Oxford City Council

OXFORD RETAIL NEEDS STUDY

Final Report

January 2004

Roger Tym & PARTNERS

Planners and Development Economists
9-10 Sheffield Street
London WC2A 2EY
Tel 020-7831 2711 Fax 020-7831 7653 e-mail london@tymconsult.com

CONTENTS

1 INTRODUCTION

1.1 In January 2003 Oxford City Council commissioned Roger Tym & Partners to carry out a Retail Needs Study for Oxford to provide background information on the need for comparison and convenience floorspace in Oxford for the period up to 2011 in order to assess the retail policies proposed in the First Draft Oxford Local Plan 2001 – 2016. In addition the Study was required to help understand the Secretary of State's decision to refuse planning permission for the proposed extension to the Westgate Shopping Centre.

1.2 The Council's brief sets out a number of objectives for the study as follows:

- To assess the vitality and viability of the City and District Centres (in accordance with the criteria set out in PPG 6);
- To consider the effects of recent major retail developments in competing centres at Reading, Swindon and Milton Keynes on the ability of Oxford to maintain its role as a sub-regional shopping centre;
- To assess the retail need for additional floorspace for comparison and convenience retail goods in the City centre in both quantitative and qualitative terms;
- To assess the retail need for additional comparison and convenience retail goods floorspace in the District Centres;
- To consider whether the development sites identified in the First Draft Oxford Local Plan are capable of accommodating the projected retail need;
- To assess the impact additional retail floorspace would have on the City centre and the four District Centres;
- To assess whether the proposed extension to the Westgate Shopping Centre provides the best opportunity of meeting any additional retail need in Oxford when considered, amongst other matters, against the sequential test; and finally
- To assess the scale of any additional retail need Oxford has over and above the proposed extension to the Westgate Shopping Centre.

1.3 Oxford is a world renowned City both for its academic achievements and for its outstanding historical architecture. It is an international tourist destination and home to over 30,000 students. In addition the City needs to fulfil its role as a sub-regional comparison shopping centre and meet the day to day needs of the resident population.

1.4 The demands on the City centre are therefore considerable and the constraints of providing modern day retailing within the historic environment challenging.

1.5 In recent years surrounding competing centres have seen major expansions to their retail floorspace such as the 66,000 sqm gross Oracle development in Reading that opened in 2000, the Midsomer Place development in Milton Keynes that also opened in 2000, and which has increased the retail floorspace in the City centre by 44% and the 25,000 sqm gross extension to the Castle Quay covered centre in Banbury. A number of additional significant future development proposals are likely to come forward before 2011 in other competing shopping centres, including Aylesbury, Didcot, High Wycombe and Milton Keynes. In contrast Oxford has seen little real growth in retail floorspace while proposals for the expansion of the Westgate Shopping Centre to provide an additional 21,500 sq metres net retail floorspace have recently been rejected by the First Secretary of State although this decision has subsequently been quashed by the High Court. The applicant has now withdrawn the application to consider the way forward.

1.6 In addition to the City centre Oxford is served by the four district centres of Headington, Summertown, Cowley Centre and Cowley Road. These centres complement the City centre by providing convenience and standard durable goods retailing for the local resident population together with other day-to-day services such as banks, other financial services and bar/restaurant facilities.

1.7 In recent years there has also been a growth in retail warehouse provision notably at Botley Road and at the Oxford Retail Park.

1.8 Within this context our Study is organised as follows:

- At Section 2 we set out the planning Policy context at both National and Local level by reference to Planning Policy Guidelines and more recent Government Statements. We also briefly review the development plan policies.

- At Section 3 we carry out our health checks of the City centre and the four District Centres. Our findings are compared with comparable centres elsewhere and earlier health checks carried out in 2001 for the Kimberley Securities Ltd and for Oxfordshire County Council

- Section 4 contains the results and findings of the household survey carried out to establish existing shopping patterns and market share.

- Section 4 contains our quantitative assessment of the need for additional comparison and convenience floorspace. Finally

- Section 6 considers the suitability and availability of sites identified in the emerging First Draft Oxford Local Plan (FDOLP) to meet the need for the additional floorspace identified in the study.

2 THE REQUIREMENTS OF NATIONAL AND LOCAL POLICIES

National Policy Context

Introduction

2.1 The national policy context in so far as it relates to town centres and the location of new retail and leisure developments is set, in the main, by PPG 1 (Revised), PPG 6, PPG 13. This has been augmented by various Ministerial Statements in particular the 'Caborn' Statement of February 1999 and more recently the Statement from ODPM dated April 2003.

The Fundamental Principles

2.2 The combined effect of these national policy documents has been to establish 14 fundamental principles, as follows:

i) the Government's primary objective to promote, sustain and enhance the vitality and viability of existing town, district and local centres as part of a package of initiatives to promote sustainable development (PPGs 1, 6 and 13);

ii) the need 'to focus development, especially retail development, in locations where the proximity of businesses facilitates competition from which all consumers are able to benefit and maximises the opportunity to use means of transport other than the car' (paragraph 1.1 of Revised PPG6);

iii) the objective of 'concentrating development for uses which generate a large number of trips in places well served by public transport, especially town centres, rather than in out-of-centre locations' (paragraph 7 of PPG1 (Revised));

iv) the need 'to maintain an efficient, competitive and innovative retail sector' (paragraph 1.1 of Revised PPG 6);

v) the need 'to ensure the availability of a wide range of shops, employment, services and facilities to which people have easy access by a choice of means of transport' (paragraph 1.1 of Revised PPG 6);

vi) the need for structure plans and UDP Part Ones to establish a hierarchy of centres and a strategy for the location of employment, shopping, leisure, hospital, education and other uses which generate many trips so as to identify the preferred locations for major retail and leisure investment in particular and ensure that all significant generators of travel are well served by public transport (paragraphs 1.4 to 1.7 of PPG6 and paragraph 35 of PPG13);

vii) the need to adopt a plan-led approach to the promotion of all types of new development which generate many trips so as to ensure that they are well served by public transport (paragraphs 1.4 to 1.7 of Revised PPG6 and paragraph 20 of PPG13);

viii) the need to adopt a sequential approach to selecting sites for new retail and leisure development and other town centre uses - in areas where there is a need and capacity for such development - which is an approach which requires flexibility on the part of local planning authorities, developers and retailers (paragraphs 1.8 to 1.17 of Revised PPG6 and paragraph 20 and 30 of PPG13);

ix) the need to incorporate the principal of 'severability' in applying the sequential approach, so that large retail and leisure development proposals are broken down into their constituent parts in seeking to fit them into existing town, district and local centres (the Government's response to the fourth report from the House of Commons Select Committee on the Environment, July 1997 and ministerial speeches of 30 October 1997 (Mr Caborn) and 29 February 2000 (Mr Raynsford) and paragraph 27 of PPG13);

x) the need to reduce overall travel and the demand for car travel in particular (PPG13and 'a better quality of life');

xi) the need to resist applications for retail development on land designated for other uses in an approved development plan (paragraphs 3.23 to 3.25 of Revised PPG6);

xii) the twin requirements that 'new retail developments should support the Government's objectives for sustaining and enhancing existing centres and should be in accord with the strategy for retail development set out in the development plan' (paragraph 4.1 of Revised PPG 6);

xiii) the need to promote mixed-use developments, especially within town centres, and maximise the use of previously developed brownfield land (paragraphs 8 to 12 of PPG1 (Revised)); and

xiv) the need to improve access to leisure, retail and other services – particularly in local centres – for residents of deprived areas as part of the drive to promote social inclusion ('a better quality of life' – the first of the White Paper's four core objectives and paragraphs 1.8, 7.29 and 7.33 of the White Paper).

These represent a rigorous set of principles which confirm the preference for town centre locations for all types of new development which generate many trips. Edge-of-centre and out-of-centre retail and leisure developments represent, respectively, the less favoured and last resort options; such retail and leisure developments can only be justified by exceptional circumstances where they pass each of the six key national policy tests, as follows.

- the 'need' test introduced by Mr Caborn in February 1999;
- the sequential approach, first introduced by PPG 13 in 1994 and confirmed by PPG 6 in 1996;
- the likely impact on the development plan's strategy;
- the likely impact on the vitality and viability of existing centres;
- accessibility by a choice of means of transport, including the by foot and bicycle modes; and
- the likely effect on travel and car use.

2.3 PPG6 makes it clear in paragraph 1.15 that the sequential approach '…should apply to all town centre uses which attract a lot of people, including commercial and public offices, entertainment, leisure and other such uses'; and PPG13 makes it clear that the accessibility and impact on travel demand considerations apply not only to retail and leisure proposals, but also to all uses which attract many trips including offices, education and health establishments and service sector uses such as libraries and conference facilities.

2.4 The areas which have fuelled most debate relate to the interpretation of the sequential test, the need test and the retail impact test, and we discuss these in greater detail.

The Sequential Approach

2.5 The sequential approach is explained in paragraphs 1.8 to 1.17 of PPG 6. Paragraph 1.10 states that after considering the need for development, local authorities should adopt a sequential approach in the selection of sites for new retail development. Local authorities and developers are required to demonstrate that they have assessed all town centre options before they consider edge or out of town sites.

2.6 *Paragraph 1.11 of PPG6 sets out the sequential test:*

> *'Adopting a sequential approach means that first preference should be for town centre sites, where suitable sites or buildings suitable for conversion are available, followed by edge-of-centre sites, district and local centres and only then out-of-centre sites in locations that are accessible by a choice of means of transport.'*

2.7 PPG 6 continues (paragraph 1.12) with the advice that:

> *'The Government recognises that the approach requires flexibility and realism from local planning authorities, developers and retailers. Developers and retailers will need to be more flexible about the format, design and scale of the development, and the amount of car parking, tailoring these to fit the local circumstances. Local planning authorities should be sensitive to the needs of retailers and other town centre businesses and identify in consultation with the private sector, sites that are suitable, viable for the proposed use and likely to become available within a reasonable period of time.'*

2.8 There has been much debate on the degree of 'flexibility' required, and this matter was clarified in the Government's Response to the Environment, Transport and Regional Affairs Committee: Second Report (May 2000), which confirms that the Government requires that the application of the sequential test should be:

> *via 'the 'class of goods approach, where the key question is whether there is any reason why such goods cannot be sold from town centres'; and*
>
> ***not** via 'the format-driven approach, where the developer has a preferred format, which, in their view, does not fit into town centres and should be exempted from the policy'.*

2.9 More recently the April 2003 Statement from ODPM's Office confirmed this approach stating that:

> *'The First Secretary of State will follow the approach set out in the Government's Response to the Environment Select Committee in 2000. Where a class of goods is capable of being sold from a town centre location, that is the*

preferred location for the retail development and he will expect to see flexibility in the scale and format of a proposed development to meet that objective. A retailing format that can only be provided at an out of town location is not regarded as meeting the requirements of this policy.'

Interpretation of the Need and Retail Impact Tests

2.10 Although PPG 6 requires local authorities to adopt a sequential approach after considering the 'need' for new development the requirement for developers to demonstrate a need was only first explicitly stated in the Caborn Statement of 1999. This requires all developments on edge of centre and out of centre sites to demonstrate both the need for the development and that a sequential approach had been adopted in selecting the site as follows.

'However, proposals which would be located at an edge-of-centre or out-of-centre location and which:

are not in accordance with an up-to-date development plan strategy; or

are in accordance with the development plan but that plan is out of date, is inconsistent with national planning policy guidance, or otherwise fails to establish adequately the need for new retail and leisure development and other development to which PPG 6 applies,

should be required to demonstrate both the need for additional facilities and that a sequential approach has been applied in selecting the location or the site.'

2.11 The ODPM Statement of April 2003 clarifies the matters which constitute 'retail need' as follows:

'Some applicants have sought to make a distinction between quantitative and qualitative need for new retail facilities. PPG 6 does not make this distinction although evidence on both has frequently been presented at planning inquiries. The First Secretary of State accepts that need can be expressed in quantitative and qualitative terms but considers that evidence presented on need is becoming increasingly and unnecessarily complicated. He therefore places greater weight on quantitative need for new retail provision to be defined in terms of additional floorspace for the types of retail development distinguished in PPG 6, which are comparison and convenience shopping.'

and that

'For the avoidance of doubt, the First Secretary of State does not regard regeneration or employment creation as aspects of retail need for the purposes of the tests set out in PPG 6 and the Caborn statement.'

Development Plan Policy Context

Oxfordshire Structure Plan 2011

2.12 The Oxfordshire Structure Plan was adopted in 1998 and covers the period up to 2011. The Plan is currently under review and a deposit Draft is expected in 2003. Since the mid 1970s development in Oxfordshire has been guided by the 'country towns' strategy which identified Banbury, Bicester, Didcot and Witney as the preferred locations for new development.

2.13 Policy TC1 in the Plan however recognises the important role of Oxford as a sub-regional shopping centre, and supports and promotes further shopping provision within the existing centre to meet the comparison and specialised requirements of the population of the wider catchment area of the town.

2.14 The preferred location for retail development is within existing centres, both to maintain their vitality and viability and since they provide greatest accessibility by modes of transport other than the car. The Plan promotes sustainable development as a means to enhance the role of the City centre as a focus for retailing and related activities. The day to day shopping needs are to be met in the local District Centres within Oxford and Policy TC 3 presumes in favour of providing shopping development 'within or convenient to existing and proposed residential areas in towns and villages'.

2.15 Policy TC 4 sets out the sequential approach to site selection but does not preclude out-of-centre development. This policy does not include a requirement to demonstrate need and generally has been superseded by more recent Government advice.

Draft Oxfordshire Structure Plan Oxfordshire Structure Plan 2016-Deposit Draft

2.16 A draft Structure Plan has been drawn up, and has now been published for public consultation. Generally, the focus for development in the county is the existing larger urban centres where most of the homes, jobs and services are to be located. Oxford has a central role in the county, and the plan promotes the city as a sub-regional centre for shopping, leisure and cultural activities. The city's strengths of education, health and related research and development activities will continue to be built on.

2.17 Chapter 8 deals with town centres. The Plan identifies Oxford City centre as the principal location for the development of retail and other facilities so that the role and diversity of the sub-regional centre is positively maintained and enhanced. The town centres of Banbury, Bicester, Didcot, Witney and Wantage are also identified as the other main locations for the development of retail and other facilities.

2.18 Developments in other town and district centres are to be encouraged to sustain and enhance their vitality and viability. The structure plan also seeks to ensure that major new development is located on city or town centre sites in accordance with the sequential approach set out in PPG6.

Oxford City Local Plan 1991 - 2001

2.19 Oxford City Local Plan 1991 – 2001was adopted in September 1997. The plan is currently under review. Below we set out the policies concerned with shopping in the adopted plan.

2.20 Chapter 7 of the adopted local plan is concerned with shopping and commerce. The chapter starts by stating the importance of commercial activity in Oxford, as it accounts for about 20% of all jobs in the City. The chapter goes on to define the hierarchy of centres with the City centre at the top, which provides a high degree of choice or shops of a more specialised kind; below this are district centres, which provide for larger purchases of regularly needed goods; finally there are local neighbourhood shops which are provided singly or in small parades for day-to-day needs of people living close by.

2.21 Paragraphs 7.5 to 7.10 provide a description of the changes that have taken place in the commercial core, district centres and out of town shopping facilities. The plan notes that the physical extent of the City centre has not changed significantly for the last forty years, although there has been intensification of retailing activity during this time. The development of the Westgate Centre in the early 1970s and The Gallery at Gloucester Green in the late 1980s are the largest developments which have taken place in the City centre. The development of further shopping facilities in the district centres (Cowley Centre, Headington and Summertown) has enabled the shopping provision in the city as a whole to increase.

2.22 Therefore Policy COM1 seeks to maintain the sub-regional role of Oxford City centre, and enhance its functions with an appropriate range and quality of activities. The district centres, of which there are four (Cowley Centre, Cowley Road, Headington and Summertown) provide for the daily and weekly shopping requirements of the local population. Policies COM2 and COM3 seek to ensure that this role is maintained and enhanced, and that expansion or intensification of the district centres takes place in the defined main commercial areas.

2.23 Policy COM4 is concerned with neighbourhood shops, which provide for day-to-day needs and ‘top up’ shopping; these shops are considered to have an important retailing function, and the Council seeks to retain for retailing use the small shops standing alone (those that are clustered together are subject to Policy COM15).

2.24 In keeping with the retail hierarchy, the local plan seeks to ensure that new proposals for large retail units outside the defined centres do not adversely affect the vitality and viability of these centres (Policy COM6).

2.25 Sites for primary shopping development in the City centre are set out in Policy COM7: Queen Street / St Ebbes Street; South of existing Westgate Shopping Centre; and North of George Street. These three sites are highlighted as the major retailing opportunities available in the City centre. There are also additional complimentary sites identified in the secondary shopping frontage. The sites identified in district centres are set out in Policies COM11; there are sites in Cowley Centre, Headington and Summertown.

First and Second Draft Deposit Oxford Local Plan 2001-2016

2.26 The First Deposit Draft Oxford Local Plan (FDOLP) was published in June 2002, and the Second Draft Deposit Oxford Local Plan (SDOLP) in February 2003 . Section 2 of the plan sets out the plans Core Policies. Section 2.6 and Policy CP 4 deal with limiting the need to travel and the sequential test. Essentially this section reflects the guidance in PPG 6 (and subsequent statements) in requiring proposals for new employment, retail and leisure developments to demonstrate both a need for the development and that a sequential approach has been adopted in selecting the location for the development.

2.27 Section 12 of the plan entitled ‘Retail and Commercial Leisure’ sets out the hierarchy of centres within the City as in the adopted plan. Policy RC1 seeks to maintain and enhance the role of Oxford’s City centre as the principal retail centre in Oxfordshire while Policy RC2 aims to maintain and enhance the roles of the District centres as the second tier of Oxford's retail hierarchy.

2.28 Primary, District and Secondary Shopping Frontages are identified which are subject to Policies RC3, RC4 and RC5 respectively.

2.29 Section 12.4 deals with new retail development. It acknowledges the need for some additional comparison goods retail floorspace in Oxford arising from the current under-provision and from substantial growth in expenditure forecast over the next few years. The redevelopment of the Westgate Centre is identified as offering the major opportunity for regeneration to allow for a significant increase in retail floorspace. Other sites considered suitable for providing additional retail floorspace are land to the west of St Aldates and south of Queen Street and Worcester Street car park.

2.30 No substantial changes have been made to these policies in the Second Draft Local Plan (SDOLP).

2.31 The emerging local plan does not seek to quantify the amount of new retail floorspace which may be required in Oxford during the Plan period and as we have set out in our introduction one of the main purposes of this study is to provide the City Council with guidance on the level of provision required during the period up to 2011.

3 TOWN CENTRE HEALTHCHECK ASSESSMENTS

3.1 Healthcheck assessments have been carried out to assess the current role and health of the City centre and the four district centres; Headington; Summertown; Cowley Road; and Templars Square, Cowley, The monitoring of the health of the centres is an important aid to identify opportunities for growth and also to indicate the warning signs of decline for centres as a whole or specific areas within centres.

3.2 This healthcheck assesses the key performance indicators (KPIs) of vitality and viability referred to at Figure 1 of the Planning Policy Guidance for Town Centres and Retail Development (PPG6), using published data where available and reliable, other secondary sources and also our own primary research.

3.3 The KPIs are grouped into three indicator categories – market, vitality and qualitative. **Market indicators** (retail rents, yields, retailer requirements and vacancy rates) give a good indication of town centre health through the pricing system of the commercial property market. **Vitality indicators** (pedestrian flows and diversity of uses) measure the relative strength of different areas of the centre at different times of the day / week and the mix of shopping and other attractions. **Qualitative indicators** (accessibility, customer views and behaviour, safety and crime and environmental quality) provide a view of a centre in terms of ease of movement, shopper perceptions and the quality of the public realm.

3.4 The health of the City centre has been assessed twice in the past three years by studies prepared by Littman & Robeson in January 2001 for Kimberley Securities Ltd in support of a retail warehouse proposal, and CB Hillier Parker in July 2001, prepared on behalf of Oxfordshire County Council to assess the impact of the City centre road closures and traffic management measures introduced in 1999. We draw on in these studies where appropriate to identify changes that have taken place in recent years.

Market indicators

Retail rents

3.5 Retail rents give an indication of the strength of the market and the demand for floorspace. The rental data for the Oxford City centre assessment is sourced from the Colliers CRE 'In-Town Retail Rents 2002' report, which provides time series comparative Zone A equivalent rentals for prime retail property in town and city centres across the UK. For the district centres, data has been sourced from local commercial agents.

Yields

3.6 Yield data is based on retail property transactions and gives an indication of the attractiveness of a centre to investors. Yield data for the Oxford City centre assessment has been sourced from the Autumn 2002 edition of the Valuation Office (VO) 'Property Market Report', which again covers most of the major UK centres. For the district centres, yield data has been obtained from local commercial agents where possible.

Retailer requirements

3.7 Retailer demand provides an indication of how attractive a centre is to traders currently not represented. We have obtained data for the current demand for in-town A1 and A3 space from the Estates Gazette (EGi) database for the City centre, and from local commercial agents for the district centres.

Vacancy rates

3.8 We have obtained data from Experian GOAD, but have updated this through our own centre surveys (carried out in April 2003). The data relates to ground floor A1, A2 and A3 accommodation only, excluding office, residential, leisure and other non-retail uses.

Vitality indicators

Pedestrian flows

3.9 Pedestrian flow data gives an indication of which areas within a centre are well patronised by pedestrians and which are not, indicating their relative strength and attractiveness. We have obtained data on pedestrian flows from the Oxford Transport Strategy 2001 Monitoring Report produced by Oxfordshire County Council.

Diversity of uses

3.10 The diversity of retail uses within a centre gives an indication of the role of the centre and the attraction to shoppers. We have calculated the proportion of ground floorspace in the various retail use class categories based on floorspace data from Goad and our own land use surveys. The use class categories used are A1 comparison goods, A1 convenience goods, services (combined A2 and A3) and vacant.

3.11 We have obtained floorspace data from the Valuation Office (VOA), Oxford City Council and Goad during the course of the study because we were concerned with the Goad and OCC estimates for the City centre. We consider the VOA 2003 data to be the most reliable dataset, but we use the Goad data for the healthcheck work because it is the only dataset that can be used to compare with centres elsewhere. There are two disadvantages with the Goad floorspace data that have led Goad to seriously underestimate the floorspace figures for Oxford City centre and over-estimate in some of the district centres, these being (i) Goad calculate floorspace based on the property footprint, which will include any space outside the building in yards or parking areas etc instead of the gross internal area, and (ii) Goad's measurements for Oxford City centre only cover ground floor space, thus ignoring the fact that a high proportion of retailers in the City centre trade on more than one floor.

Qualitative indicators

Accessibility

3.12 Accessibility issues concern the ease and convenience of access ***to*** the centre by a choice of means of travel and ease of movement on foot ***within*** the centre. We have based our assessment on qualitative information gathered through our own centre surveys.

Safety and crime

3.13 Actual and perceived safety and crime affect the attractiveness of centres, particularly after dark. Data is available for the City centre only, sourced from Oxford City Council's Fear of Crime Survey 1999, the Community Safety Audit 2001 and the Crime and Disorder Reduction Strategy 2002-2005.

Customer views and behaviour

3.14 The views and shopping habits of the catchment population are important to gauge the degree of satisfaction with the centre and specifically with the range and quality of the shopping provision and non-shopping services and facilities. Through the household survey, undertaken as part of this study, we have assessed the views and behaviour of shoppers in Oxford City centre. The survey is used to identify the strengths and weaknesses of the City centre in general and to identify any gaps in the shopping/leisure provision. No data is available for the district centres.

Environmental quality

3.15 The quality of the environment is a major determining factor that influences where shopping trips are undertaken. Shopping is increasingly seen as a leisure experience and so the overall quality of the buildings, the open spaces and the general amenity of a centre influences is vital in maintaining a centre's attractiveness to shoppers. We have based our assessment on qualitative information gathered through our own centre surveys.

Benchmarking

3.16 To assess the relative performance of the Oxford centres compared to similar centres elsewhere we have undertaken a benchmarking exercise for those KPIs for which comparable data is available. The performance for each of the Oxford centres is compared with that of similarly ranked centres in the latest Management Horizons UK Shopping Index (2001). We have selected centres in Southern England, and where possible the south-east. In the case of the City centre we have benchmarked against Cambridge and Bath. Headington is benchmarked against Plymstock (a district centre in Plymouth) and Portswood (a district centre of Southampton); Summertown against Kempston (a centre in the wider Bedford urban area) and West Byfleet (a centre in Surrey); and Templar Cowley against Bletchley (a district centre of Milton Keynes) and Shirley (a district centre within the Southampton conurbation). Cowley Road has not been benchmarked against other comparative centres as it is not included in the Management Horizons index.

3.17 Below we firstly review the healthcheck of Oxford City centre before moving on to consider the four district centres.

Oxford City Centre

3.18 The world renowned historical and architectural context of Oxford has contributed to the compact nature of the City centre. The centre provides a very attractive environment for residents, students, tourists and visiting shoppers in a concentrated and at times congested area.

3.19 The amount of City centre retail floorspace has been difficult to reliably quantify. In our view the most reliable figure is 170,000 sqm gross, which is the VOA figure that comprises 149,420 sqm of A1 space, 7,550 sqm of A2 space and 13,030 sqm of A3 space. The A1 retail floorspace figure is some 26,000 sqm higher that the OCC's latest estimate dating from the late 1990s after allowing for retail developments in the intervening period and is likely to result from increases in the amount of upper floor space being used for retail sales. However, to compare Oxford's performance against other like centres it is necessary to use a common data set, and Goad is presently the only such source. Therefore in this section we compare the performance of the City centre against the benchmark centres using Goad data, but in the following sections of this report that deal with retail capacity issues we rely on the City Council data. The Goad data[1] indicates that the City centre supports approximately 86,000 sq m gross retail floorspace of which two-thirds (58,000 sqm) is in A1 retail use. The Goad figure is less than half the City Council figure and is explained by the fact that Goad only record ground floor units and so much of Oxford's shopping takes place above ground floor.

3.20 In shopping terms the City centre is focused on the pedestrianised Cornmarket and Queen Street and the two covered shopping malls (the 9,870 sqm gross Westgate Centre and the 3,690 sqm gross Clarendon Centre). The central core area is ringed by other shopping streets such as High Street, George Street, Broad Street, Magdalen Street and St Ebbes, but these streets do not provide the quality and range of retailers found in the core, and most have a high proportion of A2 and A3 activity, which dilutes their attraction as retailing destinations. Other streets, such as New Hall Inn Street and St. Michael's Street, are dominated by non-retail uses, but provide important pedestrian links between the shopping streets.

3.21 The City centre also contains a number of more specialist retail facilities such as the covered market, open every day excluding Sunday, which provides accommodation at a more affordable rent for traders. Several traders have gone on to open small units in and around Oxford City centre in addition to their units in the market. The Golden Cross Arcade contains a number of specialist comparison traders located in small units that meet their space requirements. There is also an open market at Gloucester Green, on the northern edge of the centre, close to the bus station. These specialist facilities add to the richness and attraction of the centre.

3.22 The main concentration of leisure uses (restaurants, bars and D2 uses) that cater not only for the night time economy, but increasingly for the day time economy as shopping becomes more of a leisure activity, are to be found in the George Street / Gloucester Green area.

3.23 For the purpose of this study, we have used the Experian GOAD definition of the City centre, which covers the vast majority of identified Local Plan retail frontages. A small number of peripheral shopping frontages identified in the Plan, such as the eastern end of the High Street and Little Clarendon Street are excluded from the analysis.

3.24 The studies carried out in 2001 concluded that Oxford City centre was extremely buoyant, with a low vacancy rate and a high level of unsatisfied retailer demand for representation. The CB Hillier Parker study concluded that: "*one of the main obstacles to Oxford retaining its market share of catchment area expenditure is the difficulty of developing additional retail and service attractions*".

[1] Source : Goad data, April 2003

3.25 This assessment looks at the City centre once more, benchmarking Oxford's performance against that of Cambridge and Bath. These cities are of a similar size to Oxford and have comparable historic, attractive centres (Bath is a World Heritage site). As in Oxford, this is a constraint to the provision of new retail floorspace. Both centres have City centre redevelopment proposals which have been ongoing since the mid-1990s; the Grand Arcade scheme in Cambridge and the Southgate Centre scheme in Bath. Also, both cities have universities and attract considerable numbers of tourists. CB Hillier Parker's report on Oxford described Cambridge and Bath as "peer group" centres, and both have similar rankings to Oxford in the Management Horizons UK Shopping Index[2].

3.26 We now consider each of the KPIs in the context of Oxford City centre.

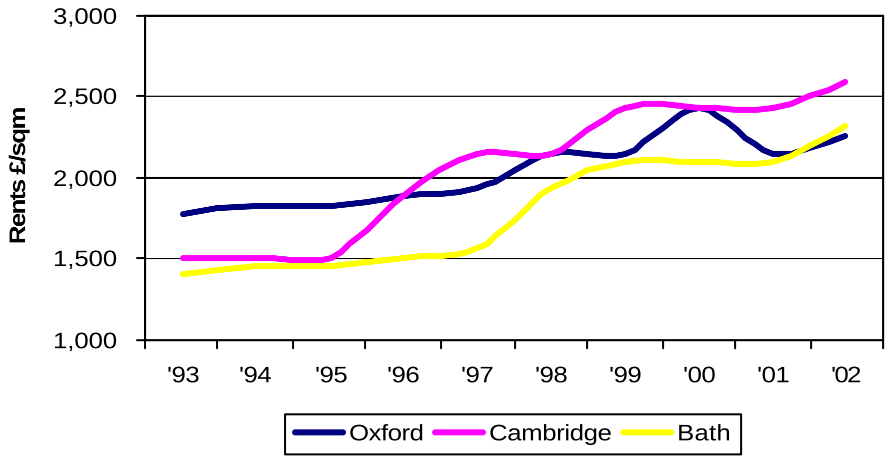
Market Indicators

Retail rents

3.27 Figure 2.1 below charts the prime Zone A retail property rentals in Oxford and the benchmark centres.

[2] Benchmark Centres: Management Horizons 2000/2001 UK Shopping Index scores Oxford 181, Cambridge 166 and Bath 194.

Figure 2.1 : Prime Zone A Retail Rents



Source: Colliers CRE 'In-Town Retail Rents' (2002)

3.28 The most striking fact illustrated by Figure 2.1 is that in 1993 Oxford commanded the highest rents of the three centres, whereas a decade later it achieved the lowest. Retail property in Oxford has experienced relatively modest rental growth (27%) over the period compared with much higher growth in Cambridge (71%) and Bath (65%). This is likely to reflect the fact that little new retail floorspace has come forward in Oxford City centre in recent times while the nearby competing centres of Reading and Milton Keynes[3] have seen, or have planned, significant new retail developments that have included larger retail units occupied by a number of the 'premium' retailers not represented in Oxford City centre such as Mexx, Muji and Zara.

3.29 Rents in Cambridge have increased more rapidly probably because the City is dominant in the sub-region, with little competition from nearby centres. The catchment areas for Cambridge, and other eastern region centres such as Peterborough and Ipswich, do not overlap to any significant extent. Oxford's catchment area, in contrast, overlaps in particular with Reading and Milton Keynes, which have a wider range of retail outlets.

3.30 Bath experienced high rental growth in the late 1990s, but the proposal for the redevelopment of the Southgate Centre in the City centre to provide over 50,000 sq m of modern retail floorspace has effectively dampened down rental growth as the floorspace supply responds to the demand pressures.

3.31 Prime retail property rental values in Oxford have historically been achieved in Queen Street and the Clarendon Centre, but have more recently also been achieved on Cornmarket. This pitch achieves rents of up to £2,475 per sq m.

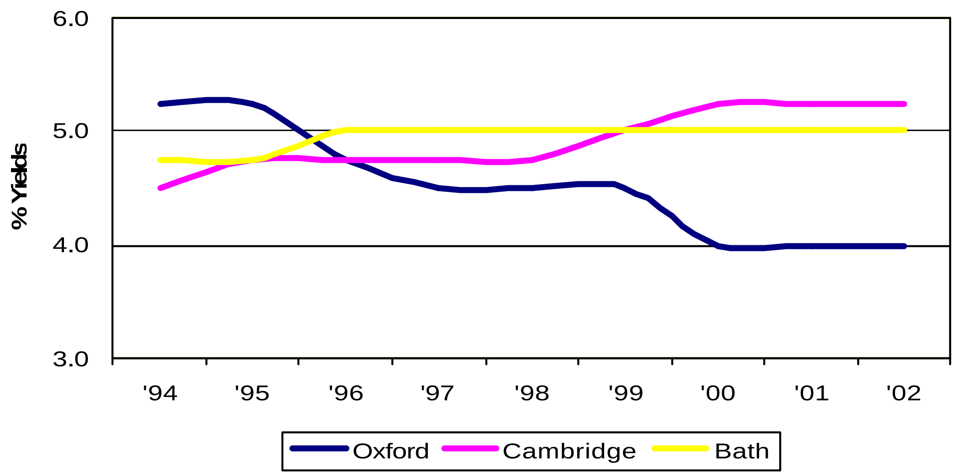
3.32 Away from the prime pitch retail property rents remain at comparatively high levels; units at the western end of the High Street achieve approximately £1,600-£1,700 per sq m reflecting a strong retail property market. Towards the edge of the City centre, rents are significantly lower – units at the eastern end of the High Street achieve only approximately £430 per sq m.

[3] Milton Keynes Borough Council have recently resolved to grant planning permission for a 63,000 sq m gross extension to The Centre, which is programmed to commence trading in 2006 and includes 50,000 sq m gross of A1 retail comprised of approximately 100 shop units plus A3 and D2 uses.

Yields

3.33 Figure 2.2 below charts the retail property yield performance for Oxford and the benchmark centres.

Figure 2.2: Yields



Source: Valuation Office 'Property Market Report' (Autumn 2002)

3.34 Over the past decade, yields have improved significantly in Oxford, reducing from 5.25% to 4.0%. This is by far the best investment performance of all three City centres. The improvement has been steady over the period, and yields have remained at a low level (4.0%) since 2000. A 4.0% yield represents a very attractive yield for property investment / development. Since 1996, yields in Oxford have been lower than those in either Cambridge or Bath and it is likely that investor confidence strengthened in the late 1990s in anticipation of the proposed extension to the Westgate Centre and the strengthening of the retail attraction that such a development would provide. In comparison yields in Cambridge have weakened by almost a percentage point since 1994, while in Bath yields have remained constant at 5.0% since 1996.

Retailer requirements

3.35 Figure 2.3 below, shows the retailer requirements for representation in Oxford City centre compared to the benchmark centres.

Figure 2.3: City centre retailer requirements for Oxford, Cambridge and Bath

	A1		A2		A3		D2		Total	
	No.	Sq m	No.	Sq m	No.	Sq m	No.	Sq m	No.	Sq m
Oxford	92	106,853 - 173,411	4	642 - 1,277	23	5,997 - 8,529	4	9,663 - 12,171	123	123,155 - 195,388
Cambridge	78	36,528 - 84,945	2	511 - 1,394	25	6,187 - 8,768	2	1,115 - 1,858	107	44,341 - 96,965
Bath	80	36,598 - 89,803	1	372 - 1,022	15	3,922 - 6,336	2	1,254 - 2,788	98	42,146 - 99,949

Source: EGi, June 2003

3.36 Oxford currently has requirements for City centre floorspace from 119 retailers (A1 to A3) and four leisure operators, significantly more than either Cambridge or Bath. This reflects the lack of available retail floorspace, especially for larger units in Oxford City centre. The vast majority (92) of requirements for floorspace in Oxford are for A1 use. The low demand for A2 space reflects the national trend for the contraction of 'high street' premises in this sector.

3.37 A full schedule of all the retailer requirements for Oxford at June 2003 is set out at **Appendix 1**. The schedule indicates that there is both high demand and from a broad range of retailers, including a requirement from House of Fraser for a new City centre department store. There are requirements for City centre stores from 'premium' traders such as Zara and Karen Millen and also from operators of large footprint stores such as TK Maxx and TJ Hughes.

3.38 The much higher demand for representation from retailers in Oxford compared to the benchmark centres, and the larger floorspace sought, indicates a serious imbalance between the demand and supply of available floorspace.

Vacancy rates

3.39 Figure 2.4 below sets out the amount of vacant floorspace within Oxford and the benchmark centres.

Figure 2.4: Vacant floorspace in Oxford, Cambridge and Bath

	Total floorspace (sq m gross)	Vacant floorspace (sq m gross)	Vacant floorspace (%)
Oxford	86,210	3,130	4
Cambridge	73,920	1,860	3
Bath	114,450	8,730	8

Source: RTP Oxford survey April 2003; GOAD Centre Report Cambridge (excluding the Grafton Centre) (2002); GOAD Centre Report Bath (2002)

3.40 Our survey of the retail premises within Oxford City centre reveals that 3,130 sq m of retail floorspace is currently vacant. This represents a vacancy rate of 4%, which is higher than that in Cambridge (3%), but half the vacancy rate in Bath (8%), and the national average (8%)[4].

3.41 The vacant floorspace in Oxford City centre is housed in 13 units, which is broadly similar to the 16 identified in July 2001 by the CB Hillier Parker study.

3.42 Although the 'headline' number of vacant units is a good benchmark of health, of rather more importance is the location, size and length of time a unit has been vacant. Figure 2.5, below, sets out the amount of vacant floorspace within Oxford City centre by shopping frontage as defined by the Adopted Local Plan [SA TO CONFIRM].

Figure 2.5: Vacant floorspace in Oxford by shopping frontage

	Total floorspace (sqm gross)	Vacant floorspace (sqm gross)	Vacant floorspace (%)	Vacant Units
Primary frontage	53,050	1,250	2	3
Secondary frontage	22,830	1,740	8	9
Other frontage	10,330	140	1	1

[4] Experian Goad 2003

TOTAL	**86,210**	**3,130**	**4**	**13**

Source: RTP survey April 2003

3.43 Vacancy in the primary frontages is very low at only 2% and comprises only three units. The largest vacant unit is the unit at the rear of the Westgate Centre, which is a 1,120 sq m unit. We understand that since carrying out our healthcheck this unit has now been let to Next. The other two units are very small and have only become vacant during the last three months; Isola in the Golden Cross Shopping Arcade (100 sq m) and Internet Exchange (30 sq m) on George Street.

3.44 There are a total of nine vacant units on secondary shopping frontages. Four of these, on St. Ebbes Street, were destroyed by fire and are currently undergoing refurbishment. The remaining five vacant units are dispersed throughout the centre.

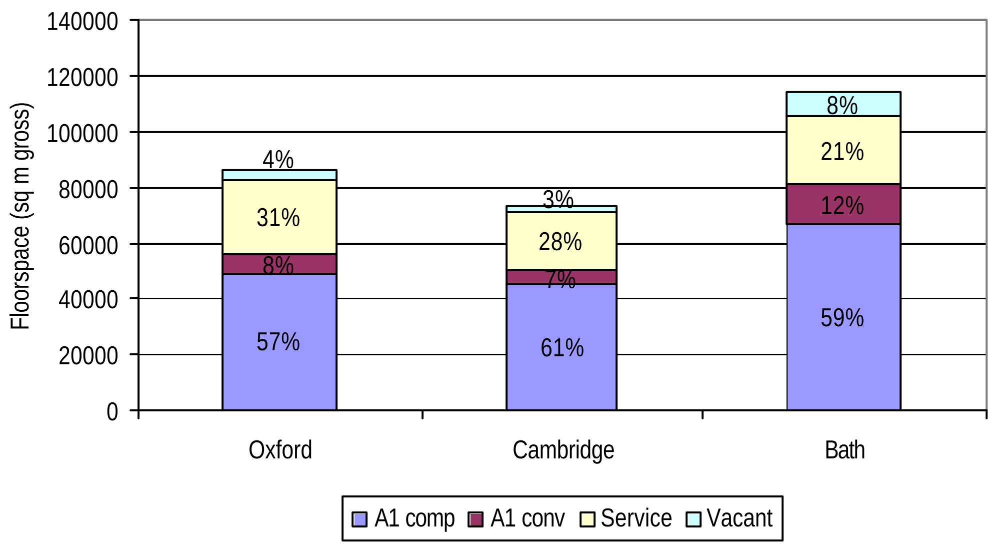
3.45 We conclude that there is virtually no shop vacancy in the prime shopping core and vacancy elsewhere in the City centre is exceptionally low.

Vitality Indicators

Diversity of uses

3.46 Figure 2.6, below, compares diversity of uses in Oxford and the benchmark centres. The proportions of floorspace : A1 comparison, A1 convenience, service (A2 and A3) are compared and the proportion of vacancy is included for completeness.

Figure 2.6: Diversity of uses – Oxford, Cambridge and Bath



Source: RTP Oxford survey April 2003; GOAD Centre Report Cambridge (excluding the Grafton Centre) (2002); GOAD Centre Report Bath (2002)

3.47 As previously mentioned Oxford City centre provides a total of 86,210 sq m of retail / service floorspace, which is accommodated in 480 units. The majority of this - 57% of all retail / service floorspace, held in 229 units - is used for comparison shopping purposes. The proportion of A1 comparison floorspace is marginally below the benchmark centres.

3.48 In terms of department stores, Oxford's provision comprises Allders, Debenhams and a local independent store, Boswells. In comparison with other sub-regional shopping centres, Oxford's department store provision is limited, as the stores are modest in scale and do not offer a full range of departments. A new department store would significantly improve the City centre's retail offer. There are a number of variety stores, including BHS, Littlewoods and Marks and Spencers and a range of mass market fashion wear stores such as Gap and Next. A major drawback for retailers and shoppers in the City centre is that many of the existing units are too small for retailers to display a full range of goods.

3.49 The 'gap' in the Oxford shopping provision is in the 'premium' fashion wear sector. Oxford does have some provision in this sector such as French Connection, but compared with Reading and Milton Keynes it is underprovided for. For example, Mango, Morgan and Zara are all represented in Reading and Milton Keynes. None of these retailers, the key attractors for modern shoppers (especially shoppers in the key 20-35 age range), are represented in Oxford City centre.

3.50 In common with national trends only a relatively small proportion of the floorspace in the centre is used for convenience good shopping (8%), housed in 14 units. The main convenience outlets in the City centre are Sainsbury in the Westgate Centre (1,230sq m net), Sainsbury Local on Magdalen Street and Marks & Spencer on Queen Street.

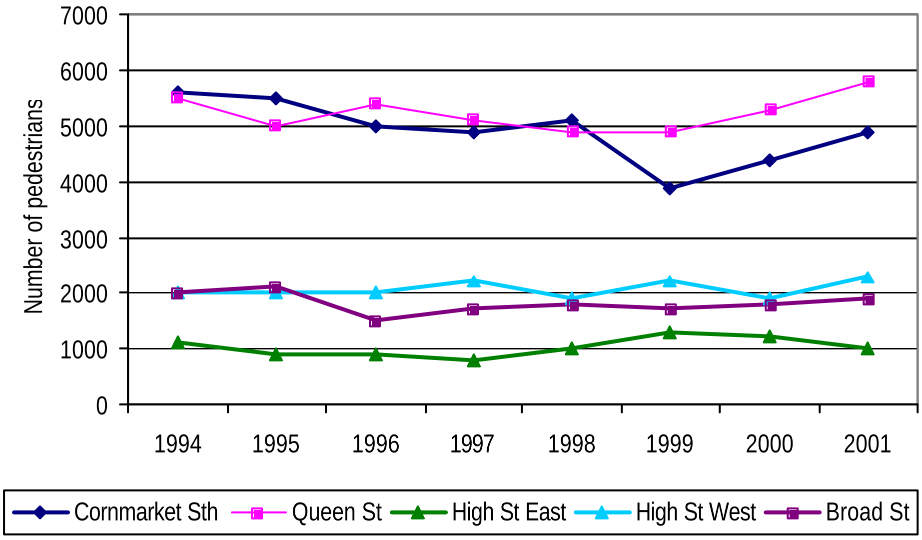
3.51 Services uses (financial and professional services and food and drink outlets) account for 31% of the total. The major banks and building societies are all represented as well as a good selection of estate agents and insurance services. However, the majority of service uses are food and drink outlets, reflecting the growing night time economy, especially in the area centred on George Street.

3.52 Oxford, Cambridge and Bath all have similar in retail / service floorspace composition, although Oxford has proportionally more service uses (including food and drink outlets) than either of the other centres. Both Oxford and Cambridge have less convenience floorspace than Bath, where convenience uses account for 12% of total floorspace.

Pedestrian flows

3.53 Oxfordshire County Council has undertaken annual pedestrian counts since 1994, on Cornmarket, Queen Street, High Street and Broad Street. We understand that the data has been collected using a consistent methodology and we set out the results in the chart below.

Figure 2.7: Pedestrian flows



Source: Oxfordshire County Council, Oxford Transport Strategy Monitoring Report 2001, Figure 56, Pedestrian Flow Oxford City centre Wednesday 1994-2001, 14.30-15.30. Counts were undertaken in the last week of September each year.

3.54 As expected, pedestrian flows in the prime shopping streets - Cornmarket and Queen Street - are the highest of the streets surveyed. Between 1994 and 1999, pedestrian flows on Queen Street remained relatively stable whilst they fell on Cornmarket. However, between 1999 (when these streets were pedestrianised) and 2001, flows increased by approximately 1,000 pedestrians per hour.

3.55 Away from the prime shopping areas, pedestrian flows are significantly lower. Broad Street and the western end of the High Street adjoin the prime shopping streets but pedestrian flow is much lower - approximately 3,000 less pedestrians per hour. The eastern end of the High Street, on the periphery of the centre, experiences around one-fifth of the pedestrian flow of the busiest locations.

Qualitative Indicators

Accessibility

3.56 Accessibility issues concern the ease and convenience of access ***to*** the City centre by a choice of means of transport and ease of pedestrian movement ***within*** the City centre.

Accessibility to Oxford

(i) By Public Transport

3.57 The Park & Ride system (there are now 5 peripheral car parks) is widely acknowledged to be convenient, although the buses do not have dedicated lanes, which means they are subject to the delays associated with traffic congestion. One-third of respondents to our Household Survey stated that they always, often or sometimes use the Park & Ride facilities when going shopping. For Oxford residents there are frequent buses along the radial routes into the town centre although a number of companies operate these routes, resulting in a lack of coherence between services. Congestion is a major factor.

3.58 The train station is located on the western edge of the City centre and is within easy walking distance (approximately 10 minutes walk) of the City centre for many shoppers, although some groups such as the elderly or those with young children may find it less convenient. Signage on the route between the station and the centre could be improved.

3.59 There are also frequent coach services directly to and from London, leaving from Gloucester Green bus station, which was upgraded in 2000 to provide a passenger waiting room[5].

(ii) By Private Transport

3.60 Oxford City centre experiences severe traffic congestion especially at peak times due to the number of vehicles and the historic street pattern that provides a number of pinch points Recent research[6] indicates the importance placed by shoppers on car parking that is both located conveniently to access the shops, and which is welcoming. There are issues with the car parking in Oxford that could be improved, but the opportunity and indeed the desirability of providing more City centre car parking are constrained by the physical environment.

3.61 The main multi-storey car park in the centre is located to the rear of the Westgate shopping centre (accessed off Thames Street), through which shoppers access the Westgate Centre and the rest of the City centre. The multi-storey car park provides 1,210 spaces[7], but does not serve as a welcoming gateway to the shopping core. There are also central off-street car parks at Hythe Bridge Street and Gloucester Green, which together provide 284 spaces[8]. There are two further off-street car parks on the periphery of the centre, at Oxford Station and Oxpens Road. On-street car parking is available in two main locations; St Giles and Beaumont Street. On average, approximately 1,400 vehicles per day park at these locations during the daytime[9].

3.62 Oxford with its high student population and generally flat terrain predictably provides good quality cycle provision. Cycles currently account for almost a quarter of all vehicles entering the City centre[10]. All the main roads into the City centre have cycle lanes and there are on-road cycle routes within the City centre; north-south along Kingston Road and Marlborough Road and east-west along George Street and Broad Street[11]. There are 1,800 public cycle parking spaces within the City centre[12].

Accessibility within Oxford

3.63 The free flow of pedestrian movement within Oxford City centre has been greatly improved by the removal of all traffic from the core area in 1999. The associated public realm improvements have made Oxford City centre a very pedestrian friendly environment. The concentrated nature of the City centre and the street pattern, based on a cross with a number of intersecting streets, means that all areas of the centre are easily accessible on foot. There are frequent and clear signs and maps within the City centre, although, as previously mentioned, signage from the train station could be improved.

---

5 Oxford City centre Management (2000:23) Business Plan Review and Key Performance Indicators

6 The Lockwood Survey 2002

7 Oxford City Council (2002) Car Park Map – www.oxford.gov.uk/oxford/transport.nst/textpages/carparkmap.html

8 ibid

9 Oxfordshire County Council (2001:46) Oxford Transport Strategy Monitoring Report

10 First Draft Oxford Local Plan (2002:33)

11 Oxfordshire County Council – Oxford Cycle Map www.oxfordshire.gov.uk/cyclemaps/index/map/b4.htm

12 Oxfordshire County Council – Oxford Cycling www.oxfordshire.gov.uk/cyclemaps/whycycle.html

3.64 The popularity of the centre and its compactness means that the core becomes very crowded particularly at weekends, especially during the summer months when there is an influx of tourists and language-school students. This has a knock-on effect on other facilities, such as places to eat, which tend to become overly busy at peak times. However, the advantage of Oxford as a shopping destination is that the shopping streets are located within easy reach of each other, one of the main shopping streets Cornmarket Street is pedestrianised providing a safe and convivial shopping experience. By contrast Queen Street is a bus route and there is evidence of pedestrian/vehicle conflict on this important thoroughfare.

Customer views

3.65 Our household survey confirms that Oxford is a popular shopping destination with half of all households in the Study Area identifying the City centre as their main location for comparison goods shopping. The figure rises to two-thirds within the Oxford core zone. Two thirds of those surveyed undertake shopping trips to the City centre at least once a month. The main reason why people choose to shop in the City centre is because it is close to where they live.

3.66 Although retailers tend to cite parking issues as a main drawback of the City centre, only 14% of respondent households said that they dislike the centre due to difficulties with access by car or with parking. However, although a significant proportion of respondents consider that Oxford has a good selection of shops, this was a much less significant reason compared with proximity, and significantly, a much higher proportion of households considered Oxford to lack a sufficient range, variety and number of shops.

Safety and crime

3.67 Oxford is perceived to be a safe City centre; in 1999, the Council undertook a fear of crime survey, which found that over 90% of people feel safe in the City centre during daylight hours and over half during darkness. Of those questioned, almost 90% had never been a victim of crime in the City centre and two-thirds did not know anyone who had experienced any incidents of crime in the City centre. Not content with this high degree of positive public experience and perception, the Council has implemented a number of measures, including increased car park security and CCTV, aimed at further improving safety and reducing fear of crime.

3.68 According to the latest available data[13], recorded crime in Oxford fell by 14% between 1999/2000 and 2000/2001. This is in line with the national picture according to the police recorded crime statistics and the British Crime Survey. Oxford's level of crime is no different from that of eight other cities with similar socio-economic backgrounds according to the latest Home Office data.

Environmental quality

3.69 Oxford City centre has a major advantage over most other shopping destinations due to the quality of the setting. The buildings are almost without exception of a high quality and main shopping streets are largely traffic-free; the full pedestrianisation of Cornmarket Street and Queen Street through the removal of bus and taxis in 1999 has greatly improved the pedestrian environment. Despite the difficulties that have been encountered with the new surface – granite setts which have cracked and been resurfaced in tarmac - the removal of the buses has made

[13] Atmosphere – Oxford's Crime & Disorder Audit 2001 (para. 2.10)

the street a much more attractive place for shoppers. However, parts of the City centre shopping facilities are in need of refurbishment, in particular the Westgate Centre.

3.70 Provision of public open space in Oxford City centre is limited, and is not sufficient to cater for the high volume of visitors to the centre. However, there is some space provided in Carfax, Bonn Square and Broad Street for people to sit down and rest. There is also Gloucester Green, a good example of urban design in the northern area of the City centre that provides seating areas. Christchurch Meadows, a large open space on the periphery of the centre, is accessible from the eastern end of the High Street.

Conclusions to the Oxford City centre Healthcheck

3.71 Oxford City centre remains a very popular shopping destination and benefits from the high quality urban environment, the 'walkable' nature of the centre and the wide range of food and drink facilities. Environmental improvements in recent years have added to the centre's attraction but there is scope to further improve the City centre, particularly the shopping environment in Queen Street and at the Westgate Centre. There is scope to significantly improve both the retail offer and environment of the Westgate Centre.

3.72 The City centre performs extremely well, with strong yields and a very low vacancy rate. There is no shortage of retailers and leisure providers seeking representation in the City centre. Demand is at an extremely high level, and the supply of floorspace is failing to keep pace.

3.73 The City centre provides a reasonable selection of shopping outlets, but the provision is lacking in range and depth. There is a supply side shortage of retail units in the City centre; in particular, there is a lack of available units of the right size for modern retailers.

3.74 The 'premium' fashion outlets make up an important sector which is poorly represented in Oxford compared to Reading and Milton Keynes. The planned expansion of The Centre in Milton Keynes over the next decade will further strengthen the quality of the shopping provision in that town and will be likely to draw more shoppers away from Oxford.

3.75 The broad range of leisure facilities in Oxford City centre is considered to be a major factor attracting visitors to the centre, encouraging visitors to stay longer and spend more on each visit.

3.76 The healthcheck demonstrates that the City centre performs extremely well, but could cater for the retailing needs of the catchment area population even more effectively, and reduce the need for people to visit centres elsewhere, by accommodating a broader range of outlets.

The District Centres

3.77 We now turn to consider the four district centres in Oxford City : Headington, Summertown, Cowley Centre and Cowley Road. These centres complement the City centre by providing convenience and standard durable goods retailing for the local resident population together with other day-to-day services such as banks, other financial services and bar/restaurant facilities. It is the Council's strategic objective to maintain the local role of these district centres, without any centre assuming a predominant position.

3.78 This section explores the health of each of the centres and draws out the changes which have taken place over time and compares performance with selected benchmark centres. We have selected other district centres of cities in the south and south-east Shirley a district in Southampton, Bletchley a district of Milton Keynes and Portswood a district of Portsmouth.

3.79 Due to the much smaller size of the district centres compared with the City centre, there is less KPI data available.

Headington

3.80 Headington is located to the north-east of the City centre and serves the resident population in much of that quadrant. Headington is also the nearest shopping centre for workers at the two main hospitals in the City (Churchill and John Radcliffe) and also students and employees at Oxford Brookes.

3.81 The VOA data identifies the total retail floorspace in Headington to be 22,160 sqm gross, of which 19,990 sqm is in A1 use, 1,230 sqm used for A2 uses and 940 sqm in A3 use. However, again for reasons of comparability we use the Goad data in the following analysis. Oddly both Goad and the VOA data give much higher A1 floorspace figures for Headington when compared to the OCC estimates from the late 1990s.

3.82 According to Goad the centre contains a total of 24,690 sqm gross of retail floorspace comprising 117 units, with the majority of the shopping provision located on London Road. However, the principal anchor store, the Somerfield foodstore(484 sqm), is located on the Old High Street, only a short distance from London Road, but somewhat hidden from view. There is other shopping provision on Old High Street, Windmill Road and Osler Road although this is generally secondary in nature.

Market indicators

Retail rents

3.83 The prime retail area in Headington is focused on the junction around London Road and Windmill Road / Old High Street extending a block either side of the junction. Retail property in the prime pitch is currently achieving Zone A rents of between £325 and £345 / sqm. Rental performance in Headington has improved over the past decade and now ranges between £270 and £300 / sqm. Beyond the prime area rental levels decrease fairly uniformly with distance.

3.84 We have no comparable evidence for rents in the benchmark centres, but the rental performance of prime retail property in Headington is the lowest of all the Oxford city district centres. Prime Zone A rentals in the district centres range from £325 / sqm (Headington) up to £590 / sqm (Cowley Centre).

Yields

3.85 As expected with a centre the size of Headington property transactions are few and far between, and institutional property ownership is rare. However, property does change hands for example three units on the south side of London Road (numbers 90 – 94 occupied by

Peacocks, Holland & Barrett, Sketchley and Countryside) have been sold in the last twelve months at a yield of 9 – 10%.

Vacancy rate

3.86 Our centre survey undertaken in April 2003 identified the vacant units within the centre and Table 2.1 below sets out the quantum of vacant floorspace in the centre (combined figures for both primary and secondary frontages).

Figure 2.1: Vacancy rates in Headington – All Retail Floorspace (A1, A2 and A3)

	Total floorspace (sqm gross)	Vacant floorspace (sqm gross)	Vacant floorspace (%)
TOTAL	24,690	1,030	4%

Source: Goad data updated by RTP survey April 2003

3.87 Overall only 4% of the total floorspace in Headington is currently vacant, this is half the national average[14] (8%) and indicates that Headington is able to attract retailers to the centre suggesting there is likely to be a relatively healthy demand for representation. There has been turnover in business occupancy in Headington over the past two years (as compared with the 2001 Goad survey). However, the overall mix of uses remained unaltered.

3.88 We also compare vacancy rates in Headington with the other Oxford districts and the benchmark centres in Figure 2.2 below. The vacancy rate in Headington of 4% (1,030 sqm) is below average, with only Cowley Centre having a lower proportion of vacant space (2% or 650 sqm).

Demand for Representation

3.89 Generally, demand for retail floorspace is driven by locally based traders, but is considered to have improved in the last three to four years. The take up of three units on London Road (numbers 124 – 128) which had been on the market for four to five years by the Co-op Travel agent, Co-op undertaker and Matthew Clulee hairdresser in the late 1990s marked a significant upturn in the demand for retail floorspace in Headington, which can be attributed to a general upturn in the wider economy. However, demand for representation is weaker in Headington than the other Oxford centres as is evidenced by the presence of the highest number of charity shops in the centre.

3.90 There is notable demand for A3 floorspace, generally from local operators. However, the Council's policies protecting A1 uses in retail frontages has limited the opportunity for the expansion of A3 floorspace with a number of applications for change of use being refused.

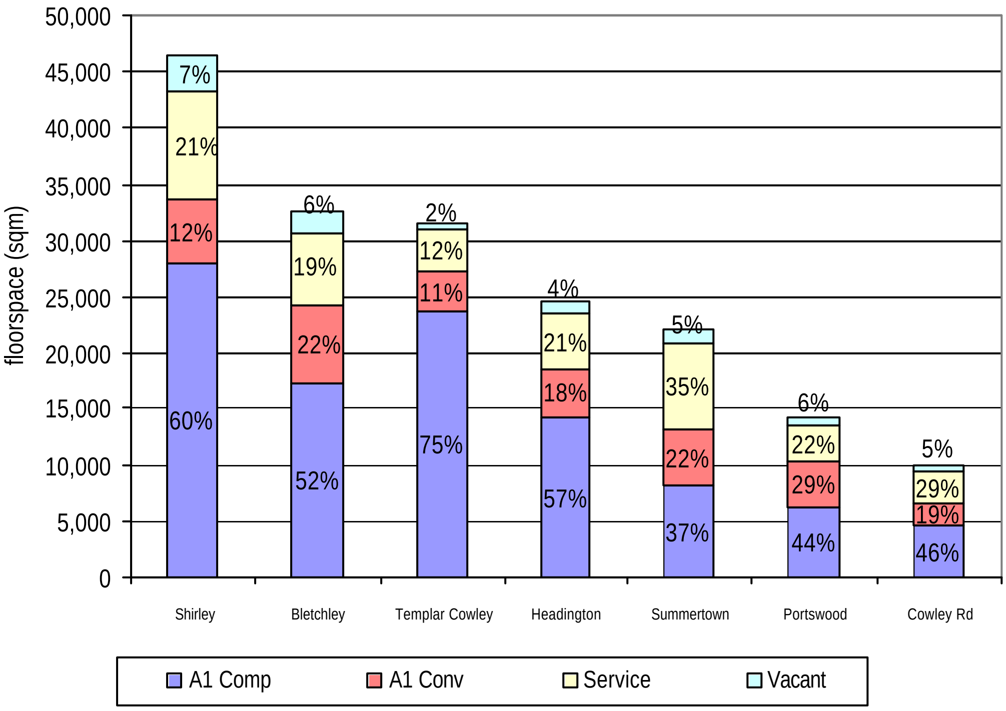
Vitality indicators

Diversity of Uses

3.91 Our survey results of the retail and service floorspace in Headington in April 2003 are presented in Figure 2.2 below and compare floorspace in Headington with the other Oxford districts and the benchmark centres using four categories: A1 comparison, A1 convenience, service (A2 and A3) and for completeness vacancy.

[14] Experian Goad 2003

Figure 2.2 Diversity of uses: Oxford District Centres and Other Selected Centres



Source: RTP April 2003 survey for Oxford centres and latest available Goad data for the others.

3.92 Figure 2.2 shows that Headington has the higher than average proportion of A1 comparison floorspace: 57% (14,100 sqm) compared to the majority of the other districts. It is noticeable that the smaller districts tend to have lower proportions of comparison retailing than the larger districts. This is due in part to the need for centres to be above a certain size threshold to generate sufficient comparison goods attraction to maintain significant numbers of traders. It would appear that the threshold is around 25,000 sqm.

3.93 Headington has only a small number of national chains such as Peacocks and WH Smith, the majority of comparison goods outlets are independent retailers selling a broad range of standard durable goods such as A-Z Discount Store, although a few are more specialised such as West of Java (china and gifts) and The Garden (florist). The centre contains five charity shops, including Oxfam and Cancer Research UK, which is higher than the other district centres.

3.94 The amount of convenience floorspace in the district centres tends to average at between 4,000 – 7,000 sqm. The proportion of A1 convenience floorspace in Headington at 18% (4,470 sqm) is at the lower end of the average. The lower than expected proportion in Headington may reflect the close proximity of the large foodstores nearby notably the Tesco store on the Cowley Retail Park. That said there are a range of convenience retailers in Headington, 11 in all. The larger stores are the Somerfield (1,420 sqm) and Co-op (1,490 sqm), added to which there are a number of smaller convenience chains such as Iceland (480 sqm) and Budgens (190 sqm), a Holland & Barrett health food shop and a number of independent convenience retailers such as Chefs Pantry (delicatessen) and La Croissanterie (bakery). Therefore, while there is no retailer representation from the 'big four' food retailers (Tesco, Safeway, Sainsbury and Asda), the provision is considered to provide a reasonable range and choice for local food shopping.

3.95 The proportions of service floorspace in Headington at 21% (3,057 sqm) is about the district centre average. Overall therefore Headington is adequately provided for in terms of service facilities. Looking at the service provision in terms of A2 and A3 uses we note that Headington supports 16 A2 units, representing 11% of the total retail / service floorspace, providing a good choice of banks and building societies. There is a total of 15 food and drink units (A3), which accounts for 10% of the total retail / service floorspace, providing a range of pubs, restaurants, cafes and take-away outlets. Both Summertown and Cowley Road have higher proportions of A3 uses compared to Headington; however in Cowley Centre the proportion of A3 uses is lower.

Qualitative indicators

Accessibility

(i) Accessibility to Headington

3.96 Headington is well served by a number of bus routes: numbers 2, 22 and 400 (Park & Ride to Thornhill car park) run by the Oxford Bus Company, and number 7a run by Oxford Stagecoach. These buses use one of the principal radial routes into and out of the City centre, London Road, from much of eastern Oxford. However, we suspect that a high proportion of shoppers arrive in Headington either by car or on foot.

3.97 Headington is located within easy access of the ring-road. Off-street public car parking is provided at the pay and display car park at Windmill Road (48 spaces). There is also off street parking associated with the Somerfield supermarket (128 spaces). The centre has limited on-street car parking.

3.98 Cycle racks are provided in convenient locations outside the shopping parades on London Road to encourage this form of travel. There are cycle lanes through Headington; some sections are partly shared with buses, and other sections provide separation from motorised traffic.

(ii) Accessibility within Headington

3.99 Linear shopping centres, on busy radial road network routes such as Headington, are faced with the difficulty of providing opportunities for shoppers to cross in safety between shopping frontages on either side. London Road is extremely busy and serves to divide the centre in two. Opportunities to cross in safety are restricted to the dedicated pedestrian crossing points at the London Road junction with Windmill Road and Old High Street.

3.100 Although, due to the importance of London Road in the strategic road network, there are no traffic calmed areas, pedestrianised zones, or areas of public open space, the centre does provide wide pavements, which contribute to reasonable pedestrian/vehicle separation.

Environmental quality

3.101 The wide pavements do reduce the impact of the traffic and contribute to a reasonably convivial shopping environment, nevertheless the heavy traffic on London Road does generate noise and air pollution.

3.102 The architectural styles of the buildings and the shop fronts in Headington are varied, but largely undistinguished.

Conclusion

3.103 Of the four Oxford district centres Headington is the third largest, with a total retail floorspace of 24,690 sqm comprising 117 units. In terms of retail rents for Prime Zone A, Headington commands the lowest values compared to the other district centres in Oxford (£325 - £345 / sqm). Property transactions have also returned significantly higher yields that the other centres. Vacancy rates, at 4%, are lower than in Summertown or Cowley Road, but are not as low as Cowley Centre. However, demand for retail floorspace is more limited than in the other centres.

3.104 Although Headington may not be performing as well as other district centres in terms of the market indicators, the range of shopping provision is considered to be reasonable. Compared to the benchmark centres Headington has a higher proportion of A1 comparison goods floorspace than most, a correspondingly lower convenience retail floorspace and similar proportions of service uses.

3.105 Accessibility to Headington, despite the lack of on-street parking, is good: off-street car parking, regular bus services, cycle routes and cycle racks are all provided in convenient locations. Movement within the centre is restricted by London Road, which is a barrier to east-west pedestrian movement, and the only controlled pedestrian crossing is provided at the central crossroads. The busy road detracts from the shopping environment, but the pavements are wide allowing pedestrians to be well separated from vehicles.

Summertown

3.106 Summertown is located in the relatively affluent area of north Oxford, 3km to the north of the City centre and located in close proximity to the ring-road. The VOA figure for retail floorspace in Summertown is 13,270 sqm gross, of which 10,900 sqm is in A1 use, 1,035 sqm in A2 and 1,335 sqm in A3 use. These figures closely accord with the latest OCC data, but are rather different from the Goad figures, the reason being we suspect that Goad will have exaggerated their figures by including in their calculations areas external to the buildings, but within the property curtilage.

3.107 According to Goad the centre contains a total of 22,115 sqm gross of retail floorspace comprising 98 units, with the majority of shopping provision located on Banbury Road with other shopping provision on South Parade. This centre serves the local residential area, as well as the working population: Oxfam headquarters are located here, as well as some Oxford City Council offices.

Market indicators

Retail rents

3.108 Retail property in Summertown is currently achieving Prime Zone A rents of between £485 and £540 / sqm. The prime retail area is defined as the pitch between 203 - 261 London Road (west side)and includes traders such as National Westminster bank and Boots. Prime Zone A retail rents have increased in Summertown in recent years, and the arrival of a Marks & Spencer foodstore in 2002 is forecast to accelerate future rental growth. However, as Summertown performs a largely convenience day-to-day role were some of the other existing convenience operators to experience trading difficulties, due to the arrival of M&S, this may have wider implications.

3.109 We have no comparable evidence for rents in the benchmark centres, but the rental performance compares favourably with the other district centres in Oxford, which currently command between £325 / sqm (Headington) to £590 / sqm (Cowley Centre) Zone A.

Yields

3.110 Prime retail property in Summertown are achieving yields as low as 7%, which indicates the centre provides a reasonably attractive investment opportunity, and particularly good for a district centre. Two small units on the western side of Banbury Road were sold at auction in 2001 at a yield of 7%. There have not been any more recent transactions that we have been made aware of, but we would expect that the arrival of the Marks & Spencer foodstore to cause yield values to possibly harden further.

Vacancy rate

3.111 Our centre survey undertaken in April 2003 identified the vacant units within the centre and Figure 2.3 below identifies the quantum of vacant floorspace in the centre (combined figures for both primary and secondary frontages).

Figure 2.3: Vacancy rates in Summertown – All Retail Floorspace (A1, A2 and A3)

	Total floorspace (sqm gross)	Vacant floorspace (sqm gross)	Vacant floorspace (%)
TOTAL	22, 115	1, 180	5%

Source: RTP survey April 2003

3.112 Shop vacancy in Summertown is low at only 5% of the total retail / service floorspace. This is well below the national average of 8%[15] and is marginally higher than the vacancy rate in the City centre (4%). The low vacancy indicates that there is likely to be healthy demand for retail units.

3.113 Shop vacancy rates in Summertown at 5% (1, 180 sqm), compare favourably with the other district and benchmark centres (refer to Figure 2.2 above) and indicate that there is sufficient demand for representation to keep pace with the supply of floorspace.

[15] Experian Goad 2003

Demand for Representation

3.114 Demand for representation in Summertown is generally for smaller shop units measuring between 55 sqm to 110 sqm. In recent years demand for retail floorspace has been largely locally driven.

Vitality indicators

Diversity of Uses

3.115 Summertown supports a total of 22,115 sqm gross of retail floorspace housed in 98 shop units. The breakdown of the different types of use are shown in Figure 2.2 above, and which compares floorspace in Summertown with the other Oxford districts and the benchmark centres.

3.116 Figure 2.2 indicates that Summertown has a lower proportion of A1 comparison floorspace: 37% (8,180 sqm) than would be expected. Low proportions of comparison goods floorspace are indicative of centres located very close to higher order centres and centres that are more successful at providing day-to-day convenience and service functions. Summertown would appear to fit this profile.

3.117 The emphasis of the comparison provision in Summertown is on household and other consumer durable goods or consumer services such as hairdressers, much the same as Headington. Most of the comparison floorspace is occupied by independent retailers such as 'Curtain World' and 'Pen to Paper', although there are some multiples such as Boots and Dolland & Aitchison. There are only two charity shops, compared to five in Headington, indicating that Summertown has a more competitive retailer market than Headington.

3.118 Summertown is reasonably well supplied for A1 convenience space at 22% (4,940 sqm) accommodated in 15 convenience units. In terms of supermarkets, the most notable recent addition is the Marks & Spencer foodstore in the unit formerly occupied by Allied Carpets, a Somerfield (510 sqm), and a Co-op (740 sqm). All three of these supermarkets are large enough to provide some main food shopping in addition to providing a 'top up' service. There are also smaller national convenience chains such as Oddbins, Bottoms Up and Holland & Barrett, as well as a number of independent bakers and delicatessen. The nearest large foodstore is the Kidlington Sainsbury.

3.119 Summertown has a high proportion of service uses at 35% (7,815 sqm) compared to the other districts. Indeed only Shirley, a centre with over twice the floorspace has more service space. The centre has a wide range of banks and building societies, as well as numerous estate agents. While Summertown has one more high street bank (Barclays) than Headington, Headington has greater representation of building societies than Summertown. There are 12 food and drink outlets which are largely restaurants and take-away units, rather than pubs and bars. These A3 uses represent 14% of the total retail / service floorspace in Summertown.

3.120 There has been very little turnover in shops in Summertown in the two years since the last GOAD survey. However, the opening of the Marks & Spencer foodstore, which has replaced a comparison shop (Allied Carpets) marks a significant qualitative improvement in the convenience offer and the shopping provision more generally in Summertown. Due to the opening of this store Summertown is currently in a transitional phase: the turnover of some retailers has been hit, although other retailers have reported an initial downturn in turnover which has since been reversed following implementation of changes instigated by individual shopkeepers. There have been other changes of occupancy, but nothing significant.

Qualitative indicators

Accessibility

(i) Accessibility to Summertown

3.121 Summertown is well served by a number of bus routes: numbers 2 and 2a served by the Oxford Bus Company, and number 7a served by Oxford Stagecoach. These buses operate on one of the principal radial routes into / out of the City centre from the north (Banbury Road).

3.122 We suspect that a high proportion of shoppers are local to North Oxford, arriving on foot, or bicycle or car. The car borne shopper is well catered for by the provision of on-street parking facilities on the west side of Banbury Road on the frontage between South Parade and Oakthorpe Road that allows shoppers to park in close proximity to the shops.

3.123 Off-street parking is provided for approximately 110 cars conveniently located off Diamond Place behind the Co-op store. There are also a further 80 public car parking spaces adjacent to the Ferry Pool Sports Centre that are available for shoppers.

3.124 Cycle racks are provided in convenient locations on the Banbury Road. There are cycle lanes along Banbury Road, although the cyclist has to share these with buses.

(ii) Accessibility within Summertown

3.125 Summertown, like Headington and Cowley Road, is a linear shopping centre. Banbury Road serves to split the centre in two, but there are two dedicated crossing points, one close to the junction of Banbury Road with South Parade and the other at the junction of Banbury Road with Oakthorpe Road, which provide opportunities to cross safely.

3.126 The vehicle/pedestrian conflict is less in Summertown than in Headington as Banbury Road is significantly wider than London Road in the shopping parades and the volume of traffic is less. The parking pull in on the west-side of Banbury Road serves to further separate the shopper from the traffic and provides a more pleasant shopping experience.

Environmental quality

3.127 Traffic flows on Banbury Road would appear to be less heavy than on London Road, Headington. As a consequence Summertown has comparatively less noise and air pollution. There are no pedestrianised zones and no public open spaces, although the wide pavements create a safe and pleasant shopping environment. The architectural styles of the buildings in Summertown are varied but largely undistinguished.

Conclusion

3.128 Although Summertown is the second smallest of the Oxford district centres with 22,115 sqm of retail floorspace the healthcheck indicators demonstrate that the centre is thriving. Summertown commands the second highest retail rents £485 – 540 / sqm Zone A, and recent property transactions have achieved a yield as low as 7%. The vacancy rate for Summertown (5%) is slightly higher than in Headington (4%) and Cowley Centre (2%), but is on a par with

Cowley Road. Demand for retail floorspace in Summertown is higher than in Headington, and the arrival of the Marks & Spencer foodstore on Banbury Road is likely to improve demand levels especially from comparison goods operators, although the store will make trading a little more difficult for the existing convenience retailers in the centre.

3.129 The centre has a very good range of convenience retailers, but low provision of comparison retailers, which is likely to reflect the relatively close proximity of the centre to Oxford City centre. The proportion of service uses is significantly higher than would be expected in a district centre, but is consistent with the more day-to-day role of Summertown.

3.130 Accessibility to the centre is good: the provision of both on-street and off-street parking means that the centre is accessible by car; there are also regular bus services to and from the City centre; and cycle lanes and cycle racks also provided. Banbury Road is less busy than London Road, and therefore accessibility within the centre is easier than in Headington. There are pedestrian crossings and the pavement is generally very wide providing a more comfortable shopping environment.

Cowley Centre

3.131 Cowley Centre is located south of the City centre off the Cowley Road / Oxford Road and close to the Oxford bypass. The VOA estimate that the Cowley Centre (exclusive of the John Allen Retail Park) accommodates a total of 24,155 sqm gross of retail floorspace, of which 23,305 sqm is in A1 use and 850 sqm in A2 use with no A3 provision. The latest OCC estimates are that the Cowley Centre accommodates 26,190 sqm, which is some 3,000 sqm higher than the VOA and some 7,500 sqm higher than the Goad estimate.

3.132 According to Goad the Cowley Centre is the largest of the district centres comprising of 31,610 sqm including the five retail warehouse units in the John Allen Retail Park. The retail warehousing collectively comprise 13,000 sqm and the purpose-built Templars Square covered centre accommodates approximately 18,600 sqm of floorspace. Templars Square is only open during daytime trading hours.

3.133 The Templars Square centre opened in the late 1960s and was originally two pedestrianised shopping malls connecting two open court areas that was open to the elements. The mall was roofed over in the late 1980s.

3.134 The centre is supported by two multi-storey car parks located on adjacent sites that provide parking for approximately 700 cars, and together with the 500 surface level spaces in the retail park, Cowley Centre has much the highest car parking provision of all the Oxford district centres. The car park is pay and display.

3.135 Templars Square was sold last year to Fairacre for £26.5million. The new owners have been very successful in attracting in new retailers to the centre. The main anchor unit, formerly occupied by Sainsbury, that had been vacant for two years has been subdivided and leased to Wilkinsons and Iceland. This letting has attracted in other important anchor traders such as Peacocks.

3.136 The Cowley Centre serves the surrounding residential area, and it is the closest district centre to the Blackbird Leys housing estate which lies south of the bypass. The area surrounding this district centre is generally less affluent than Headington in the east or Summertown to the north. The traders in the covered centre tend to be at the value-for-money end of the market in terms of both food and comparison goods shopping with operators such as Kwik Save and Iceland, and Wilkinson, New Look and Peacocks providing the main attractions.

Market Indicators

Retail rents

3.137 Retail property in Templars Square is currently achieving prime Zone A rents of approximately £590 / sqm. The prime pitch is concentrated on the Templars Square court at the heart of the centre, and which is home to the key anchor stores Wilkinsons, Woolworths, the Co-op and Kwik Save. This level of rent is higher than all the other district centres and is comparable with the weaker pitches in the City centre such as the eastern end of the High Street.

3.138 Away from prime the next main pitch is Pound Way, which is the main route between the prime area and the larger and more convenient of the two car parks. Pound Way commands rents in the range of £450 / sq m to £485 / sq m.

3.139 Rental values in the centre have improved over the past twelve months since the change in ownership. The improvement is attributable to the addition of the new anchor stores, which serve as key attractors increasing footfall in the centre.

Yields

3.140 The sale of Templar Square last year to Fairacre achieved a yield of 6%, which is low by any standard, but is especially so for a district centre.

Vacancy rate

3.141 Our centre survey undertaken in April 2003 identified the vacant units within the centre and Table 2.5 below identifies how much vacant floorspace there currently is in the shopping frontages.

Figure 2.5: Vacancy rates in Cowley Centre – All Retail Floorspace (A1, A2 and A3)

	Total floorspace (sqm gross)	Vacant floorspace (sqm gross)	Vacant floorspace (%)
TOTAL	31, 610	650	2%

Source: RTP survey April 2003

3.142 Vacant floorspace represents only 2% of the total retail / service floorspace in Cowley Centre. This is well below the national average of 8%[16] and is half that of the City centre (4%). This indicates that Cowley Centre is a strong district centre and attractive to retailers.

3.143 Figure 2.2 above demonstrates that Cowley Centre has the lowest vacancy rate of all the district and benchmark centres. Since the 2001 survey there has been some movement of businesses within the district centre, most notably the closure of the Sainsbury store and the re-letting of the premises after a void period of two years to Wilkinson and Iceland.

[16] Experian Goad 2003

Demand for Representation

3.144 Demand for floorspace is from both convenience and comparison retailers and from local chains and national multiples. The floorspace required by the retailers varies in a range up to approximately 930 sqm.

Vitality indicators

Diversity of Uses

3.145 The mix of uses in Cowley Centre compared with the other districts and the benchmark centres is shown in Figure 2.2 above. The total retail floorspace in Cowley Centre (A1, A2, A3 and vacant) is 31,610 sqm, which is accommodated in 90 units. Figure 2.2 demonstrates that Cowley Centre has the largest proportion of A1 comparison floorspace: 75% (23,800 sqm), and that the other centres have far lower proportions, Shirley for example has the next highest proportion at 60% (28,094 sqm). The comparison floorspace is accommodated in 54 units and a high proportion of these are multiple retailers such as WH Smith, Woolworths and Boots and Wilkinsons in the covered centre and Matalan, B&Q and JJB Sports in the retail park.

3.146 In terms of A1 convenience retail floorspace Cowley Centre has 11% (3,500 sqm), which is a similar proportion to Shirley at 12% (5,548 sqm), but generally less than the average for district centres, of course the loss of Sainsbury was a major factor in the below average performance. Cowley Centre supports a total of nine convenience shops, the principle stores being Kwik Save (990 sqm), Co-op (1,080 sqm) and Iceland (840 sqm). All three of these supermarkets provide a main food shopping role. There are also a number of specialist independent convenience outlets such as Queen of Hearts bakers and Simmons butchers. The loss of the Sainsbury store is obviously significant in terms of the convenience provision in the centre. However, there remains a reasonable choice at the discount value for money end of the market.

3.147 The proportion of floorspace dedicated to service uses is lower in Cowley Centre: 12% (3,660 sqm), compared to the other districts and benchmark centres. Although Cowley Centre supports some of the national banks and building societies (such as Barclays and Lloyds) there is less provision of other financial services and estate agencies compared with the other district centres. The provision of A3 uses is also lower than in the other district centres, which is likely to reflect the daytime only trading hours.

Qualitative indicators

Accessibility

(i) Accessibility to Cowley Centre

3.148 The Cowley Centre is served by two bus routes, the number 5 (Oxford Bus Company) and number 1 (Oxford Stagecoach) which run between Blackbird Leys and the City centre and number 10 which links Headington with Cowley Centre.

3.149 As we mention above there are approximately 1,200 car parking spaces that serve the centre (which must be paid for) and anecdotal evidence suggests that over 50% of the shoppers access the centre by car, although local residents (including those that live above the centre) arrive on foot or by bicycle. The catchment area for Templars Square during weekdays

Monday to Thursday is an approximate 3.5 – 4 mile radius from the centre, covering nearby Barton and Headington (enabled by bus routes) and Cowley, and Botley which is slightly further away. The catchment area changes on Friday and Saturday, with shoppers coming in from as far as 25 miles away, drawn in by the range of shops provided.

3.150 The centre can be accessed by cycle along the local cycle route network and cycle racks are provided on the pavement around the perimeter of Templars Square.

(ii) Accessibility within Cowley Centre

3.151 Templars Square provides for easy pedestrian movement within the pedestrianised malls, which allow shoppers to move between the shops in total safety. The roofed in aspect of Templars Square also guarantees shelter from the vagaries of the weather, which is a significant advantage over the other Oxford district centres from a shopping perspective.

3.152 The two parts of the district centre, Templars Square and the retail warehouses (John Allen centre) are separated by Between Towns Road, which has two pedestrian crossing points allowing shoppers to move reasonably easily from the covered malls to the retail warehouses. Anecdotal evidence would support the fact that there is trip linkage between Templars Square and the John Allen centre and that the car parks are used interchangeably.

Environmental quality

3.153 Like virtually all purpose built shopping centres dating from the 1970s Cowley Centre is inward looking and the architectural style is non-distinguished. The centre is bordered by roads on all sides and is effectively an island site, which makes it difficult to integrate the centre with the surroundings. However, the glazed canopy allows a bright and airy outlook and a comfortable shopping environment. The centre does provide two court areas that allow shoppers to stop, meet and relax. Public seating is provided largely within the covered area.

3.154 Again with the retail park, this environment is dominated by the functionality of the retailing, the buildings are non-descript warehouse sheds in a contextual setting of a large area devoted to car parking. Given the operational requirements of this type of retailing it is very difficult, even in these more enlightened times, to provide a more attractive shopping environment.

Conclusion

3.155 Cowley Centre is a successful district centre. The amount of retail floorspace is the highest of all the district centres in Oxford (31,610 sqm), which is provided in the smallest number of units (90) reflecting the fact that unlike the other districts Cowley Centre is a purpose built shopping centre. This centre commands the highest Zone A rents (£590 / sqm), of all the districts and comparable to the weaker pitches in the City centre. The centre recently changed hands at the very low yield of 6% indicating that the centre is successful and the new owners have confidence that there are good prospects for rental growth. Vacancy rates are also the lowest of all the centres assessed, at 2%, which suggests that demand for retail floorspace is high. Demand for representation is as likely to be from national multiples as it is from local chains/independents, which distinguishes the centre from the other districts. The substantial amount of car parking provision at the centre, which is much higher than at any of the other centres, is a major advantage in attracting both shoppers and retailers to the centre.

3.156 Cowley Centre has the largest proportion of A1 comparison retail floorspace (75%) dedicated to comparison goods. This proportion is higher than anticipated for a district centre and reflects the fact that the large anchor unit formerly occupied by Sainsbury is no longer used for convenience retailing. Cowley Centre also has a smaller provision of services and food and drink outlets than the other district centres, which is likely to result from the centre closing in the evenings.

3.157 Access to the centre is dominated by car borne shoppers as is evidenced by the high number of car parking spaces and also the high usage of the car parks. There are regular bus services to the centre, and the centre is accessible by bicycle, although the car is clearly dominant. In contrast to the high quality shopping environment in the covered centre, which makes for a pleasant and safe shopping environment, the shopping environment beyond the centre that extends across Between Towns Road to the retail park is less appealing due in the main to the dominance of the car.

Cowley Road

3.158 Of all the district centres in Oxford, Cowley Road lies closest to the City centre. It is located to the east of central Oxford and serves the surrounding residential area, which has a high student population as the area is convenient for both Oxford University and Oxford Brookes. The Cowley Road and the surrounding area are generally less affluent than Headington or Summertown, but similar to the socio-economic profile of the Templar Square centre.

3.159 The Cowley Road centre is much the smallest of the four Oxford district centres. We have not been able to obtain data from the VOA for this centre. However, the Goad and OCC data closely match. Goad estimate that the centre comprises of 9,918 sqm of retail floorspace accommodated in 188 units, much the highest unit count of any of the centres, indicating that shop units on Cowley Road are very small by district centre standards The majority of the shopping provision is located on the Cowley Road, with further retail/service activity on St Clements and The Plain. The principal anchor store is the Tesco Metro located at the heart of the Cowley Road shopping area, and the centre stretches out for a mile and a half from The Plain along the Cowley Road to the junction with Divinity Road, and from The Plain up St Clements.

Market indicators

Retail rents

3.160 The best retail property on Cowley Road is located close to the Tesco Metro store and is currently achieving prime Zone A rents of £375 / sqm. This level of rent is achievable on both the north and south side of the road, bounded by East Avenue in the east and Rectory Road in the west. The rental levels decrease further away from this area, to an average of approximately £270 / sqm elsewhere in the centre.

3.161 Retail rents have increased marginally over the last two years, but rents for A3 floorspace currently tend to out-perform retail floorspace, commanding rents in excess of £375 / sqm.

3.162 Compared with the other Oxford districts, rents in Cowley Road are lower, but only marginally below those achieved in Headington.

Retail yields

3.163 Property transactions rarely takes place on Cowley Road as most of the property is privately owned. However, we understand that prime retail property could achieve a yield of 8% in the prime shopping area close to the Tesco Metro, but would be much higher elsewhere in the centre.

Vacancy rate

3.164 Our centre survey undertaken in April 2003 identified the vacant units within the centre and Table 2.7 below identifies how much vacant floorspace there currently is in the shopping frontages.

Figure 2.7: Vacancy rates in Cowley Road – All Retail Floorspace (A1, A2 and A3)

	Total floorspace (sqm gross)	Vacant floorspace (sqm gross)	Vacant floorspace (%)
TOTAL	9, 918	535	5%

Source: RTP survey April 2003

3.165 Vacant units represent only 5% of the total retail / service floorspace. This is well below the national average of 8%[17] and is slightly higher than the vacancy rate in the City centre (4%). This indicates that the supply of shopping floorspace on Cowley Road is currently matching retailer demand.

Demand for Representation

3.166 The main focus for demand is the prime area centred on the Tesco store. Beyond this very narrow area there tends to be a high turnover of retailers, many of which are independents and a high proportion selling specialist ethnic food and other goods. The local traders seek units of approximately 30 - 70 sqm.

3.167 Demand for A3 units on the Cowley Road centre is high, and over the years there have been a significant amount of change of use from A1 to A3. This change has served to shrink the amount of A1 space available, which has tended to concentrate in the central area around Tesco.

Vitality indicators

Diversity of Uses

3.168 As referred to earlier, the Cowley Road supports a total of 9,900 sqm of retail floorspace accommodated in 188 units. This gives a very low unit floorspace ratio reflecting the non-planned nature of the retail provision on the Cowley Road.

3.169 Figure 2.l2 sets out the diversity of uses in the Cowley Road centre The majority of the floorspace (46%) is taken up by comparison shops, of which there are 84. Most of the traders are independent retailers such as Honest Stationery and SS20 (clothing), although there is limited representation by some national multiples such as Boots and Blockbuster. The comparison shops tend to focus on the day-to-day essential items type of retailing and there is

[17] Experian Goad 2003

relatively little in the way of clothing and footwear provision, which reflects the close proximity of the centre to the City centre.

3.170 The proportion of convenience floorspace on the Cowley Road is 19%, which is accommodated in 14 outlets. This is a similar proportion as that found in Headington and Summertown and most of the benchmark centres. There are few multiple foodstores although the largest, the Tesco (1,330 sqm), is by far and away the most important anchor store in the centre and serves as a main food shopping store for a large proportion of the resident population. There are a large number of small independent convenience retailers, many of which are small grocers stocking a range of foods to meet the needs of the local ethnic communities (eg. Halal butchers). These convenience shops provide for both main and top-up shopping.

3.171 The proportion of service floorspace makes up the second largest category on the Cowley Road, accounting for 29% of the total retail floorspace, accommodated in 51 units. The amount of food and drink provision in Cowley Road district centre in both absolute and proportional terms is particularly high, significantly higher than in any of the other district centres in Oxford or the other benchmark centre. The reasons for this are two-fold (i) the centre's close proximity to the City centre, which dampens demand from retailers, and (ii) the high student population means the resident population have a higher propensity to spend on eating out than in other areas. This makes the Cowley Road a popular place at evenings and weekends and demand for A3 floorspace is high. The Cowley Road has a particularly large number of curry restaurants due serving the local ethnic and student populations.

3.172 A2 uses account for only 6% (19 units) of the total floorspace; there are limited banking facilities (Lloyds and NatWest) compared to Headington or Summertown which have a larger number of these facilities. There are 10 estate agents, which is a higher representation than that which is found in any of the other Oxford district centres, and reflects the more transient nature of the area.

Qualitative indicators

Accessibility

(i) Accessibility to Cowley Road

3.173 The Cowley Road is one of the principal routes in and out of the City centre, and is characterised by busy traffic and frequent congestion. The district centre is well served by bus routes: number 5 (Oxford Bus Company) and number 1 (Oxford Stage Coach) for the Cowley Road, and numbers 2 and 22 (Oxford Bus Company) and 7a (Oxford Stage Coach) for St Clements. All these buses travel the length of Cowley Road and provide a number of stopping points allowing shoppers to access shops and services along its length.

3.174 Off-street car parking is provided by a small car park located at the back of the Tesco Metro store and a public car park at St Clements which is pay and display.

3.175 There are limited on-street car parking opportunities on Cowley Road and the side-streets that lead off the Cowley Road, although there is resident's controlled parking on many of the streets closest to The Plain, which limits the ability of shoppers to access this centre by car. The centre is easily accessed either on foot or by bicycle from the surrounding residential area.

3.176 Cycle lanes are provided on the Cowley Road, although they do not stretch along the entire length and are often shared by other vehicles at narrow points in the road. There are cycle racks provided outside some of the shops on the Cowley Road, notably the Tesco Metro store.

(ii) Accessibility within the Cowley Road

3.177 Cowley Road is a linear centre, like Headington and Summertown, and it is located on a busy radial route to / from the City centre. There are five dedicated pedestrian crossing points on Cowley Road, two crossing points on St Clements, and crossing points at the junctions of The Plain with Cowley Road, St Clements and Iffley Road.

3.178 Cowley Road does not have traffic calmed or pedestrianised areas, due to the importance of the road in the strategic road network, but the wide pavements separate pedestrians and vehicles.

Environmental quality

3.179 The traffic on the Cowley Road and St Clements create noise and air pollution, which does not contribute positively to the environment. In common with the other district centres, the architectural styles are mixed, and there are neither any exceptionally high quality buildings nor any that are particularly unattractive. There is a public park at the eastern end of Cowley Road, just beyond the main shopping area.

Conclusion

3.180 Cowley Road is much the smallest of the Oxford district centres. However, the centre has much the largest number of units indicating that the units are very small in size. Rental values for this centre compare favourably with Headington, but are less than in Summertown and Cowley Centre. The other market indicators show that the prime shopping area on the Cowley Road centred on the Tesco store is performing satisfactory, and away from the core the large number of A3 units ensures that it continues to perform an important leisure/evening economy role.

3.181 The close proximity to the City centre and the large student population are the major factors limiting the comparison goods floorspace in the centre and contributing to the high proportion of service activity, most notably the A3 uses.

3.182 Overall Cowley Road functions satisfactory providing for the day-to-day shopping requirements of the resident population and as a destination for evening and weekend leisure activity.

Conclusions to the Oxford District Centres' Healthcheck

3.183 Overall the district centres in Oxford are performing well in terms of market indicators, with Cowley Centre performing particularly well, due in the main to its more extensive comparison goods offer than any of the other centres that is a major draw for shoppers. The other three are all healthy centres, but rely on the convenience shopping and/or service provision to attract shoppers.

3.184 Our assessment of the vitality indicators demonstrates that all of the centres have a reasonable range of convenience and comparison shopping, although Cowley Centre has a lower than expected proportion of convenience floorspace. The recent addition of the Marks & Spencer foodstore represents a significant qualitative improvement in the food shopping offer in Summertown, which is likely to attract in specialist comparison goods operators in due course that will strengthen the centre as a whole. Summertown and Cowley Road have a higher than expected proportion of service floorspace that reflects their specialist evening and weekend economies.

3.185 The qualitative assessment highlights the movement problems for pedestrians within each the three linear centres, but indicates that in the case of Headington and Summertown this is mitigated by the wide pavements that provide a degree of separation between pedestrians and road traffic. The physical dimensions on the Cowley Road provide less of a buffer between pedestrians and road traffic, but more signal controlled crossing points are provided that have the added bonus of slowing down the road traffic. None of the centres contain any particularly distinguishing or detracting architecture, nor do any provide any informal areas of public open space close to the prime shopping area for shoppers to meet, rest and relax.

3.186 In conclusion Cowley Centre is much the strongest centre followed by Summertown, which is likely to improve in the short term. Headington and Cowley Road are weaker centres, but performing adequately, the former providing a balance of shopping attractions and the latter more of a service function rather than a comparison shopping role.

4 CURRENT SHOPPING PATTERNS

4.1 In order to understand existing shopping patterns within the Oxford area a household survey was carried out between March and May 2003. The Study Area selected for the survey extends from just north of Bicester in the north to Wallingford and Wantage in the south and just west of Witney in the west across to Thame in the east. This enables us to establish the extent of the draw of Oxford City centre and indeed the outflow of expenditure from the study area to other centres. The Study Area Map is shown at **Appendix 1**.

4.2 For the purpose of analysis the Study Area has been subdivided into 6 zones based on the larger centres surrounding Oxford as follows:

Zone 1: Oxford
Zone 2: Kidlington
Zone 3: Abingdon
Zone 4: Thame
Zone 5: Wantage
Zone 6: Witney

4.3 The survey involved a systematic random sample of 1,000 households drawn directly from the residential telephone subscriber listings across the Study Area. The survey questionnaire sought to establish shopping trip destinations for both convenience and comparison goods together with mode of transport and length of journey. Respondents were also asked about their reasons for visiting their preferred centre and frequency of trips.

4.4 Because of the heterogeneity of retail warehouse shopping, and in view of recent Government advice regarding the 'class of goods' approach to the location of new retail floorspace, the survey sought to establish the frequency of use of such outlets, type of outlet visited and annual spend rather than trip destination.

4.5 Finally respondents were asked about their use of park and ride when visiting Oxford City centre.

4.6 A copy of the questionnaire is attached at **Appendix 2** together with the Survey Methodology. The household survey tables are included at **Appendix 3**.

Comparison Shopping

4.7 Respondents were first asked in which centre they undertook most of their shopping for clothes and shoes. This question was designed to establish the most popular centres for comparison shopping. The results are shown at **Table 1**. This shows that across the Study Area as a whole Oxford City centre attracts nearly 50% of comparison shopping trips. Given the extent of the Study Area and the proximity of other major centres this is a relatively high level of retention and reflects the importance of Oxford as a comparison goods shopping destination.

4.8 Within Zone 1 Oxford attracts nearly 70% of trips while across the remaining zones, with the exception of Zone 4, the City attracts 40% or above. The level drops in Zone 4 where Aylesbury is the dominant centre attracting approximately half of all trips with Oxford following with just under 20%.

4.9 Surprisingly Bicester Village Outlet despite its apparent popularity attracts very few comparison shopping trips from the Study Area.

4.10 We also asked householders whether they used any other centre for clothes and shoe shopping. The results, shown at **Table 2**, show that over half the respondents did not have a second shopping destination. Of those that did the major centres of Milton Keynes, Reading and Swindon featured in those zones which were closer to those centres namely Zones 2, 3 and 5 respectively. Nevertheless the numbers of trips attracted to these centres remains quite low ranging from 11 – 17%. Over the Study Area as a whole Oxford is the dominant second centre for comparison goods shopping.

4.11 To obtain meaningful market share indicators it is necessary to merge the responses to the two questions, taking account of the non-response just noted together with estimates of the relative scale of expenditure at each level. We do this by dividing the data into three sets:

- the distribution of centres given by respondents who gave only a single (solus) centre;
- with other respondents, the distribution of their main centres; and
- with the same respondents as the bullet point above, the distribution of their secondary centres

4.12 When merging the data the first set is given a weighting of 100%. The second and third sets are weighted by 70% and 30% respectively. The last two weights are derived from a large number of previous surveys where we have asked respondents who gave more than one centre to estimate the split of their yearly household expenditure between the two centres. The results have consistently been very close to the ratio 70:30.

4.13 The resulting market shares are given by **Table 3**. Oxford City centre dominates the entire Survey Area with almost 50% of the total trade, far above the next most important centre, Reading, which has only an 8% market share. In Zone 1 (the Central zone) Oxford City centre's market share is 71%. In the outer zones there was more competition, but only in Zone 4 (Thame) does Oxford City centre it take second place (after Aylesbury). Elsewhere the City centre's market share exceeds one third, and it was well ahead of the competition – namely Reading to the southeast, Swindon to the southwest, Witney to the west and Banbury/Bicester to the north.

Oxford City centre

4.14 We asked a series of questions about use and perceptions of the main centre for clothes and shoes. Because of the dominance of Oxford and the fragmentation of its main competition amongst a sizable number of other centres, none of these other centres received enough responses to support a separate statistical analysis. In Table 4 onwards we therefore compare those who used Oxford City centre with the combined results for the next four most frequently used major centres (Swindon, Banbury, Reading and Aylesbury). It will be noticed that the figures for the total sample contain substantial numbers of *not applicable/ no replies.* These are mainly people who did not give a main centre, either because they did not regularly buy clothes and shoes (as with a few elderly respondents) or because they used mail order or the internet. The percentage responses relate to those who gave named centres. It will be borne in mind that Oxford's main competitors are the centres of Reading, Aylesbury, Swindon, Witney, Banbury and the Cowley district of Oxford.

4.15 We asked about the means of transport normally used when shopping for clothes and shoes. (**Table 4**) Those who used Oxford had a markedly greater tendency to use buses, either alone or as part of the Oxford park and ride system. Those using cars, either alone or as part of the park and ride system, accounted for 56% of Oxford users compared with 80% for the other main centres. Further details of the use of park and ride are given later.

4.16 **Table 5** gives the time taken to get to the centre on a door to door basis. The main difference was that Oxford shoppers had a rather lower tendency to take less than 15 minutes or more than 45 minutes. Even so, given the small size of the Survey Area it is interesting that as many as 10% took 45 minutes or more to get to Oxford.

4.17 **Table 6** gives the frequency of visits to the centre, such visits not being restricted to shopping for clothes and shoes. With Oxford the proportion visiting at least once a week was higher, at 25% compared with 16% for the other main centres.

4.18 We asked whether respondents felt that their main centre for clothes and shoes met their households' needs. Only a small minority replied "poorly" though Oxford users had a lower tendency to say "very well"- 62% against 84% for the other main centres (**Table 7**), but Oxford did rather worse on other questions related to perceptions (**Tables 8 and 9**).

4.19 **Table 8** gives the reasons why the centre is used (the total is more than 100% because some respondents gave more than one reason). As is common in questions of this kind, many respondents gave rather weak reasons – simply that the centre is close to their home or place of work, that they were familiar with it, or that they shop there out of habit. Such reasons were given by 70% of Oxford users against 32% for the other main centres. More positive reasons relate to particular advantages in accessibility, such as good parking or good public transport. Only 13% of Oxford users gave responses of this kind, against 40% for the other main centres. Oxford also received below-average scores on reasons related to the standard of the shopping offer – whether on range, quality or environmental criteria. Some 63% of Oxford users gave these reasons compared with 109% for the other main centres (again, the total is more than 100% because respondents gave more than one of the individual answers in the set).

4.20 Criticisms of the centres (Table 9) are to a large extent a mirror image of the foregoing. Thus, criticisms of accessibility totalled 34% with Oxford users, against 11% for the other main centres. It is interesting that the main problems are with parking and other car-related issues, complaints about public transport being everywhere negligible. Oxford also scored below-average on its shopping offer, with 32% complaining against 20% for the other main centres. But the main differences were related to the social and physical environment, particularly on overcrowding, poor maintenance and dirtiness. The Cornmarket was especially subject to complaints of this type. Such criticisms were made by 33% of Oxford users compared with just 4% for the other main centres. With this type of question a useful measure is the proportion of users who had no complaint. This was 41% with Oxford users compared with 74% for the other main centres.

The Oxford Park and Ride System

4.21 It was shown above in Table 4 that 22% of those who did their main clothes and shoes shopping in the City centre normally use the Park and Ride system to get there. To investigate further, we posed a more detailed question to all people who shop in the City centre.

4.22 **Table 10** gives the percentage who said they shop or did not shop in the City centre. It is interesting that many respondents said they do not shop there, the percentage being as high as 39% to 41% in Zones 4 and 5 (Thame and Wantage). Even in the Zone 1 it reached 11%. It seems that use of the City centre is polarised: its market share for comparison goods is very high, but people outside this clientele tend to stay away.

4.23 Of those who shop in the City centre, 17% said they always use the Park and Ride, 7% said mostly, 19% sometimes and 56% said never (**Table 11**). These averages were brought down by the large Central Zone (Zone 1), where 83% said they never used the service. (Such respondents are only likely to use the Park and Ride if they live near the edges of that zone). In the outer zones the figures were higher, with half or less saying they never use the service. There was some variation between zones, probably because of differential access to the service points. The highest usage is in Zone 4 (Thame) where 29% said they always use the service although significant numbers said they never use it.

4.24 Finally, **Table 12** gives the breakdown for all respondents who gave the City centre as their main centre for clothes and shoes. It will be seen that this is almost identical to the "all Zones" column of Table 11. By contrast, as shown below, use of the Park and Ride system for supermarket trips is negligible.

Convenience Shopping

4.25 Convenience shopping tends to be split between trips to the major foodstores to carry out bulk shopping and day to day 'top up' shopping carried out at smaller more localised convenience stores. Typically some 30% of convenience goods expenditure is accounted for by trips to smaller shops. It is not possible to identify every convenience store used by residents within the Study Area and our survey sought to identify the frequency of use of the major foodstores where residents carried out the bulk of their convenience shopping.

4.26 We therefore asked respondents where they usually undertake their main supermarket shop. **Tables 13 and 14** give the main supermarket and secondary supermarkets used by respondents. Once again, a few respondents did not shop at supermarkets and a proportion (965 less 551) gave only one supermarket. The final columns of these tables give the results of a special analysis confined to the Oxford City administration area. The City lies mostly, but not entirely within Zone 1 (the Oxford Central zone): two of its wards (Blackbird Leys and Northfield Brook) being assigned to Zone 3 (Abingdon) and five non-City wards being included in Zone 1. For this reason responses for the City are sometimes larger than the corresponding entries for Zone 1.

4.27 The supermarket data was merged in a similar manner to the data for clothes and shoes, using solus, main and secondary supermarkets. The weighting factors, again based on expenditure data from previous surveys, were 61 for solus, 41 for main and 20 for secondary.

4.28 **Table 15** gives the resulting market shares. There are eleven leading stores:

Tesco, Abingdon
Sainsbury, Heyford Hill
Sainsbury, Oxford Rd, Kidlington
Tesco, Didcot
Tesco, Cowley Cen/Ret Pk
Sainsbury, Witney
Asda, Wheatley
Waitrose, Thame
Waitrose, Wallingford
Waitrose, Abingdon
Waitrose, Witney

4.29 In each of the zones, two or more of these stores were the leading players. The most important store outside the Survey Area was the Aylesbury Tesco, which had some influence in Zone 4 (Thame), taking 12% of its trade. A similar amount leaked away from Zone 4 (Thame), to smaller centres outside the Survey Area, but from the other zones leakages were much smaller. The Survey Area was reasonably self-contained for supermarket shopping, as would be expected in an area with powerful stores in the interior, but low population densities at the edges.

4.30 Table 15 demonstrates that within Zone 1 and within the Oxford City administration area (final column) Sainsbury at Heyford Hill together with Tesco on the Oxford Retail Park are far and away the most popular destinations with a combined market share of 34% and 40% respectively. The Tesco store on the Oxford Retail Park has a higher market share from Oxford City (22.5%) compared to its market share from Zone 1 (17%) because Zone 1 excludes two wards in relatively close proximity to the store. The Sainsbury store in Oxford City centre attracts a market share of about 7%, which is relatively high given its City centre location.

4.31 The main foodstores in the District centres are performing reasonably well. The Tesco on the Cowley Road, the Co-op in Summertown and the Somerfield in Headington all record respectable market shares from Zone 1 and, from the City administrative area.

4.32 Supermarket shopping is predominantly car-based. (**Table 16**). The percentage using cars is well over 80%, except in Zone 1 where 22% walked or cycled. Use of public transport was low and not a single household in the sample used the Park and Ride system for their main supermarket trips (this is partly because of the need to use the car to carry away purchases and partly because most supermarket trips, being localised, do not cross the Park and Ride cordon).

4.33 The majority of trips to the main supermarket took less than 15 minutes, while few took 30 minutes or more. (**Table 17**).

Retail Warehouse Shopping

4.34 Previous surveys have been based on the concept that the unifying characteristic of the retail warehouse sector is the sale of bulky goods. Accordingly, proxies were sought for this general category – typically furniture/ carpets or electrical/ DIY- to be used in the same way that clothing and footwear is used as a general proxy for "pure comparison" goods. This approach has now been abandoned on the grounds that:

- Experience has shown that respondents to questionnaires do not conceive of "bulky goods" as a coherent retail category. Moreover, many purchases at retail warehouses are not particularly bulky. Because of this, and because of the heterogeneity of retail warehouse shopping (DIY, carpets, furniture, white durables, electronics, etc) it is impossible to frame simple goods-based questions that cover all items of retail warehouse expenditure.

- In addition, retail warehousing is highly fragmented - people who use retail warehouses may buy DIY goods in one location, furniture and carpets at a quite different place, white durables at a third and so on. This is in marked contrast to what we term "pure comparison" shopping, where consumers carry out most of their expenditure in a single centre (or mall)

4.35 The new approach, used in the Oxford survey, addresses the retail warehouse format directly. The questions are:

- *Now I want to ask whether your household shops in any of the big shopping sheds like B&Q or Comet. (CLARIFY IF NECESSARY) During the past twelve months has your household bought goods any of these places?*
  (TAKE LOCATIONS AND NAMES OF THE THREE MAIN STORES (IF ANY)

- *How much has your household spent in all such places over the past twelve months? Was it:*
  less than £50
  £50 to £99
  £100 to £499
  £500 to £999
  £1,000 to £1,999
  £2,000 or more

4.36 So the questions were defined by format (*large shopping sheds*) and not by the type of goods purchased. The responses were recorded in the order given and no significance should be attached to that order (We did not for example ask for the most important store to be recorded first). Finally, it should be noted that the question on expenditure applies to <u>all</u> retail warehouses used by the household over the past 12 months. It is obviously difficult to collect data on such "lumpy" expenditure in the course of a telephone interview, so the ranges were kept broad to make things easier for the interviewer and the respondent. It will be seen later that almost all those who used retail warehouses were able to make some kind of estimate, though there are obvious questions about the accuracy of these estimates.

Retail warehouse locations and retail warehouse operators

4.37 For the sake of clarity the following analysis is for the entire study area. First, **Table 18** gives the responses on retail warehouse location (details of the respective store operators are given later). Altogether, 73% of respondents gave at least one location, the implication being that 27% of the sample had not used a retail warehouse over the previous 12 months. Only 33%

gave as many as three locations. The last two rows of the table give the number of locations that lay inside the Survey Area (after excluding external places like Aylesbury or Banbury) and the percentage they formed of the total. This was consistently 80% or more, the average for all responses being 84%. The most frequently named location outside the Survey Area was Aylesbury, with 9% of the total. Inside, the most frequent locations were Botley Road, Abingdon and Oxford Retail Park/Templar Square, which together accounted for 67% of the total. The Survey Area therefore seems broadly self-contained for retail warehouse shopping – and it is likely that the small level of outflows is balanced by inflows from outside.

4.38 **Table 19** gives a similar analysis for the retail warehouse operators named at each stage. DIY operators (B&Q, Homebase, Texas, Focus and Wicks) together accounted for 58% of all responses. A broad electrics/electronics group (Comet, Curry's Dixons and PC World) accounted for almost half the remainder. It is interesting that furniture and carpets – formerly used as a key proxy for retail warehouse shopping, - accounted for less than one percent of the total.

Characteristics of retail warehouse customers

4.39 **Table 20** examines the characteristics of retail warehouse customers, compared with those who had made no retail warehouse purchases over the past 12 months. The independent variables are sometimes characteristics of the principal wage earner (PWE), but the dependent variable relates to household purchases, which could have been made by other household members. However, it should be noted that as far as age is concerned, most households with PWEs of 60 years or over are elderly people living alone or with their spouses.

4.40 First, with social class of the PWE, blue collar households were rather more likely to be customers than white collar households. A total of 87% of blue collar households had made retail warehouse purchases compared with 83% of white collar households. Those with retired PWEs were far less likely to have been customers – only 54% had made retail warehouse purchases. Amongst the small group of "others" (mainly non-working housewives and students) 60% had made purchases. This is reflected in the results for sex of the PWE – with females 64% had been customers compared to 78% with males. On age, households with PWEs aged 60 years or over had the lowest propensity to be retail warehouse customers (60%), but the propensity was higher with those aged 40-59 than those aged 20 to 39. The tiny group of households with PWEs under 20 is too small to be statistically significant.

4.41 Car-owning households are much more likely to be retail warehouse customers than those with no car. Some 75% of those with one car are customers and 85% of those with two cars. By contrast, only 33% of non-car-owning households are customers. As is now accepted, this is not related to the requirement to use cars to carry away "bulky" retail warehouse purchases, but rather to the poor provision of public transport to retail warehouse locations.

4.42 Finally, there are some differences by zone of residence. The percentage of households who are customers varied from 68% in the Zone 6 (Witney) to 76% in Zone 2 (Kidlington). Variation in the outer zones is probably due to differences in ease of access to retail warehouses – Abingdon has the second highest concentration of retail warehouses in the Survey Area, while a high proportion of households from the Kidlington zone use retail warehousing at Bicester and Botley Road. But such arguments cannot explain the low level of patronage in Oxford Centre which is very well provided with retail warehouses, at Botley Road and Cowley. Here the reason is likely to be better access to non-retail warehouse facilities selling the same kinds of good – builders' merchants with DIY and department stores/specialist shops with electricals/electronics.

4.43 The propensities described above could be largely related to the dominance of DIY in local retail warehouse shopping: in particular, elderly people are not normally DIY enthusiasts. But the key unanswered question here is whether this dominance of DIY is significantly greater in the Survey Area than in other parts of the country.

Expenditure at retail warehouses

4.44 **Tables 21 and 22** give the findings from the question on expenditure. This question required respondents to fit their expenditure into broad ranges, but we can make a crude estimate of total and average expenditure by taking the midpoint of each range. Thus, the total expenditure of those giving the £100 to £499 range is taken as the number of such respondents multiplied by the mid-point of the range (£300). With the final range, "£2,000 or more" we have taken an arbitrary "midpoint" of £2,300, but this is not critical as the number of respondents giving this range was small. On this assumption, total expenditure at retail warehouses by the sample was £355,075 over the 12–month period. If we divide this by the total number of respondents, 966, the average is £368 per household. If we divide by the number who had actually made retail warehouse purchases during the period - "retail warehouse customers" - the average is £507 per household.

4.45 It is of interest to know how DIY expenditure compares with total retail warehouse expenditure. Figures for DIY cannot be obtained directly since the expenditure question applies to the mixture of all retail warehouse expenditure. We can, however get some guidance by filtering out those respondents who had only made DIY purchases. There were 224 such households, whose average expenditure was £372, which is considerably lower than the average calculated above for all retail warehouse customers, £507. So it appears that the dominance of DIY customers is to an extent offset by lower levels of expenditure.

4.46 **Figure 1** presents the data in the commonly-used style of a logistics curve, with the upper limit of each expenditure range plotted against the cumulative number of respondents that lie at or below that limit. Thus, reading along the 50th percentile it can be seen that the median retail warehouse expenditure for all respondents is around £160. For retail warehouse customers the median is £300 while for DIY-only customers it is £200. These medians are well below the averages for the three groups (£507), showing that the distribution is heavily skewed by high expenditure at the top of the scales.

4.47 All these figures are low in terms of previous assumptions that retail warehouse expenditure accounts for about 15% of the total expenditure on comparison goods. In 2003 we estimate that national comparison-goods expenditure was around £6,000 per household. Fifteen percent of this is £900, far higher than the £368 calculated above. This latter survey-derived figure represents only 6% of the comparison goods total. The margins of error of the survey expenditure data are undoubtedly high but it would be surprising if they were responsible for the whole of this difference.

5 RETAIL FLOORSPACE CAPACITY MODELLING

5.1 This section sets out our assessment of the future capacity for additional retail floorspace in Oxford during the period up to 2011 for both comparison and convenience shopping. The Study does not cover the whole of the Plan period, which extends to 2016, because forecasting over such a long time period can be prone to error and consequently a high degree of caution needs to be exercised in making provision for new retail floorspace over such a lengthy period. We believe that in Oxford's case where the City is tightly constrained by its historic fabric a more a more realistic approach is for the Council to monitor the provision of new retail floorspace over the first part of the Plan period and if necessary carry out an interim review.

Comparison Goods

5.2 We have employed a step-by-step approach to the capacity modelling exercise, in accordance with standard practice, as follows:

- Step 1 : The Study Area has been subdivided into 6 zones as set out in the previous section of our study;
- Step 2 : Population estimates have been obtained for each Study Area zone for the base year (2003) and the forecast years (2006 and 2011) using the latest 2001 census results. Because of the large number of resident students within the Study Area population figures are disaggregated into resident (non student) and student;
- Step 3 : Locally based per capita expenditure estimates for comparison goods and convenience goods have been obtained for all of the zones within the Study Area for the base and forecast years (all monetary values are maintained at constant 2000 prices). Student per capita expenditure figures are shown separately ;
- Step 4 : Total available expenditure within each of the Study Area zones is obtained by applying population data to per capita expenditure and the growth in expenditure over the period 2003 to 2016.
- Step 5 : Expenditure currently going to out-of-centre retail warehousing is deducted from the total available expenditure figures.
- Step 6 : The current turnover of each of the centres which is derived from within the Study Area is calculated by applying market shares to the available expenditure for the different types of retail goods;
- Step 7 : The current sales density of Oxford City centre and the District centres is calculated using floorspace data and the results of the household survey;
- Step 8 : Floorspace capacity is calculated at the forecast years based on maintaining the existing market shares.

Step 1: Study Area Definition

5.3 The Study Area was defined at the outset to set the geographical parameters of the household shopping patterns survey. The extent of the Study Area is discussed fully in the preceding section of this report and is illustrated on, **Appendix 1**. The Study Area divides into a series of zones (six in all) that are based on ward-level geography. A full schedule of the wards that make up each of the six zones is set out in **Table 1**, **Appendix 4** together with Tables 2 to 12 that set out the floorspace requirement calculations.

Step 2: Study Area Population

5.4 We have obtained ward-level population figures from the 2001 Census which have been projected forward to the base and forecast years using the latest district level forecasts provided by Oxfordshire and Buckinghamshire County Councils. Unlike the 1991 Census the 2001 Census was carried out during term time and therefore includes the resident student population. Because of the unusually high levels of resident students in Oxford (over 30,000) we have disaggregated population figures into resident (non student) and student. This has been done to ensure that expenditure levels are not overestimated by the inclusion of the student population who may only be resident during term time and who have a lower level of per capita expenditure.

5.5 The ward-level data was then aggregated on the basis of the Study Area zones and the resulting population projections are set out at **Table 2**, along with the change in population in each zone between the base and forecast years both in terms of absolute numbers and percentage growth.

5.6 Across the Study Area as a whole population is forecast to rise by approximately 20,000 (3.7%) in the period 2003 to 2011.

Step 3: Per Capita Expenditure Estimates

5.7 We have obtained from Experian per capita comparison goods expenditure estimates for each of the Study Area zones. The data obtained is the latest available, that is 2000 expenditure estimates at 2000 prices. Experian estimates are derived from statistics contained in the CSO UK National Accounts, known as the 'Bluebook'.

5.8 The expenditure estimates give the total annual retail expenditure figures and therefore include a proportion of expenditure that will be spent by special forms of trading (SFTs) such as mail order and internet shopping. To accurately forecast the amount of expenditure available for conventional forms of retailing it is necessary to deduct the proportion of the total expenditure that is likely to be spent via SFT. In respect of the comparison goods per capita expenditure figures we have deducted 7.7**%** to reflect national trends as directed by Experian which we forecast to rise by 2% per annum.

5.9 Per capita expenditure estimates are shown separately for resident (non student) and student for the reasons discussed above. Since no estimates for per capita student expenditure levels are currently available we have taken 50% of the national average which we believe to be reasonable given that most students are only resident during term times.

5.10 The 2000 per capita expenditure estimates for each of the Study Area zones is projected forward to the base year (2003) and to the forecast years 2006 and 2011 based upon Experian Consensus forecast of 3.9% per annum. The results are shown at **Table 3**

Step 4: Total Expenditure Estimates

5.11 We calculate the total available comparison expenditure in each zone by applying the population forecasts to the per capita expenditure figures. The results are presented in **Table 4** which identifies the amount of expenditure generated in each Study Area zone over the time horizon and the total Study Area expenditure growth to the forecast years.

5.12 **Table 4** shows that the Study Area as a whole currently generates about £1.3 billion of comparison goods expenditure which is forecast to grow to over £1.4 billion in 2006, an increase of almost £171 million, rising to nearly £1.8 billion in 2011 (a growth of over £324 million in the period between 2006 and 2011). Over the eight year period to 2011 comparison goods expenditure is forecast to grow by almost £500 million.

Step 5: Retail Warehouse Expenditure

5.13 At **Table 5** we deduct from the total available comparison goods expenditure the amount of expenditure which is currently going to out-of-centre retail warehousing. Normally a 15% deduction is made for retail warehouse expenditure however the results of our household survey (set out in the previous section of our study) indicate that retail warehouse expenditure accounts for about 6% of the total comparison goods expenditure generated within the Study Area. In order to ensure our estimates are robust we have increased this to 10%.

5.14 In projecting expenditure forward we make no distinction between non-bulky and bulky goods this is in accordance with the government's stated policy for a goods-based approach rather than a format driven approach to the need for additional retail provision[18].

Step 6: Turnover of Existing Centres from within the Study Area

5.15 Having calculated the available spend and growth in expenditure on comparison goods generated from within the Study Area, we next calculate the turnover of the existing centres which is generated within the Study Area by applying the market share estimates[19] to the amount of available expenditure generated within each zone.

5.16 The results set out at **Table 6** show that Oxford City centre achieves a 50% market share across the Study Area as a whole. The results of the household survey set out at Section 4 show that over the whole Study Area Oxford is the dominant centre. Surprisingly given that other nearby centres such as Reading have seen considerable retail floorspace growth in recent years while Oxford's retail provision has remained relatively static this does not seem to have effected to any significant degree the market share of the City.

5.17 As is common with household surveys which are designed primarily to establish the main centre for higher order comparison goods shopping the market shares of the District centres as derived from the survey are relatively low although this does not necessarily mean these centres are trading poorly. Apart from the Cowley Centre the District Centres in Oxford mostly

[18] Government Statement from the ODPM 10th April 2003

[19] Market share data obtained from the Oxford household survey (2003)

meet day to day convenience goods shopping requirements and as such are not regarded as being main centres for comparison shopping purposes.

Step 7: Sales Densities of Existing Centres

5.18 Sales density is a function of turnover divided by the net sales area and gives an indication of how well a centre is trading, a high sales density is indicative of a centre that is trading strongly. **Tables 7** sets out the current turnover and sales density figures for Oxford City centre and the Cowley Centre.

5.19 Not all of the centres turnover will be derived from within the Study Area and we have assumed that 10% of Oxford City centre's turnover, 5% of the Cowley Centre and 5% of 'other in Oxford' will derive from beyond the Study Area. This is based on the extent of the Study Area and the proximity of other competing centres. In addition Oxford is an international tourist destination with tourist expenditure estimated to add nearly £60 million to the City centre turnover. In total therefore we estimate that at 2003 Oxford City centre's turnover is in the region of £688 million.

5.20 Our net sales figure for City centre floorspace is derived from the VOA which, although higher than previous OCC estimates, is in our opinion the most reliable.

5.21 On this basis we estimate that the sales density for City centre comparison goods floorspace is about £7,400 per sq metre and £3,300 for the Cowley Centre. The sales density figure for the City centre is relatively high and is probably a factor of the increased growth in expenditure within the Study Area generally, the almost static level of retail floorspace provision in the Centre over a number of years while as we have set out earlier Oxford has managed to maintain a high market share despite the increasing competition from nearby centres. By way of comparison equivalent sales density figures for Merry Hill are £7,500, £6,500 for Kingston upon Thames and £5,300 for Walsall.

Step 8: Capacity for Floorspace Growth

5.22 The starting point for assessing future capacity is to assume that as of the base year expenditure and floorspace is in equilibrium. However, as we have set out above existing City centre comparison goods floorspace is currently trading at a relatively high level and in excess of what we would normally expect for a centre of the size of Oxford. Nevertheless in order to provide a robust assessment of future retailing requirements we have maintained this assumption as set in the first column of **Table 8.**

5.23 For the forecast years we have maintained the City centre's current market share of just below 50%. It is normal practice to allow a 1.5% growth in the turnover of existing floorspace in the forecast years. However, in this case we have reduced the growth by half to 0.75% because of the currently high turnover level of existing floorspace. In addition there are no commitments in terms of extant planning permissions which need to be deducted from the residual expenditure.

5.24 The 10% of the City centre's turnover derived from outside the study area is forecast to grow by 3.9% per annum while a small increase of 1.5% per annum has also been made for the growth in tourist expenditure.

5.25 Having taken these factors into account it can be seen that in 2006 the residual expenditure available to support additional comparison goods floorspace is just under £80 million rising to over £230 million in 2011.

5.26 In converting this expenditure to floorspace we are mindful of the fact that, for the reasons set out above, current sales density figures in the City Centre are relatively high and above what we would normally expect a centre at this position in the hierarchy to achieve. In addition much will depend on the composition of any retail development being proposed. We have therefore adopted a range of sales density figures of between £6,000 and £7,000 per sq metres in 2003. In accordance with our approach to making an allowance for growth in the forecast years of the existing floorspace we increase the density of the average for the new stock by 0.75%/annum.

5.27 Thus in 2006 we estimate that there is significant capacity for between approximately 11,000 and 13,000 sq metres net comparison goods retail floorspace within the City centre rising to between approximately 31,000 and 36,500 sq metres net in 2011.

Conclusions on Comparison Goods Floorspace Capacity

5.28 The results of our assessment as derived from the household survey are that Oxford City centre is currently trading extremely well with high sales density figures for existing floorspace. The consequences of these high levels of trading can be evidenced by a trip to the City centre at peak times which can be very congested in the main shopping area. This in turn can lead to uncomfortable conditions for the shoppers in moving around the centre and purchasing goods from the more popular store.

5.29 As we have mentioned these trading conditions are primarily due to the fact that the centre has seen little in the way of new floorspace provision for some years while expenditure growth continues to rise.

5.30 Our capacity exercise assumes that the City centre floorspace will continue to trade at current high levels and thus is extremely robust but even having taken this into account there still remains a need to provide an additional 11,000 to 13,000 sq metres net of new retail floorspace over the next three years rising to between 31,000 and 36,500 sq metres net by 2011.

5.31 Both the emerging Structure Plan and the Draft Deposit Oxford Local Plan (Policy RC1) seek to maintain and enhance Oxford's City Centre as the principle retail centre in Oxfordshire. Our study demonstrates that there is an urgent need to provide additional comparison goods retail floorspace within the City Centre if Oxford is to maintain its role in the retail hierarchy. While Oxford is currently a vibrant centre the failure to provide additional retail floorspace in the City within the near future will eventually lead to its overall decline particularly in relation to other nearby competing centres which continue to grow.

5.32 In the final section of our study we consider the potential development sites which may be available in the centre to accommodate both the significant scale and type of retail floorspace for which a need has been identified.

6 DEVELOPMENT SITES

City centre

6.1 Our City Centre healthcheck concluded that there is no shortage of retailers and leisure providers seeking representation in the City centre. Demand is at a high level, and the supply of floorspace is failing to keep pace. In addition while the City centre provides a reasonable selection of shopping outlets, this provision is lacking in range and depth. There is a supply side shortage of retail units in the City centre; in particular, there is a lack of available units of the right size for modern retailers.

6.2 Our quantitative assessment of retail floorspace needs demonstrates that within the next three years between 11,000 and 13,000 sq metres net of retail floorspace is required within the City Centre to take account of the growth in expenditure during this period rising to between 31,000 and 36,500 sq metres net by 2011.

6.3 The First Draft Oxford Local Plan 2001 – 2016 (FDOLP) and Second Draft Oxford Local Plan (SDOLP) identify the City Centre as the main location for developments which attract a large number of people, and defines the boundary on the Proposals Map. A number of potential sites are identified in both the FDOLP and SDOLP where retail development may be acceptable. Below we consider these in terms of the sequential approach, their suitability in meeting the scale and type of retail development for which a need has been identified in this study and availability. Issues concerning viability are beyond the scope of this Study.

DS 85 Westgate Shopping Centre

6.4 The Issues Paper which preceded the publication of the FDOLP identified this site as being the main opportunity for providing additional retail floorspace within the City Centre. The adopted Plan proposed a limited extension to the Westgate Centre of 6,500 square metres in accordance with guidelines drawn up following the refusal of an earlier application in 1988 for 30,000 sq metres.

6.5 The site includes the whole of the existing shopping centre and extends south to include the multi-storey car park and the surface level car park at Thames Street. The Westgate Centre is identified as comprising Primary Shopping Frontage while Castle Street is allocated as Secondary Shopping Frontage.

6.6 In 2000 an outline planning application was submitted to provide an additional 32,324 sq metres gross floorspace of which 21,527 sq metres net would comprise new comparison retail floorspace including a department store of some 9,756 sq metres net. The application was called in by the First Secretary of State and was considered at a Public Inquiry held in November 2001.

6.7 The Inspector recommended that permission be granted (with the exception of the proposed office development at the junction of Old Greyfriars Street and Turn Again Lane). The Secretary of State disagreed with the Inspector and refused permission on 26th September 2002. The principal reasons concerned the scale and design of the proposal and its impact on the views into the City, the lack of identified retail need and the effect of the scheme on other centres.

6.8 The Secretary of State noted the Inspector's suggestion that the applicants be invited to submit revised proposals with a view to re-opening the Inquiry, but as he considered the objections to the scheme before him to be so fundamental he decided that the proposals should be refused. However in rejecting the proposals the Secretary of State did accept the principle of the refurbishment of the Westgate Centre and the redevelopment of at least part of the remainder of the site for the uses proposed. The Secretary of State's decision was subsequently quashed by the High Court. The application has however now been formally withdrawn, whilst the applicants' consider the appropriate way forward.

6.9 The SDOLP confirmed that the redevelopment of the Westgate Centre offers the only major opportunity for a significant increase in retail floorspace in the City centre. The Plan also anticipates that its redevelopment would bring significant regeneration, environmental and transport benefits.

6.10 The Westgate site lies within the City Centre boundary and includes, in part, Primary Shopping Frontage. The site is available for development as evidenced by the recent planning applications while the relative lack of constraints to its redevelopment represents the only opportunity to provide a significant amount of additional floorspace for which a need has been identified and the larger scale retail units currently lacking within the City Centre.

DS 73 Land to the West of St Aldates & South of Queen Street

6.11 The FDOLP and the SDOLP identify this site as having scope for mixed use development to make more efficient use of this land. It anticipates that this will take the form of A1 retail development with office uses (Classes A2 and B1a) and/or residential development on the upper floors. The site includes Primary Shopping Frontage in Queen Street and Secondary Frontage along St Aldates.

6.12 The site is included within the Conservation Area while the emerging policies require any development proposals to have regard to the impact on the Central Conservation Area, any Listed Buildings and frontages that must be retained. As such the site is more constrained than the Westgate site and it is therefore difficult to gauge the quantum or type of additional retail floorspace which might result from its development. However, the site is to be subject to detailed guidance to be published as Supplementary Planning Guidance.

6.13 We understand that although much of the site is now in a single ownership there could still be land assembly issues which need to be resolved. Subject to the resolution of these issues we believe that the St Aldates site is well placed to provide additional small scale comparison retail floorspace which could improve both the quantity and quality of shops in the area. Its redevelopment would also significantly improve the pedestrian links through the site to the benefit of existing shops in St. Aldates. However, the physical and environmental constraints of the site are likely to result in smaller units being provided than can be achieved at the Westgate site.

DS 88 Worcester Street Car Park

6.14 This site, located at the end of George Street and between Park End Street and Hythe Bridge Street, is identified in the FDOLP and the SDOLP as being suitable for a mixed use development including A1 retail. The Plan recognises that this is a key City centre site which offers an important opportunity for redevelopment. The SDOLP proposes that Supplementary Planning Guidance will be prepared for this site.

6.15 The site lies beyond the Secondary Shopping Frontage in George Street and although it is included within the defined City Centre boundary it is some 200 metres beyond the edge of the Primary Shopping Frontage. It is therefore edge-of-centre in PPG 6 terms.

6.16 We understand that the site is currently leased by the Council from Nuffield College. The use of this site for car parking does not appear to be making the best and most efficient use of this valuable resource and we believe that although the site is some distance from the City Centre's main retail core there may be some scope for providing a modest scale of retail development comprising small specialist shops as part of an overall package of proposals for a mixed-use development.

DS.2 Abbey Place Car Park

6.17 This site lies to the west of the Westgate surface car park and presently comprises a public car park owned by the City Council and a public house. In locational terms it is included within the defined City Centre boundary but is some 200 metres from the Primary Shopping Frontage at the Westgate Centre.

6.18 The site is identified in the FDOLP and SDOLP as being suitable for a mixed use development to include retail units at ground floor level to provide an active street frontage for shoppers and visitors. In addition the Plan requires that the redevelopment of this site should include land uses that are complementary with, and relate to, the development of Westgate, Oxpens and the College of Further Education with good pedestrian links between these sites the City centre.

6.19 The use of the site as surface level car parking is not making the best and most efficient use of this resource within the City Centre. The site is capable of accommodating some additional retail development and if considered in conjunction with the Westgate site could, as part of a comprehensive redevelopment, make a useful contribution towards meeting the identified quantum of retail floorspace.

Other City Centre Sites

6.20 The other City Centre sites identified in the FDOLP and SDOLP are regarded as either being to small to provide the quantum or type of retail units for which a need has been identified or to distant from the Primary Shopping Frontage. Nevertheless their cumulative impact will serve to improve the quality and range of facilities available in the City and make a positive contribution to the vitality of the streetscene. One of Oxford's main attractions as a shopping centre is it fairly compact layout. The provision of a significant level of higher order comparison retail floorspace at a location distant and separated from the main centre could lead to an overall dilution of the existing city centre retail offer.

DS.33 Hythe Bridge Street and Park End Street

6.21 This site lies to the West of the City centre and comprises commercial properties in Hythe Bridge Street and Park End Street. The site is located within the defined City centre boundary but is some 300 metres from the Primary Shopping Frontage and is close to both the Bus Station and the Railway Station. However in PPG 6 terms it is considered edge of centre.

6.22 The site which is identified in the FDOLP and the area enlarged in the SDOLP is considered suitable for a mixed-use development to include small retail units on the ground floors to promote an active street frontage. These buildings are currently underused and the mix of uses could be improved. The redevelopment of these properties offers an opportunity to improve the mix of uses and make more efficient use of these resources. However, the site because of its location away from the core shopping area is unlikely to add significantly to the City Centre retail offer.

DS.63A Park End Street and St. Thomas' Street

6.23 This site lies to the West of the City centre and has planning permission for a mixed-use development. The majority of the buildings on the site have now been demolished and construction work is currently in progress. The site is located within the defined City centre boundary but it is some 300 metres from the primary Shopping Frontage and is close to the Bus and the Railway Stations. In PPG6 terms it is edge of centre.

6.24 The site is identified in the FDOLP and SDOLP as suitable for a mixed-use development to include small retail units on the ground floor intended to improve the mix of uses in the street and promote an active street frontage.

DS.11 BT. Paradise Street

6.25 This site is located to the West of the City centre and has planning permission for a mixed-use development. The site is situated within the city centre boundary and some 150 metres form the Primary Shopping Frontage. It is also only 350 metres from the Railway Station. In PPG6 terms it is edge of centre.

6.26 The site is identified in the FDOLP and SDOLP and considered suitable for a mixed-use development to include some small retail units.

6.27 The existing buildings on this site have been demolished and is available for development. It has the potential for only limited additional small retail units.

DS.14B Cooper Callas Site, Paradise Street

6.28 This site is located to the West of the City centre. It lies within the City centre boundary and some 200 metres from the Primary Shopping Frontage. In PPG6 terms it is edge of centre.

6.29 The site is identified in the SDOLP as suitable for a mixed-use development to include a limited amount of small retail units. The site presently includes a mix of showroom and offices and has potential for redevelopment. Additional small retail units could offer the opportunity to increase the level of ground floor activity to the street frontage.

DS.14A College of Further Education, Oxpens Road

6.30 This site is located to the south-west of the City centre and is presently occupied by College of Further Education. It lies within the defined City centre boundary and some 200 metres from the Primary Shopping Frontage. The site is also reasonably close to the existing Railway Station. In PPG 6 terms it is edge of centre.

6.31 The SDOLP supports the modernisation or regeneration of the existing uses on the site. Alternatively if the College do relocate this would offer an opportunity to redevelopment the site to improve the mix of uses and create better links between the station and the City centre. However, since the redevelopment of the site is dependant upon the relocation of the college it cannot be regarded as being available in PPG 6 terms nevertheless it may offer an opportunity to provide additional retail floorspace in the longer term should a need be identified.

DS.50 Odeon Cinema, George Street

6.32 The site is situated in the heart of the City centre and is currently in use as a cinema. It lies within the defined City centre boundary as shown on the Proposals Map some 25 metres from the Primary Shopping Frontage. The site is also close to the Bus Station.

6.33 The site is identified in the FDOLP and SDOLP as suitable for conversion, re-use or redevelopment of the existing site should the cinema relocate to alternative premises. There is an opportunity for the property to be redeveloped for mixed-use development to include retail uses on the ground floor which would add interest and vitality to the street frontage. Nevertheless this would be dependant upon the relocation of the current use and again this site cannot be regarded as being available in the short term.

DS.58A Oxford Station, Botley Road and Beckett Street Car Park

6.34 This site comprises the present Railway Station and the Becket Street car park and is situated to the West of the City centre. It lies within the defined City centre boundary, but some 550 metres from the Primary Shopping Frontage. In PPG 6 terms it is out of centre.

6.35 The site is identified in the FDOLP and SDOLP as suitable for mixed-use redevelopment subject to the relocation of Oxford station to Oxpens. This site is not readily available for development but may offer the opportunity to provide additional retail floorspace in the longer term should the need be identified and if no sequentially preferable sites available.

Conclusions on City Centre sites

6.36 Both the Westgate and St Aldates sites appear to represent the most sequentially preferable and suitable sites to accommodate the anticipated need for additional comparison goods retail floorspace within Oxford City Centre.

6.37 The Westgate Site which is less constrained in environmental terms appears most likely to be able to provide the type of modern retail units which are currently lacking in the centre and for which there is much demand. Were the Westgate site to be developed we believe that the Abbey Place car park should also be incorporated into the scheme to ensure that a comprehensive approach is taken towards the redevelopment of this part of the City Centre.

6.38 The 2000 application at the Westgate Centre proposed a net increase in comparison goods retail floorspace of 21,527 which is greater than that for which we have identified a need to 2006 but nearly 10,000 to 15,000 sq metres less than for which a need is identified for in 2011.

6.39 While no information is currently available on the likely level of floorspace which could be provided at St Aldates the Council has stated its intention to prepare detailed guidance to assist in its development which will be published as Supplementary Planning Guidance. Subject to the preparation of this guidance we believe that both the Westgate and St Aldates sites could provide for Oxford’s comparison goods retail floorspace needs up to 2011.

6.40 The other sites identified in the FDOLP and SDOLP are either less sequentially preferable in PPG 6 terms or only capable of providing small scale retail development. While the latter sites would add to the attractiveness of the City they will not substantially increase the overall retail provision. Any proposals on the former sites should be assessed in terms of both the need for additional retail floorspace and the sequential approach to site selection.

6.41 Our overall conclusion is that the Westgate site remains the principle development opportunity in Oxford's City centre to provide both the quantum and type of retail floorspace for which a need has been identified in this study. We are of the opinion that proposals for the development of this site should be brought forward as a matter of urgency in order to ensure that Oxford continues to fulfil its role within the retail hierarchy.

District Centres

6.42 The sequential test set out in PPG 6 gives first priority to town centre sites followed by edge-of-centre, district and local centres and only then out-of-centre sites. Prior to considering potential development sites in Oxford's District Centres we believe that it is important to bear in mind that the provision of any large scale comparison development in the District Centres will not help maintain Oxford City Centre's position in the retail hierarchy. The District Centres, for the most part, meet the day to day needs of the resident population and not the larger catchment area of the City Centre. In addition it would not meet the needs of retailers anxious to be represented in the City Centre. Nevertheless there is some scope for increasing the attractiveness of these centres for the communities which they serve.

6.43 Our healthcheck assessment of the District Centres demonstrate that overall these centres are performing relatively well and that the need for additional retail floorspace is not great. However we do believe that there is some scope for adding to the overall range of retailing, although any development should be of a scale appropriate to the size and function of the centre. Having considered potential development sites within the District Centres we believe that the main scope for providing additional retail floorspace is at Summertown and the Cowley Centre as follows.

Summertown

Summertown : DS.20 Diamond Place, Ferry Pool car park

6.44 This site is identified in the FDOLP and SDOLP as being suitable for a mixed-use development, which includes retail as one of the principal uses. The site comprises two public car parks, an Examination School, and a frontage to Banbury Road. The redevelopment of this site offers the opportunity to improve the mix of uses and make more efficient use of the land. Its frontage to Banbury Road represents the most likely location for consolidating and expanding retail development. We believe that with the opening of the recent Marks & Spencer store at Summertown the District Centre is now well provided for in terms of convenience retail floorspace and that this site could make a useful contribution towards providing some additional comparison floorspace within the Centre.

DS.8 BMW Garage Site, Banbury Road

6.45 This site lies in the Summertown District Shopping Centre and fronts directly onto the Banbury Road. The property is no longer in use as a garage and has the potential for redevelopment. It has been identified in the FDOLP and SDOLP as suitable for mixed-use redevelopment to include retail at ground floor level. Retail, particularly small units would help to strengthen the District Shopping Frontage and add interest, vitality and viability to the shopping facilities available in the District Centre.

DS.75 Suffolk House, Banbury Road

6.46 This site lies in the Summertown District Shopping Centre and has a principal frontage to Banbury Road and a secondary frontage to South Parade. The site is underused and the mix of uses could be improved. It has been identified in the FDOLP and SDOLP as suitable for mixed-use development to include retail. The redevelopment of the site offers the opportunity to make more efficient use of the land. Retail units on the ground floor would strengthen the District Shopping Frontage and maintain and enhance the vitality and viability of the shopping facilities available in the District centre.

Cowley

Cowley Centre : DS.15 Cowley Centre: Templars Square Shopping Centre and Crowell Road Car Park, Between Towns Road.

6.47 Following the recent sale of Templars Square the new owners have expressed an interest in rejuvenating this shopping centre to further improve the level of facilities. We believe that the site is suitable for an appropriate additional increase in floorspace which would probably take the form of limited consolidation. The site could actually benefit from additional units fronting the main road at present it is rather inward looking. Development of this sort could help to integrate Cowley centre and Templars Square. The potential redevelopment of the Crowell Road Car Park offers the opportunity for an additional mixed-use development which includes retail on the ground floor. This could strengthen the District centre and its redevelopment could make a positive contribution to the vitality and viability of the shopping facilities available and improve the environment.

DS.7 Between Towns Road

6.48 This site lies adjacent to the Cowley Centre/Templars Square district Shopping Centre. It comprises a mix of uses including the Swan garage, a petrol filling station and a club. It has been identified in the SDOLP as suitable for a mixed-use development to include small retail units principally at ground floor level. The redevelopment of this site offers an opportunity to regenerate this area and significantly improve the mix of uses. Retail units would add interest and activity to the frontage and make a positive contribution to the environmental improvement of the area.

DS.7D Blackbird Leys Road, Regeneration Zone

6.49 This site is located some 1500 metres to the south east of the Cowley centre/Templars Square District Shopping Centre. The land uses in the area comprise a mix of retail, educational, leisure and community related uses. This area has been identified in the SDOLP as a suitable regeneration zone which could stimulate appropriate commercial development. There is scope for extensions and consolidations of existing retail uses and or changes of use to provide additional retail floorspace at a level appropriate for a District centre.

Other retail provision within Oxford City

6.50 Our convenience retail floorspace capacity exercised effectively 'ring fenced' convenience retail expenditure which would go to the smaller 'corner shop' convenience stores. Consequently there is scope to provide smaller convenience retail units in some of the larger housing areas throughout the city which are currently underprovided for. Such provision would accord with both National and local policy guidance in creating more sustainable patterns of development and decrease reliance on the private car for carrying out day to day shopping trips.

Overall Conclusions on Potential Development Sites

6.51 It is clear from our capacity exercise that there is a significant urgent need in quantitative terms to provide additional retail floorspace within Oxford City Centre over the next eight years in order to both meet the demands of shoppers and retailers seeking representation or larger premises within the City and to maintain Oxford's position in the retail hierarchy. In addition our study has clearly identified an urgent qualitative need for new retail development, to reduce the high levels of trading, meet customer and retail need and to reduce the potential leakage of expenditure to other shopping centres.

6.52 It is equally clear that opportunities in terms of development sites which are suitable and available to meet this need are limited. We believe that the Council has identified those sites which are most suitable and likely to become available within the first part of the plan period.

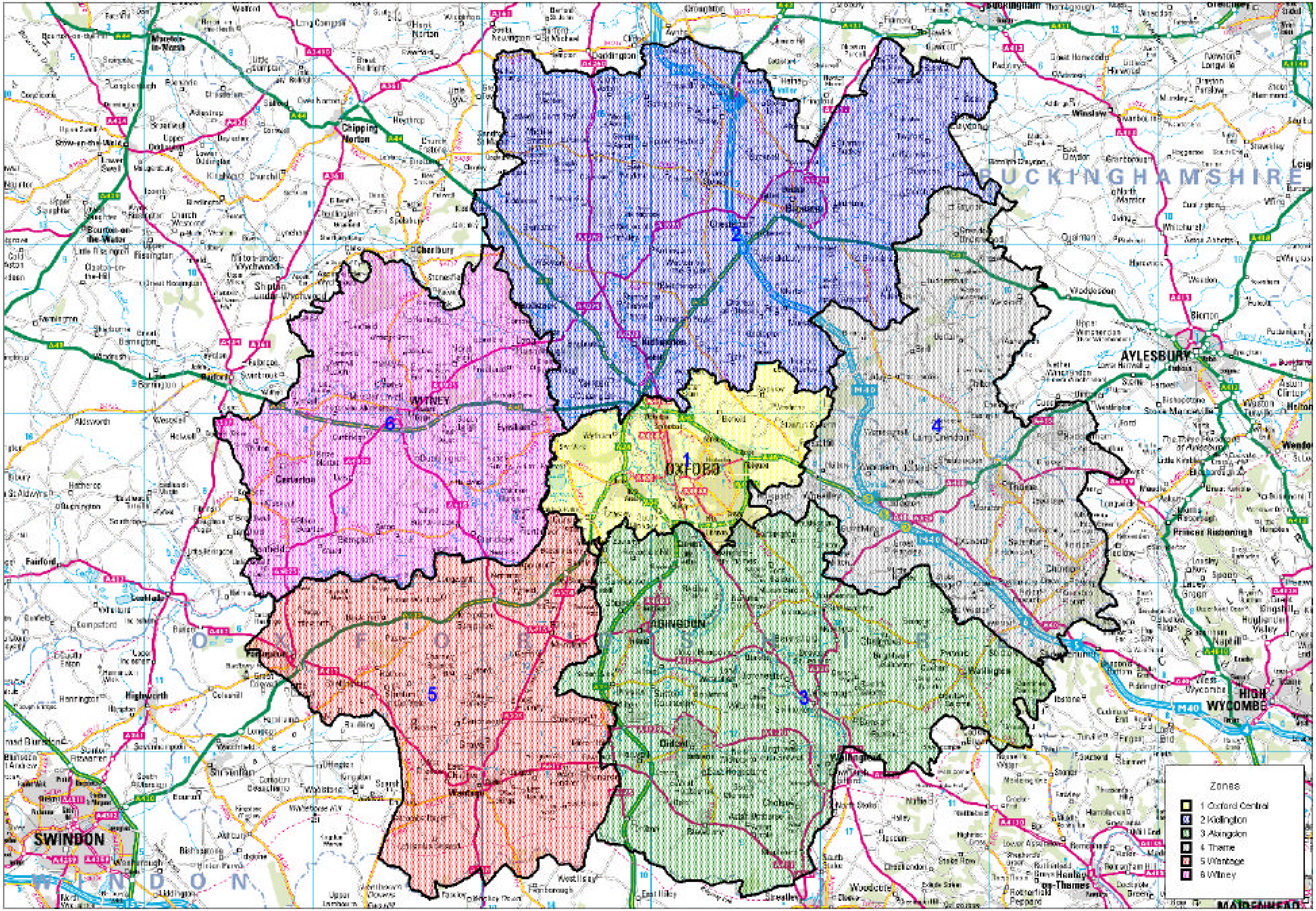
6.53 Nevertheless it is possible that other opportunities could arise over the lifetime of the plan. Any such sites that do come forward should be considerable cumulatively with those already identified and in terms of the sequential approach as set out in PPG 6 and the emerging Local Plan.

6.54 Our overall conclusion is that the Westgate site remains the principal development opportunity in Oxford's City centre to provide both the quantum and type of retail floorspace for which a need has been identified in this study. We are of the opinion that proposals for the development of this site should be brought forward as a matter of urgency in order to ensure that Oxford continues to fulfil its role within the retail hierarchy. Since the new floorspace would be mostly supported by the growth in comparison goods retail expenditure there should be no unacceptable adverse impact on the existing city centre particularly since, as we have explained earlier, this floorspace is trading at a relatively high level.

APPENDIX 1

STUDY AREA MAP

Oxford Study Area



APPENDIX 2

HOUSEHOLD SURVEY QUESTIONNAIRE
AND SURVEY METHODOLOGY

OXFORD SURVEY, 2003

OXFORD SURVEY, 2003	Int (1)	Household code (2)

	supermarket		clothes/shoes		retail warehouses		
	main	**other**	**main**	**other**	**first**	**second**	**third**
	[6]	[8]	[10]	[12]	[14]	[16]	[18]
No place	01	01	01	01	01	01	01
Sainsbury, Heyford Hill Oxford	02	02					
Sainsbury, Oxford Rd Kidlington	03	03					
Tesco, Abingdon	04	04					
Asda, London Rd Wheatley	05	05					
Oxford City Centre	07	07	07	07	07	07	07
Milton Keynes	08	08	08	08	08	08	08
Banbury	09	09	09	09	09	09	09
Swindon Centre	10	10	10	10	10	10	10
Swindon Great Western	11	11	11	11	11	11	11
Reading	12	12	12	12	12	12	12
Bicester Centre	13	13	13	13	13	13	13
Bicester Village	14	14	14	14	14	14	14
Cowley Centre	15	15	15	15	15	15	15
Cowley Road	16	16	16	16	16	16	16
Cowley Retail Park	17	17	17	17	17	17	17
Abingdon	18	18	18	18	18	18	18
Didcot	19	19	19	19	19	19	19
other *(WRITE IN)*							

	supermarket main	supermarket other	clothes/shoes main
name of store	[20]	[22]	
	[27]		[28]
Oxford park/ride	A		A
car all the way	B		B
bus all the way	C		C
other public transport	D		D
taxi	E		E
walk/ cycle	F		F
other *(WRITE IN)*			
time taken (mins) *DOOR TO DOOR*	[29]		[32]
meets needs	[35]		[36]
very well	A		A
adequately	B		B
poorly	C		C

name of store	[24]	[25]	[26]
B&Q	A	A	A
Homebase	B	B	B
Texas	C	C	C
Comet	D	D	D
Currys	E	E	E
PC World	F	F	F
Toys 'R Us	G	G	G
Argos	H	H	H
Carpetright	I	I	I
other *(WRITE IN)*	J	J	J

About how much has your household spent at retail warehouses over the past year?

	[37]
less than £50	1
£50 to £99	2
£100 to £499	3
£500 to £999	4
£1000 to £1,999	5
£2,000 or more	6

Do you ever use Oxford City Centre for shopping?	[38]
yes	1
no	2
IF YES do you use the Oxford Park & Ride to get there:	[39]
always	A
mostly	B
sometimes	C
never	D
Now, the following questions apply to the main centre that you use for clothes and shoes Just to check, that was ________________________	
First, why do you shop in this centre? *(MULTICODE, DO NOT PROMPT)*	[40]
close to home	1
close to work	2
to visit a specific shop *(SPECIFY)*	3
good selection / quality of shops	4
good prices/ discounts	5
easy car parking	6
free car parking	7
convenient bus service	8
convenient rail service	9
pleasant place to shop	A
everything under one roof	B
other *(WRITE IN)*	
What, if anything, do you dislike about that centre? *(MULTICODE, DO NOT PROMPT)*	[45]
nothing/ very little	1
too far from home/ work	2
difficult to get to by car	3
parking difficult	4
parking expensive	5
difficult to get to by public transport	6
expensive place to shop	7
lack of chain stores/ multiples	8
lack of department store (s)	9
lack of covered malls/ arcades	A
no market	B
lack of pubs/restaurants/cafes	C
traffic	D
litter	E
too large	F
other *(WRITE IN)*	

About how often do you visit this centre?	[50]
more than once a week	A
once a week	B
once a week to once a month	C
monthly	D
not regularly	E
this is the first time	F
Now, I'd like to ask some questions to make sure we have interviewed a good cross section of people.	
First, what is the occupation of the principal wage earner in your household?	[51]
Sex of principal wage earner?	[52]
male	1
female	2
Age of the principal wage earner?	[53]
under 20	1
20 to 39	2
40 to 59	3
60 or over	4
Does your household have the use of a car?	[54]
no car	1
one car	2
two or more cars	3
Finally, can I check your address? Is it?	[55]
And what is the Postcode?	

1 METHODOLOGY

The Oxford household survey was prepared by Jordan Research, which has worked with RTP on retail surveys and retail analyses for the past 17 years. Fieldwork was carried out in March and April 2003 by a team of experienced interviewers, yielding a total of 968 completed interviews.

The aims of the survey were to establish:

- Where respondents go to undertake their 'main' and 'other' shopping for (i) clothes and shoes and (ii) supermarket shopping. Questions were also asked about shopping at retail warehouses.

- What mode of transport is used to reach the main shopping destinations and time taken to get there.

- To what extent shopping facilities meet the needs of shoppers.

- Use of the Oxford Park & Ride system.

- Reasons for choosing the main centre for clothes & shoes, and frequency of visiting this centre. Criticisms of the centre.

- A series of questions on socio-economic characteristics of the respondents' households.

The survey was based on a systematic random sample drawn directly from the residential telephone subscriber listings for the Survey Area. Interviewers were instructed to adhere strictly to this sample and were prohibited from choosing alternatives in the event of non-response (the selected sample included an allowance for refusals, no-contacts and other forms of non-response). They were required to make at least three calls at different times of the day and week before abandoning a sample member. The final response rate was more than 65%.

Zones

For purposes of analysis it was necessary to divide the survey area into zones. On the basis of the final postcode-level survey results giving the main centres used for *clothes & shoes* we delineated six zones, according to the penetration rates of the various centres. The boundaries were then converted from postcodes to wards for the reason that better population data were available for wards. The final configuration was as follows:

Zone 1 ***Oxford Central***, the inner core of the survey area

Zone 2 a zone around ***Kidlington***. Here, as in the remaining zones, Oxford Centre was the dominant centre for clothing and footwear, but Banbury and Bicester were also important

Zone 3 a zone around ***Abingdon***, which, after Oxford Centre, also looked towards Reading.

Zone 4 a zone centred on ***Thame,*** which for clothing and footwear depended mainly on Aylesbury

Zone 5 a zone around ***Wantage***, which also looked towards Swindon

Zone 6 a zone centred on ***Witney***, where Witney itself was an important centre

Statement of reliability

All sample surveys are subject to problems known by statisticians as *sample bias* and *sampling errors*. The former result from imperfect sample design and cannot readily be quantified, though in our surveys we make every effort to ensure that samples are as representative as possible. These include taking a random sample over the entire telephone listing (to avoid alphabetical bias), measures to maximise the response rate and prohibition of interviewer discretion in sampling.

Sampling errors, on the other hand, do not arise from mistakes (despite the term *error*) but are differences between attributes of the sample and those of the entire population that arise solely through chance. The bigger the sample, the smaller are such errors. The formula for calculating them is

$$\sqrt{pq(1-n/N)/n}$$

where:

p is an attribute of the sample
q is (1-*p*)
n is the size of the sample
N is the size of the total population

There is a 95% chance that the “real attribute” of the population is within plus or minus 1.96 times the value of the above expression.

In the Oxford survey the sample size (n) was 968 households and the population (N) was approximately 220,000 households. As an example of an attribute (p) we can take the percentage of the sample who said they never shopped in Oxford Centre, which was 23.4% (refer to Table 10). Substituting these values into the above formula we find there is a 95% probability that the “real figure” lies between 20.7% and 26.1%. On a less exacting test there is a 68% probability that the limits are 22.0% and 24.8%.

It will be seen that the scale of these limits depends primarily on the <u>absolute</u> size of the sample rather than the <u>percentage</u> that the sample forms of the total population.

APPENDIX 3

HOUSEHOLD SURVEY
TABULATED RESULTS

TABLE 1 WHAT IS THE MAIN CENTRE WHERE YOUR HOUSEHOLD BUYS CLOTHES AND SHOES?

	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		All Zones	
	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%
Centres in Oxford City														
Oxford City Centre	168	69%	63	48%	142	49%	18	19%	36	42%	48	40%	475	49%
Cowley Cen/Retail Pk/Templars Sq	17	7%	3	2%	13	4%	3	3%			2	2%	38	4%
Other Oxford	3	1%			1	0%							4	0%
Other Centres														
Reading	7	3%			46	16%			3	4%	2	2%	58	6%
Aylesbury	3	1%			1	0%	50	52%					54	6%
Swindon Centre	2	1%			3	1%			18	21%	10	8%	33	3%
Witney	2	1%	3	2%	1	0%			1	1%	26	22%	33	3%
Banbury	2	1%	23	17%	1	0%					2	2%	28	3%
Abingdon	1	0%			15	5%			4	5%	1	1%	21	2%
Milton Keynes	3	1%	5	4%	2	1%					1	1%	11	1%
Bicester Village Outlet	1	0%	6	5%	2	1%			1	1%			10	1%
Cheltenham	2	1%									12	10%	14	1%
Bicester Centre	1	0%	12	9%	1	0%							14	1%
Wallingford					17	6%							17	2%
High Wycombe					3	1%	6	6%					9	1%
Thame							8	8%					8	1%
Swindon Great Western Outlet					1	0%			1	1%	1	1%	3	0%
Newbury					2	1%			2	2%			4	0%
Wantage									4	5%			4	0%
Didcot					4	1%							4	0%
Burford	2	1%									1	1%	3	0%
Henley					2	1%							2	0%
Carterton											1	1%	1	0%
Woodstock			1	1%									1	0%
Princes Risborough							1	1%					1	0%
Watlington					1	0%							1	0%
Other, in Survey Area	1	0%	1	1%					1	1%			3	0%
Other out of Survey Area	8	3%	7	5%	11	4%	8	8%	5	6%	5	4%	44	5%
Internet	1	0%											1	0%
Mail Order	13	5%	5	4%	13	4%	2	2%	3	4%	8	7%	44	5%
No place	8	3%	3	2%	7	2%	1	1%	6	7%			25	3%
Total	**245**	**100%**	**132**	**100%**	**289**	**100%**	**97**	**100%**	**85**	**100%**	**120**	**100%**	**968**	**100%**

TABLE 2 IS THERE ANY OTHER CENTRE THAT YOUR HOUSEHOLD USES REGULARLY TO BUY CLOTHES AND SHOES?

	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		All Zones	
	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%
Centres in Oxford City														
Oxford City Centre	20	8%	10	8%	44	15%	21	22%	3	4%	17	14%	115	12%
Cowley Cen/Retail Pk/Templars Sq	6	2%	2	2%	5	2%							13	1%
Other Oxford	6	2%											6	1%
Other Centres														
Reading	7	3%			49	17%	2	2%	2	2%	2	2%	62	6%
Aylesbury	1	0%	4	3%			9	9%					14	1%
Swindon Centre	3	1%	1	1%	4	1%			9	11%	6	5%	23	2%
Witney	1	0%	3	2%	1	0%			3	4%	11	9%	19	2%
Banbury	5	2%	9	7%	2	1%	1	1%			11	9%	28	3%
Abingdon	3	1%			4	1%			4	5%			11	1%
Milton Keynes	2	1%	14	11%			4	4%			1	1%	21	2%
Bicester Village Outlet	6	2%	7	5%	4	1%	3	3%	2	2%			22	2%
Cheltenham	1	0%	4	3%					1	1%	4	3%	10	1%
Bicester Centre			3	2%			2	2%					5	1%
Wallingford					2	1%							2	0%
High Wycombe			1	1%	2	1%	9	9%					12	1%
Thame							5	5%					5	1%
Swindon Great Western Outlet	1	0%							3	4%	3	3%	7	1%
Newbury					1	0%			2	2%			3	0%
Wantage	1	0%			1	0%			2	2%			4	0%
Didcot	1	0%			1	0%							2	0%
Burford	2	1%			1	0%					2	2%	5	1%
Henley					2	1%							2	0%
Carterton														
Woodstock														
Princes Risborough														
Watlington														
Other, in Survey Area									1	1%			1	0%
Other, out of Survey Area	18	7%	3	2%	8	3%	4	4%	5	6%	4	3%	42	4%
Internet														
Mail Order	7	3%	1	1%	10	3%	3	3%	3	4%	7	6%	31	3%
No place	154	63%	70	53%	148	51%	34	35%	45	53%	52	43%	503	52%
Total	**245**	**100%**	**132**	**100%**	**289**	**100%**	**97**	**100%**	**85**	**100%**	**120**	**100%**	**968**	**100%**

TABLE 3 MARKET SHARES FOR CLOTHES AND SHOES

	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		All Zones	
	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%
Centres in Oxford City														
Oxford City Centre		71%		46%		51%		22%		39%		40%		49.8%
Cowley Centre and Retail Park		7%		2%		5%		3%				1%		3.9%
Other in Oxford City		2%				0%								0.5%
Oxford City Total		**80%**		**49%**		**56%**		**25%**		**39%**		**41%**		**54%**
Other Centres														
Reading		3%				21%		1%		4%		2%		7.6%
Aylesbury		1%		1%		0%		46%						5.3%
Swindon Centre		1%		0%		1%				25%		9%		4.0%
Witney		1%		2%		0%				3%		22%		3.7%
Banbury		1%		18%		0%		0%				5%		3.6%
Abingdon		1%				5%				6%		1%		2.3%
Milton Keynes		1%		7%		1%		1%				1%		1.8%
Bicester Village Outlet		1%		6%		1%		1%		2%				1.7%
Cheltenham		1%		1%						0%		10%		1.6%
Bicester Centre		0%		9%		0%		1%						1.5%
Wallingford						5%								1.5%
High Wycombe				0%		1%		8%						1.1%
Thame								8%						0.9%
Swindon Great Western Outlet		0%				0%				3%		2%		0.5%
Newbury						1%				3%				0.5%
Wantage		0%				0%				5%				0.5%
Didcot		0%				1%								0.4%
Burford		1%				0%						1%		0.4%
Henley						1%								0.2%
Carterton												1%		0.1%
Woodstock				1%										0.1%
Princes Risborough								1%						0.1%
Watlington						0%								0.1%
Other, in Survey Area		0%		1%						1%				0.3%
Other, out of Survey Area		6%		5%		5%		9%		8%		5%		5.9%
Sub-total Other Centres		**20%**		**51%**		**44%**		**75%**		**61%**		**59%**		**46%**
Total		**100%**		**100%**		**100%**		**100%**		**100%**		**100%**		**100%**

TABLE 4 WHAT FORM OF TRANSPORT DO YOU NORMALLY USE TO GET THERE? (MAIN CENTRE FOR CLOTHES AND SHOES)

	Oxford Centre	Other major centres
Base	475	173
Not applicable, no reply	2	2
Oxford park & ride	22%	
car all the way	34%	80%
bus all the way	34%	8%
other public transport	1%	12%
taxi	0%	
walk or cycle	8%	
other		
TOTAL PERCENTAGE	100%	100%

TABLE 5 HOW LONG DOES IT NORMALLY TAKE TO GET THERE, DOOR TO DOOR (MAIN CENTRE FOR CLOTHES AND SHOES)

	Oxford Centre	Other major centres
Base	475	173
Not applicable, no reply	2	1
less than 15 mins	12%	2%
15 to 29 mins	49%	44%
30 to 44 mins	29%	37%
45 mins or more	10%	17%
TOTAL PERCENTAGE	100%	100%

TABLE 6 HOW OFTEN DO YOU VISIT THIS CENTRE? (MAIN CENTRE FOR CLOTHES AND SHOES)

	Oxford Centre	Other major centres
Base	475	173
Not applicable, no reply	2	
more than once a week	13%	6%
once a week	12%	10%
once a week to once a month	26%	34%
monthly	20%	20%
not regularly	28%	30%
this is first time	0%	
TOTAL PERCENTAGE	100%	100%

TABLE 7 WOULD YOU SAY THAT THIS CENTRE MEETS YOUR HOUSEHOLDS NEEDS? (MAIN CENTRE FOR CLOTHES AND SHOES)

	Oxford Centre	Other major centres
Base	475	173
Not applicable, no reply	9	1
very well	62%	84%
adequately	34%	15%
poorly	4%	2%
TOTAL PERCENTAGE	**100%**	**100%**

TABLE 8 WHY DO YOU SHOP IN THIS CENTRE? (MAIN CENTRE FOR CLOTHES AND SHOES)

	Oxford Centre	Other major centres
Base	475	173
Not applicable, no reply	19	1
close to home	61%	23%
close to work	4%	3%
familiar	5%	6%
proximity, familiarity	70%	32%
easy car parking	1%	26%
free car parking		2%
convenient bus services	12%	4%
convenient rail service	0%	8%
access-related	13%	40%
to visit a specific shop	13%	17%
good selection/quality of shops	36%	47%
good prices/discounts	1%	3%
pleasant place to shop	13%	29%
everything under one roof	1%	13%
quality of shopping	63%	109%
generally convenient	2%	6%
other	2%	10%
TOTAL REASONS GIVEN	**151%**	**196%**

TABLE 9 WHAT, IF ANYTHING DO YOU DISLIKE ABOUT THAT CENTRE? (MAIN CENTRE FOR CLOTHES AND SHOES)

	Oxford Centre	Other major centres
Base	475	173
Not applicable, no reply	10	4
nothing/very little	41%	74%
too far from home/work	0%	5%
difficult to get to by car	5%	1%
parking difficult	9%	3%
parking expensive	12%	1%
traffic	8%	1%
difficult to get to by pub trans	0%	
total accessibility-related	34%	11%
expensive place to shop	2%	1%
lack of chain stores/multiples	10%	6%
lack of department stores	8%	7%
poor mix of outlets	12%	7%
lack of covered malls/arcades	1%	
no market	0%	
quality of shopping	32%	20%
litter	3%	
too large	3%	2%
not a pleasant place to shop	2%	1%
too crowded/busy	9%	1%
anti-social behaviour/security	3%	1%
too many buses, fumes, noise etc	3%	
badly maintained surfaces/equipment,dirty	7%	1%
complaints about Cornmarket	4%	
total environment-related	33%	4%
lack of pubs/restaurants/cafes	0%	1%
other	5%	2%
TOTAL COMPLAINTS	**104%**	**38%**

TABLE 10 DO YOU EVER USE OXFORD CITY CENTRE FOR SHOPPING?

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	All Zones
Base	245	132	289	97	85	120	968
No reply	2		1			1	4
yes	89%	70%	80%	59%	61%	76%	77%
no	11%	30%	20%	41%	39%	24%	23%
TOTAL PERCENTAGE	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

TABLE 11 DO YOU USE THE OXFORD PARK AND RIDE TO GET THERE?

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	All Zones
Base	245	132	289	97	85	120	968
Not applicable, no reply	30	38	58	38	32	28	224
always	5%	21%	24%	29%	26%	14%	17%
mostly	1%	7%	10%	12%	15%	8%	7%
sometimes	11%	26%	19%	15%	28%	28%	19%
never	83%	46%	47%	44%	30%	50%	56%
TOTAL PERCENTAGE	100%	100%	100%	100%	100%	100%	100%

TABLE 12 DO YOU USE THE OXFORD PARK AND RIDE TO GET THERE? (FOR THOSE WHO GAVE OXFORD CITY CENTRE FOR MAIN CLOTHES/SHOES)

	All Zones
always	17%
mostly	8%
sometimes	20%
never	55%
TOTAL PERCENTAGE	100%

TABLE 13 WHERE DO YOU DO YOUR HOUSEHOLD'S MAIN SUPERMARKET SHOPPING?

	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		All Zones		Oxford City	
	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%
Stores in Oxford City	243															
Sainsbury, Heyford Hill	45	19%	1	1%	18	6%	3	3%					67	7%	40	18%
Tesco, Oxford Retail Park	45	19%			14	5%	1	1%					60	6%	52	24%
Tesco, Cowley Rd	15	6%					1	1%	1	1%			17	2%	14	6%
Sainsbury, Oxford Centre	12	5%											12	1%	12	5%
Co-op Summertown	11	5%											11	1%	11	5%
Somerfield, Headingdon	13	5%											13	1%	13	6%
Other Oxford City																15%
Stores Outside Oxford City																
Tesco, Abingdon	8	3%	1	1%	64	22%			18	21%	1	1%	92	10%	4	2%
Sainsbury, Oxford Rd, Kidlington	28	12%	34	26%							3	3%	65	7%	24	11%
Tesco, Didcot					63	22%			1	1%			64	7%		
Sainsbury, Witney	1	0%	3	2%	1	0%			2	2%	53	44%	60	6%	1	0%
Asda, Wheatley	18	7%	2	2%	10	3%	13	13%					43	4%	11	5%
Waitrose, Thame	1	0%			1	0%	39	40%					41	4%		
Waitrose, Wallingford					38	13%							38	4%		
Waitrose, Abingdon	2	1%			32	11%			3	4%			37	4%		
Waitrose, Witney			1	1%	1	0%					26	22%	28	3%		
Tesco, Bicester Centre			25	19%			2	2%					27	3%		
Tesco, Bicester Village			25	19%									25	3%		
Sainsbury, Wantage									23	27%	1	1%	24	2%		
Co-op Carterton	2	1%									16	13%	18	2%	1	0%
Tesco, Aylesbury			1	1%			13	13%					14	1%		
Waitrose, Wantage					1	0%			10	12%			11	1%		
Tesco, Kidlington	1	0%	7	5%							2	2%	10	1%	1	0%
Other, inside Survey Area	38	16%	17	13%	33	11%	14	14%	23	27%	16	13%	141	15%	33	
Other, outside Survey Area	3	1%	15	11%	12	4%	11	11%	4	5%	2	2%	47	5%	2	1%
TOTAL	**243**	**100%**	**132**	**100%**	**288**	**100%**	**97**	**100%**	**85**	**100%**	**120**	**100%**	**965**	**100%**	**219**	**100%**

TABLE 14 IS THERE ANY OTHER SUPERMARKET THAT YOU USE REGULARLY?

	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		All Zones		Oxford City	
	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%
Stores in Oxford City																
Sainsbury, Heyford Hill	19	13%	1	1%	11	7%			1	2%			32	6%	17	14%
Tesco, Oxford Retail Park	12	9%	1	1%	10	7%	1	2%					24	4%	14	11%
Tesco, Cowley Rd	11	8%			1	1%							12	2%	11	9%
Sainsbury, Oxford Centre	13	9%			1	1%							14	3%	12	10%
Co-op Summertown	5	4%							1	2%			6	1%	5	4%
Somerfield, Headingdon	6	4%											6	1%	6	5%
Other Oxford City															44	35%
Stores Outside Oxford City																
Tesco, Abingdon	3	2%	1	1%	17	11%			9	17%	2	3%	32	6%	2	2%
Sainsbury, Oxford Rd, Kidlington	4	3%	16	23%							2	3%	22	4%	4	3%
Tesco, Didcot					23	15%							23	4%		
Sainsbury, Witney			1	1%							21	27%	22	4%		
Asda, Wheatley	7	5%			2	1%	8	14%	1	2%			18	3%	7	6%
Waitrose, Thame	2	1%			3	2%	14	25%					19	3%		
Waitrose, Wallingford					19	12%							19	3%		
Waitrose, Abingdon	4	3%			15	10%			3	6%			22	4%	2	2%
Waitrose, Witney	1	1%	5	7%					2	4%	21	27%	29	5%		
Tesco, Bicester Centre			11	16%			2	4%					13	2%		
Tesco, Bicester Village			4	6%			1	2%					5	1%		
Sainsbury, Wantage									10	19%			10	2%		
Co-op Carterton					1	1%			2	4%	6	8%	9	2%		
Tesco, Aylesbury			1	1%	1	1%	6	11%					8	1%		
Waitrose, Wantage									7	13%			7	1%		
Tesco, Kidlington			5	7%									5	1%		
Other, inside Survey Area	54	38%	17	25%	42	27%	17	30%	9	17%	22	28%	161	29%		
Other, outside Survey Area			6	9%	7	5%	7	13%	9	17%	4	5%	33	6%		
TOTAL	**141**	**100%**	**69**	**100%**	**153**	**100%**	**56**	**100%**	**54**	**100%**	**78**	**100%**	**551**	**100%**	**124**	**100%**

TABLE 15 MARKET SHARES FOR SUPERMARKETS

	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		All Zones		Oxford City	
	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%
Stores in Oxford City																
Sainsbury, Heyford Hill		17%		1%		6%		3%		0%				7%		17.1%
Tesco, Oxford Retail Park		17%		0%		5%		1%						6%		22.5%
Tesco, Cowley Rd		6%				0%		1%		1%				2%		6.7%
Sainsbury, Oxford Centre		6%				0%								2%		6.7%
Co-op Summertown		5%								0%				1%		5.0%
Somerfield, Headingdon		5%												1%		5.0%
Other Oxford City																14.0%
Oxford City Total		**56%**		**1%**		**12%**		**4%**		**2%**				**18%**		**77.0%**
Stores Outside Oxford City																
Tesco, Abingdon		3%		1%		21%				22%		1%		9%		2.0%
Sainsbury, Oxford Rd, Kidlington		10%		26%								3%		6%		9.3%
Tesco, Didcot						21%				1%				6%		
Sainsbury, Witney		0%		2%		0%				2%		40%		6%		0.5%
Asda, Wheatley		7%		1%		3%		14%		0%				4%		5.3%
Waitrose, Thame		1%				1%		38%						4%		
Waitrose, Wallingford						13%								4%		
Waitrose, Abingdon		1%				11%				4%				4%		0.3%
Waitrose, Witney		0%		2%		0%				1%		25%		4%		
Tesco, Bicester Centre				19%				2%						3%		
Tesco, Bicester Village				17%				0%						2%		
Sainsbury, Wantage										24%		1%		2%		
Co-op Carterton		1%				0%				1%		12%		2%		0.5%
Tesco, Aylesbury				1%		0%		12%						1%		
Waitrose, Wantage						0%				12%				1%		
Tesco, Kidlington		0%		6%								1%		1%		0.3%
Other, inside Survey Area		19%		14%		14%		18%		25%		16%		17%		
Other, outside Survey Area		1%		10%		4%		11%		7%		2%		5%		4.9%
Stores Outside Oxford City Total		**44%**		**99%**		**88%**		**96%**		**98%**		**100%**		**82%**		**23.0%**
TOTAL		**100%**		**100%**		**100%**		**100%**		**100%**		**100%**		**100%**		**100.0%**

TABLE 16 WHAT FORM OF TRANSPORT DO YOU NORMALLY USE TO GET THERE? (MAIN SUPERMARKET)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	All Zones
Base	245	132	289	97	85	120	968
No reply	4	3	6			2	15
Oxford park & ride							
car all the way	69%	90%	84%	85%	82%	90%	82%
bus all the way	7%	4%	3%	1%		2%	4%
other public transport			0%			1%	0%
taxi	0%		1%		1%	1%	1%
walk or cycle	22%	6%	12%	14%	16%	6%	14%
other	1%		0%			1%	0%
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

TABLE 17 HOW LONG DOES IT NORMALLY TAKE TO GET THERE, DOOR TO DOOR (MAIN SUPERMARKET)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	All Zones
Base	245	132	289	97	85	120	968
No reply	5	1	5		1		12
less than 15 mins	73%	64%	76%	69%	65%	72%	72%
15 to 29 mins	25%	29%	22%	26%	27%	26%	25%
30 to 44 mins	2%	7%	1%	5%	5%	3%	3%
45 mins or more	1%		1%		2%		1%
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

TABLE 18 LOCATION OF RETAIL WAREHOUSES

	first	second	third	all	percent all
Base	968	968	967		
No place	266	454	651		
Centres in Oxford City					
Botley Rd	147	126	102	375	24%
Oxford Retail Park/Templars Square	148	90	33	271	18%
Oxford City Centre	31	30	30	91	6%
Cowley Road	11	7	5	23	2%
Headingdon	11	6		17	1%
Centres Outside Oxford City					
Abingdon	158	130	70	358	23%
Aylesbury	56	44	34	134	9%
Didcot	25	18	6	49	3%
Bicester Centre	33	10	2	45	3%
Witney	29	9	3	41	3%
Swindon Centre	14	9	6	29	2%
Banbury	6	8	6	20	1%
Reading	10	5	4	19	1%
High Wycombe	5	7	4	16	1%
Swindon Great Western Outlet	4	5	4	13	1%
Bicester Village Outlet	7	4		11	1%
Newbury	1	1	3	5	0%
Milton Keynes	1	1	1	3	0%
Wallingford		1	1	2	0%
Wantage			1	1	0%
Mail Order	1			1	0%
Other, in Survey Area	1	1		2	0%
Other, out of Survey Area	3	2	1	6	0%
TOTAL RESPONSES	702	514	316	1532	100%
PERCENTAGE OF RESPONDENTS	73%	53%	33%		
TOTAL IN STUDY AREA	601	432	253	1286	
PERCENT IN STUDY AREA	86%	84%	80%	84%	

TABLE 19 RETAIL WAREHOUSE OPERATORS

	first	second	third	all	percent all
Base	968	968	968		
None given	264	445	648		
B&Q	311	90	20	421	27%
Homebase	150	177	49	376	24%
Argos	73	70	99	242	16%
Comet	39	63	40	142	9%
Curry's	31	41	30	102	7%
Focus	47	26	6	79	5%
PC World	11	26	23	60	4%
Toy 'R Us	18	12	24	54	3%
Wicks	8	7	10	25	2%
Mattalan	7	1	3	11	1%
Carpetright			6	6	0%
Habitat	1	2		3	0%
Texas		2		2	0%
Other	8	6	10	24	2%
TOTAL RESPONSES				1547	100%
TOTAL DIY					58%
TOTAL ELECTRICS					20%

TABLE 20 HAS HOUSEHOLD MADE RETAIL WAREHOUSE PURCHASES IN THE PAST 12 MONTHS?

AVERAGE FOR ALL RESPONDENTS

	Base number	made purchases (%)	no purchases (%)	total (%)
all respondents	968	73%	27%	100%

SOCIAL CLASS OF PRINCIPAL WAGE EARNER

	Base number	made purchases (%)	no purchases (%)	total (%)
white collar	408	83%	17%	100%
blue collar	179	87%	13%	100%
retired	337	54%	46%	100%
other	30	60%	40%	100%

SEX OF PRINCIPAL WAGE EARNER

	Base number	made purchases (%)	no purchases (%)	total (%)
male	610	78%	22%	100%
female	350	64%	36%	100%

AGE OF PRINCIPAL WAGE EARNER

	Base number	made purchases (%)	no purchases (%)	total (%)
under 20	2	100%		100%
20 to 39	209	78%	22%	100%
40 to 59	357	84%	16%	100%
60 or over	400	60%	40%	100%

DOES HOUSEHOLD HAVE USE OF CAR?

	Base number	made purchases (%)	no purchases (%)	total (%)
no car	139	33%	67%	100%
one car	436	75%	25%	100%
two or more cars	389	85%	15%	100%

ZONE OF RESIDENCE

	Base number	made purchases (%)	no purchases (%)	total (%)
Zone 1	245	70%	30%	100%
Zone 2	132	76%	24%	100%
Zone 3	289	75%	25%	100%
Zone 4	97	69%	31%	100%
Zone 5	85	76%	24%	100%
Zone 6	120	68%	32%	100%

TABLE 21 RETAIL WAREHOUSE EXPENDITURE LAST YEAR

Base	968
Errors	
Not asked	
Retail warehouse shopper not givi	2

		midpoint of range (£)	total expenditure (£)	upper limit of range (£)	cumulative no of respondents	cumulative % of respondents	cumulative no of retail warehouse shoppers	cumulative % of retail warehouse shoppers
No retail warehouse purchases in last 12 month	268				268	28%		
Less than £50	44	25	1,100	50	312	32%	44	6%
£50 to £99	115	75	8,625	100	427	44%	159	23%
£100 to £499	316	300	94,800	500	743	77%	475	68%
£500 to £999	149	750	111,750	1,000	892	92%	624	89%
£1,000 to £1,999	45	1,500	67,500	2,000	937	97%	669	96%
£2,000 or more	31	2,300	71,300		968	100%	700	100%

TOTAL	966	355,075
TOTAL RETAIL WAREHOUSE SHOPPERS	700	
AVERAGE EXPENDITURE/RESPONDENT		368
AVERAGE EXPENDITURE/RETAIL WAREHOUSE SHOPPER		507

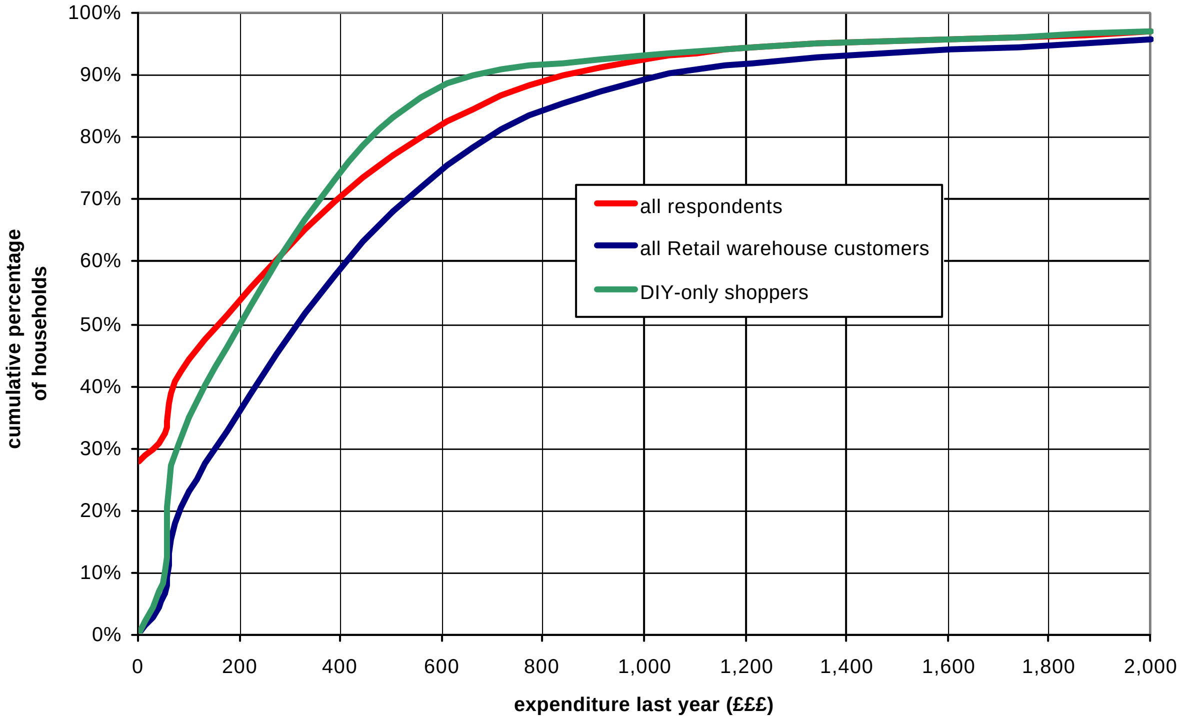
TABLE 22 RETAIL WAREHOUSE EXPENDITURE LAST YEAR (DIY-ONLY SHOPPERS)

Base	226
Errors	
Not asked	
Retail warehouse shopper not givi	2

		midpoint of range (£)	total expenditure (£)	upper limit of range (£)	cumulative no of DIY-only spprs	of DIY-only spprs
No retail warehouse purchases in last 12 month						
Less than £50	22	25	550	50	22	10%
£50 to £99	56	75	4,200	100	78	35%
£100 to £499	108	300	32,400	500	186	83%
£500 to £999	22	750	16,500	1,000	208	93%
£1,000 to £1,999	9	1,500	13,500	2,000	217	97%
£2,000 or more	7	2,300	16,100		224	100%

TOTAL	224	83,250
AVERAGE EXP/DIY-ONLY SHOPPER		372

FIGURE 1 : EXPENDITURE AT RETAIL WAREHOUSES



APPENDIX 4

SCHEDULE OF WARDS WITHIN THE STUDY AREA BY ZONE AND THE RETAIL CAPACITY TABULATIONS

Table 1 : Wards by Zone

Zone	Ward	District
1	Appleton and Cumnor	Vale of White Horse
1	Barton and Sandhills	Oxford
1	Carfax	Oxford
1	Churchill	Oxford
1	Cowley	Oxford
1	Cowley Marsh	Oxford
1	Forest Hill and Holton	South Oxfordshire
1	Headington	Oxford
1	Headington Hill and Northway	Oxford
1	Hinksey Park	Oxford
1	Iffley Fields	Oxford
1	Jericho and Osney	Oxford
1	Kennington and South Hinksey	Vale of White Horse
1	Littlemore	Oxford
1	Lye Valley	Oxford
1	Marston	Oxford
1	North	Oxford
1	North Hinksey and Wytham	Vale of White Horse
1	Quarry and Risinghurst	Oxford
1	Rose Hill and Iffley	Oxford
1	St Clement's	Oxford
1	St Margaret's	Oxford
1	St Mary's	Oxford
1	Summertown	Oxford
1	Wheatley	South Oxfordshire
1	Wolvercote	Oxford
2	Ambrosden and Chesterton	Cherwell
2	Bicester East	Cherwell
2	Bicester North	Cherwell
2	Bicester South	Cherwell
2	Bicester Town	Cherwell
2	Bicester West	Cherwell
2	Caversfield	Cherwell
2	Fringford	Cherwell
2	Kidlington North	Cherwell
2	Kidlington South	Cherwell
2	Kirtlington	Cherwell
2	Launton	Cherwell
2	Marsh Gibbon	Aylesbury Vale
2	Otmoor	Cherwell
2	Stonesfield and Tackley	West Oxfordshire
2	The Astons and Heyfords	Cherwell
2	The Bartons	West Oxfordshire
2	Woodstock and Bladon	West Oxfordshire
2	Yarnton, Gosford and Water Eaton	Cherwell
3	Abingdon Abbey and Barton	Vale of White Horse
3	Abingdon Caldecott	Vale of White Horse
3	Abingdon Dunmore	Vale of White Horse
3	Abingdon Fitzharris	Vale of White Horse
3	Abingdon Northcourt	Vale of White Horse
3	Abingdon Ock Meadow	Vale of White Horse
3	Abingdon Peachcroft	Vale of White Horse
3	Basildon	West Berkshire
3	Benson	South Oxfordshire
3	Berinsfield	South Oxfordshire
3	Blackbird Leys	Oxford
3	Blewbury and Upton	Vale of White Horse
3	Brightwell	South Oxfordshire
3	Chalgrove	South Oxfordshire
3	Cholsey and Wallingford South	South Oxfordshire
3	Crowmarsh	South Oxfordshire
3	Didcot All Saints	South Oxfordshire
3	Didcot Ladygrove	South Oxfordshire
3	Didcot Northbourne	South Oxfordshire
3	Didcot Park	South Oxfordshire
3	Downlands	West Berkshire
3	Drayton	Vale of White Horse
3	Garsington	South Oxfordshire
3	Hagbourne	South Oxfordshire
3	Harwell	Vale of White Horse
3	Marcham and Shippon	Vale of White Horse
3	Northfield Brook	Oxford
3	Radley	Vale of White Horse
3	Sandford	South Oxfordshire
3	Stokenchurch and Radnage	Wycombe
3	Sunningwell and Wootton	Vale of White Horse
3	Sutton Courtenay and Appleford	Vale of White Horse
3	Wallingford North	South Oxfordshire
3	Watlington	South Oxfordshire
4	Aston Rowant	South Oxfordshire
4	Bledlow and Bradenham	Wycombe
4	Brill	Aylesbury Vale
4	Chinnor	South Oxfordshire
4	Great Milton	South Oxfordshire
4	Grendon Underwood	Aylesbury Vale
4	Haddenham	Aylesbury Vale
4	Long Crendon	Aylesbury Vale
4	Thame North	South Oxfordshire
4	Thame South	South Oxfordshire
4	Waddesdon	Aylesbury Vale
5	Faringdon and The Coxwells	Vale of White Horse
5	Greendown	Vale of White Horse
5	Grove	Vale of White Horse
5	Hanneys	Vale of White Horse
5	Hendreds	Vale of White Horse
5	Kingston Bagpuize with Southmoor	Vale of White Horse
5	Longworth	Vale of White Horse
5	Stanford	Vale of White Horse
5	Wantage Charlton	Vale of White Horse
5	Wantage Segsbury	Vale of White Horse
6	Bampton and Clanfield	West Oxfordshire
6	Brize Norton and Shilton	West Oxfordshire
6	Carterton North East	West Oxfordshire
6	Carterton North West	West Oxfordshire
6	Carterton South	West Oxfordshire
6	Ducklington	West Oxfordshire
6	Eynsham and Cassington	West Oxfordshire
6	Freeland and Hanborough	West Oxfordshire
6	Hailey, Minster Lovell and Leafield	West Oxfordshire
6	North Leigh	West Oxfordshire
6	Standlake, Aston and Stanton Harcourt	West Oxfordshire
6	Witney Central	West Oxfordshire
6	Witney East	West Oxfordshire
6	Witney North	West Oxfordshire
6	Witney South	West Oxfordshire
6	Witney West	West Oxfordshire

Oxford City : Retail Capacity Assessment

Table 2
Population Projections at Base and Forecast Years

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	All Zones Total
2003 Total Population	***146,216***	***82,864***	***143,772***	***47,714***	***40,177***	***63,479***	***524,222***
Resident (non-student) Population	118,305	80,214	138,656	46,011	38,781	61,408	483,374
Student Population	27,912	2,650	5,115	1,704	1,396	2,071	40,849
2006 Total Population	***147,509***	***86,230***	***145,121***	***48,737***	***40,411***	***64,799***	***532,807***
Resident (non-student) Population	119,348	83,472	139,960	46,996	39,006	62,685	491,467
Student Population	28,161	2,758	5,161	1,742	1,405	2,114	**41,340**
2003-2006 Numeric Increase	1,293	3,366	1,349	1,023	234	1,320	8,584
Percentage Increase	0.9%	4.1%	0.9%	2.1%	0.6%	2.1%	1.6%
2011 Total Population	***149,960***	***90,555***	***147,001***	***49,115***	***40,799***	***66,422***	***543,853***
Resident (non-student) Population	121,314	87,660	141,776	47,360	39,381	64,255	501,745
Student Population	28,646	2,896	5,226	1,755	1,418	2,167	**42,108**
2006-2011 Numeric Increase	2,451	4,325	1,881	378	389	1,623	11,047
Percentage Increase	1.7%	5.0%	1.3%	0.8%	1.0%	2.5%	2.1%
2003 - 2011 Total Population							
2003-2011 Numeric Increase	3,744	7,691	3,230	1,401	622	2,943	19,631
Percentage Increase	2.6%	9.3%	2.2%	2.9%	1.5%	4.6%	3.7%

NOTES:
Source : All the population figures are based on 2001 ward-level Census data , and projected forward to 2003, 2006 and 2011 using the latest district level forecasts from Oxfordshire and Buckinghamshire County Councils. The County Council forecasts predate the 2001 Census, but are the best source available.
The 2003 figures are extrapolated from the average annual growth rate figure for the 2001-06 period.
The 2006 and 2011 projections use the County Council forecasts for those years.
Separate figures are forecast for resident and student populations based on 2001 Census Table S002 in respect of residents, and Census 2001 Table T02 in respect of students. The student population includes all students aged 16 years and over.

Oxford City : Retail Capacity Assessment

Table 3
Comparison Goods Expenditure (Per Capita) at Base and Forecast Years

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
	£	£	£	£	£	£
2003 Resident (non-student) Expenditure	2,158	2,562	2,608	2,767	2,616	2,574
Student Expenditure	1,340	1,340	1,340	1,340	1,340	1,340
2006 Resident (non-student) Expenditure	2,408	2,858	2,910	3,087	2,919	2,872
Student Expenditure	1,502	1,502	1,502	1,502	1,502	1,502
2011 Resident (non-student) Expenditure	2,889	3,429	3,491	3,703	3,501	3,445
Student Expenditure	1,819	1,819	1,819	1,819	1,819	1,819

NOTES:
Source: All data derived from BSL Experian 2000 per capita annual local area comparison goods expenditure estimates.
Resident (non student) expenditure figures are based on the local area estimates . The student expenditure figures are based on 50% of the national average annual expenditure figure (ie the all persons average of £2,414 in 2002 at 2002 prices) in accordance with RTP assumptions.
2000 estimates projected forward to base year and forecast years using BSL Experian Consensus growth forecast of 3.9% per annum.
2003 and forecast years estimates exclude expenditure on SFT at 7.7% in the base year in accordance with BSL Experian estimates. RTP estimate that SFT will grow by 2%/annum over the forecast period.
All monetary values are held constant at 2000 prices.

Oxford City : Retail Capacity Assessment

Table 4

Total Comparison Goods Expenditure and Expenditure Growth at Base and Forecast Years

Year	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**All Zones Total**
	£m	**£m**	**£m**	**£m**	**£m**	**£m**	**£m**
2003 Total Expenditure	***292.7***	***209.0***	***368.4***	***129.6***	***103.3***	***160.8***	***1,263.9***
Resident (non-student) Expenditure	255.3	205.5	361.6	127.3	101.4	158.0	1,209.2
Student Expenditure	37.4	3.6	6.9	2.3	1.9	2.8	54.7
2006 Total Expenditure	***329.8***	***242.7***	***415.0***	***147.7***	***116.0***	***183.2***	***1,434.4***
Resident (non-student) Expenditure	287.4	238.6	407.3	145.1	113.9	180.0	1,372.3
Student Expenditure	42.3	4.1	7.8	2.6	2.1	3.2	**62.1**
Total Growth in Expenditure 2003-2006	37.0	33.7	46.6	18.1	12.7	22.4	170.5
2011 Total Expenditure	***402.6***	***305.8***	***504.4***	***178.6***	***140.5***	***225.3***	***1,757.3***
Resident (non-student) Expenditure	350.5	300.6	494.9	175.4	137.9	221.4	1,680.7
Student Expenditure	52.1	5.3	9.5	3.2	2.6	3.9	**76.6**
Total Growth in Expenditure 2006-2011	72.9	63.1	89.4	30.9	24.5	42.1	322.9
Total Growth in Expenditure 2003-2011	**109.9**	**96.8**	**136.0**	**49.0**	**37.2**	**64.5**	**493.4**

NOTES:
The figures in the table are the sums of the data presented in Tables 2 (population) and 3 (per capita comparison goods expenditure) and are in millions of pounds (£m).
All monetary values are held constant at 2000 prices.

Oxford City : Retail Capacity Assessment

Table 5

Comparison Goods Expenditure by Retail Format Category at Base and Forecast Years

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	All Zones Total
	£m	£m	£m	£m	£m	£m	£m
2003 Total Expenditure	***292.7***	***209.0***	***368.4***	***129.6***	***103.3***	***160.8***	***1,263.9***
Out-of-centre Retail Warehousing	29.3	20.9	36.8	13.0	10.3	16.1	126.4
All other Retailing	263.5	188.1	331.6	116.6	93.0	144.7	1,137.5
2006 Total Expenditure	***329.8***	***242.7***	***415.0***	***147.7***	***116.0***	***183.2***	***1,434.4***
Out-of-centre Retail Warehousing	29.3	20.9	36.8	13.0	10.3	16.1	126.4
All other Retailing	300.5	221.8	378.2	134.7	105.6	167.1	1,308.0
2011 Total Expenditure	***402.6***	***305.8***	***504.4***	***178.6***	***140.5***	***225.3***	***1,757.3***
Out-of-centre Retail Warehousing	29.3	20.9	36.8	13.0	10.3	16.1	126.4
All other Retailing	373.3	284.9	467.6	165.6	130.1	209.2	1,630.9

NOTES:

The figures in the table set out the amount of expenditure that currently flows to out-of-centre retail warehousing from the Study Area, and the amount of expenditure that is spent in all other conventional retail formats.

The out-of-centre retail warehousing expenditure is based on the RTP extimate that 10% of the total available expenditure is captured by this category of store, which is higher than the 6% recorded by the household survey for the Study Area, and reflects our cautionary approach.

All monetary values are held constant at 2000 prices, and are in millions of pounds (£m). .

Oxford City : Retail Capacity Assessment

Table 6

Comparison Goods Spending Patterns across the Study Area Zones in 2003

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	All Zones Total	All Zones Market share by expenditure
	£m	£m	£m	£m	£m	£m	£m	%
Oxford City Centres								
Oxford City Centre	186.7	86.9	167.9	25.8	36.6	58.2	562.1	49.4
Cowley Centre and Retail Park	18.8	4.6	15.4	3.0	-	1.8	43.6	3.8
Other Oxford	4.6	-	0.9	-	-	-	5.5	0.5
Oxford City Total	**210.1**	**91.5**	**184.2**	**28.8**	**36.6**	**60.0**	**611.2**	**53.7**
Other Centres								
Reading	8.3	-	68.5	0.7	3.7	3.0	84.3	7.4
Aylesbury	3.2	1.8	0.9	53.1	-	-	59.0	5.2
Swindon Centre	3.1	0.5	4.1	-	23.7	13.1	44.4	3.9
Witney	2.4	4.6	1.6	-	2.3	32.5	43.4	3.8
Banbury	3.8	33.5	1.6	0.4	-	6.9	46.3	4.1
Abingdon	2.3	-	16.4	-	5.7	0.9	25.3	2.2
Milton Keynes	3.9	13.0	2.1	1.5	-	1.3	21.9	1.9
Bicester Village Outlet	3.0	10.9	3.2	1.1	2.0	-	20.2	1.8
Cheltenham	2.4	1.8	-	-	0.4	14.1	18.7	1.6
Bicester Centre	0.8	17.7	0.9	0.7	-	-	20.2	1.8
Wallingford	-	-	17.1	-	-	-	17.1	1.5
High Wycombe	-	0.5	3.4	9.0	-	-	12.8	1.1
Other Locations	20.2	12.3	27.6	21.2	18.6	12.8	112.8	9.9
Sub-total Other Centres	**53.3**	**96.6**	**147.4**	**87.8**	**56.4**	**84.7**	**526.3**	**46.3**
Total	**263.5**	**188.1**	**331.6**	**116.6**	**93.0**	**144.7**	**1,137.5**	**100.0**

NOTES:
The spending patterns are calculated by multiplying the total comparison goods expenditure for 'All other retailing' for 2003 (row 3, Table 5) by the market share (the market share calculations are set out in the household survey section of this report).
All monetary values in the table are held constant at 2000 prices, and are in millions of pounds (£m).

Oxford City : Retail Capacity Assessment

Table 7
Comparison Goods Centre Turnover and Sales Densities 2003

Zone	Turnover Derived from Study Area [1]	Turnover Derived from Beyond the Study Area [2]		Tourist Expenditure [3]	Total Turnover	Sales Area [4]	Current Sales Density
	£m	%	£m	£m	£m	sqm net	£/sqm
Oxford City Centres							
Oxford City Centre	£562.1	10%	£62.46	58.8	£683.4	92,379	7,397
Cowley Centre and Retail Park	£43.6	5%	£2.29		£45.9	13,864	3,310
Other Oxford	£5.5	5%	£0.29		£5.8		
Total	**£611.2**				**£735.0**		

NOTES:
(1) Source: Table 6 'All Zones Total' column.
(2) Source: RTP estimates.
(3) Source: Tourist expenditure - Table 11 , The Economic Impact of Tourism in Oxford City - 1996, Southern Tourist Board (April 1997) .
(4) Source : Valuation Office Agency (August 2003 data). The VOA A1 floorspace figure for Oxford City is 149,421 sqm gross, which when the Goad figure for convenience floorspace in the centre (7,300 sqm) is deducted, and the product netted down by applying a ratio of 65:35 net:gross equals a net figure of 92,379 sqm. The VOA figure for the Cowley Centre is 23,305 sqm, which minus the Goad figure for convenience floorspace in the centre (3,500 sqm), and netted down by applying a ratio of 70:30 net:gross (higher than the ratio for the City centre, reflecting the purpose built nature of the stock) gives a net figure of 13,864 sqm.
All monetary values are held constant at 2000 prices.

Oxford City : Retail Capacity Assessment

Table 8
Comparison Goods Floorspace Requirement at Base and Forecast Years

	2003		2006		2011	
Total Study Area Expenditure (£m) [(1)]	£1,137.5		£1,308.0		£1,630.9	
Expenditure Retention [(2)]						
Current Market Shares (%)	49.4		49.4		49.4	
Retained Expenditure (£m)	£562.1		£646.4		£805.9	
Expenditure Inflow [(3)]						
From Beyond the Study Area (£m)	£62.5		£70.1		£84.8	
Tourist Expenditure (£m)	£58.8		£61.5		£66.2	
Oxford City Centres' Turnover (£m) [(4)]	**£683.4**		**£698.9**		**£725.5**	
Committments (£m) [(5)]	£0.0		£0.0		£0.0	
Residual Expenditure (£m) [(6)]	£0.0		£79.1		£231.5	
Assumed Sales Density (£/sqm) [(7)]	**High**	**Low**	**High**	**Low**	**High**	**Low**
	£7,000	£6,000	£7,159	£6,136	£7,431	£6,370
Floorspace Requirement (sqm net) [(8)]	**0**	**0**	**11,043**	**12,884**	**31,155**	**36,347**

NOTES:
(1) The total Study Area expenditure net of expenditure currently going to out-of-centre retail warehouses (see Table 5).
(2) The current market share (refer to row one of Table 6). Retained expenditure is the sum of (1) multiplied by market share.
(3) Expenditure inflow - from beyond the Study Area at 10% of the total turnover of the centre in the base year, which increases by the rate of expenditure growth (3.9% per annum) in the forecast years. Tourist expenditure source : Table 11 , The Economic Impact of Tourism in Oxford City (1996), Southern Tourist Board (April 1997). Comparison goods estimated to account for 90% of the total tourist retail expenditure (£65.3m). Tourist expenditure in forecast years incorporates growth at 1.5%/annum in accordance with RTP assumptions.
(4) Oxford City centre's turnover - base year figure from Table 6, with an allowance for growth in forecast years of 0.75%/annum.
(5) There are no known committments in the Study Area.
(6) The residual expenditure is the product of the available expenditure minus committments.
(7) The assumed sales densities for new floorspace provide 'high' and 'low' estimates. These are based on RTP estimates of the appropriate level for 2003, with an allowance for growth of 0.75%/annum.
(8) The floorspace requirements are the product of the residual expenditure divided by the assumed sales densities for new floorspace.
All monetary values are held constant at 2000 prices.

Oxford City : Retail Capacity Assessment

Table 9

Total Population and Population Growth in the Convenience Goods Study Area at Base and Forecast Years

Year	2003 (3)	2006	2011
Total Population	**135,083**	**136,290**	**138,677**
Resident (non-student) Population (1)	108,270	109,238	111,151
Student Population (2)	26,813	27,052	27,526
2003-2006 Numeric Increase		1,207	
Percentage Increase		0.9%	
2006-2011 Numeric Increase			2,388
Percentage Increase			1.8%

NOTES:
Source : All the population figures are based on 2001 ward-level Census data , and projected forward to 2003, 2006 and 2011 using the latest district level forecasts from Oxfordshire County Council. The County Council forecasts predate the 2001 Census, but are the best source available.
The 2003 figures are extrapolated from the average annual growth rate figure for the 2001-06 period.
The 2006 and 2011 projections use the County Council forecasts for those years.
Separate figures are forecast for resident and student populations based on 2001 Census Table S002 in respect of residents, and Census 2001 Table T02 in respect of students.
The student population includes all students aged 16 years and over.

Oxford City : Retail Capacity Assessment

Table 10

Convenience Goods Expenditure and Expenditure Growth at Base and Forecast Years

Year	**2003**	**2006**	**2011**
Per Capita Resident (non-student) Expenditure (£) (1)	1,243	1,280	1,342
Per Capita Student Expenditure (£) (2)	1,056	1,087	1,140
Total Resident (non-student) Expenditure (£M)	134.6	139.8	149.2
Total Student Expenditure (£M)	28.3	29.4	31.4
Total Expenditure (£M) (3)	**162.94**	**169.18**	**180.56**
Total Growth in Expenditure (£M)	**-**	**6.2**	**17.63**

NOTES:
(1) Source: BSL Experian 2000 per capita annual expenditure estimates at 2000 prices, projected forward using BSL Experian Consensus expenditure growth rate forecasts of 1.0% per annum. Deduction made to account for forecast expenditure on special forms of trading (SFT) at 1.8% in the base year in accordance with BSL Experian estimates. RTP estimate that SFT will grow by 2%/annum over the forecast period.
(2) Student expenditure is estimated by RTP to be 75% of the national average annual expenditure figure (ie the all persons figure of £1,441 in 2002 at 2002 prices).
(3) Total expenditure is the product of the Resident (non-student) and Student per capita figure (net of SFT) and the population figures from rows two and three of Table 9.
All monetary values are held constant at 2000 prices.

Oxford City : Retail Capacity Assessment

Table 11

Convenience Goods Expenditure Available for Local Convenience Stores and Supermarkets at Base and Forecast Years

Year	2003	2006	2011
Local Convenience Store Expenditure (£m) [1]	**48.9**	**50.8**	**54.2**
Supermarket Expenditure (£m) [2]	**114.1**	**118.4**	**126.4**
Total Growth in Local Conveninece Store Expenditure (£M)		1.9	5.3
Total Growth in Supermarket Expenditure (£M)		**4.4**	**12.3**

NOTES:
(1) The amount of expenditure growth that is available for non-supermarket retailing, based on the RTP estimate that this sector accounts for 30% of total convenience expenditure.
(2) The amount of expenditure growth that is available for supermarkets, based on a supermarket market share 70% of the total convenience expenditure.
All monetary values are held constant at 2000 prices, and are in millions of pounds (£M).

Oxford City : Retail Capacity Assessment

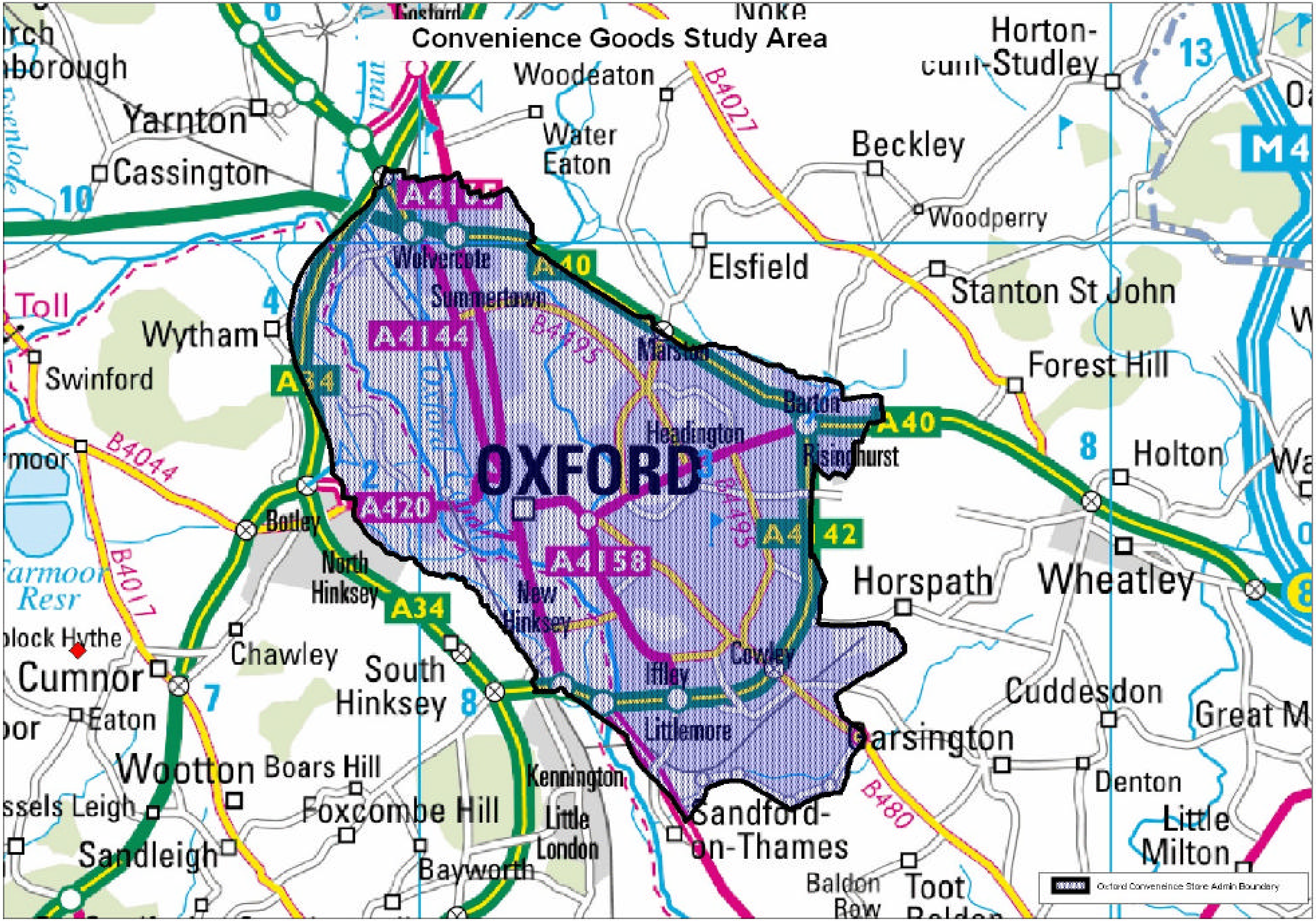
Table 12
Convenience Goods Floorspace Requirement at Base and Forecast Years

	2003	2006	2011
Total Study Area Expenditure (£m) (1)	114.1	118.4	126.4
Expenditure Retention (2)			
Current Market Shares (%)	86.3	86.3	86.3
Retained Expenditure (£m)	£98.5	£102.2	£109.1
Expenditure Inflow (3)			
From Beyond the Study Area (£m)	£10.9	£11.3	£11.8
Oxford City Centres' Turnover (£m) (4)	**£109.4**	**£109.4**	**£109.4**
Committments (5)	£0.0	£0.0	£0.0
Residual Expenditure (£m) (6)	£0.0	£4.1	£11.6
Assumed Sales Density (£/sqm) (7)	£8,500	£8,500	£8,500
Floorspace Requirement (sqm net) (8)	**0**	**483**	**1,360**

NOTES:
(1) Total Study Area supermarket expenditure net of expenditure in local convenience retailing (see Table 11).
(2) The current market share of stores within centres in Oxford City, plus Sainsbury, Kidlington (refer to household survey Table 15). The retained expenditure is the sum of (1) multiplied by market share.
(3) Expenditure inflow - estimate of 10% inflow from beyond the Study Area in the base year, which increases by the forecast rate of expenditure growth (1.0% per annum) in the forecast years.
(4) Oxford City centre's convenience goods turnover - base year figure is the sun of the retained expenditure plus the inflow, which is held constant in the forecast years.
(5) There are no known committments in the Study Area.
(6) The residual expenditure is the product of the available expenditure minus committments.
(7) The assumed sales density for new floorspace is an RTP estimate.
(8) The floorspace requirement is the product of the residual expenditure divided by the assumed sales density for new floorspace.
All monetary values are held constant at 2000 prices.

APPENDIX 5

CONVENIENCE GOODS
STUDY AREA MAP


Convenience Goods Study Area
OXFORD
Wolvercote
Summertown
Marston
Barton
Headington
Risinghurst
Botley
North Hinksey
New Hinksey
Iffley
Cowley
Littlemore
Yarnton
Cassington
Woodeaton
Water Eaton
Horton-cum-Studley
Beckley
Woodperry
Elsfield
Stanton St John
Forest Hill
Holton
Wheatley
Horspath
Cuddesdon
Garsington
Denton
Little Milton
Wytham
Swinford
Cumnor
Eaton
Wootton
Boars Hill
Chawley
South Hinksey
Foxcombe Hill
Kennington
Little London
Sandford-on-Thames
Bayworth
Sandleigh
Baldon Row
Toot Baldon
A40
A34
A4144
A420
A4158
A4142
B4027
B4044
B4017
B4495
B480
M40
Oxford Convenience Store Admin Boundary