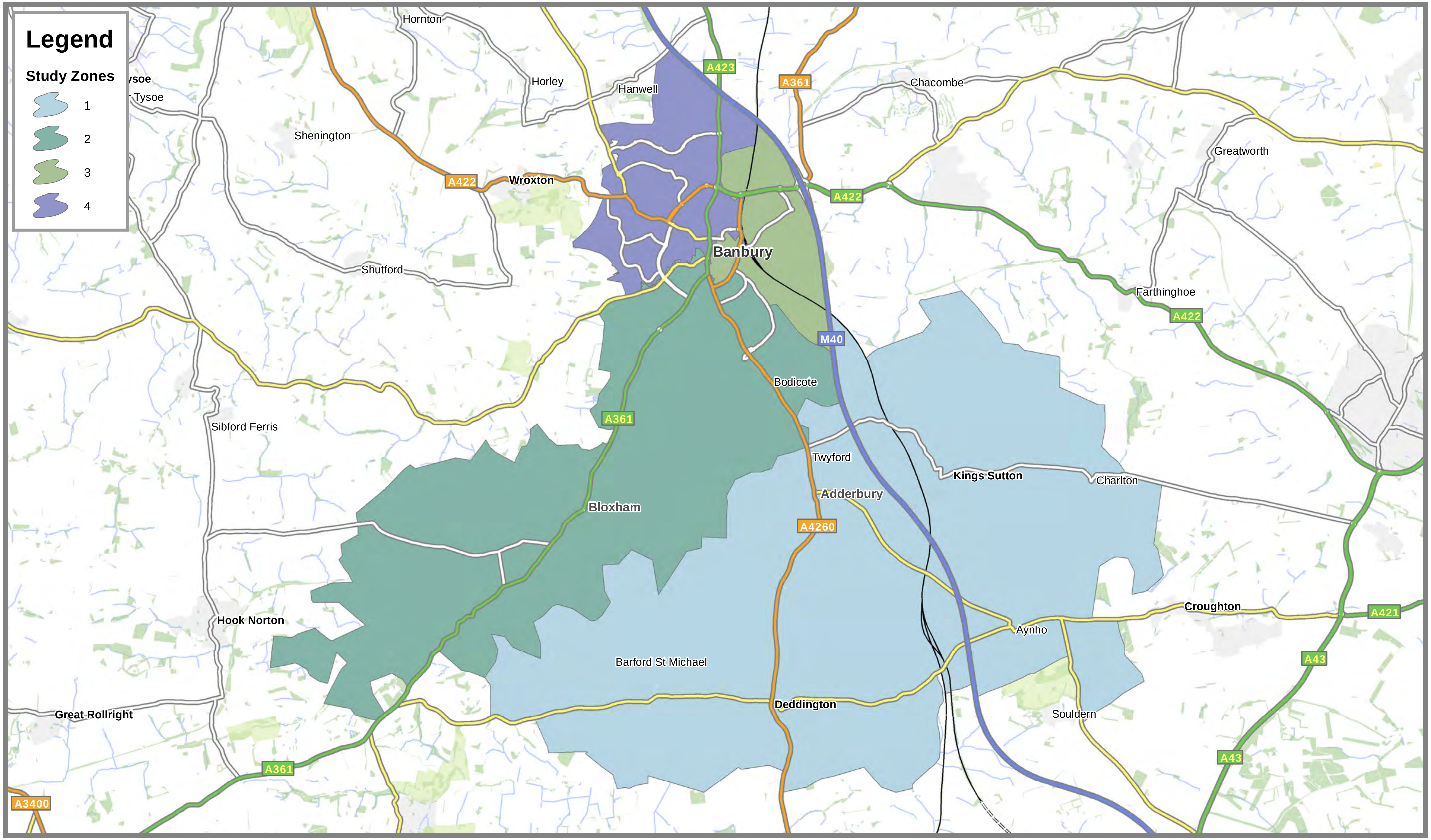
Conclusion	Overall, the site is not considered to be suitable or available for the proposed development. The site recently opened as Lock29; a food, drink, retail, and event space. None of the units within this are of a suitable scale to accommodate the proposed development whilst the unit as a whole, when it was formerly in use as BHS is too large to accommodate the development.

Plan / Image



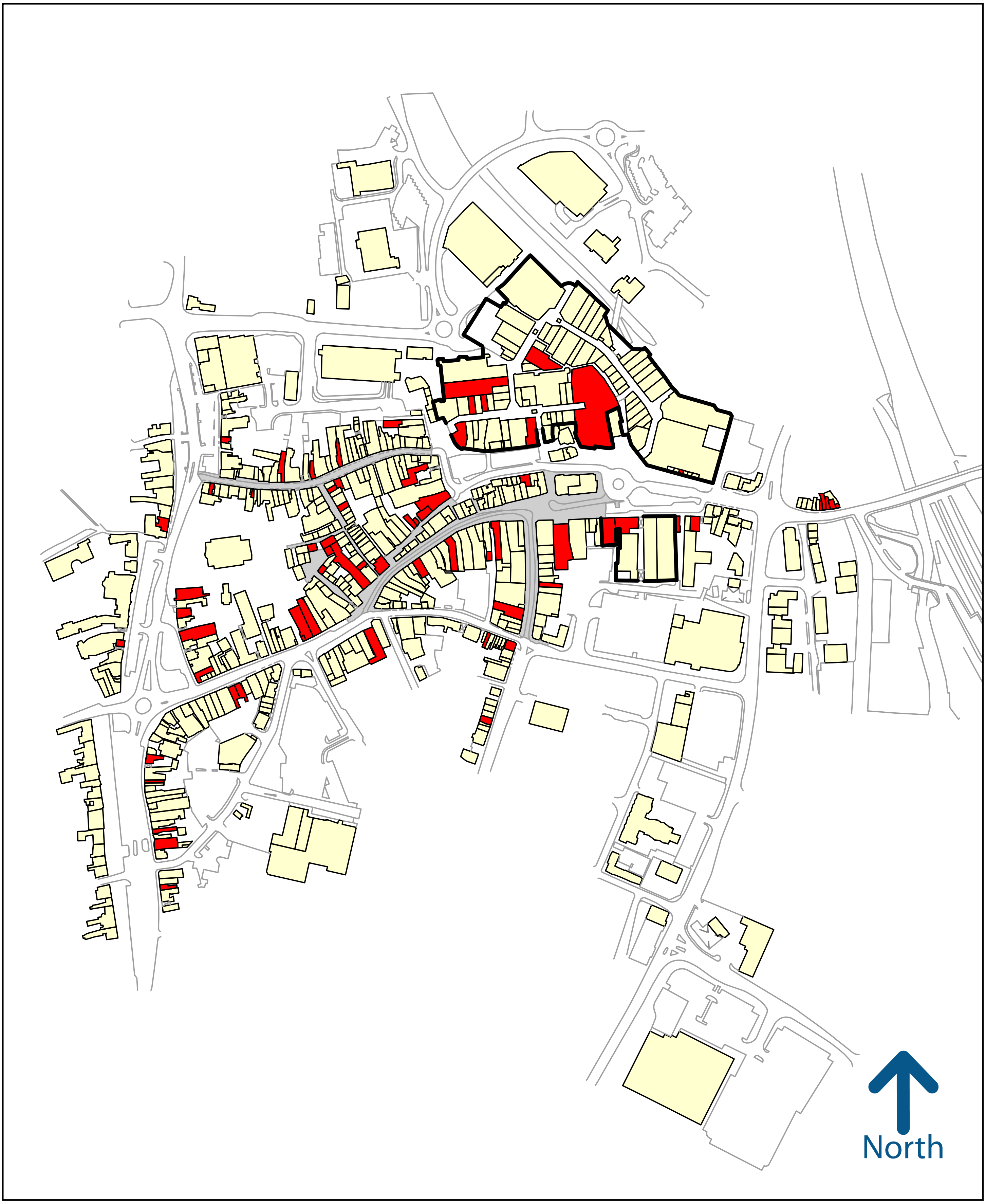
APPENDIX 3 – STUDY AREA MAP

Study area map



APPENDIX 4 – TOWN CENTRE VACANCY PLAN

Banbury



250 metres

Experian Goad Plan Created: 30/09/2020
Created By: Pegasus Planning Group

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APPENDIX 5 – RETAIL IMPACT TABLES

Table 1 - Population

Zone	2018	2019	2020	2021	2022	2023
1	9,387	9,445	9,498	9,546	9,607	9,676
2	21,028	21,080	21,156	21,248	21,301	21,371
3	11,600	11,657	11,697	11,730	11,768	11,814
4	24,717	24,835	24,951	25,074	25,176	25,274
Total	**66,732**	**67,017**	**67,302**	**67,598**	**67,852**	**68,135**

Notes:

1. Population data taken from Experian Location Analyst

Table 2a - Convenience Goods Per Capita Expenditure

Zone	Incl SFT	Excluding SFT					
	2018	2018	2019	2020	2021	2022	2023
1	2,588	2,490	2,457	2,607	2,469	2,474	2,467
2	2,278	2,191	2,163	2,295	2,173	2,178	2,171
3	2,083	2,004	1,978	2,098	1,987	1,991	1,985
4	2,138	2,057	2,030	2,154	2,040	2,044	2,038

Notes:

1. Base 2019 including SFT from Experian Location Analyst
2. SFT then removed from 2018 base figure in accordance with 'adjusted for SFT sales from stores' data at Figure 5 (Appendix 3) of Experian Retail Planner Briefing Note 18.
3. Growth rates applied from 2018 using growth rates set out in Figure 6 (Appendix 3) of Experian Retail Planner Briefing Note 18.
4. 2018 Prices.

Table 2b - Total Convenience Goods Expenditure

Zone	2018	2019	2020	2021	2022	2023
1	23.37	23.21	24.76	23.57	23.77	23.87
2	46.08	45.59	48.55	46.18	46.39	46.40
3	23.24	23.06	24.55	23.31	23.43	23.45
4	50.84	50.42	53.74	51.14	51.45	51.50
Total	**143.53**	**142.27**	**151.60**	**144.20**	**145.04**	**145.22**

Notes:

1. Population (Table 1) multiplied by Per Capita Expenditure (Table 2a).
2. 2018 Prices.

Table 2c - Main Trip Convenience Expenditure

Zone	2018	2019	2020	2021	2022	2023
1	17.53	17.41	18.57	17.68	17.83	17.90
2	34.56	34.20	36.41	34.63	34.79	34.80
3	17.43	17.29	18.41	17.48	17.57	17.59
4	38.13	37.81	40.31	38.36	38.59	38.62
Total	**107.65**	**106.71**	**113.70**	**108.15**	**108.78**	**108.91**

Notes:

1. 80% of total expenditure (Table 2b) assumed to be main trip expenditure as derived from household survey responses.
2. 2018 Prices

Table 2d - Top-up Trip Convenience Expenditure

Zone	2018	2019	2020	2021	2022	2023
1	5.84	5.80	6.19	5.89	5.94	5.97
2	11.52	11.40	12.14	11.54	11.60	11.60
3	5.81	5.76	6.14	5.83	5.86	5.86
4	12.71	12.60	13.44	12.79	12.86	12.87
Total	**35.88**	**35.57**	**37.90**	**36.05**	**36.26**	**36.30**

Notes:

1. 20% of total expenditure (Table 2b) assumed to be top-up trip expenditure as derived from household survey responses.
2. 2018 Prices

Table 3a - Comparison Goods Per Capita Expenditure

Zone	Incl SFT	Excluding SFT					
	2018	2018	2019	2020	2021	2022	2023
1	4,585	3,815	3,944	3,372	3,646	3,751	3,853
2	4,392	3,654	3,778	3,231	3,492	3,593	3,690
3	3,381	2,813	2,909	2,487	2,688	2,766	2,841
4	3,562	2,964	3,064	2,620	2,832	2,914	2,993

Notes:

1. Base 2018 including SFT from Experian Micromarketer G3 report.
2. SFT then removed from 2018 base figure in accordance with 'adjusted for SFT sales from stores' data at Figure 5 (Appendix 3) of Experian Retail Planner Briefing Note 18.
3. Growth rates applied from 2018 using growth rates set out in Figure 6 (Appendix 3) of Experian Retail Planner Briefing Note 18.
4. 2018 Prices.

Table 3b - Total Comparison Goods Expenditure

Zone	2018	2019	2020	2021	2022	2023
1	35.81	37.26	32.03	34.80	36.04	37.28
2	76.84	79.65	68.34	74.20	76.54	78.87
3	32.63	33.91	29.09	31.53	32.55	33.56
4	73.25	76.10	65.37	71.02	73.37	75.65
Total	**218.53**	**226.91**	**194.84**	**211.55**	**218.51**	**225.36**

Notes:

1. Population (Table 1) multiplied by Per Capita Expenditure (Table 3a).
2. 2018 Prices.

Table 4a - Main Food Shopping - Market Share

Retail Destination	Zone	In / Edge / Out	Total		Zone 1		Zone 2		Zone 3		Zone 4
			%	Count	%	Count	%	Count	%	Count	%
Zone 1											
Out of Centre											
Co-op, Market Place, Deddington	1	Out	0.18%	1	1.45%	1	0.00%	0	0.00%	0	0.00%
Co-op, Richmond Street, Kings Sutton	1	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Adderbury Stores, High Street, Adderbury, Banbury	1	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Deddington	1	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Kings Sutton	1	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Zone 2											
Out of Centre											
Co-op, Chatsworth Drive, Cherwell Heights, Banbury	2	Out	0.32%	2	0.48%	0	0.91%	1	0.00%	0	0.00%
Co-op, High Street, Bloxham	2	Out	0.12%	1	0.00%	0	0.42%	1	0.00%	0	0.00%
Co-op, Queensway Shopping Centre, Mewburn Road, Banbury	2	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Londis, (BP Garage), South Newington Road, Bloxham	2	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Londis, High Street, Bloxham	2	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
New Road Stores, New Road, Milcombe	2	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Sainsbury's Superstore, Oxford Road, Banbury	2	Out	24.54%	137	38.18%	27	37.01%	60	19.22%	20	13.65%
Spar, (Euro Garages), Oxford Road, Bodicote	2	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Spar, Molyneux Drive, Bodicote	2	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Wykham Park Farm, Banbury	2	Out	0.89%	5	0.00%	0	3.06%	5	0.00%	0	0.00%
Zone 3											
Banbury Town Centre											
Iceland, Calthorpe Street, Banbury	3	In	1.77%	10	0.00%	0	0.91%	1	0.00%	0	3.76%
Martin's, High Street, Banbury	3	In	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Farmfoods, The Calthorpe Centre, Banbury	3	In	0.75%	4	0.48%	0	0.00%	0	0.00%	0	1.72%
McColl's, Orchard Way, Banbury	3	In	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Tesco Express, High Street, Banbury	3	In	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Banbury Town Centre	3	In	0.77%	4	0.00%	0	0.00%	0	0.00%	0	1.92%
McColl's, South Bar Street, Banbury	2	In	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Food Plus, West Bar Street, Banbury	2	Edge	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Costcutter, Horse Fair, Banbury	4	In	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Out of Centre											
Co-op, Burchester Place, Grimsbury, Banbury	3	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Londis, Middleton Road, Banbury	3	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
M&S, Gateway Retail Park, Banbury	3	Out	2.66%	15	1.06%	1	2.77%	5	5.10%	5	1.98%
Morrisons, Swan Close Road, Banbury	3	Out	23.36%	131	13.71%	10	26.90%	44	37.29%	38	17.53%
Spar, (Euro Garages), Ermont Way, Banbury	3	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Spar, (Shell), Swan Close Road , Banbury	3	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Tesco Express, Blacklock House, Middleton Road, Banbury	3	Out	0.19%	1	0.00%	0	0.00%	0	1.04%	1	0.00%
Zone 4											
Out of Centre											
Aldi, Ruscote Avenue, Banbury	4	Out	13.65%	76	12.75%	9	11.66%	19	10.59%	11	16.74%
Co-op, Ferriston, Hardwick Estate, Banbury	4	Out	0.15%	1	0.00%	0	0.00%	0	0.00%	0	0.37%
Co-op, Rotary Way, Hanwell Fields, Banbury	4	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Co-op, Ruscote Arcade, Longelondes Way, Banbury	4	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Iceland, Banbury Cross Retail Park, Banbury	4	Out	0.39%	2	0.48%	0	0.42%	1	0.48%	0	0.31%
Londis, Bradley Arcade, Bretch Hill, Banbury	4	Out	0.13%	1	0.00%	0	0.00%	0	0.00%	0	0.31%
Nisa Local, Orchard Way, Neithrop, Banbury	4	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Tesco Extra, Lockheed Close, Banbury	4	Out	21.51%	120	4.69%	3	6.34%	10	21.57%	22	37.74%
Waitrose, Southam Road, Banbury	4	Out	4.83%	27	9.87%	7	5.77%	9	4.72%	5	2.61%
Banbury Cross Retail Park, BANBURY	4	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Outside of Study Area											
Chipping Norton Town Centre											
Sainsbury's Superstore, Market Place, Chipping Norton	0	In	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Chipping Norton Town Centre	0	In	0.07%	0	0.58%	0	0.00%	0	0.00%	0	0.00%
Coventry	0	In	0.26%	1	2.09%	1	0.00%	0	0.00%	0	0.00%
Bicester	0	In	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Out of Centre											
Co-op, Market Place, Brackley	0	Edge	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Sainsbury's Superstore, Pioneer Square, Bicester	0	Edge	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Waitrose, Manor Road, Brackley	0	Edge	0.13%	1	1.06%	1	0.00%	0	0.00%	0	0.00%
Aldi, Banbury Road, Chipping Norton	0	Out	0.85%	5	4.97%	4	0.77%	1	0.00%	0	0.00%
Aldi, Launton Road, Bicester	0	Out	0.70%	4	0.58%	0	2.16%	4	0.00%	0	0.00%
Co-op, High Street, Brackley	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Co-op, High Street, Middleton Cheney	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Co-op, Park End, Croughton	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
M&S, (Simply Food), Cherwell Valley Services, M40, Bicester	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
M&S, (Simply Food), Northampton Road, Brackley	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Spar, (Euro Garages), A43, Baynards Green, Bicester	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Spar, High Street, Hook Norton	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Tesco Express, Pavillons Way, Lark Rise, Brackley	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Tesco Superstore, Lakeview Drive, Bicester	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Tesco Superstore, Oxford Road, Brackley	0	Out	0.35%	2	2.79%	2	0.00%	0	0.00%	0	0.00%
Aldi, Botley Rd, Oxford	0	Out	0.37%	2	2.97%	2	0.00%	0	0.00%	0	0.00%
Asda, Leamington Spa	0	Out	0.96%	5	1.25%	1	0.91%	1	0.00%	0	1.35%
M&S, Windmill Square, Chipping Norton	0	Out	0.07%	0	0.58%	0	0.00%	0	0.00%	0	0.00%
Other			0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Total Excluding Internet, don't know, nowhere else			100%	559	100%	71	100%	162	100%	102	100%

Notes:

1. Derived from household survey.

Table 4b - Main Food Shopping - Turnover

Retail Destination	Zone 1		Zone 2		Zone 3		Zone 4		Total	
	2020 (£m)	2023 (£m)	2020 (£m)	2023 (£m)	2020 (£m)	2023 (£m)	2020 (£m)	2023 (£m)	2020 (£m)	2023 (£m)
Zone 1										
Out of Centre										
Co-op, Market Place, Deddington	0.27	0.26	0.00	0.00	0.00	0.00	0.00	0.00	0.27	0.26
Co-op, Richmond Street, Kings Sutton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Adderbury Stores, High Street, Adderbury, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Deddington	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Kings Sutton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Zone 2										
Out of Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Chatsworth Drive, Cherwell Heights, Banbury	0.09	0.09	0.33	0.32	0.00	0.00	0.00	0.00	0.42	0.40
Co-op, High Street, Bloxham	0.00	0.00	0.15	0.15	0.00	0.00	0.00	0.00	0.15	0.15
Co-op, Queensway Shopping Centre, Mewburn Road, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Londis, (BP Garage), South Newington Road, Bloxham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Londis, High Street, Bloxham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
New Road Stores, New Road, Milcombe	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sainsbury's Superstore, Oxford Road, Banbury	7.09	6.83	13.48	12.88	3.54	3.38	5.50	5.27	29.61	28.37
Spar, (Euro Garages), Oxford Road, Bodicote	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Spar, Molyneux Drive, Bodicote	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wykham Park Farm, Banbury	0.00	0.00	1.12	1.07	0.00	0.00	0.00	0.00	1.12	1.07
Zone 3										
Banbury Town Centre										
Iceland, Calthorpe Street, Banbury	0.00	0.00	0.33	0.32	0.00	0.00	1.51	1.45	1.84	1.77
Martin's, High Street, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Farmfoods, The Calthorpe Centre, Banbury	0.09	0.09	0.00	0.00	0.00	0.00	0.69	0.66	0.78	0.75
McColl's, Orchard Way, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Express, High Street, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Banbury Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.77	0.74	0.77	0.74
McColl's, South Bar Street, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Food Plus, West Bar Street, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Costcutter, Horse Fair, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Out of Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Burchester Place, Grimsbury, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Londis, Middleton Road, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
M&S, Gateway Retail Park, Banbury	0.20	0.19	1.01	0.97	0.94	0.90	0.80	0.77	2.94	2.82
Morrisons, Swan Close Road, Banbury	2.55	2.45	9.79	9.36	6.86	6.56	7.07	6.77	26.27	25.14
Spar, (Euro Garages), Ermont Way, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Spar, (Shell), Swan Close Road , Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Express, Blacklock House, Middleton Road, Banbury	0.00	0.00	0.00	0.00	0.19	0.18	0.00	0.00	0.19	0.18
Zone 4										
Out of Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Aldi, Ruscote Avenue, Banbury	2.37	2.28	4.24	4.06	1.95	1.86	6.75	6.47	15.31	14.67
Co-op, Ferriston, Hardwick Estate, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.15	0.14	0.15	0.14
Co-op, Rotary Way, Hanwell Fields, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Ruscote Arcade, Longelondes Way, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Iceland, Banbury Cross Retail Park, Banbury	0.09	0.09	0.15	0.15	0.09	0.08	0.13	0.12	0.46	0.44
Londis, Bradley Arcade, Bretch Hill, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.13	0.12	0.13	0.12
Nisa Local, Orchard Way, Neithrop, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Extra, Lockheed Close, Banbury	0.87	0.84	2.31	2.21	3.97	3.79	15.21	14.58	22.36	21.42
Waitrose, Southam Road, Banbury	1.83	1.77	2.10	2.01	0.87	0.83	1.05	1.01	5.85	5.61
Banbury Cross Retail Park, BANBURY	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Outside of Study Area										
Chipping Norton Town Centre										
Sainsbury's Superstore, Market Place, Chipping Norton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Chipping Norton Town Centre	0.11	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.11	0.10
Coventry	0.39	0.37	0.00	0.00	0.00	0.00	0.00	0.00	0.39	0.37
Bicester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Out of Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Market Place, Brackley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sainsbury's Superstore, Pioneer Square, Bicester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Waitrose, Manor Road, Brackley	0.20	0.19	0.00	0.00	0.00	0.00	0.00	0.00	0.20	0.19
Aldi, Banbury Road, Chipping Norton	0.92	0.89	0.28	0.27	0.00	0.00	0.00	0.00	1.20	1.16
Aldi, Launton Road, Bicester	0.11	0.10	0.79	0.75	0.00	0.00	0.00	0.00	0.89	0.85
Co-op, High Street, Brackley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, High Street, Middleton Cheney	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Park End, Croughton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
M&S, (Simply Food), Cherwell Valley Services, M40, Bicester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
M&S, (Simply Food), Northampton Road, Brackley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Spar, (Euro Garages), A43, Baynards Green, Bicester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Spar, High Street, Hook Norton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Express, Pavillons Way, Lark Rise, Brackley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Superstore, Lakeview Drive, Bicester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Superstore, Oxford Road, Brackley	0.52	0.50	0.00	0.00	0.00	0.00	0.00	0.00	0.52	0.50
Aldi, Botley Rd, Oxford	0.55	0.53	0.00	0.00	0.00	0.00	0.00	0.00	0.55	0.53
Asda, Leamington Spa	0.23	0.22	0.33	0.32	0.00	0.00	0.54	0.52	1.11	1.06
M&S, Windmill Square, Chipping Norton	0.11	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.11	0.10
Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Excluding Internet, don't know, nowhere else	18.57	17.90	36.41	34.80	18.41	17.59	40.31	38.62	113.70	108.91

Notes:

1. Responses to household survey (Table 4a) multiplied by main trip convenience expenditure (Table 2c)
2. 2018 Prices

Table 4c - Top-up Food Market Share

Retail Destination	Zone	In / Edge / Out	Total		Zone 1		Zone 2		Zone 3		Zone 4
			%	Count	%	Count	%	Count	%	Count	%
Zone 1											
Out of Centre											
Co-op, Market Place, Deddington	1	Out	1.99%	7	16.21%	7	0.00%	0	0.00%	0	0.00%
Co-op, Richmond Street, Kings Sutton	1	Out	2.39%	9	19.52%	9	0.00%	0	0.00%	0	0.00%
Adderbury Stores, High Street, Adderbury, Banbury	1	Out	0.72%	3	5.88%	3	0.00%	0	0.00%	0	0.00%
Deddington	1	Out	0.89%	3	7.25%	3	0.00%	0	0.00%	0	0.00%
Kings Sutton	1	Out	0.55%	2	4.51%	2	0.00%	0	0.00%	0	0.00%
Zone 2											
Out of Centre											
Co-op, Chatsworth Drive, Cherwell Heights, Banbury	2	Out	6.56%	24	0.90%	0	18.70%	23	0.00%	0	0.52%
Co-op, High Street, Bloxham	2	Out	3.28%	12	2.86%	1	8.74%	11	0.00%	0	0.00%
Co-op, Queensway Shopping Centre, Mewburn Road, Banbury	2	Out	7.12%	26	0.00%	0	8.75%	11	0.00%	0	11.35%
Londis, (BP Garage), South Newington Road, Bloxham	2	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Londis, High Street, Bloxham	2	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
New Road Stores, New Road, Milcombe	2	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Sainsbury's Superstore, Oxford Road, Banbury	2	Out	10.26%	38	16.25%	7	15.83%	19	11.20%	7	2.76%
Spar, (Euro Garages), Oxford Road, Bodicote	2	Out	0.31%	1	0.00%	0	0.93%	1	0.00%	0	0.00%
Spar, Molyneux Drive, Bodicote	2	Out	3.08%	11	6.46%	3	6.82%	8	0.00%	0	0.00%
Wykham Park Farm, Banbury	2	Out	0.65%	2	0.76%	0	1.66%	2	0.00%	0	0.00%
Zone 3											
Banbury Town Centre											
Iceland, Calthorpe Street, Banbury	3	In	2.44%	9	0.76%	0	4.52%	6	0.64%	0	1.96%
Martin's, High Street, Banbury	3	In	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Farmfoods, The Calthorpe Centre, Banbury	3	In	0.20%	1	0.76%	0	0.00%	0	0.64%	0	0.00%
McColl's, Orchard Way, Banbury	3	In	0.19%	1	0.00%	0	0.55%	1	0.00%	0	0.00%
Tesco Express, High Street, Banbury	3	In	1.21%	4	0.00%	0	1.48%	2	2.81%	2	0.62%
Banbury Town Centre	3	In	2.02%	7	0.00%	0	0.00%	0	4.58%	3	3.31%
McColl's, South Bar Street, Banbury	2	In	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Food Plus, West Bar Street, Banbury	2	Edge	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Costcutter, Horse Fair, Banbury	4	In	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Out of Centre											
Co-op, Burchester Place, Grimsbury, Banbury	3	Out	5.68%	21	0.00%	0	0.00%	0	28.54%	18	1.96%
Londis, Middleton Road, Banbury	3	Out	1.65%	6	0.00%	0	0.00%	0	9.49%	6	0.00%
M&S, Gateway Retail Park, Banbury	3	Out	3.37%	12	0.76%	0	3.11%	4	3.95%	3	4.20%
Morrisons, Swan Close Road, Banbury	3	Out	5.82%	21	4.22%	2	14.70%	18	0.00%	0	1.04%
Spar, (Euro Garages), Ermont Way, Banbury	3	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Spar, (Shell), Swan Close Road , Banbury	3	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Tesco Express, Blacklock House, Middleton Road, Banbury	3	Out	5.16%	19	0.00%	0	0.00%	0	26.86%	17	1.34%
Zone 4											
Out of Centre											
Aldi, Ruscote Avenue, Banbury	4	Out	5.46%	20	3.27%	1	4.52%	6	0.00%	0	9.63%
Co-op, Ferriston, Hardwick Estate, Banbury	4	Out	6.09%	22	0.00%	0	0.00%	0	0.00%	0	16.51%
Co-op, Rotary Way, Hanwell Fields, Banbury	4	Out	2.81%	10	0.00%	0	0.00%	0	0.00%	0	7.61%
Co-op, Ruscote Arcade, Longelondes Way, Banbury	4	Out	3.52%	13	0.00%	0	0.00%	0	0.00%	0	9.56%
Iceland, Banbury Cross Retail Park, Banbury	4	Out	1.48%	5	0.00%	0	0.00%	0	0.64%	0	3.71%
Londis, Bradley Arcade, Bretch Hill, Banbury	4	Out	2.38%	9	0.00%	0	0.00%	0	0.00%	0	6.47%
Nisa Local, Orchard Way, Neithrop, Banbury	4	Out	3.76%	14	0.00%	0	0.00%	0	0.00%	0	10.19%
Tesco Extra, Lockheed Close, Banbury	4	Out	3.51%	13	0.76%	0	2.13%	3	4.71%	3	5.13%
Waitrose, Southam Road, Banbury	4	Out	1.81%	7	1.66%	1	1.94%	2	4.43%	3	0.52%
Banbury Cross Retail Park, BANBURY	4	Out	1.43%	5	0.00%	0	1.66%	2	1.53%	1	1.65%
Outside of Study Area											
Chipping Norton Town Centre											
Sainsbury's Superstore, Market Place, Chipping Norton	0	In	0.19%	1	0.00%	0	0.55%	1	0.00%	0	0.00%
Chipping Norton Town Centre	0	In	0.19%	1	0.00%	0	0.55%	1	0.00%	0	0.00%
Coventry	0	In	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Bicester	0	In	0.11%	0	0.90%	0	0.00%	0	0.00%	0	0.00%
Out of Centre											
Co-op, Market Place, Brackley	0	Edge	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Sainsbury's Superstore, Pioneer Square, Bicester	0	Edge	1.07%	4	0.90%	0	2.86%	4	0.00%	0	0.00%
Waitrose, Manor Road, Brackley	0	Edge	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Aldi, Banbury Road, Chipping Norton	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Aldi, Launton Road, Bicester	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Co-op, High Street, Brackley	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Co-op, High Street, Middleton Cheney	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Co-op, Park End, Croughton	0	Out	0.09%	0	0.76%	0	0.00%	0	0.00%	0	0.00%
M&S, (Simply Food), Cherwell Valley Services, M40, Bicester	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
M&S, (Simply Food), Northampton Road, Brackley	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Spar, (Euro Garages), A43, Baynards Green, Bicester	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Spar, High Street, Hook Norton	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Tesco Express, Pavillons Way, Lark Rise, Brackley	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Tesco Superstore, Lakeview Drive, Bicester	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Tesco Superstore, Oxford Road, Brackley	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Aldi, Botley Rd, Oxford	0	Out	0.57%	2	4.66%	2	0.00%	0	0.00%	0	0.00%
Asda, Leamington Spa	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
M&S, Windmill Square, Chipping Norton	0	Out	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Other			0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Total Excluding Internet, don't know, nowhere else			100%	367	100%	45	100%	123	100%	64	100%

Notes:

1. Derived from household survey.

Table 4d - Top-up Shopping - Turnover

Retail Destination	Zone 1		Zone 2		Zone 3		Zone 4		Total	
	2020 (£m)	2023 (£m)	2020 (£m)	2023 (£m)	2020 (£m)	2023 (£m)	2020 (£m)	2023 (£m)	2020 (£m)	2023 (£m)
Zone 1										
Out of Centre										
Co-op, Market Place, Deddington	1.00	0.97	0.00	0.00	0.00	0.00	0.00	0.00	1.00	0.97
Co-op, Richmond Street, Kings Sutton	1.21	1.16	0.00	0.00	0.00	0.00	0.00	0.00	1.21	1.16
Adderbury Stores, High Street, Adderbury, Banbury	0.36	0.35	0.00	0.00	0.00	0.00	0.00	0.00	0.36	0.35
Deddington	0.45	0.43	0.00	0.00	0.00	0.00	0.00	0.00	0.45	0.43
Kings Sutton	0.28	0.27	0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.27
Zone 2										
Out of Centre										
Co-op, Chatsworth Drive, Cherwell Heights, Banbury	0.06	0.05	2.27	2.17	0.00	0.00	0.07	0.07	2.40	2.29
Co-op, High Street, Bloxham	0.18	0.17	1.06	1.01	0.00	0.00	0.00	0.00	1.24	1.18
Co-op, Queensway Shopping Centre, Mewburn Road, Banbury	0.00	0.00	1.06	1.02	0.00	0.00	1.53	1.46	2.59	2.48
Londis, (BP Garage), South Newington Road, Bloxham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Londis, High Street, Bloxham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
New Road Stores, New Road, Milcombe	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sainsbury's Superstore, Oxford Road, Banbury	1.01	0.97	1.92	1.84	0.69	0.66	0.37	0.36	3.99	3.82
Spar, (Euro Garages), Oxford Road, Bodicote	0.00	0.00	0.11	0.11	0.00	0.00	0.00	0.00	0.11	0.11
Spar, Molyneux Drive, Bodicote	0.40	0.39	0.83	0.79	0.00	0.00	0.00	0.00	1.23	1.18
Wykham Park Farm, Banbury	0.05	0.05	0.20	0.19	0.00	0.00	0.00	0.00	0.25	0.24
Zone 3										
Banbury Town Centre										
Iceland, Calthorpe Street, Banbury	0.05	0.05	0.55	0.52	0.04	0.04	0.26	0.25	0.90	0.86
Martin's, High Street, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Farmfoods, The Calthorpe Centre, Banbury	0.05	0.05	0.00	0.00	0.04	0.04	0.00	0.00	0.09	0.08
McColl's, Orchard Way, Banbury	0.00	0.00	0.07	0.06	0.00	0.00	0.00	0.00	0.07	0.06
Tesco Express, High Street, Banbury	0.00	0.00	0.18	0.17	0.17	0.16	0.08	0.08	0.43	0.42
Banbury Town Centre	0.00	0.00	0.00	0.00	0.28	0.27	0.44	0.43	0.73	0.69
McColl's, South Bar Street, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Food Plus, West Bar Street, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Costcutter, Horse Fair, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Out of Centre										
Co-op, Burchester Place, Grimsbury, Banbury	0.00	0.00	0.00	0.00	1.75	1.67	0.26	0.25	2.01	1.93
Londis, Middleton Road, Banbury	0.00	0.00	0.00	0.00	0.58	0.56	0.00	0.00	0.58	0.56
M&S, Gateway Retail Park, Banbury	0.05	0.05	0.38	0.36	0.24	0.23	0.56	0.54	1.23	1.18
Morrisons, Swan Close Road, Banbury	0.26	0.25	1.78	1.70	0.00	0.00	0.14	0.13	2.18	2.09
Spar, (Euro Garages), Ermont Way, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Spar, (Shell), Swan Close Road , Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Express, Blacklock House, Middleton Road, Banbury	0.00	0.00	0.00	0.00	1.65	1.57	0.18	0.17	1.83	1.75
Zone 4										
Out of Centre										
Aldi, Ruscote Avenue, Banbury	0.20	0.20	0.55	0.52	0.00	0.00	1.29	1.24	2.04	1.96
Co-op, Ferriston, Hardwick Estate, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	2.22	2.13	2.22	2.13
Co-op, Rotary Way, Hanwell Fields, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	1.02	0.98	1.02	0.98
Co-op, Ruscote Arcade, Longelondes Way, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	1.28	1.23	1.28	1.23
Iceland, Banbury Cross Retail Park, Banbury	0.00	0.00	0.00	0.00	0.04	0.04	0.50	0.48	0.54	0.51
Londis, Bradley Arcade, Bretch Hill, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.87	0.83	0.87	0.83
Nisa Local, Orchard Way, Neithrop, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	1.37	1.31	1.37	1.31
Tesco Extra, Lockheed Close, Banbury	0.05	0.05	0.26	0.25	0.29	0.28	0.69	0.66	1.28	1.23
Waitrose, Southam Road, Banbury	0.10	0.10	0.24	0.23	0.27	0.26	0.07	0.07	0.68	0.65
Banbury Cross Retail Park, BANBURY	0.00	0.00	0.20	0.19	0.09	0.09	0.22	0.21	0.52	0.50
Outside of Study Area										
Chipping Norton Town Centre										
Sainsbury's Superstore, Market Place, Chipping Norton	0.00	0.00	0.07	0.06	0.00	0.00	0.00	0.00	0.07	0.06
Chipping Norton Town Centre	0.00	0.00	0.07	0.06	0.00	0.00	0.00	0.00	0.07	0.06
Coventry	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bicester	0.06	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.05
Other Centres	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Market Place, Brackley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sainsbury's Superstore, Pioneer Square, Bicester	0.06	0.05	0.35	0.33	0.00	0.00	0.00	0.00	0.40	0.39
Waitrose, Manor Road, Brackley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Aldi, Banbury Road, Chipping Norton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Aldi, Launton Road, Bicester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, High Street, Brackley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, High Street, Middleton Cheney	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Park End, Croughton	0.05	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.05
M&S, (Simply Food), Cherwell Valley Services, M40, Bicester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
M&S, (Simply Food), Northampton Road, Brackley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Spar, (Euro Garages), A43, Baynards Green, Bicester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Spar, High Street, Hook Norton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Express, Pavillons Way, Lark Rise, Brackley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Superstore, Lakeview Drive, Bicester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Superstore, Oxford Road, Brackley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Aldi, Botley Rd, Oxford	0.29	0.28	0.00	0.00	0.00	0.00	0.00	0.00	0.29	0.28
Asda, Leamington Spa	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
M&S, Windmill Square, Chipping Norton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Excluding Internet, don't know, nowhere else	6.19	5.97	12.14	11.60	6.14	5.86	13.44	12.87	37.90	36.30

Notes:

1. Responses to household survey (Table 4c) multiplied by top-up trip convenience expenditure (Table 2d)
2. 2018 Prices

Table 4e - Total Convenience Turnover

Retail Destination	Zone 1		Zone 2		Zone 3		Zone 4		Total	
	2020 (£m)	2023 (£m)	2020 (£m)	2023 (£m)	2020 (£m)	2023 (£m)	2020 (£m)	2023 (£m)	2020 (£m)	2023 (£m)
Zone 1										
Out of Centre										
Co-op, Market Place, Deddington	1.27	1.23	0.00	0.00	0.00	0.00	0.00	0.00	1.27	1.23
Co-op, Richmond Street, Kings Sutton	1.21	1.16	0.00	0.00	0.00	0.00	0.00	0.00	1.21	1.16
Adderbury Stores, High Street, Adderbury, Banbury	0.36	0.35	0.00	0.00	0.00	0.00	0.00	0.00	0.36	0.35
Deddington	0.45	0.43	0.00	0.00	0.00	0.00	0.00	0.00	0.45	0.43
Kings Sutton	0.28	0.27	0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.27
Zone 2										
Out of Centre										
Co-op, Chatsworth Drive, Cherwell Heights, Banbury	0.15	0.14	2.60	2.48	0.00	0.00	0.07	0.07	2.81	2.69
Co-op, High Street, Bloxham	0.18	0.17	1.21	1.16	0.00	0.00	0.00	0.00	1.39	1.33
Co-op, Queensway Shopping Centre, Mewburn Road, Banbury	0.00	0.00	1.06	1.02	0.00	0.00	1.53	1.46	2.59	2.48
Londis, (BP Garage), South Newington Road, Bloxham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Londis, High Street, Bloxham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
New Road Stores, New Road, Milcombe	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sainsbury's Superstore, Oxford Road, Banbury	8.10	7.80	15.40	14.72	4.22	4.04	5.87	5.63	33.59	32.18
Spar, (Euro Garages), Oxford Road, Bodicote	0.00	0.00	0.11	0.11	0.00	0.00	0.00	0.00	0.11	0.11
Spar, Molyneux Drive, Bodicote	0.40	0.39	0.83	0.79	0.00	0.00	0.00	0.00	1.23	1.18
Wykham Park Farm, Banbury	0.05	0.05	1.32	1.26	0.00	0.00	0.00	0.00	1.36	1.30
Zone 3										
Banbury Town Centre										
Iceland, Calthorpe Street, Banbury	0.05	0.05	0.88	0.84	0.04	0.04	1.78	1.70	2.74	2.62
Martin's, High Street, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Farmfoods, The Calthorpe Centre, Banbury	0.14	0.13	0.00	0.00	0.04	0.04	0.69	0.66	0.87	0.83
McColl's, Orchard Way, Banbury	0.00	0.00	0.07	0.06	0.00	0.00	0.00	0.00	0.07	0.06
Tesco Express, High Street, Banbury	0.00	0.00	0.18	0.17	0.17	0.16	0.08	0.08	0.43	0.42
Banbury Town Centre	0.00	0.00	0.00	0.00	0.28	0.27	1.22	1.17	1.50	1.44
McColl's, South Bar Street, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Food Plus, West Bar Street, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Costcutter, Horse Fair, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Out of Centre										
Co-op, Burchester Place, Grimsbury, Banbury	0.00	0.00	0.00	0.00	1.75	1.67	0.26	0.25	2.01	1.93
Londis, Middleton Road, Banbury	0.00	0.00	0.00	0.00	0.58	0.56	0.00	0.00	0.58	0.56
M&S, Gateway Retail Park, Banbury	0.24	0.23	1.39	1.33	1.18	1.13	1.36	1.31	4.17	3.99
Morrisons, Swan Close Road, Banbury	2.81	2.71	11.58	11.07	6.86	6.56	7.21	6.91	28.46	27.24
Spar, (Euro Garages), Ermont Way, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Spar, (Shell), Swan Close Road , Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Express, Blacklock House, Middleton Road, Banbury	0.00	0.00	0.00	0.00	1.84	1.76	0.18	0.17	2.02	1.93
Zone 4										
Out of Centre										
Aldi, Ruscote Avenue, Banbury	2.57	2.48	4.79	4.58	1.95	1.86	8.04	7.71	17.36	16.63
Co-op, Ferriston, Hardwick Estate, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	2.37	2.27	2.37	2.27
Co-op, Rotary Way, Hanwell Fields, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	1.02	0.98	1.02	0.98
Co-op, Ruscote Arcade, Longelondes Way, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	1.28	1.23	1.28	1.23
Iceland, Banbury Cross Retail Park, Banbury	0.09	0.09	0.15	0.15	0.13	0.12	0.62	0.60	0.99	0.95
Londis, Bradley Arcade, Bretch Hill, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.99	0.95	0.99	0.95
Nisa Local, Orchard Way, Neithrop, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	1.37	1.31	1.37	1.31
Tesco Extra, Lockheed Close, Banbury	0.92	0.88	2.57	2.45	4.26	4.07	15.90	15.24	23.64	22.64
Waitrose, Southam Road, Banbury	1.94	1.87	2.34	2.23	1.14	1.09	1.12	1.07	6.53	6.26
Banbury Cross Retail Park, BANBURY	0.00	0.00	0.20	0.19	0.09	0.09	0.22	0.21	0.52	0.50
Outside of Study Area										
Chipping Norton Town Centre										
Sainsbury's Superstore, Market Place, Chipping Norton	0.00	0.00	0.07	0.06	0.00	0.00	0.00	0.00	0.07	0.06
Chipping Norton Town Centre	0.11	0.10	0.07	0.06	0.00	0.00	0.00	0.00	0.17	0.17
Coventry	0.39	0.37	0.00	0.00	0.00	0.00	0.00	0.00	0.39	0.37
Bicester	0.06	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.05
Other Centres	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Market Place, Brackley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sainsbury's Superstore, Pioneer Square, Bicester	0.06	0.05	0.35	0.33	0.00	0.00	0.00	0.00	0.40	0.39
Waitrose, Manor Road, Brackley	0.20	0.19	0.00	0.00	0.00	0.00	0.00	0.00	0.20	0.19
Aldi, Banbury Road, Chipping Norton	0.92	0.89	0.28	0.27	0.00	0.00	0.00	0.00	1.20	1.16
Aldi, Launton Road, Bicester	0.11	0.10	0.79	0.75	0.00	0.00	0.00	0.00	0.89	0.85
Co-op, High Street, Brackley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, High Street, Middleton Cheney	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, Park End, Croughton	0.05	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.05
M&S, (Simply Food), Cherwell Valley Services, M40, Bicester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
M&S, (Simply Food), Northampton Road, Brackley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Spar, (Euro Garages), A43, Baynards Green, Bicester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Spar, High Street, Hook Norton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Express, Pavillons Way, Lark Rise, Brackley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Superstore, Lakeview Drive, Bicester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Superstore, Oxford Road, Brackley	0.52	0.50	0.00	0.00	0.00	0.00	0.00	0.00	0.52	0.50
Aldi, Botley Rd, Oxford	0.84	0.81	0.00	0.00	0.00	0.00	0.00	0.00	0.84	0.81
Asda, Leamington Spa	0.23	0.22	0.33	0.32	0.00	0.00	0.54	0.52	1.11	1.06
M&S, Windmill Square, Chipping Norton	0.11	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.11	0.10
Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Excluding Internet, don’t know, nowhere else	24.76	23.87	48.55	46.40	24.55	23.45	53.74	51.50	151.60	145.22

Notes:

1. Main trip turnover (Table 4b) plus top-up trip turnover (Table 4d)
2. 2018 Prices

Table 4f - Total Convenience Market Share

Retail Destination	Zone 1	Zone 2	Zone 3	Zone 4	Total
	%	%	%	%	%
Zone 1					
Out of Centre					
Co-op, Market Place, Deddington	5.1%	0.0%	0.0%	0.0%	0.8%
Co-op, Richmond Street, Kings Sutton	4.9%	0.0%	0.0%	0.0%	0.8%
Adderbury Stores, High Street, Adderbury, Banbury	1.5%	0.0%	0.0%	0.0%	0.2%
Deddington	1.8%	0.0%	0.0%	0.0%	0.3%
Kings Sutton	1.1%	0.0%	0.0%	0.0%	0.2%
Zone 2					
Out of Centre					
Co-op, Chatsworth Drive, Cherwell Heights, Banbury	0.6%	5.4%	0.0%	0.1%	1.9%
Co-op, High Street, Bloxham	0.7%	2.5%	0.0%	0.0%	0.9%
Co-op, Queensway Shopping Centre, Mewburn Road, Banbury	0.0%	2.2%	0.0%	2.8%	1.7%
Londis, (BP Garage), South Newington Road, Bloxham	0.0%	0.0%	0.0%	0.0%	0.0%
Londis, High Street, Bloxham	0.0%	0.0%	0.0%	0.0%	0.0%
New Road Stores, New Road, Milcombe	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Oxford Road, Banbury	32.7%	31.7%	17.2%	10.9%	22.2%
Spar, (Euro Garages), Oxford Road, Bodicote	0.0%	0.2%	0.0%	0.0%	0.1%
Spar, Molyneux Drive, Bodicote	1.6%	1.7%	0.0%	0.0%	0.8%
Wykham Park Farm, Banbury	0.2%	2.7%	0.0%	0.0%	0.9%
Zone 3					
Banbury Town Centre					
Iceland, Calthorpe Street, Banbury	0.2%	1.8%	0.2%	3.3%	1.8%
Martin's, High Street, Banbury	0.0%	0.0%	0.0%	0.0%	0.0%
Farmfoods, The Calthorpe Centre, Banbury	0.6%	0.0%	0.2%	1.3%	0.6%
McColl's, Orchard Way, Banbury	0.0%	0.1%	0.0%	0.0%	0.0%
Tesco Express, High Street, Banbury	0.0%	0.4%	0.7%	0.2%	0.3%
Banbury Town Centre	0.0%	0.0%	1.1%	2.3%	1.0%
McColl's, South Bar Street, Banbury	0.0%	0.0%	0.0%	0.0%	0.0%
Food Plus, West Bar Street, Banbury	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Horse Fair, Banbury	0.0%	0.0%	0.0%	0.0%	0.0%
Out of Centre					
Co-op, Burchester Place, Grimsbury, Banbury	0.0%	0.0%	7.1%	0.5%	1.3%
Londis, Middleton Road, Banbury	0.0%	0.0%	2.4%	0.0%	0.4%
M&S, Gateway Retail Park, Banbury	1.0%	2.9%	4.8%	2.5%	2.8%
Morrisons, Swan Close Road, Banbury	11.3%	23.8%	28.0%	13.4%	18.8%
Spar, (Euro Garages), Ermont Way, Banbury	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, (Shell), Swan Close Road , Banbury	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Blacklock House, Middleton Road, Banbury	0.0%	0.0%	7.5%	0.3%	1.3%
Zone 4					
Out of Centre					
Aldi, Ruscote Avenue, Banbury	10.4%	9.9%	7.9%	15.0%	11.4%
Co-op, Ferriston, Hardwick Estate, Banbury	0.0%	0.0%	0.0%	4.4%	1.6%
Co-op, Rotary Way, Hanwell Fields, Banbury	0.0%	0.0%	0.0%	1.9%	0.7%
Co-op, Ruscote Arcade, Longelondes Way, Banbury	0.0%	0.0%	0.0%	2.4%	0.8%
Iceland, Banbury Cross Retail Park, Banbury	0.4%	0.3%	0.5%	1.2%	0.7%
Londis, Bradley Arcade, Bretch Hill, Banbury	0.0%	0.0%	0.0%	1.9%	0.7%
Nisa Local, Orchard Way, Neithrop, Banbury	0.0%	0.0%	0.0%	2.5%	0.9%
Tesco Extra, Lockheed Close, Banbury	3.7%	5.3%	17.4%	29.6%	15.6%
Waitrose, Southam Road, Banbury	7.8%	4.8%	4.6%	2.1%	4.3%
Banbury Cross Retail Park, BANBURY	0.0%	0.4%	0.4%	0.4%	0.3%
Outside of Study Area					
Chipping Norton Town Centre					
Sainsbury's Superstore, Market Place, Chipping Norton	0.0%	0.1%	0.0%	0.0%	0.0%
Chipping Norton Town Centre	0.4%	0.1%	0.0%	0.0%	0.1%
Coventry	1.6%	0.0%	0.0%	0.0%	0.3%
Bicester	0.2%	0.0%	0.0%	0.0%	0.0%
Other Centres					
Co-op, Market Place, Brackley	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Pioneer Square, Bicester	0.2%	0.7%	0.0%	0.0%	0.3%
Waitrose, Manor Road, Brackley	0.8%	0.0%	0.0%	0.0%	0.1%
Aldi, Banbury Road, Chipping Norton	3.7%	0.6%	0.0%	0.0%	0.8%
Aldi, Launton Road, Bicester	0.4%	1.6%	0.0%	0.0%	0.6%
Co-op, High Street, Brackley	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, High Street, Middleton Cheney	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Park End, Croughton	0.2%	0.0%	0.0%	0.0%	0.0%
M&S, (Simply Food), Cherwell Valley Services, M40, Bicester	0.0%	0.0%	0.0%	0.0%	0.0%
M&S, (Simply Food), Northampton Road, Brackley	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, (Euro Garages), A43, Baynards Green, Bicester	0.0%	0.0%	0.0%	0.0%	0.0%
Spar, High Street, Hook Norton	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Pavillons Way, Lark Rise, Brackley	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Lakeview Drive, Bicester	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Oxford Road, Brackley	2.1%	0.0%	0.0%	0.0%	0.3%
Aldi, Botley Rd, Oxford	3.4%	0.0%	0.0%	0.0%	0.6%
Asda, Leamington Spa	0.9%	0.7%	0.0%	1.0%	0.7%
M&S, Windmill Square, Chipping Norton	0.4%	0.0%	0.0%	0.0%	0.1%
Other	0.0%	0.0%	0.0%	0.0%	0.0%
Total Excluding Internet, don't know, nowhere else	100%	100%	100%	100%	100%

Notes:

1. Market share derived from total convenience expenditure (Table 4e)

Table 5a - Total Comparison Market Share

Retail Destination	Total	Zone 1	Zone 2	Zone 3	Zone 4
	%	%	%	%	%
Zone 1					
Other Centres					
Adderbury Village Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 2					
Other Centres					
Sainsbury's Superstore, Oxford Road, Banbury	1.03%	0.00%	1.46%	1.92%	0.64%
Zone 3					
Banbury Town Centre					
Banbury Town Centre	35.27%	38.11%	40.52%	38.11%	29.13%
Castle Quay Shopping Centre, BANBURY (M&S, Boots, Debenhams, Clarks, Gap, H&M, Next & more)	8.71%	1.92%	6.85%	13.65%	9.97%
M&S, Bridge Street, Banbury	0.73%	0.88%	2.20%	0.00%	0.00%
Out of Centre					
Banbury Gateway Shopping Park, Acorn Way, BANBURY (M&S, Next, New Look, Outfit, Primark, Fatface, Mountain Warehouse & more)	19.63%	20.62%	8.60%	26.42%	23.69%
M&S, Gateway Retail Park, Banbury	0.45%	0.00%	0.73%	0.00%	0.64%
Morrisons, Swan Close Road, Banbury	0.15%	0.00%	0.00%	0.74%	0.00%
Zone 4					
Banbury Cross Retail Park, BANBURY (Carpetright, Argos, DFS, Currys, Home Bargains, Next, Boots & more)	13.75%	3.14%	15.16%	8.56%	19.09%
Southam Road Retail Area, BANBURY (Homebase, Halfords, B&Q, Toolstation, Wickes & more)	3.53%	1.05%	4.37%	0.00%	5.57%
Aldi, Ruscote Avenue, Banbury	0.00%	0.00%	0.00%	0.00%	0.00%
Tesco Extra, Lockheed Close, Banbury	0.00%	0.00%	0.00%	0.00%	0.00%
Waitrose, Southam Road, Banbury	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 0 - Outside of Study Area					
Aylesbury Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Bicester Town Centre	0.24%	1.76%	0.00%	0.00%	0.00%
Birmingham City Centre	0.68%	0.00%	0.87%	0.74%	0.76%
Brackley Town Centre	0.31%	2.27%	0.00%	0.00%	0.00%
Buckingham Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Central London	0.12%	0.88%	0.00%	0.00%	0.00%
Chipping Norton Town Centre	0.14%	1.05%	0.00%	0.00%	0.00%
Coventry City Centre	0.30%	0.00%	0.00%	0.00%	0.76%
Daventry Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Evesham Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Kidlington Village Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Leighton Buzzard Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Middleton Cheney Village Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Milton Keynes City Centre	5.23%	8.89%	5.10%	0.89%	6.20%
Moreton-in-Marsh Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Newbury Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Northampton Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Oxford City Centre	4.14%	11.98%	3.66%	5.00%	1.27%
Reading Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Royal Leamington Spa Town Centre	2.54%	0.00%	6.40%	3.97%	0.00%
Rugby Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Southam Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Stratford upon Avon Town Centre	0.12%	0.88%	0.00%	0.00%	0.00%
Thame Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Towcester Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Warwick Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%
Witney Town Centre	0.12%	0.88%	0.00%	0.00%	0.00%
Sainsbury's Superstore, Market Place, Chipping Norton	0.00%	0.00%	0.00%	0.00%	0.00%
Canterbury	0.20%	0.00%	0.73%	0.00%	0.00%
Cambridge	0.12%	0.88%	0.00%	0.00%	0.00%
Sainsbury's Superstore, Pioneer Square, Bicester	0.00%	0.00%	0.00%	0.00%	0.00%
Waitrose, Manor Road, Brackley	0.00%	0.00%	0.00%	0.00%	0.00%
Bicester Avenue Home and Garden Centre, Oxford Road, BICESTER (Lakeland, Hobbycraft, Laura Ashley, Cotton Traders, Pets Corner & more)	0.00%	0.00%	0.00%	0.00%	0.00%
Bicester Village Factory Outlet, BICESTER (Levi's, Lacoste, Versace, Timberland, Ted Baker, Gucci, All Saints, Dior & more)	0.14%	1.05%	0.00%	0.00%	0.00%
Botley Road Retail Park, Oxford (Currys, Harveys, Pets at Home, Wren Kitchens, Screwfix)	0.00%	0.00%	0.00%	0.00%	0.00%
Broadfields Retail Park, Aylesbury (The Range, TK Maxx, Next, Halfords & more)	0.00%	0.00%	0.00%	0.00%	0.00%
Cowley Retail Park, Oxford (Tesco, Sports Direct, Next, Boots, M&S Simply Food)	0.00%	0.00%	0.00%	0.00%	0.00%
Launton Drive Retail Park, BICESTER (Homebase, Halfords, Carpetright, Pets at Home)	0.00%	0.00%	0.00%	0.00%	0.00%
Templars Shopping Park, Oxford (Asda Living, Halfords, Sainsbury's, TK Maxx, JD Sports, Pets at Home)	0.00%	0.00%	0.00%	0.00%	0.00%
Aldi, Banbury Road, Chipping Norton	0.00%	0.00%	0.00%	0.00%	0.00%
Aldi, Launton Road, Bicester	0.00%	0.00%	0.00%	0.00%	0.00%
Tesco Superstore, Lakeview Drive, Bicester	0.00%	0.00%	0.00%	0.00%	0.00%
Tesco Superstore, Oxford Road, Brackley	0.00%	0.00%	0.00%	0.00%	0.00%
Yarnton	0.20%	0.00%	0.73%	0.00%	0.00%
Swindon Designer Outlet	0.52%	0.00%	1.89%	0.00%	0.00%
Ikea, Milton Keynes	0.25%	0.00%	0.00%	0.00%	0.64%
St James Retail Park, Northampton	0.52%	3.80%	0.00%	0.00%	0.00%
Maybird Retail Park, Stratford-upon-Avon	0.64%	0.00%	0.00%	0.00%	1.64%
Shipston-on-Stour	0.20%	0.00%	0.73%	0.00%	0.00%
Abroad	0.00%	0.00%	0.00%	0.00%	0.00%
Other					
Total Excluding Internet, don't know, abroad, mail order, TV shopping	100%	100%	100%	100%	100%

Notes:

1. Derived from household survey.

Table 5b - Total Comparison Turnover

Retail Destination	Zone 1		Zone 2		Zone 3		Zone4		Total	
	2020 (£m)	2023 (£m)	2020 (£m)	2023 (£m)	2020 (£m)	2023 (£m)	2020 (£m)	2023 (£m)	2020 (£m)	2023 (£m)
Zone 1										
Other Centres										
Adderbury Village Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Zone 2										
Other Centres	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sainsbury's Superstore, Oxford Road, Banbury	0.00	0.00	1.00	1.16	0.56	0.65	0.42	0.48	1.98	2.28
Zone 3										
Banbury Town Centre										
Banbury Town Centre	12.21	14.21	27.69	31.96	11.09	12.79	19.04	22.04	70.03	80.99
Castle Quay Shopping Centre, BANBURY (M&S, Boots, Debenhams, Clarks, Gap, H&M, Next & more)	0.62	0.72	4.68	5.40	3.97	4.58	6.52	7.54	15.78	18.24
M&S, Bridge Street, Banbury	0.28	0.33	1.50	1.73	0.00	0.00	0.00	0.00	1.78	2.06
Out of Centre										
Banbury Gateway Shopping Park, Acorn Way, BANBURY (M&S, Next, New Look, Outfit, Primark, Fatface, Mountain Warehouse & more)	6.61	7.69	5.88	6.78	7.68	8.87	15.49	17.92	35.65	41.26
M&S, Gateway Retail Park, Banbury	0.00	0.00	0.50	0.58	0.00	0.00	0.42	0.48	0.92	1.06
Morrisons, Swan Close Road, Banbury	0.00	0.00	0.00	0.00	0.22	0.25	0.00	0.00	0.22	0.25
Zone 4										
Banbury Cross Retail Park, BANBURY (Carpetright, Argos, DFS, Currys, Home Bargains, Next, Boots & more)	1.01	1.17	10.36	11.95	2.49	2.87	12.48	14.44	26.34	30.44
Southam Road Retail Area, BANBURY (Homebase, Halfords, B&Q, Toolstation, Wickes & more)	0.34	0.39	2.99	3.45	0.00	0.00	3.64	4.21	6.96	8.05
Aldi, Ruscote Avenue, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Extra, Lockheed Close, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Waitrose, Southam Road, Banbury	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Zone 0 - Outside of Study Area										
Aylesbury Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bicester Town Centre	0.56	0.65	0.00	0.00	0.00	0.00	0.00	0.00	0.56	0.65
Birmingham City Centre	0.00	0.00	0.60	0.69	0.22	0.25	0.50	0.57	1.31	1.51
Brackley Town Centre	0.73	0.84	0.00	0.00	0.00	0.00	0.00	0.00	0.73	0.84
Buckingham Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Central London	0.28	0.33	0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.33
Chipping Norton Town Centre	0.34	0.39	0.00	0.00	0.00	0.00	0.00	0.00	0.34	0.39
Coventry City Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.50	0.57	0.50	0.57
Daventry Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Evesham Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Kidlington Village Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Leighton Buzzard Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Middleton Cheney Village Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Milton Keynes City Centre	2.85	3.31	3.49	4.02	0.26	0.30	4.05	4.69	10.65	12.33
Moreton-in-Marsh Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Newbury Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Northampton Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Oxford City Centre	3.84	4.46	2.50	2.89	1.45	1.68	0.83	0.96	8.62	9.99
Reading Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Royal Leamington Spa Town Centre	0.00	0.00	4.37	5.05	1.15	1.33	0.00	0.00	5.53	6.38
Rugby Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Southam Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Stratford upon Avon Town Centre	0.28	0.33	0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.33
Thame Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Towcester Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Warwick Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Witney Town Centre	0.28	0.33	0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.33
Sainsbury's Superstore, Market Place, Chipping Norton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Canterbury	0.00	0.00	0.50	0.58	0.00	0.00	0.00	0.00	0.50	0.58
Cambridge	0.28	0.33	0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.33
Sainsbury's Superstore, Pioneer Square, Bicester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Waitrose, Manor Road, Brackley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bicester Avenue Home and Garden Centre, Oxford Road, BICESTER (Lakeland, Hobbycraft, Laura Ashley, Cotton Traders, Pets Corner & more)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bicester Village Factory Outlet, BICESTER (Levi's, Lacoste, Versace, Timberland, Ted Baker, Gucci, All Saints, Dior & more)	0.34	0.39	0.00	0.00	0.00	0.00	0.00	0.00	0.34	0.39
Botley Road Retail Park, Oxford (Currys, Harveys, Pets at Home, Wren Kitchens, Screwfix)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Broadfields Retail Park, Aylesbury (The Range, TK Maxx, Next, Halfords & more)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Cowley Retail Park, Oxford (Tesco, Sports Direct, Next, Boots, M&S Simply Food)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Launton Drive Retail Park, BICESTER (Homebase, Halfords, Carpetright, Pets at Home)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Templars Shopping Park, Oxford (Asda Living, Halfords, Sainsbury's, TK Maxx, JD Sports, Pets at Home)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Aldi, Banbury Road, Chipping Norton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Aldi, Launton Road, Bicester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Superstore, Lakeview Drive, Bicester	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Superstore, Oxford Road, Brackley	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Yarnton	0.00	0.00	0.50	0.58	0.00	0.00	0.00	0.00	0.50	0.58
Swindon Designer Outlet	0.00	0.00	1.29	1.49	0.00	0.00	0.00	0.00	1.29	1.49
Ikea, Milton Keynes	0.00	0.00	0.00	0.00	0.00	0.00	0.42	0.48	0.42	0.48
St James Retail Park, Northampton	1.22	1.42	0.00	0.00	0.00	0.00	0.00	0.00	1.22	1.42
Maybird Retail Park, Stratford-upon-Avon	0.00	0.00	0.00	0.00	0.00	0.00	1.08	1.24	1.08	1.24
Shipston-on-Stour	0.00	0.00	0.50	0.58	0.00	0.00	0.00	0.00	0.50	0.58
Total Excluding Internet, don't know, abroad, mail order, TV shopping	32.03	37.28	68.34	78.87	29.09	33.56	65.37	75.65	194.84	225.36

Notes:

1. Table 3b (Total Expenditure) multiplied by Table 5a (Market Shares)
2. 2018 Prices

Table 6 - Main Convenience Store Trading Performance

						2020						2023					
Store	Gross Sales Area	Net Sales Area	Convenience Floorspace Ratio	Convenience Sales Area	Sales Density	Benchmark Convenience Turnover	Survey Derived Convenience Turnover	Allowance for Inflow	Allowance for Inflow	Total Survey Derived + Inflow Turnover	Over / Undertrading	Benchmark Convenience Turnover	Survey Derived Convenience Turnover	Allowance for Inflow	Allowance for Inflow	Total Survey Derived + Inflow Turnover	Over / Undertrading
	m^2	m^2	%	m^2	£ per m^2	£m	£m	%	£m	£m	£m	£m	£m	%	£m	£m	£m
Banbury																	
Morrisons, Swan Close Road, Banbury	6,745	3,036	79%	2,408	12,095	29.13	28.46	15%	4.27	32.72	3.60	27.98	27.24	15%	4.09	31.32	3.34
Sainsbury's Superstore, Oxford Road, Banbury	6,239	4,147	75%	3,110	11,296	35.13	33.59	15%	5.04	38.63	3.50	33.75	32.18	15%	4.83	37.01	3.27
Tesco Extra, Lockheed Close, Banbury	9,648	5,436	67%	3,642	12,971	47.24	23.64	25%	5.91	29.55	-17.69	45.38	22.64	25%	5.66	28.30	-17.08
M&S, Gateway Retail Park, Banbury	9,294	6,995	13%	938	10,107	9.48	4.17	50%	2.09	6.26	-3.22	9.11	3.99	50%	2.00	5.99	-3.11
Waitrose Southam Road	3,576	2,697	70%	1,888	12,172	22.98	6.53	20%	1.31	7.84	-15.14	22.07	6.26	20%	1.25	7.51	-14.56
Aldi, Ruscote Avenue, Banbury		743	75%	555	10,331	5.73	17.36	15%	2.60	19.96	14.23	5.51	16.63	15%	2.49	19.12	13.62
Spar, Molyneux Drive	99	79	95%	75	7,512	0.56	1.23	0%	0.00	1.23	0.66	0.54	1.18	0%	0.00	1.18	0.64
Spar, (Euro Garages), Oxford Road, Bodicote		95	95%	90	7,512	0.68	0.11	50%	0.06	0.17	-0.51	0.65	0.11		0.00	0.11	-0.54
Co-op, Chatsworth Drive	263	184	95%	175	8,599	1.51	2.81	0%		2.81	1.31	1.45	2.69	0%	0.00	2.69	1.25
Co-op, Queensway Shopping Centre, Mewburn Road, Banbury	511	358	95%	340	8,599	2.92	2.59	5%	0.13	2.72	-0.20	2.81	2.48	5%	0.12	2.60	-0.21
Lanes News, Horton View, Easington	26	21	95%	20	5,000	0.10				0.00	-0.10	0.09			0.00	0.00	-0.09
Wykham Park Farm, Banbury	76	61	95%	58	5,000	0.29	1.36	10%	0.14	1.50	1.21	0.28	1.30	10%	0.13	1.43	1.16
Spar, (Shell), Swan Close Road , Banbury	124	86	95%	82	7,512	0.62	0.00			0.00	-0.62	0.59	0.00		0.00	0.00	-0.59
Iceland, Banbury Cross Retail Park, Banbury	928	742	90%	668	7,502	5.01	0.99	20%	0.20	1.19	-3.82	4.82	0.95	20%	0.19	1.14	-3.67
Bloxham																	
Londis, BP PFS, South Newington Rd	114	80	95%	76	6,319	0.48	0.00			0.00	-0.48	0.46	0.00		0.00	0.00	-0.46
Co-op, High Street, Bloxham	161	113	95%	107	8,599	0.92	1.39	5%	0.07	1.46	0.54	0.88	1.33	5%	0.07	1.40	0.51
Londis, High Street, Bloxham	113	79	95%	75	6,319	0.47	0.00			0.00	-0.47	0.46	0.00		0.00	0.00	-0.46
Adderbury												0.00			0.00	0.00	0.00
Adderbury Stores, High Street, Adderbury, Banbury	74	52	95%	50	5,000	0.25	0.36	10%	0.04	0.40	0.15	0.24	0.35	10%	0.04	0.39	0.15
Kings Sutton																	
Co-op, Richmond Street, Kings Sutton	160	128	95%	122	8,599	1.05	1.21	10%	0.12	1.33	0.28	1.01	1.16	10%	0.12	1.28	0.27
Deddington																0.00	0.00
Co-op, Market Place, Deddington	207	166	95%	157	8,599	1.35	1.27	10%	0.13	1.40	0.05	1.30	1.23	10%	0.12	1.35	0.05
Milcombe																	
New Road Stores, New Road, Milcombe	93	65	95%	62	5,000	0.31	0.00			0.00	-0.31	0.30	0.00		0.00	0.00	-0.30
Total	**38,452**			**14,698**		**166.21**	**127.09**		**22.09**	**149.18**		**159.67**	**121.73**		**21.10**	**142.83**	

Notes:

1. Morrisons, Sainsburys, Tesco Extra and Aldi Floorspace from council's 2012 Retail Study
2. M&S Foodhall Floorspace from 11/01870/F planning app retail statement
3. Waitrose 15/00831/F split of floorspace from retail statement
4. Euro garage net sales area from - 17/00572/F planning app planning statement
5. Co-op, Co-Op, Lanes News, Wykham Farm Shop, Londis Bloxham, Co-Op Bloxham, Adderbury Stores, Kings Sutton, Deddington, Milcombe VOA
6. Sales density for individual retailers from Global Data's Convenience and Comparison Goods Sales Densities of Major Grocers
7. Floorspace efficiencies applied in line with Experian Retail Planner Briefing Note 18 - Figure 4a
8. Allowance for inflow based on Pegasus estimates
9. 2018 prices

Table 7 - Planned Investment

Planning Application	Gross Sales Area	Net Sales Area	Convenience Floorspace Ratio	Convenience Sales Area	Sales Density	Total Turnover 2020	Total Turnover 2023
	m²	m²	%	m²	£ per m²	£m	£m
Local centre at Longford Park (14/01888/F) - Approved application for local centre at Longford Park as part of the original outline application (05/01337/OUT). Approved plan 1419.400.Rev H show 381 sqm retail unit.	381	267	95%	253	7,500	1.90	1.83
Proposed local centre at Wykham Park Farm / South of Saltway (14/01932/OUT) A1 retail up to 1000 sqm - Application approved 19/12/19 - retail units yet to come forward, suggested a convenience store.	400	280	95%	266	7,500	2.00	1.92
Spiceball Redevelopment - Lidl Food Store (13/01601/OUT) - Reserved matters application 17/00284/REM approved in September 2018. Lidl submitted advertisement applications in 2020.	2942	2059	80%	1648	10,542	17.37	16.68
Land at Drayton Lodge Farm, Banbury (18/01882/OUT) - Residential development and local centre with a Class A1 retail unit around 250 sqm trading area to comprise of 2/3 shops. Application approved January 2020.		250	95%	238	7,500	1.78	1.71

Notes

1. Floorspace figures for Longford Park from the 14/01888/F approved plan: 1419.400.Rev H
2. Floorspace figures from Wykham Park planning statement.
3. Lidl floorspace figures from retail impact statement 13/01601/OUT
4. Floorspace figures from 18/01882/OUT planning statement
5. Sales density for individual retailers from Global Data's Convenience and Comparison Goods Sales Densities of Major Grocers
6. Floorspace efficiencies applied in line with Experian Retail Planner Briefing Note 18 - Figure 4a
7. 2018 prices

Table 8 - Proposed Development

Unit	Gross Internal Floorspace	Net Floorspace	Convenience Goods: Net Floorspace	Convenience Goods: Sales Density	Convenience Goods: Turnover at 2020	Convenience Goods: Turnover at 2023	Comparison Goods: Net Floorspace	Comparison Goods: Sales Density	Comparison Goods: Turnover at 2020	Comparison Goods: Turnover at 2023	Total Turnover 2020	Total turnover 2023
	m²	m²	m²	£ per m²	£m	£m	m²	£ per m²	£m	£m	£m	£m
Proposed Store	1,235	833	750	10,067	7.5	7.2	83	7,518	0.6	0.7	8.2	7.9

Notes:

1. Sales density derived from Global Data's Convenience and Comparison Sales Densities of Major Grocers 2019 excluding the 'big 4' retailers
2. Assumes 90% of sales area will be convenience goods
3. Floorspace efficiencies applied in line with Experian Retail Planner Briefing Note 18 - Figure 4a and Figure 4b
4. 2018 prices

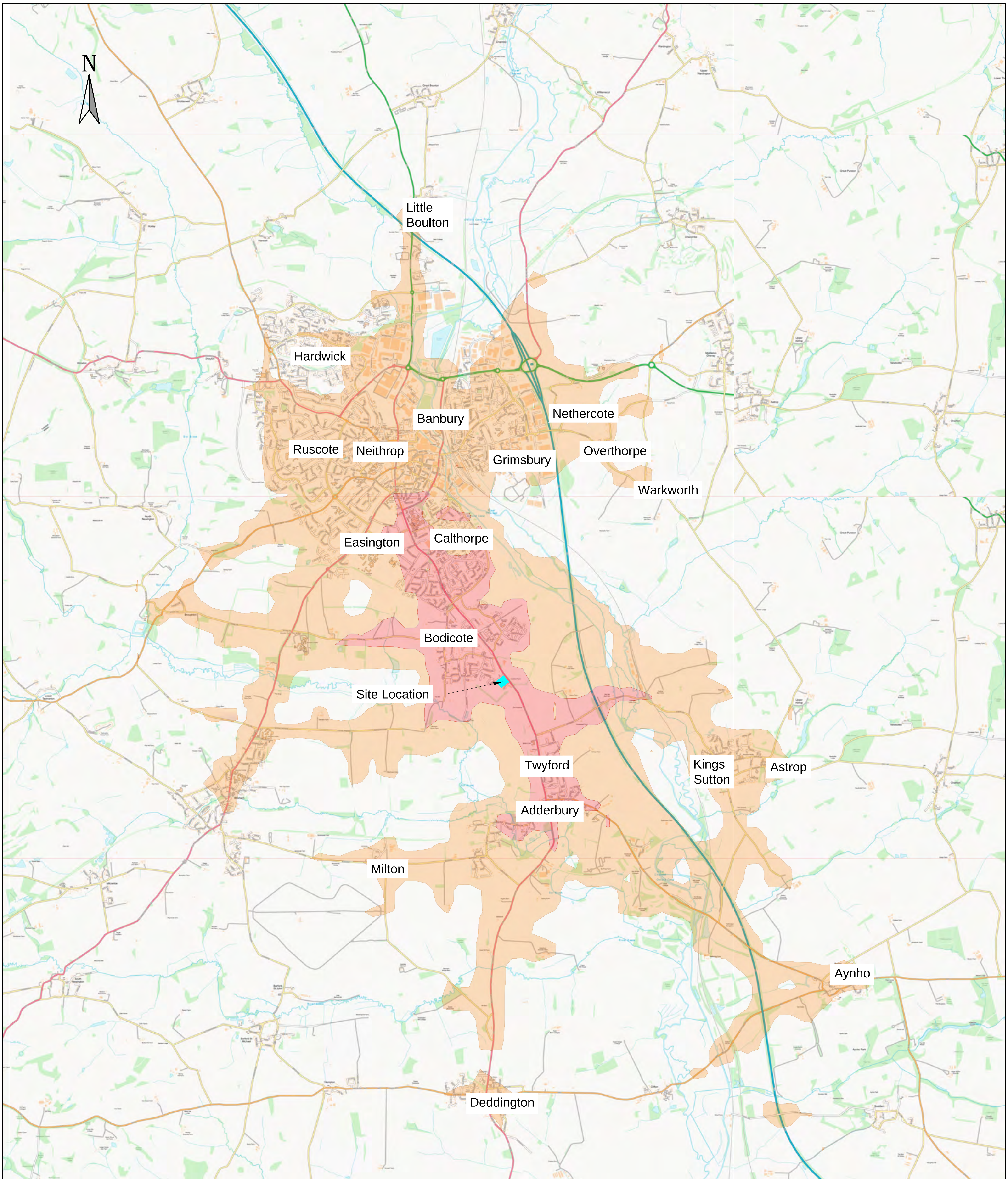
Table 9 - Trade Diversion and Cumulative Impact

					Lidl, SpiceBall Site				Longford Farm				Proposed Development				Total	
Retail Destination	Existing Convenience Turnover at 2023	Proportion of Inflow	Inflow	Existing Turnover inc Inflow at 2023	Trade Diversion		Turnover following trade diversion	Solus Based Impact	Trade Diversion		Turnover following trade diversion	Solus Based Impact	Trade Diversion		Turnover following trade diversion	Solus Based Impact	Turnover following trade diversion	Impact
	£m	%	£m	£m	%	£m	£m		%	£m	£m		%	£m	£m		£m	%
Zone 1																		
Other Centres																		
Co-op, Market Place, Deddington	1.23	10%	0.12	1.35		0.00	1.35	0.0%			1.35	0.0%	0.75%	0.05	1.29	4.0%	1.3	4.0%
Co-op, Richmond Street, Kings Sutton	1.16	10%	0.12	1.28			1.28	0.0%			1.28	0.0%	1.00%	0.07	1.21	5.7%	1.2	5.7%
Adderbury Stores, High Street, Adderbury, Banbury	0.35	10%	0.04	0.39			0.39	0.0%			0.39	0.0%	0.25%	0.02	0.37	4.7%	0.4	4.7%
Zone 2																		
Other Centres																		
Co-op, Chatsworth Drive, Cherwell Heights, Banbury	2.69	0%	0.00	2.69		0.00	2.69	0.0%	23%	0.4	2.28	15.3%	1.00%	0.07	2.21	2.7%	2.2	18.0%
Co-op, High Street, Bloxham	1.33	5%	0.07	1.40			1.40	0.0%			1.40	0.0%	0.50%	0.04	1.36	2.6%	1.4	2.6%
Co-op, Queensway Shopping Centre, Mewburn Road, Banbury	2.48	5%	0.12	2.60			2.60	0.0%			2.60	0.0%	0.75%	0.05	2.55	2.1%	2.5	2.1%
Sainsbury's Superstore, Oxford Road, Banbury	32.18	15%	4.83	37.01	15%	2.50	34.51	6.8%	50%	0.9	33.60	2.5%	36.00%	2.61	30.99	7.1%	31.0	16.3%
Spar, (Euro Garages), Oxford Road, Bodicote	0.11	50%	0.05	0.16			0.16	0.0%	5%	0.1	0.07	56.5%	0.25%	0.02	0.05	11.2%	0.1	67.8%
Spar, Molyneux Drive, Bodicote	1.18	0%	0.00	1.18			1.18	0.0%	3%	0.0	1.13	3.9%	1.50%	0.11	1.02	9.2%	1.0	13.1%
Wykham Park Farm, Banbury	1.30	10%	0.13	1.43			1.43	0.0%			1.43	0.0%	1.00%	0.07	1.36	5.1%	1.4	5.1%
Longford Farm (commitment)											*1.83*		*2.00%*	*0.14*	*1.68*	*7.9%*	*1.7*	
Zone 3																		
Banbury Town Centre																		
Iceland, Calthorpe Street, Banbury	2.62	30%	0.79	3.41	1%	0.17	3.24	4.9%			3.24	0.0%	2.00%	0.14	3.10	4.3%	3.1	9.1%
Banbury Town Centre	1.44	50%	0.72	2.15	1%	0.17	1.99	7.7%			1.99	0.0%	1.00%	0.07	1.91	3.4%	1.9	11.1%
Lidl, Spiceball site (commitment)							*16.68*				*16.68*	*0.0%*	*4.00%*	*0.29*	*16.39*	*1.7%*	*16.4*	
Banbury Town Centre Total	5.37	2.30	1.88	7.25			23.60		0.00	0.00	23.60		7.00%	0.51	23.10	2.1%	23.10	-218.4%
Out of Centre																		
Co-op, Burchester Place, Grimsbury, Banbury	1.93	15%	0.29	2.21	1%	0.10	2.12	4.4%			2.12	0.0%	0.00%	0.00	2.12	0.0%	2.1	4.4%
M&S, Gateway Retail Park, Banbury	3.99	50%	2.00	5.99			5.99	0.0%			5.99	0.0%	4.00%	0.29	5.70	4.8%	5.7	4.8%
Morrisons, Swan Close Road, Banbury	27.24	15%	4.09	31.32	15%	2.56	28.77	8.2%	20%	0.4	28.40	1.2%	26.00%	1.88	26.52	6.0%	26.5	15.3%
Tesco Express, Blacklock House, Middleton Road, Banbury	1.93	15%	0.29	2.22	1%	0.17	2.05	7.5%			2.05	0.0%	0.00%	0.00	2.05	0.0%	2.1	7.5%
Zone 4																		
Other Centres	0.00																	
Aldi, Ruscote Avenue, Banbury	16.63	15%	2.49	19.12	40%	6.67	12.45	34.9%			12.45	0.0%	4.00%	0.29	12.16	1.5%	12.2	36.4%
Co-op, Ferriston, Hardwick Estate, Banbury	2.27	5%	0.11	2.38	1%	0.19	2.20	7.8%			2.20	0.0%	0.00%	0.00	2.20	0.0%	2.2	7.8%
Tesco Extra, Lockheed Close, Banbury	22.64	25.0%	5.66	28.30	15%	2.50	25.80	8.8%			25.80	0.0%	4.00%	0.29	25.51	1.0%	25.5	9.9%
Waitrose, Southam Road, Banbury	6.26	20.0%	1.25	7.51			7.51	0.0%			7.51	0.0%	5.00%	0.36	7.15	4.8%	7.2	4.8%
Aldi, Banbury Road, Chipping Norton	1.16	10.0%	0.12	1.27			1.27	0.0%			1.27	0.0%	1.00%	0.07	1.20	5.7%	1.2	5.7%
Tesco Superstore, Oxford Road, Brackley	0.50	10.0%	0.05	0.55			0.55	0.0%			0.55	0.0%	1.00%	0.07	0.48	13.2%	0.5	13.2%
Other Outside Study Area					10%	1.67	-1.67				-1.67		3.00%	0.22	-1.89		-1.9	
Total	**141.11**			**165.45**	**100%**	**16.69**	**165.45**		**1.00**	**1.83**	**165.45**		**100.00%**	**7.25**	**158.20**		**158.20**	

Notes:

1. Existing Turnover taken from Tables 4e
2. Allowance for inflow in line that that set out in benchmark turnover table (Table 6)
3. Trade diversion for Lidl Spiceball based on Table 5 of Retail Statement for Spiceball Redevelopment Outline application.
4. Trade diversion for Longford Park based on Pegasus Group assumptions in the absence of any retail assessment being submitted with that application
5. 2018 prices

APPENDIX 6 – DRIVETIME PLANS



Key

(cyan)	Site Location
(pink)	5 minutes drive time
(peach)	10 minutes drive time

First Floor, South Wing, Equinox
North Great Park Road,
Almondsbury, Bristol , BS32 4QL

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Pegasus Group

Planning | Design | Environment | Economics

REV	DATE	BY	DESCRIPTION	CHK	APD

CLIENT: ROWLAND BRATT	SCALE @ A3: 1:50,000	CHECKED: AJ	APPROVED: AJ
PROJECT: COTEFIELD BUSINESS PARK, BODICOTE	DATE: 18/06/2020	DESIGN-DRAWN: BB	DRAWING TYPE: ISO
TITLE: CAR DRIVE TIME ISOCHRONE 5 AND 10 MINUTES SATURDAY PEAK 12-1PM	PROJECT No: P20-1296	DRAWING No: 001	REV: -