

Oxford City Council OXFORD RETAIL NEEDS STUDY UPDATE



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1 INTRODUCTION

- 1.1 In January 2004, Roger Tym & Partners (RTP) submitted the Oxford Retail Needs Study (ORNS) to Oxford City Council which found that there was capacity for both convenience and comparison floorspace up until the period 2011: approximately 1,400 sq m net convenience floorspace by 2011, and approximately 31,000 - 36,500 sq m net of comparison floorspace.
- 1.2 RTP has been commissioned because there have been changes to planning policy at national, regional and local levels. At a national level PPGs are being replaced by PPSs. The draft Regional Spatial Strategy for the South East was considered at the Examination in Public in Spring 2007. The Panel issued its report in August 2007, with the Government's response expected in Spring / Summer 2008. There have also been changes in the Development Plans with the adoption of a new Oxfordshire Structure Plan and Oxford Local Plan in 2005, and the preparation of the new Local Development Framework. The Study update will therefore provide an important evidence base for the Local Development Framework. Its findings will inform both the West End Area Action Plan (DPD) and the Core Strategy (DPD). The Core Strategy considers the longer term period up to 2026.
- 1.3 The study has also been commissioned because there have been a number of significant retail applications and decisions since ORNS 2004, the most notable of which is the recent approval of the Westgate Centre redevelopment. This not only represents a significant net increase in comparison floorspace, but it will also create a modernised and updated shopping environment which will be more attractive to shoppers. We also understand that an application for more comparison floorspace will be submitted for a City Centre site located on land between St Aldates and Queen Street. This forms part of a retail led development site (Policy DS.77). However the development of these two major sites will considerably reduce the capacity of the City centre to accommodate additional retail floorspace in the future, compounding the constraints created by the historic built environment on future development.
- 1.4 A number of planning applications for new foodstores have also been granted permission, most notably a Lidl foodstore on an out of centre site which was granted planning permission at appeal.
- 1.5 These policy changes and planning permissions form the background against which this Study update is set. Below we set out the aims of the Study and the report structure.

Study Aims

- 1.6 The Council's brief sets out a number of objectives of the study:
 - To provide a policy context in terms of recent changes to national, regional and local planning policy since the publication of ORNS 2004.
 - To assess the existing retail provision in Oxford for food and non-food (quantitatively, qualitatively and spatially). This assessment should include a summary position for City, Districts and out-of-centre locations.
 - To assess commitments for additional food and non-food provision in Oxford in relation to both quantitative and qualitative need, including the foodstore applications which have recently been granted planning permission.
 - To assess existing commitments and particularly the impact of the Westgate redevelopment on future demand for comparison goods;
 - To update retail capacity modelling forecasts of population and expenditure to project future retail need for food and non-food provision for short, medium and

long terms (2005 - 2026) and to provide a broad indication of how future requirements could be planned for.

- To propose an appropriate boundary for the Primary Shopping Area with the City centre, taking account of existing defined retail frontages and potential for expansion;
- To propose a preferred spatial strategy for the short and medium terms, together with a broad spatial vision for the long term, based on policy and capacity for Oxford's centres to absorb the growth. (this has been taken out but surely should remain since it was part of the original brief).

Report structure

- 1.7 The structure of this Study is as follows: **Section 2** sets out a brief policy background providing an update on the key changes in policy since the Oxford Retail Needs Study 2004.
- 1.8 **Section 3** sets out an assessment of the existing retail provision in Oxford and provides more details on the recent planning applications and permissions which have been granted on comparison and convenience floorspace.
- 1.9 **Section 4** sets out the methodology, assumptions and results of the retail capacity modeling exercise for comparison and convenience floorspace.
- 1.10 **Section 5** concludes this Study update with a retail strategy for Oxford city council.

2 PLANNING POLICY

Introduction

- 2.1 The Study brief requires that the key elements of planning policy are set out in the Study update, due to the changes in national, regional and local policies. We first examine briefly national policy guidance PPS 1, PPS 6 and PPG13 and the Regional Spatial Strategy, the Draft South East Plan. We then look at the Development Plan: the adopted Oxfordshire Structure Plan, adopted Oxford Local Plan.

National Policy Guidance

- 2.2 Since the submission of ORNS 2004, national policy guidance has been revised, and a number of Planning Policy Guidance notes have been replaced with Planning Policy Statements. The function of these Statements remains the same: to explain statutory planning provisions, and provide guidance to local authorities on planning policy and the operation of the planning system.
- 2.3 **PPS 1 Delivering Sustainable Development (2005)** states that sustainable development is the core principle of planning - this will ensure a better quality of life for everyone now and in future generations. In relation to new shopping facilities, the guidance states that developments should be located where everyone can access services or facilities on foot, bicycle or public transport rather than having to rely on access by car, while recognising that this may be more difficult in rural areas.
- 2.4 Reflecting the broad objectives of PPS 1, the core principle of the planning guidance set out in **PPS 6 Planning for Town Centres (2005)** is sustainable development and the creation of vital and viable town centres. Therefore the guidance encourages planned growth and development of existing centres, focusing development in these centres and encouraging a wide range of services that are accessible to all. The new guidance focuses on town centres as whole; retailing is considered alongside other town centre 'activities' such as leisure, entertainment, offices, culture, tourism and housing.
- 2.5 Thus, in considering the retail developments, the key principles of PPS 6 state that local authorities should require applicants to demonstrate:
- the need for the development;
 - that the development is an appropriate scale;
 - the sequential approach to site selection has been applied;
 - there are no unacceptable impacts on existing centres;
 - and the location of the development is accessible.
- 2.6 **PPG 13 Transport (2001)**, seeks to integrate planning and transport with the aim to reduce the need to travel, reduce the length of journeys, and make jobs, shopping, leisure facilities and services more easily and safely accessible by public transport. The underlying aim is to create sustainable development. The principles of PPS 6 are supported in the guidance as it goes on to state that land uses which generate travel demand should be located in city, town and district centres and near to major public transport interchanges.

Regional Spatial Strategy

- 2.7 The draft South East Plan which was published in March 2006 sets out the Regional Spatial Strategy identifies a network of town centres where retail, leisure and residential growth should be focused. Oxford is identified as one of these strategic town centres (under Policy TC2). Government advice set out in PPS 6 to promote

town centres and use the sequential approach to site selection is reflected in the regional strategy.

Development Plan

Oxfordshire Structure Plan 2016

- 2.8 The Oxfordshire Structure Plan 2016 was adopted in October 2005, replacing the Structure Plan 2011. The focus for development in the County remains the existing larger urban centres where most of the jobs, homes and services are to be located. Oxford is promoted as a sub-regional centre for shopping, leisure and cultural activities. One of the key priorities for the County is to rejuvenate the West End of Oxford; it represents the most significant opportunity for new mixed development. The Plan acknowledges that schemes for the conversion of the Prison and Castle Mound for cultural and hotel activity, and the redevelopment of Westgate shopping centre have been submitted, and the Plan considers that the schemes indicate significant intent to rejuvenate the area under the guidance of a partnership project between the County and City councils with SEEDA.
- 2.9 Chapter 8 of the Plan is concerned with town centres. Oxford City centre is identified as the principal location for the development of retail and leisure facilities. The other main locations for development of retail and other facilities are Banbury, Bicester, Didcot, Witney and Wantage.
- 2.10 The Plan seeks to ensure that major new development is located on city or town centre sites in accordance with the sequential approach set out in PPS 6.

Oxford Local Plan 2001 - 2016

Core policy

- 2.11 The Oxford Local Plan was adopted in 2005. One of the key policies (Policy CP3) in the Core Policies section, which is concerned with the location of development, seeks to limit the need to travel and implement the sequential test in site selection. Thus proposals for new employment, retail and leisure developments are required to demonstrate that there is a need for the proposal and that the sequential approach has been adopted in selecting the location for the development.

Retail Hierarchy and Shopping Frontages

- 2.12 Oxford has a retail hierarchy, with the City centre at the top: it is the principal retail centre in Oxfordshire, and therefore retail proposals will only be granted planning permission if they maintain and enhance the role of the centre (policy RC1).
- 2.13 The second tier in the hierarchy comprises District centres: Cowley centre (Templars Square), Cowley Road, Headington and Summertown. Development which maintains and enhances the role of these centres is encouraged; mainly convenience, standard durable and specialist goods are sold in District centres (policy RC2).
- 2.14 At the bottom of the hierarchy are neighbourhood shopping centres - small groups, parades or single units of shops. They provide for day-to-day needs of the local population, and their loss is protected under policies RC8 and RC9.
- 2.15 Shopping frontages are identified on the Proposals Map, with Primary Shopping Frontages located in the City centre only, Secondary Shopping Frontages located largely in the City centre as well as parts of St Clements and Cowley Road, and District Shopping Frontages located in the four District centres. Policies set out the appropriate uses in each of these frontages.

Additional Retail Floorspace and Development Sites

- 2.16 The Local Plan also sets out the findings of the Oxford Retail Needs Study 2004: there is an identified need in quantitative and qualitative terms to provide additional

comparison retail floorspace. In the short term 11,000 - 13,000 sq m net comparison floorspace is needed, and 31,000 - 36,500 sq m net will be needed by 2011.

- 2.17 Some of the identified Development Sites in the adopted Local Plan could potentially accommodate the additional floorspace identified by ORNS 2004 and the Study update. We examine these sites in more detail in Section 5.

3 ASSESSMENT OF EXISTING RETAIL PROVISION

Introduction

- 3.1 The Study brief requires an assessment of existing provision in Oxford for food and non-food retailing. The Oxford Retail Needs Study 2004 undertook thorough town centre healthcheck assessments for the City centre, and the four district centres: Headington, Summertown, Cowley Road, and Templars Square, Cowley. The findings are set out in Section 3 of the ORNS 2004, and they are also summarised below.
- 3.2 Since the submission of the ORNS 2004, there has been a number of planning applications and subsequent permissions. These developments will change the existing provision for comparison and convenience shopping once the sites are developed, and we have included them in our capacity modeling exercise in Section 4. We set out more details on these applications below.

Summary of findings from Oxford Retail Needs Study 2004

City centre

- 3.3 The largest concentration of retail floorspace in Oxford is in the City centre; there is approximately 170,000 sq m, of which approximately 87% is A1 space. Shopping is focused around Cornmarket and Queen Street and the two covered shopping malls, Westgate Centre and Clarendon Centre; the majority of floorspace here is occupied by A1 use. Surrounding streets such as High Street and Broad Street also have retailing, but the proportion of A2 and A3 retailers is higher.
- 3.4 The City centre is a popular shopping destination: there is a high quality urban environment. The centre is compact so shopping and leisure facilities are easily accessible. We found that there are strong yields and a low vacancy rate, with no shortage of retailers seeking representation in the City centre. Although the provision of retail outlets was found to be reasonable, there is a shortage of units in the City centre particularly those that are the right size for modern retailers.
- 3.5 Oxford City centre competes with nearby large centres such as Milton Keynes and Reading; Milton Keynes is planning an expansion of The Centre which will further strengthen the quality of the shopping provision in the town, and draw more shoppers away from Oxford. However there is a broad range of leisure facilities in Oxford which are considered to be a major factor attracting visitors to the centre.

District centres

- 3.6 The District centres provide a range of convenience and some comparison retailing, with other services such as banks, other financial services and bar / restaurant facilities. These centres complement the retail offer in the City centre.
- 3.7 **Cowley Centre**, a purpose built shopping centre, is located to the south of the City Centre. It has the largest amount of floorspace which is concentrated into the smallest number of units. It has the highest Zone A rent and low yields. There are low vacancy rates which suggests that demand for retail floorspace is high, and demand for representation is equally from national multiples and local chains / independents. The centre is well served by public transport but is also notable for having a substantial amount of car parking.
- 3.8 **Headington**, located to the north east of the City centre, is the second largest of the district centres. It commands the lowest retail rents of all the other district centres. Although vacancy rates are lower than in Summertown and Cowley Road, demand for

retail floorspace is more limited than other centres. Shopping provision in Headington is considered reasonable, and accessibility to the centre is good. However the busy London Road, divides the centre in two and detracts from the shopping environment.

- 3.9 **Summertown** is located north of the City centre. It is the second smallest of the district centres. It has the second highest retail rents, and low yields. Vacancy rates are slightly higher, but demand for floorspace is higher than in Headington. The range of convenience provision is good, but there is a lower comparison provision which may reflect the relatively close proximity of the centre to the City centre. There is good accessibility to the centre by different modes of transport.
- 3.10 **Cowley Road** is located closest to the City centre and it is the smallest of the four Oxford district centres. The centre is composed of a large number of small units. Rental values are lower than Summertown and Cowley Centre. The anchor store in the centre is Tesco. There is a smaller amount of comparison goods floorspace than in other centres, and a higher proportion of service activity, mainly A3 uses.

Recent planning applications and planning permissions

City Centre

- 3.11 The most significant retail application in Oxford is the proposal to redevelop and refurbish the Westgate centre and the adjoining car parks and areas in the City centre.
- 3.12 The site is located in the West End of the City Centre, and comprises approximately 5.7ha. It is currently occupied by a range of land uses, and the new scheme aims to ensure that its character and layout are properly integrated with the new buildings and the units meet modern retailer requirements.
- 3.13 The key elements of the proposal are:
- Extension of the existing Westgate Centre to create a new shopping street and department store.
 - Development of a new Garden Building which will replace part of the existing Westgate Centre at the southern end of the existing building (13,500 sq m gross; 10,500 sq m retail floorspace).
 - Development of a new Market Building which will occupy a central position on the site (26,500 sq m gross; 18,000 sq m for Class A use); it will include ground floor shops on western elevation of the building, creating an active frontage on Norfolk Street.
 - A new department store will also be built on an existing car park (proposed floorspace 23,500 sq m).
 - Development of a multi-storey car park, new residential development and bus drop off and pick up facilities on Abbey Place car park and part of Oxford and Cherwell College site. Creation of a bus priority route connecting Castle Street with Speedwell Street via Norfolk Street.
 - Improvements to the public realm: pedestrianisation of Old Greyfriars Street, improvements to streetscape, cycle stands.
- 3.14 There is currently approximately 17,000 sq m net in the existing Westgate Centre. Approximately 4,700 sq m net will be demolished when the proposals are implemented. However the proposals are expected to provide approximately 39,000 sq m net of comparison floorspace; this is a net increase of 34,300 sq m.
- 3.15 The application was referred to GOSE, but the Secretary of State notified Oxford City Council on 18th December 2006 that the application would not be called in. The City Council had previously resolved to grant the application permission in October 2006 and therefore planning permission was granted.

- 3.16 We have taken account of this commitment in our retail capacity modeling exercise, by assuming that the redeveloped Westgate Centre will have settled trading patterns by 2013.
- 3.17 We also understand that an application to redevelop the plot of land to the west of St Aldates and south of Queen Street will be submitted later in Spring / Summer 2008. It will comprise 7,000 sq m gross comparison floorspace. We have taken account of this commitment in our retail capacity modeling exercise by assuming that it will be granted planning permission, and that settled trading patterns will be achieved by 2011.

Out of Centre

- 3.18 Four applications for food stores have recently been submitted, three of which have now been granted consent. We set out more details below.

Lidl foodstore, Watlington Road

- 3.19 Lidl submitted two applications for a foodstore on a site on Watlington Road, to the south of the City Centre, in May and July 2005. The site is located out of centre according to the sequential approach, and allocated for employment use in the Oxford Local Plan 2002 - 2016.
- 3.20 The first application (dated 21st May 2004) was for the demolition of the existing building, and the construction of a single storey building for use as a discount foodstore measuring 1,837 sq m and including provision of 102 parking spaces, provision for cycle store and spaces, and compactor. This application was refused on 13th December 2004.
- 3.21 The second application (dated 26th July 2005) was for the demolition of the existing building, and the construction of a 2 storey building for use as a discount food store (1,871 sq m) at ground floor level, and Class B1 offices (840 sq m) at first floor plus provision of 102 car parking spaces, and provision for cycles, as well as revised vehicular access, compactor, public art and landscaping. This application was refused on 20th December 2005.
- 3.22 The applicants appealed the decision on both of these applications. The Inspector considered that there was insufficient conflict with development plan location or retail policies. However the first application was considered to be in conflict with employment policy. The second application was not considered to be in conflict with employment policy since office space will be provided on the first floor.
- 3.23 In terms of retail issues, the Inspector considered that:
- there is an identifiable need for the proposed foodstore, both in terms of quantitative and qualitative need;
 - there was insufficient evidence submitted to clearly demonstrate that sequentially preferable sites would be available in a reasonable time period, and would be suitable and viable.
 - the trading impact of the store would be acceptable;
 - the proposed store is within a realistically accessible distance by walking, cycling, public transport and car.
- 3.24 The Inspector concluded that the first application should be dismissed, and the second application should be allowed.
- 3.25 Therefore we have included the development of the Lidl foodstore on Watlington Road as a commitment in our convenience retail capacity modeling exercise. The store was opened in April 2007 and we have assumed settled trading patterns by 2008.

Marks & Spencer applications at Oxford Retail Park, Cowley and Summertown

- 3.26 An application was submitted in October 2006 by Marks & Spencer for development at Unit 2, Oxford Retail Park in Cowley which is was formerly occupied by comparison retailing. This site is also out of centre according to the sequential approach.
- 3.27 The application was for a mezzanine floor to the existing retail store to be used for storage, staff accommodation and uses ancillary to retail use. The application was granted consent on 22nd December 2006. The new Marks & Spencer foodstore has a gross floorspace of 929 sq m, and is now open and trading.
- 3.28 Marks & Spencer submitted another application in October 2006 at their existing store in the District Centre of Summertown. The application proposed a change of use of part of the first floor (366 sq m) from offices to Class A1 retail. This application was approved on 29th November 2006, which will enable all the ground floor to be used for a sales area (1857 sqm), and the upper floor used for storage and ancillary facilities.
- 3.29 Therefore we have included the development of the two Marks & Spencer foodstores as commitments in our convenience retail capacity modeling exercise; we have assumed that these stores will be developed and have settled trading patterns by 2008.

Aldi foodstore, Botley Road

- 3.30 In July 2006, Aldi submitted an application for a foodstore on Botley Road measuring 1,012 sq m net (1,731 sq m gross). The site is located 1.9km west of Oxford city centre at the Botley Road retail park. The site is located between Toys 'R' Us and Wickes, and comprises 0.35 ha.
- 3.31 Planning permission has already been granted for non-food retail units in 1999 and 2005.
- 3.32 The retail statement notes that this part of Botley Road is characterised by a mix of land uses, including retail units, office development and 1930s residential properties. The retailing is characterised by being largely non-food floorspace, with an emphasis on bulky comparison goods. The applicants consider that Botley Road provides an important service function but fulfills a limited overall shopping role. Main or top up food shopping is not provided for in Botley Road, and therefore there is little 'competitive overlap' with an Aldi foodstore.
- 3.33 The application was refused permission on (April 2007) on grounds of traffic congestion and for flooding reasons, and is now the subject of an appeal. In the meantime the applicant has submitted a further planning application, which was refused at committee in November 2007 on the grounds of flooding as advised by the Environment Agency. We have developed one scenario ('Scenario B') in our retail capacity modeling exercise which assumes that Aldi will be granted planning permission, and it is therefore included as a commitment.

4 FUTURE RETAIL TRENDS

Overview

- 4.1 The recent buoyant economic cycle has continued for about a decade until the middle of last year. In this period consumer spending on comparison goods, reflecting an expanding UK economy, has continued at a high level. Furthermore consumer spending has been partly fuelled by the availability of credit in recent years, either through property based borrowing (re-mortgaging or asset release) or the promotion of credit card spending. It is not axiomatic that this level of consumer spending will continue at a similarly high rate despite the relatively optimistic retail expenditure forecasts provided by Experian Business Strategies.
- 4.2 Recent research commissioned by the British Council of Shopping Centres entitled the “Future of Retail Property” has considered the impact of retail trends on the demand for additional floorspace. This research suggests that the future of retail spending, over the next five to ten years, is predicted to slow down for a number of reasons. These include a concern among consumers about the amount of borrowing, which may also be linked to the availability of credit; falling house prices will result in less potential equity available for withdrawal; and relatively low high street prices caused by the flood of cheap imports from the Far East coming to an end.
- 4.3 The changing pattern of consumer behaviour is already having an effect on retail sales, such as the increase in online retailing. Online retailing is reportedly “growing twenty-six times faster than the high street, as large numbers of consumers switch to buying online.” This will impact on some retail goods more than others. For example high ticket discretionary purchases, such as LCD TVs, digital cameras and other electrical products are likely to have the greatest potential impact.
- 4.4 In addition to a reduction in spending growth and a potential increase in internet sales there are some other factors that will influence the need for additional retail floorspace. These include the overall growth in sales per square metre (sales densities), and a potential increase in comparison goods sales in supermarkets and hypermarkets as companies such as Tesco and Asda seek to expand their comparison goods offer. It is considered that these factors could all contribute towards limiting the future need for additional comparison floorspace.

Implications For Expenditure Growth

- 4.5 The effects of quite small changes in growth rates for consumer spending when compounded over 5-10 years can have significant implications for the quantum of additional retail floorspace which is required. Consequently, we consider that it is appropriate to establish the implications of a downturn in consumer spending. We do this in Section 5 by incorporating a sensitivity test on comparison goods expenditure growth which reflects reduced consumer spending as a result of a general tightening of credit, or a downturn in the economy (or both). Another factor that will influence consumer spending in retail shops is the scale of change in internet purchases. The two key variables here are the propensity to shop ‘on-line’ and the rate of roll-out of broadband connections. There is insufficient hard evidence on the likely extent of changes on these points so we do not undertake a sensitivity test on our core SFT assumptions.
- 4.6 Our sensitivity test solely reflects changes in comparison goods spending. The variations in rates of growth in consumer spending on convenience goods is far less extreme than for comparison goods expenditure and, additionally, less tied to variations in the availability of credit.
- 4.7 There have been previous historic periods when a downturn in the economy has occurred between economically buoyant periods. These recessions are reflected in

lower growth in per capita comparison goods expenditure sandwiched between periods of higher growth in expenditure. In the five year period 1980 to 1984 the average growth in per capita comparison goods expenditure was 3.5% per annum¹. It then rose to over 6% per annum on average in the intervening period before declining to 2.2% per annum² in the five years between 1989 and 1993.

- 4.8 Accordingly, we have undertaken a sensitivity test to forecast comparison goods floorspace potential taking into consideration the implications of a downturn in comparison goods spending.
- 4.9 In our view the main potential for a downturn in consumer spending is in the period up to 2011. Thereafter the UK economy may return to relatively more buoyant conditions. Clearly the performance of the economy and the resultant changes in consumer spending will need to be monitored over time. At the present time, we consider that it would be quite feasible for comparison goods spending growth in the Study Area to decline to about 3% per annum for the next few years and potentially return to a higher level of 3.5% per annum after 2011. These are the assumptions which we consider in the sensitivity test which is incorporated in the next Section.

¹ Calculated from Data Consultancy Information Brief 98/2, Table 1.

² Calculated from MapInfo Information Brief 05/2, Table 1.

5 RETAIL CAPACITY MODELLING

Introduction

- 5.1 The ORNS 2004 concluded that there is a future need, in terms of expenditure which could support comparison floorspace growth within Oxford City as a whole: of between **11,000 sq m and 13,000 sq m by 2006**, and **31,000 to 36,500 sq m by 2011** (on the assumption that the City centre floorspace will continue to trade at current high levels).
- 5.2 In terms of convenience floorspace, ORNS 2004 concluded that the future capacity within Oxford City as a whole is low, **approximately 1,400 sq m net by 2011** which is the size of a relatively small supermarket. Because of this, and the fact that the city is relatively well provided for in terms of existing foodstores, we did not recommend that there is a need to make a specific allocation within the emerging local plan.
- 5.3 In this section we set out the method and findings of our updated retail capacity modeling exercise, using 2005 as our base year, and projecting forward to 2011, 2016, 2021 and 2026. In order to be consistent with ORNS 2004 we have used the same basic methodology for calculating the capacity. The methodology is set out in para 5.2 to para 5.32 of ORNS 2004. However we have updated the assumptions in line with new data that has been published since ORNS 2004, and we discuss this in more detail below

Floorspace requirement for comparison goods

Step 1 The Study Area

- 5.4 We have maintained the same Study Area for comparison goods as ORNS 2004. The Study Area covers an area wider than Oxford City Council, and is divided into six zones (see map in Appendix 1). We have included a schedule of wards that make up each of the six zones in **Table 1**.
- 5.5 There have been some changes in ward boundaries since ORNS 2004 at an administrative level, so there have been some slight changes in the zone boundaries. **Map 1** shows the Study Area and zones.

Step 2 The Study Area Population

- 5.6 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 forecast provided by Oxfordshire and Buckinghamshire County Councils. As West Berkshire do not make these forecasts we used DCLG's sub-national population projections for the years 2005-2009.
- 5.7 To be consistent with ORNS 2004 we have split out the student population from the resident (non-student) population because population forecasts are based on Census 2001 which was taken during term time. Oxford has a particularly large student population which increases the total population during term time (by some 30,000) and has an impact on our Study Area Population figures and, therefore, total expenditure.
- 5.8 **Table 2** sets out the population for each Study Area zone and the change in population in each zone between the base and forecast years, in terms of absolute numbers and percentage growth. In 2005 the total population of the Study Area is just over 535,000. By 2026 the population is 661,200. During the study period 2005 - 2026, the population has increased by approximately 66,000 or 12.4%.
- 5.9 Since ORNS 2004, ONS sub national population projections (which are consistent with 2004 mid-year estimates, produced in December 2005) have changed, which has resulted in an increase in population in the Study Area which is most notable in Zone 1:

the population of this zone in 2003 (as set out in ORNS 2004) is 146,216; in the Study Update, the population of this zone is 156,678 in 2005.

Step 3 Per capita expenditure estimates

- 5.10 Per capita expenditure estimates for comparison goods expenditure have been obtained from the latest Experian (2005) data. Reflecting the methodology in ORNS 2004, we have also taken account of the student population expenditure, and again taken 50% of the latest Experian UK per capita expenditure³, which we believe to be reasonable given that most students are only resident during term times.
- 5.11 We have taken account of special forms of trading (SFT) deducting 6.3% in the base year 2005, rising to 12% in 2011, and rising again to 12.4% at 2016⁴. Experian does not forecast SFT beyond 2015, however we have increased SFT to 13% in the years 2021 - 2026. This compares with ORNS 2004 which deducted 7.7% in the base year for SFT, rising by 2% per annum.
- 5.12 We have also deducted SFT from student expenditure, at a constant rate of 6.3% throughout the study period⁵. This compares to ORNS 2004 which deducted 7.7% for SFT from student expenditure throughout the study period.
- 5.13 We have used per capita expenditure growth rates set out in Experian Retail Planner Briefing Note 4.0. We have applied 3.8% per annum for the entire Study Period⁶ to both resident and student populations. This compares with ORNS 2004 which used a growth rate of 3.9% per annum from Experian Consensus for the entire Study Period.
- 5.14 The results are set out in **Table 3**.

Step 4 Total Expenditure Estimates

- 5.15 The total available comparison expenditure in each zone is calculated by applying the population forecast to the per capita expenditure figures. The results are presented in **Table 4**, which shows that in 2005 the Study Area generates a total of just over £1,450m, which is projected to increase to almost £3,320m by 2026: a total growth in expenditure of nearly £1,870m in the study period.

Step 5 Retail Warehouse Expenditure

- 5.16 The household survey undertaken for the ORNS 2004 showed that some 6% of comparison expenditure was going to out of centre retail warehouses. We deducted 10% in the ORNS 2004 study to make the estimates more robust, and we have continued to use this proportion of 10% for retail warehouse expenditure in the Study Update. **Table 5** sets out the amount of total expenditure which flows to out of centre retail warehousing, and that which is spent in all other conventional retail formats.

Step 6 Turnover of existing centres from within the Study Area in base year

- 5.17 In calculating the turnover of the existing centres within the Study Area we have applied the market share estimates derived from the Household Survey (ORNS 2004) to the amount of available expenditure generated within each zone. **Table 6** sets out the results.
- 5.18 ORNS 2004 found that Oxford City centres have a market share of 53.7%. In 2005 Oxford City centres achieved a 54.9% market share. This slight increase in market share is due to the large population increase in Zone 1 in 2005, where the Oxford City

³ ie. 50% of £2,766 in 2005 at 2005 prices (Source: Experian)

⁴ source: Table 5.1, Broad Definition of Non-Store Retail Sales - Experian Retail Planner Briefing Note 4.0, October 2006

⁵ source: Table 5.1, Broad Definition of Non-Store Retail Sales - Experian Retail Planner Briefing Note 4.0, October 2006

⁶ source: Table 3.2, EBS forecast - Experian Retail Planner Briefing Note 4.0, October 2006

centres are located: a higher population in this zone will generate a larger amount of expenditure, which will be spent in Oxford centres. As we have noted earlier, this population increase is due to changes in the ONS subnational population projections used since ORNS 2004.

Step 7 Sales densities of existing centres

- 5.19 We have calculated the turnover of existing centres, and we have maintained the assumption used in ORNS 2004 that a proportion of turnover will derive from beyond the Study Area: 10% for Oxford City centre, 5% for Cowley Centre, and 5% for 'other centres in Oxford'. Our results are set out in **Table 7**.
- 5.20 The net sales figure for City centre floorspace is taken from ORNS 2004, originally derived from the Valuation Office (VOA) which, although higher than previous OCC estimates, is the most reliable.
- 5.21 Therefore we estimate that in 2005 the sales density for the City centre comparison goods floorspace is £8,509 / sq m, and £3,933 / sq m for Cowley Centre.

Step 8 Capacity for floorspace growth

- 5.22 **Table 8** sets out the comparison goods floorspace which could be supported for the base and forecast years summarised in Figure 4.1 below. We have also included the ORNS 2004 base year (2003) total Study Area, rebased to 2005 prices⁷. We have included 2013 as a forecast year too, as the redeveloped Westgate Centre is expected to have settled trading patterns by this time.

Figure 4.1 : Comparison Goods Floorspace that could be supported at base and forecast years 2003 - 2026

| Year | 2003 | 2005 | 2011 | 2013 | 2016 | 2021 | 2026 |
|---|--------|--------|--------|--------|--------|--------|--------|
| Assumed sales density for new development | £7,500 | £7,500 | £7,500 | £8,000 | £7,500 | £7,500 | £7,500 |
| Floorspace that could be supported (sq m net) | - | 21,269 | 24,033 | 12,523 | 23,307 | 45,136 | 74,875 |

- 5.23 We have assumed in 2003 that consumer spending attracted to Oxford City centres is in equilibrium with Oxford City centres turnover. The total consumer expenditure attracted to Oxford City centres is comprised of:
- 'Expenditure retained' by Oxford City centres ie. the 2003 market share of total Study Area expenditure: 53.7%
 - 'Expenditure inflow', which is comprised of expenditure from beyond the Study Area (10% of the total expenditure for Oxford City centres), and tourist expenditure⁸.
- 5.24 In **2003**, because consumer spending is in equilibrium with turnover there is no residual expenditure, and therefore no floorspace requirement.
- 5.25 Again, in 2005 total consumer expenditure attracted to Oxford City centres is calculated in the same way as in 2003:

⁷ Rebase 2000 prices to 2005 prices using Experian Retail Planner Briefing Note 4.0 prices indices set out in Annex 1

⁸ Tourist expenditure for 2003 from ORNS 2004 is rebased to 2005 prices using Experian Retail Planner Briefing Note 4.0 price indices. Tourist expenditure is projected to increase at 1.5% per annum for the Study period (RTP assumptions).

- 'Expenditure retained' by Oxford City centres ie. the 2005 market share of total Study Area expenditure: 54.9%⁹
 - 'Expenditure inflow' which is comprised of expenditure from beyond the Study Area (10% of the total expenditure for Oxford City centres¹⁰) and tourist expenditure.
- 5.26 In **2005**, the total consumer expenditure increases at a higher rate than the turnover of Oxford City centres¹¹. Therefore there is a residual expenditure surplus which could support floorspace of 21,269 sq m net in 2005, based on an assumed sales density of £7,500 / sq m net for new development in the primary shopping area.
- 5.27 In **2011** we have included the St Aldates redevelopment as a commitment. We have assumed that this development of 7,000 sq m net has a sales density of £7,500 / sq m, reflecting its location on the secondary shopping frontage. Therefore total turnover is £52.5m. By 2011, after taking account of this commitment, the residual expenditure is some £180m which could support just over 24,000 sq m net of comparison floorspace, assuming a sales density of £7,500 / sq m (which could be expected in the primary shopping area).
- 5.28 The Westgate Centre is included as a commitment at **2013**, reflecting the assumptions made in the Westgate Partnership Retail Statement submitted in June 2006 that settled trading patterns will be achieved at this time. The turnover of the redeveloped shopping centre is calculated by applying the net increase in floorspace (34,300 sq m net) to a floorspace turnover of £8,000 / sq m net¹². Thus in 2013, turnover is estimated to be £274.4m.
- 5.29 We have assumed that the new development will have an impact on the turnover of existing floorspace, and we have therefore deducted 10% from the existing floorspace turnover to reflect this. Therefore, once the committed floorspace has been accounted for, we estimate that residual expenditure in 2013 is just over £100m. This could support a further 12,500 sq m net of floorspace, assuming a sales density of £7,500 / sq m. We have assumed a higher sales density in 2013 reflecting the sales densities that can be expected in the redeveloped Westgate centre, and other prime pitch shopping locations in 2013.
- 5.30 In **2016**, there is approximately £175m of residual expenditure which could support approximately 23,300 sq m of comparison floorspace (assuming a sales density of £7,500 / sq m, which could be expected in secondary shopping locations).
- 5.31 Table 8 shows that in **2021** there is a need which could support floorspace of 45,100 sq m which rises to 74,875 sq m in **2026** assuming a sales density of £7,500 / sq m net in both years reflecting the sales density that can be expected in secondary shopping locations at this time. However we recommend that: **extreme caution is used with these figures, and that a review of the retail capacity is undertaken in the future at five yearly intervals reflecting current evidence.** Due to the acknowledged limitations of long-term forecasting, only broad indications particularly for the last ten years, from 2016 to 2026 can realistically be used. This approach is supported by Government advice in PPS6 which advises that "the need for additional floorspace should normally be assessed no more than five years ahead."
- 5.32 The existing average sales density of the City is high (£7,500 / sq m). Apart from the Westgate Centre which is a prime pitch scheme (£8,000 / sq m) we assume a

⁹ This market share of 54.9% is constant between 2005 - 2026.

¹⁰ Expenditure inflow from beyond the Study Area increases at 3.8% (ie. per capita expenditure growth rate) after 2005. This compares to ORNS 2004 where expenditure inflow from beyond the Study Area was increased by 3.9% per annum (ie. the per capita expenditure growth rate used).

¹¹ Turnover of existing floorspace is projected to increase at 2.5% per annum for 2005 - 2011, and 2% per annum for 2011 - 2026. These assumptions are also applied to committed floorspace.

¹² A higher sales density of £8,000 / sq m is adopted for the Westgate Centre reflecting its prime retail location and the quality of proposed key anchor tenants.

continuation of a constant relatively high sales density of £7,500 / sq m. By adopting a constant sales density assumption over the whole projection period we are effectively showing a relative reduction over time since we would envisage sales densities increasing elsewhere.

Sensitivity test for comparison goods floorspace capacity

- 5.33 As previously discussed in Section Four we consider that it is appropriate to explore the implications of a downturn in consumer spending on comparison goods as a sensitivity test to inform this study.
- 5.34 To represent a downturn in spending comparable to the periods 1980 to 1984 and 1989 to 1993 outlined above, we have reduced the per capita comparison goods expenditure growth rate in the period 2005 - 2011 to 3.0% per annum. This reduced growth assumption would need to be reviewed in about 2010 in the light of actual outturn. This would then inform the appropriate assumption to adopt for the forward projection beyond 2011. For the present, we have assumed a growth rate of 3.5% p.a. for the period 2011 - 2026.
- 5.35 In terms of other assumptions we have used the same Study Area, Study Area population figures, and per capita expenditure estimates. However in this exercise whilst we have assumed that per capita growth rates are lower the amount deducted for Special Forms of Trading is the same. In addition to the St Aldates and Westgate Centre developments which have been included as commitments at 2011 and 2013 respectively, we have also included additional capacity sites at 2016 and 2021¹³. These are set out in Figure 4.2 below. In relation to these sites it is assumed that:
- Net floorspace is calculated as 70% of gross
 - Sales density is assumed to be £4,000 / sq m net, which reflects sales densities that can be achieved in the site locations set out in Figure 4.2 which are not located in the city centre.
 - It is assumed that there is a sales density growth of 2% per annum from 2011 - 2026, in line with the assumptions used in the comparison floorspace capacity exercise.

¹³ We have made assumptions when the different sites are expected to come forward in agreement with Oxford City Council.

Figure 4.2 : Additional commitments at 2016 and 2021

| | 2016 | 2021 |
|-------------------------------|--------------------|-------------------|
| John Allen Centre | 7,000 sq m | |
| Diamond Place | 1,000 sq m | |
| BMW Garage | 1,000 sq m | |
| Blackbird Leys | 3,000 sq m | |
| Barns Road Car Park | | 2,000 sq m |
| Barns Road Community Centre | | 1,500 sq m |
| County Hall | | 4,000 sq m |
| Total gross floorspace | 12,000 sq m | 7,500 sq m |
| Total net floorspace | 8,400 sq m | 5,250 sq m |

Comparison goods floorspace requirement

5.36 The implications of this reduced per capita comparison goods growth is shown in Figure 4.3 below.

Figure 4.3 : Economic Downturn Sensitivity Test: Floorspace Growth Potential

| | | Original | Sensitivity Test | Difference |
|-------------|--|----------|------------------|------------|
| 2005 | Residual Expenditure (£m) | £159.5 | £159.5 | 0 |
| | Floorspace Growth Potential (sq m net) | 21,269 | 21,269 | 0 |
| 2011 | Residual Expenditure (£m) | £180.3 | £140.5 | £39.8 |
| | Floorspace Growth Potential (sq m net) | 24,033 | 18,734 | 5,299 |
| 2013 | Residual Expenditure (£m) | £100.18 | £50.83 | £49.35 |
| | Floorspace Growth Potential (sq m net) | 12,523 | 6,354 | 6,169 |
| 2016 | Residual Expenditure (£m) | £174.8 | £77.4 | £97.4 |
| | Floorspace Growth Potential (sq m net) | 23,307 | 10,325 | 12,982 |
| 2021 | Residual Expenditure (£m) | £338.5 | £184.1 | £154.4 |
| | Floorspace Growth Potential (sq m net) | 45,136 | 24,547 | 20,589 |
| 2026 | Residual Expenditure | £561.6 | £356.5 | £205.1 |
| | Floorspace Growth Potential (sq m net) | 74,875 | 47,536 | 27,339 |

5.37 Full tables are provided in Appendix 4.

- 5.38 Future retail trends, as referred to in Section 4, make it clear that the pattern of consumer behaviour will potentially have a significant impact on the demand for additional retail floorspace. These factors include not only the level of spending growth but also the increase in internet sales, growth in sales per sqm, and the amount of comparison goods being sold in the future from supermarkets and hypermarkets. It does appear from research that a change to any of these individual factors could significantly effect the demand for floorspace.
- 5.39 In Oxford there is a scarcity of land, through a tightly drawn Green Belt, demand from a competing range of land uses for this limited supply. Oxford also has an internationally renowned historic and environmental legacy that further constrains the use of land . Government advice further encourages investment to be directed towards the established and/or emerging retail hierarchy. In Oxford this comprises the City centre and District centres.
- 5.40 Therefore in the context of the recent emerging economic forecasts, which suggest that expenditure growth is slowing down, together with Oxford's limited opportunities for development, it does seem advisable to pursue a 'pre-cautionary approach' to the expected need for retail floorspace. In these circumstances it is suggested that the 'sensitivity test' should be applied at least until 2011 until a review of trends is undertaken in 2010, or thereabouts.

Conclusions on Comparison Goods Floorspace Requirement

- 5.41 A sensitivity test has been undertaken on comparison goods expenditure to assess the implications of reduced consumer spending which may result from a downturn in the economy. The per capita expenditure growth rate has been reduced from 3.8% per annum for the entire study period 2005 - 2026, to 3.0% per annum for the period 2005 - 2011, and 3.5% per annum for the period 2011 - 2026.
- 5.42 Included within this sensitivity test scenario are additional comparison floorspace commitments: 8,400 sq m net at 2016 and 5,250 sq m net at 2021, located on sites outside the City centre. An assumed sales density of £4,000 / sq m net has been used to for these commitments to calculate turnover.
- 5.43 Figure 4.3 above sets out the results of the sensitivity test: the residual expenditure has been converted to a floorspace figure using an assumed sales density of £7,500 / sq m, which is the same sales density used in the original scenario. It is clear that with a lower per capita expenditure growth rate, the floorspace requirement is considerably reduced in the study period.
- 5.44 In 2005, the floorspace requirement is the same under the original scenario and the sensitivity test: 21,269 sq m net. By 2011, in the original scenario the requirement for comparison floorspace is some 5,299 sq m net higher than under the sensitivity test scenario. For each study year throughout the study period until 2026 the floorspace requirement in the original scenario continues to be higher than under the sensitivity test scenario. Furthermore, the difference in floorspace requirements between the two scenarios increases during the study period. Therefore in 2011 there is a requirement for 5,299 sq m net less floorspace in the sensitivity test than compared to the requirement under the original scenario; and by 2026, the sensitivity test scenario requires 27, 339 sq m net less floorspace than compared to the requirement under the original scenario.
- 5.45 The findings of the sensitivity test are significant for Oxford, particularly the City centre, since there is restricted availability of development sites. A reduced per capita expenditure growth rate results in a lower requirement for comparison floorspace, which may be easier to accommodate than the requirement for comparison floorspace under the original scenario.

Floorspace for convenience goods

Step 1 The Study Area

- 5.46 We have maintained the same Study Area for convenience goods as ORNS 2004. The Study Area covers the Oxford City Council administrative area.

Step 2: Study Area Population

- 5.47 Study Area Population is set out in **Table 9**. We have used 2001 Census data and the latest District level forecasts obtained from Oxfordshire County Council. Again we have split out the student population from the resident (non-student) population.
- 5.48 **Table 9** shows that the total population of the Study Area in 2005 is 146,366. This compares to the total population in 2003 of 139,421 in ORNS 2004. As we discussed earlier, the increase in population from 2003 to 2005 is a result of a change in ONS sub national population projections; the most recent ONS figures project a higher population in Oxford City Council administration area.
- 5.49 Between 2005 - 2011, the population increases by 7.4%, rising to 157,346. The population in 2016 is 163,679 which is a 4% increase. In 2021 the population rises by a further 3.1% to 168,827. In the final forecast year, 2026, population will be 174,269, which represents an increase of 3.2% since 2021.

Steps 3 and 4: Expenditure Estimates and Growth

- 5.50 Per capita expenditure estimates for convenience goods expenditure has been obtained from the latest Experian data: 2005 expenditure at 2005 prices. The per capita expenditure on convenience goods in the Study Area is £1,443 per annum for 2005.
- 5.51 To be consistent with ORNS 2004 methodology we have taken account of student expenditure, assuming that students spend 75% of the national average on convenience goods, reflecting the fact that most students are only resident in term time. Therefore we have assumed that in 2005 students spend £1,190 on convenience goods.
- 5.52 Expenditure on Special Forms of Trading (SFT) was taken account of in ORNS 2004 by deducting 1.8%, rising to 2% per annum to account for the increasing popularity of internet food shopping. However we have not deducted a proportion of the expenditure for SFT for convenience goods in the Study Update since food ordered from supermarkets via the internet is usually picked and packed from the local supermarket, rather than a large warehouse which might lie outside the Study Area.
- 5.53 For convenience goods, we have used the following growth rates from Experian Retail Planner Briefing Note 4.0.
- 2005 - 2011: 0.7% per annum (Experian Consensus Forecast 2006 - 2015)
 - 2011 - 2026: 0.6% per annum (Experian Ultra Long Term Forecast 2006 - 2015)
- 5.54 These convenience expenditure growth rates are lower than those used in ORNS 2004, which projected forward expenditure at 1.0% per annum for the entire Study period.
- 5.55 Total expenditure on convenience goods in the Study Area is calculated by applying the population projections to the per capita expenditure figures. **Table 10** shows that in 2005 the approximate total expenditure generated in the Study Area is £204m, which increases to nearly £229m in 2011. The total expenditure then increases to almost £245m in 2016, and to approximately £260m in 2021. By 2026, total expenditure is £277m. There is total growth in convenience expenditure of just over £73m in the Study period.

Step 5: Expenditure Growth Available for Supermarkets and the Convenience Stores Sector

- 5.56 In ORNS 2004, a distinction was made between the expenditure growth available for supermarkets and the convenience stores sector. An assumption was made that approximately 70% of convenience goods spending is on supermarkets, while the remaining 30% was on convenience stores, reflecting the Expenditure and Food Survey (2003).
- 5.57 However, this approach has not been taken in the Study update because there is a wide range of turnovers for stores defined as 'supermarkets': different formats such as small supermarkets have a lower turnover compared to large out of town supermarkets; and deep discounters such as Aldi and Lidl have much lower turnovers compared to more 'up market' operators such as Marks and Spencer or Waitrose.
- 5.58 In Step 6 we indicate that there are a range of potential sales densities by converting projected turnover into floorspace total using a sales density of £5,000 / sq m net for the smaller convenience store or £10,000 / sq m net for the larger supermarkets, to give a range of floorspace which could be supported in each Study year.

Step 6: Capacity for New Convenience Goods Floorspace

- 5.59 We have provided two scenarios of convenience goods floorspace requirements. **Scenario A** assumes that the committed floorspace at 2008 includes: Lidl, M&S in Summertown and M&S in Oxford Retail Park which have all been granted planning permission¹⁴ (see **Table 11A** in Appendix 3). **Scenario B** assumes that the committed floorspace at 2008 is the three supermarkets with planning permission, and the Aldi supermarket which has been recommended for approval (see **Table 11B**).
- 5.60 We summarise the results in Figure 4.4 below:

¹⁴ Lidl (1029 sq m net; turnover £2,798 / sq m net) granted permission at appeal. Marks and Spencer Oxford Retail Park (929 sq m net; turnover £9,457 / sq m net) granted permission December 2006. Marks and Spencer Summertown (1,857 sq m net; turnover £9,457 / sq m net) granted permission December 2006.

Figure 4.4 : Convenience Goods Floorspace Requirement at Base and Forecast Years 2003 - 2026

| Year | 2003 | 2005 | 2008 | 2011 | 2016 | 2021 | 2026 |
|--|------|-------|------|-------|-------|-------|-------|
| Scenario A | | | | | | | |
| Assumed sales density £5,000 / sq m net | - | 5,022 | 720 | 2,198 | 3,901 | 5,389 | 7,045 |
| Assumed sales density £10,000 / sq m net | - | 2,511 | 360 | 1,099 | 1,950 | 2,695 | 3,523 |
| Scenario B | | | | | | | |
| Assumed sales density £5,000 / sq m net | - | 5,022 | 61 | 1,527 | 3,209 | 4,677 | 6,311 |
| Assumed sales density £10,000 / sq m net | - | 2,511 | 30 | 763 | 1,605 | 2,338 | 3,156 |

- 5.61 Again, in both scenarios we have included 2003 as a study year, re-basing the total Study Area expenditure set out in ORNS 2004 from 2000 prices to 2005 prices¹⁵. In both scenarios we have also included 2008 as a study year, on the basis that this is the year that the commitments could be expected to have settled trading patterns.
- 5.62 The methodology used to calculate the capacity for new convenience goods floorspace is the same for that used in the comparison goods floorspace calculations.
- 5.63 In **2003** total consumer expenditure attracted to Oxford City centres is assumed to be in equilibrium with Oxford City centres turnover. Total consumer expenditure attracted to Oxford City centres is the sum of:
- 'Expenditure retained' in the Study Area (86.3% of the total Study Area expenditure)
 - 'Expenditure inflow' from beyond the Study Area, which is assumed to be 10% of the total retained expenditure.
- 5.64 As expenditure and turnover are in equilibrium in 2003, there is no floorspace requirement.
- 5.65 Again in **2005** total consumer expenditure attracted to Oxford City centres is the sum of 'expenditure retained' in the Study Area (86.3%) and 'expenditure inflow' from beyond the Study Area. Again we have assumed this to be 10% of the total retained expenditure, and from 2005 onwards this inflow increases at 0.7% per annum until 2011, and then at 0.6% per annum from 2011 - 2026¹⁶.
- 5.66 In 2005, there is a substantial residual expenditure. This is because the amount of available consumer expenditure is greater than the turnover for Oxford City centres'

¹⁵ Rebase 2000 prices to 2005 prices using Experian Retail Planner Briefing Note 4.0 prices indices set out in Annex 1

¹⁶ In ORNS 2004 the expenditure inflow, which was 10% of the total retained expenditure in the base year, was increased by the per capita expenditure growth rate of 1.0% / annum on the assumption that expenditure inflow will only increase at the rate of per capita expenditure growth. The same approach is taken in the Study update: expenditure inflow is assumed to be 10% of the total retained expenditure, and the growth rate is 0.7% for the period 2005 - 2011, and 0.6% for the period 2011 - 2026 which are the per capita growth rates used in this Study update.

floorspace from total consumer expenditure¹⁷. An estimated 5,022 sq m net of floorspace can be supported, assuming a sales density of £5,000 / sq m net; half of this (2,511 sq m net) can be supported if the sales density is £10,000 / sq m net.

- 5.67 In **2008** we assumed that the commitments will have settled trading patterns. In **Scenario A**, where Aldi is not included, there is a residual expenditure of some £3.6m which would support between 720 sq m net floorspace (sales density of £5,000 / sq m) and 360 sq m floorspace (sales density of £10,000 / sq m net). In **Scenario B**, where Aldi is included as a commitment, there is a much smaller amount of residual expenditure (£0.3m) and correspondingly a smaller amount of floorspace that could be supported.
- 5.68 In **2016**, in **Scenario A** the residual expenditure is £19.5m. Between 3,900 and 1,950 sq m net of floorspace could be supported using a sales density of £5,000 and £10,000 / sq m net respectively. **Scenario B** shows there is a smaller amount of residual floorspace (£16.0m) which could support between 3,210 and 1,650 sq m net using a sales density of £5,000 and £10,000 / sq m net respectively.
- 5.69 Residual expenditure continues to increase in **2021** and **2026** in both scenarios as Table 4.2 demonstrates. **However we recommend that extreme caution is used with these figures in this long term period, and that a review of the retail capacity is undertaken in the future reflecting the current assumptions at that time.**

Additional Convenience Floorspace Commitments

- 5.70 Following the submission of the Draft Report to Oxford City Council and at the request of officers we have provided an additional estimate of convenience floorspace goods requirements which assume development at three sites at 2016.
- 5.71 The additional capacity sites are listed in Table 4.5 below:

Table 4.5 : Additional convenience capacity sites at 2016

| | 2016 | |
|----------------|------------|-------------------|
| | gross | net |
| Crowell Road | | 2,325 sq m |
| Diamond Place | 3,000 sq m | 1,950 sq m |
| Blackbird Leys | 1,500 sq m | 975 sq m |
| TOTAL | | 5,250 sq m |

- 5.72 We have assumed that net convenience floorspace is 65% of gross, and the sales density for convenience foodstore development at these sites will be £7,500 / sq m net, with turnover increasing by 0.6% per annum from 2005 - 2026. This sales density for the 2016 commitments reflects a mid-point between a lower sales density (£5,000 / sq m net) which could be expected at Blackbird Leys where a discount supermarket might locate, and the higher sales density (£10,000 / sq m net) which could be expected at Crowell Road and Diamond Place where a Tesco or Waitrose might locate. It is worth noting that the turnover of the 2008 commitments used in the original scenario reflect a range of sales densities, as provided in Retail Rankings 2006.
- 5.73 In Figure 4.6 below we present the estimated floorspace requirement for Scenario A, setting out the results for the original scenario which assumes commitments at 2008 (Lidl, Marks & Spencer Summertown and Oxford Retail Park), and the new scenario which assumes commitments at both 2008 and 2016. We have provided the estimated floorspace requirement using an assumed sales density of £5,000 / sq m net which could be expected in smaller supermarkets and discount supermarkets; and an

¹⁷ From 2005 onwards, sales density growth is assumed to be 0.6% per annum; this growth rate is applied to all floorspace, including the committed floorspace (source: Experian Retail Planner Briefing Note 4.0 October 2006, para 8.2)

assumed sales density of £10,000 / sq m net which could be expected for larger supermarkets such as Tesco. .

Table 4.6 : Scenario A Floorspace Growth Potential: Comparison of Original and New Scenarios

| | 2003 | 2005 | 2008 | 2011 | 2016 | 2021 | 2026 |
|-------------------------------|------|--------------|------------|--------------|---------------|---------------|---------------|
| Assumed sales density | | | | | | | |
| £5,000 / sq m net | | | | | | | |
| Original scenario | 0 | 5,022 | 720 | 2,198 | 3,901 | 5,389 | 7,045 |
| <i>New scenario</i> | 0 | <i>5,022</i> | <i>720</i> | <i>2,198</i> | <i>-3,974</i> | <i>-2,725</i> | <i>-1,315</i> |
| Assumed sales density: | | | | | | | |
| £10,000 / sq m net | | | | | | | |
| Original scenario | 0 | 2,511 | 360 | 1,099 | 1,950 | 2,695 | 3,523 |
| <i>New scenario</i> | 0 | <i>2,511</i> | <i>360</i> | <i>1,099</i> | <i>-1,987</i> | <i>-1,362</i> | <i>-658</i> |

- 5.74 In Table 4.7 below we present the results for Scenario B which includes the Aldi application in the 2008 commitments in the original scenario; again the new scenario includes the 2008 and 2016 commitments. Again we have provided a range for the estimated floorspace requirement using two assumed sales densities: £5,000 / sq m net and £10,000 / sq m net.

Table 4.7 : Scenario B Floorspace Growth Potential: Comparison of Original and New Scenarios

| | 2003 | 2005 | 2008 | 2011 | 2016 | 2021 | 2026 |
|-------------------------------|------|--------------|-----------|--------------|---------------|---------------|---------------|
| Assumed sales density: | | | | | | | |
| £5,000 / sq m net | | | | | | | |
| Original scenario | 0 | 5,022 | 61 | 1,527 | 3,209 | 4,677 | 6,311 |
| <i>New scenario</i> | 0 | <i>5,022</i> | <i>61</i> | <i>1,527</i> | <i>-4,666</i> | <i>-3,437</i> | <i>-2,049</i> |
| Assumed sales density: | | | | | | | |
| £10,000 / sq m net | | | | | | | |
| Original scenario | 0 | 2,511 | 30 | 763 | 1,605 | 2,338 | 3,156 |
| <i>New scenario</i> | 0 | <i>2,511</i> | <i>30</i> | <i>763</i> | <i>-2,333</i> | <i>-1,719</i> | <i>-1,025</i> |

- 5.75 Full tables are provided in Appendix 4.

Conclusions on Convenience Goods Floorspace Requirements

- 5.76 In the original scenario we estimated the convenience goods floorspace which could be supported by taking account of convenience floorspace commitments at 2008; Scenario A included Lidl, and Marks & Spencer Summertown and Oxford Retail Park and Scenario B included Aldi in addition to the other three commitments. In the new scenario we included commitments at 2008 and 2016; again we have provided within this Scenarios A and B. As we have set out above we have provided a range of estimated additional floorspace for both the original and new scenarios by converting the residual expenditure into floorspace by using two sales densities: £5,000 / sq m net and £10,000 / sq m net.
- 5.77 With the addition of commitments at 2016 in both Scenario A and B, it is clear that after this date there are negative floorspace needs. This negative floorspace requirement is greater in the case of Scenario B, since the Aldi application has been included at 2008, thus absorbing more of the estimated residual expenditure.
- 5.78 We do not consider that the quantitative assessments of convenience goods floorspace requirements should be applied in an overly prescriptive manner in the development control context, provided that new proposals satisfy the PPS6 sequential test. This is for a range of qualitative factors:
- Provided that foodstore provision is within or on the edge of one of Oxford's District Centres then there will be a beneficial effect from the provision of an additional store;

- Oxford is not represented by the full range of convenience goods operators and the introduction of a 'new' retailer could have beneficial competition effects, as suggested in the recent report of the Competition Commission;
- The introduction of a new foodstore to the District Centres could well precipitate a rationalization of existing convenience outlets which may mean that the eventual net increase in space provided is less than the gross area of any new proposal;
- Investment in foodstores is usually rather 'lumpy' given the scale of store formats and it is often difficult to achieve a smooth incremental progression towards quantitatively derived assessments of need at any given target year; sometimes the investment has to be made in advance of the theoretical target need requirement.

6 THE RETAIL STRATEGY

Introduction

- 6.1 In this section we outline a potential approach for future retail provision. First we propose a Primary Shopping Area in the City Centre. Second we look at the location and proposed use for the Development Sites set out in the adopted local plan. Thirdly we outline a spatial strategy for the short, medium and long term.

Proposed Primary Shopping Area Within the City Centre

- 6.2 PPS6 provides a definition of a Primary Shopping Area:

Defined area where retail development is concentrated (generally comprising the primary and those secondary shopping frontages which are contiguous and closely related to the primary shopping frontage).¹⁸

- 6.3 We have defined a Primary Shopping Area in Oxford, which draws a boundary around the core shopping area which is comprised of the primary and secondary shopping frontages. These frontages are concentrated around High Street, Cornmarket, Queen Street, George Street, Magdalen Street, St Aldates, and Gloucester Green and the smaller interlinking streets.
- 6.4 The proposed Primary Shopping Area also includes the whole of the Westgate shopping centre development site which is located to the south of the core shopping area. The development site land between St Aldates & Queen Street is also included in the proposed Primary Shopping Area.
- 6.5 The Gloucester Green bus station and the secondary shopping frontages to the west of the core shopping area are included in the western part of the proposed area. The Oxford Playhouse Theatre and the Randolph Hotel on Beaumont Street, which are key town centre uses and local landmarks, lying to the north of the core shopping area, are included in the northern part of the proposed Primary Shopping Area.
- 6.6 Map 2 in Appendix 5 shows the extent of the proposed Primary Shopping Area boundary. (boundary amended to delete Abbey Place but add County Hall).

Accommodating Additional Need: Development Sites

- 6.7 ORNS 2004 set out potential development sites in Section 6. We provide here a revised list of potential development sites which reflects the Development Sites set out in the adopted Local Plan (November 2005), and the planning permissions which have been granted in recent months. More details on these sites are set out in Appendix 6.
- 6.8 Site DS 88 Westgate Shopping Centre has recently been granted planning permission and is therefore not included in this summary of future potential development sites.

Primary Shopping Area sites

- 6.9 There are three sites within the proposed Primary Shopping Area which are identified as development sites in the adopted plan:
- DS 1 Abbey Place Car Park, Oxford City Centre
 - DS 77 Land to the West of St Aldates & South of Queen Street
 - DS 54 Odeon Cinema, George Street.

¹⁸ Table 2, Annex A, PPS 6 (2005)

- 6.10 The Abbey Place Car Park development site is part of the Westgate Centre redevelopment and is therefore not available for accommodating additional development.
- 6.11 We understand that an application to develop the land west of St Aldates and South of Queen Street for retail uses will be submitted later this year, and we have included the additional 7,000 sq m gross of comparison floorspace proposed as a commitment in our capacity modeling calculations. Therefore this site cannot accommodate further additional floorspace.
- 6.12 Therefore the remaining opportunity for development in the proposed Primary Shopping Area is the Odeon Cinema site on George Street. Although the redevelopment of this site would strengthen the secondary shopping frontages located at Gloucester Green, the adopted plan states that this site can only be redeveloped if an alternative provision for the existing use can be found. It is anticipated that as part of the renaissance of the West End the cinema will be redeveloped, with active frontages to the road frontages. It is unlikely that this will add a significant amount of retail floorspace.
- 6.13 Therefore development site opportunities beyond the proposed Primary Shopping Area should be considered for further retail floorspace in the City centre. These are examined below.

Other City Centre sites

- 6.14 There are five identified development sites which are within the City centre but lie just beyond the proposed Primary Shopping Area. They are all located to the west of the proposed Primary Shopping Area, and redevelopment of these sites would rejuvenate this side of the City Centre. These sites are:
- DS 14 Castle Site
 - DS 17 Cooper Callas Site, Paradise Street
 - DS 35 Hythe Bridge Street and Park End Street
 - DS 78 St Aldates Regeneration Zone
 - DS 91 Worcester Street Car Park
- 6.15 The Castle Site has now been developed, and was opened by the Queen in May 2006.
- 6.16 The Hythe Bridge Street and Park End Street sites are bounded by street specific shopping frontages and the sites are under used. The West End Area Action Plan envisages the redevelopment of this site, with the existing A3-A5 uses being replaced. Again, this would not add to the retail floorspace.
- 6.17 The other development sites which are located in the City centre are, like the Castle Site, also for mixed use development where retail is included but is not the dominant use. For example Worcester Street Car Park is identified as a suitable location for a new entertainment quarter. The Cooper Callas Site is proposed primarily for residential development, with some retail permitted, and the St Aldates Regeneration Zone allows for development of retail at ground floor. Therefore the potential to include a large quantum of retail floorspace on these sites is limited.
- 6.18 The West End Area Action Plan has considered the need for additional retail floorspace being identified as part of this Retail Needs Study (Interim Update). Therefore the County Hall site has been identified as a site with potential for some additional retail floorspace - especially on the ground floor. This site is adjacent to the Westgate shopping centre, and Thames Street where the bus stops will be relocated following the pedestrianisation of Queen Street.

Cowley

- 6.19 There are two development sites identified in Cowley:
- DS 8 Between Towns Road
 - DS 18 Cowley Centre: Templars Square Shopping Centre and Crowell Road Car Park, Between Towns Road.
- 6.20 The Cowley Centre (DS 18) is considered to have potential for enhancement, extension and reorganisation. It is identified as a Primary District shopping centre, in the Preferred options of the Core Strategy. This centre is the best performing centre, with the greatest floorspace, largest proportion of retail uses and a diverse range and type of units. The centre is well served by public transport but also has three multi-storey car parks and a large open surface car park. A major redevelopment and upgrading of the centre would not only enable the accommodation of additional retail floorspace but provide a more attractive and modern shopping environment for local residents and the wider catchment area.
- 6.21 The other development site (DS.8), located on Between Towns Road, is sited to the east of the retailing located at the Cowley Centre and the John Allen Retail Park and therefore it is not so well linked to the existing retail provision, which may limit the number of retailers interested in locating there.

Headington

- 6.22 There are no development sites allocated for retail use, or mixed use including retailing, within or adjacent to the designated shopping frontage in this district centre. Potential development opportunities should however be explored to encourage the provision of some additional floorspace. This could include identifying sites not presently allocated for development, extensions to existing premises and or consolidation. Consideration should also be given to any potential for extending the District centre boundary. It is important to promote appropriate commercial developments which could positively add to the vitality and viability of this centre. Further measures that improve the attractiveness and public realm should also be encouraged.

Summertown

- 6.23 There are three identified development sites in Summertown
- DS 11 BMW Garage Site - located at the northern end of the shopping frontage on Banbury Road.
 - DS 24 Diamond Place, Ferry Pool Car Park - located at the southern end of the Banbury Road.
 - DB 81 Suffolk House, Banbury Road - located at the northern end of the shopping frontage.
- 6.24 These sites are all located on the shopping frontage in Summertown, thereby offering opportunities to strengthen the existing shopping provision. Diamond Place is the largest development site located here, which could enable comparison and / or convenience development. There are constraints on the other two sites which mean that little additional retail development is likely to come forward in the short term.

The Spatial Strategy: Short, Medium and Long term

- 6.25 National, regional and local planning guidance seeks to deliver sustainable retail development by locating it in existing centres, where it accessible by a range of modes of transport. Oxford City centre is identified as a Primary regional centre in the Draft South East Plan. This recognises its role as a regional hub and its importance as a

centre for both retail and non-retail uses, which includes employment leisure and cultural activities.

- 6.26 There are two major proposals for additional comparison goods floorspace in the City centre. These include the redevelopment of the Westgate shopping centre and the identified development site at St. Aldates / Queen Street. Other than the potential for some new retail development at County Hall there are limited other opportunities for accommodating any significant additional comparison floorspace in the proposed Primary Shopping Area of the City Centre.
- 6.27 There is however potential for district centre comparison goods development firstly through the intensification of Templars Square and secondly through development of a new district centre at Blackbird Leys in the medium or longer term. Blackbird Leys is currently not well served with shops, and the provision of a District Centre at this location could absorb some of the additional comparison floorspace.
- 6.28 Turning to the additional convenience floorspace, we consider that the majority of this should be located in the District Centres. In the short term, Templars Square shopping centre is the most appropriate place for this, with potential opportunities including the Crowell Road car park. Thereafter, new convenience floorspace should be directed to Blackbird Leys District Centre. Smaller additions of convenience floorspace should not be ruled out in other District Centre, in particular Summertown that has capacity to accommodate additional floorspace.

Comparison floorspace

- 6.29 The table below sets out the amount of comparison retail floorspace that can be supported in the Study period.

Table 5.1 : Comparison Goods Floorspace requirement at base and forecast years 2003 - 2026

| Year | 2003 | 2005 | 2011 | 2013 | 2016 | 2021 | 2026 |
|-----------------------------------|--------|--------|--------|--------|--------|--------|--------|
| Assumed sales density | £7,500 | £7,500 | £7,500 | £8,000 | £7,500 | £7,500 | £7,500 |
| Floorspace requirement (sq m net) | - | 21,269 | 24,033 | 12,523 | 23,307 | 45,136 | 74,875 |

Short term - up to 2011

- 6.30 While policy directs additional retail floorspace to the City Centre as a priority it is likely that only a small amount of the floorspace requirement will be met by infill sites or clusters of small units within larger mixed use schemes in the City centre. For example retail could form a small part of the redevelopment of existing sites on Hythe Bridge Street and Park End Street, but these can only accommodate small retail units. Refurbishment of existing retail units, so that they remain competitive with the Westgate Centre once it is redeveloped, may enable the accommodation of further comparison floorspace - for example the Clarendon Centre on Cornmarket.
- 6.31 The designation of Templars Square shopping centre and the John Allen Retail Park as a 'Primary' District Centre will encourage the further development of this centre, which has potential for enhancement and improvement. This will enable the provision of more comparison floorspace in the short to medium term.
- 6.32 Development of sites in the District Centres during this period will allow the accommodation of additional comparison retail floorspace. Some of the units on the John Allen Retail Park have already developed mezzanine levels; further developments like this will increase the capacity of the Retail Park.

Medium term - up to 2016

- 6.33 Comparison goods retailing normally forms a significant component of a district centre. This is especially important in Oxford where there is limited additional capacity in the City centre. The development of a proposed new centre in Blackbird Leys in this period could accommodate a significant amount of comparison floorspace, perhaps some 7,000 - 8,000 sq m (net) or more.

Long term - up to 2026

- 6.34 Beyond 2016 the amount of floorspace, which is forecast for this period should be treated with caution due to possible changes in the assumptions in the future. There are at present no obvious locations for accommodating the amount of potential floorspace that could be supported.

Sensitivity Test

- 6.35 A sensitivity test was undertaken to assess the implications of reduced consumer spending which may result in a downturn in the economy. The table below sets out the amount of comparison retail floorspace that can be supported in the study period in accordance with the sensitivity test. As previously indicated, it will be important to monitor trends in consumer expenditure growth over the next few years and by 2010 come to a view as to the most appropriate rate of growth to assume in the period 2011-2016 and thereafter. For current purposes we simply show the sensitivity test outcome as, at the time of drafting this report, it seems the most plausible outcome.

Table 5.2 : Comparison Goods Floorspace requirement at base and forecast years 2003 - 2026

| Year | 2003 | 2005 | 2011 | 2013 | 2016 | 2021 | 2026 |
|-----------------------------------|--------|--------|--------|--------|--------|--------|--------|
| Assumed sales density | £7,500 | £7,500 | £7,500 | £8,000 | £7,500 | £7,500 | £7,500 |
| Floorspace requirement (sq m net) | - | 21,269 | 18,734 | 6,354 | 10,325 | 24,547 | 47,536 |

- 6.36 We recommend that the strategy for the sensitivity test scenario is similar to the original scenario. In the short term, the focus for development should be largely in the district centres, where there is capacity. The designation of Templar's Square shopping centre and the John Allen Centre as a Primary District Centre will particularly encourage development and redevelopment at this location. In the medium term, the provision of a new district centre at Blackbird Leys will absorb some of the additional floorspace requirement. In the long term, beyond 2016, the estimated floorspace requirement should be treated with caution since assumptions may change in the future.

Convenience floorspace

- 6.37 The table below sets out the convenience retail floorspace requirement during the Study period.

Table 5.3 : Convenience Goods Floorspace Requirement at Base and Forecast Years 2003 - 2026

| Year | 2003 | 2005 | 2008 | 2011 | 2016 | 2021 | 2026 |
|--|------|-------|------|-------|-------|-------|-------|
| Scenario A | | | | | | | |
| Assumed sales density £5,000 / sq m net | - | 5,022 | 720 | 2,198 | 3,901 | 5,389 | 7,045 |
| Assumed sales density £10,000 / sq m net | - | 2,511 | 360 | 1,099 | 1,950 | 2,695 | 3,523 |
| Scenario B | | | | | | | |
| Assumed sales density £5,000 / sq m net | - | 5,022 | 61 | 1,527 | 3,209 | 4,677 | 6,311 |
| Assumed sales density £10,000 sq m net | - | 2,511 | 30 | 763 | 1,605 | 2,338 | 3,156 |

Short term - up to 2011

- 6.38 The development of two scenarios in the retail capacity modeling exercise shows that there is sufficient residual retail expenditure to support the proposed Aldi foodstore. If the Aldi foodstore is granted permission there is a very small additional floorspace requirement, which we do not consider needs to be planned for. If the Aldi foodstore is not granted permission the additional floorspace should be directed to the District Centres, especially Templars Square, Cowley.

Medium term - up to 2016

- 6.39 In the medium term, additional retail floorspace should be accommodated in the new District Centre in Blackbird Leys: a major supermarket could be located here. This will complement the comparison goods floorspace located here.

Long term - up to 2026

- 6.40 During this time period our recommendations for convenience floorspace are the same for comparison floorspace: the amount of floorspace which is forecast for this period should be treated with caution due to possible changes in the assumptions in the future.
- 6.41 The strategy proposed here does not rule out small scale convenience floorspace applications during the period up to 2026 which should be considered on a case by case basis.

New scenario: additional commitments at 2016

- 6.42 We have provided a new scenario which takes account of additional convenience floorspace commitments at 2016. The table below sets out the convenience retail floorspace requirement during the Study period.

Table 5.4 : Convenience Goods Floorspace Requirement at Base and Forecast Years 2003 - 2026

| Year | 2003 | 2005 | 2008 | 2011 | 2016 | 2021 | 2026 |
|--|------|-------|------|-------|--------|--------|--------|
| Scenario A | | | | | | | |
| Assumed sales density £5,000 / sq m net | - | 5,022 | 720 | 2,198 | -3,974 | -2,725 | -1,315 |
| Assumed sales density £10,000 / sq m net | - | 2,511 | 360 | 1,099 | -1,987 | -1,362 | -658 |
| Scenario B | | | | | | | |
| Assumed sales density £5,000 / sq m net | - | 5,022 | 61 | 1,527 | -4,666 | -3,437 | -2,049 |
| Assumed sales density £10,000 / sq m net | - | 2,511 | 30 | 763 | -2,333 | -1,719 | -1,024 |

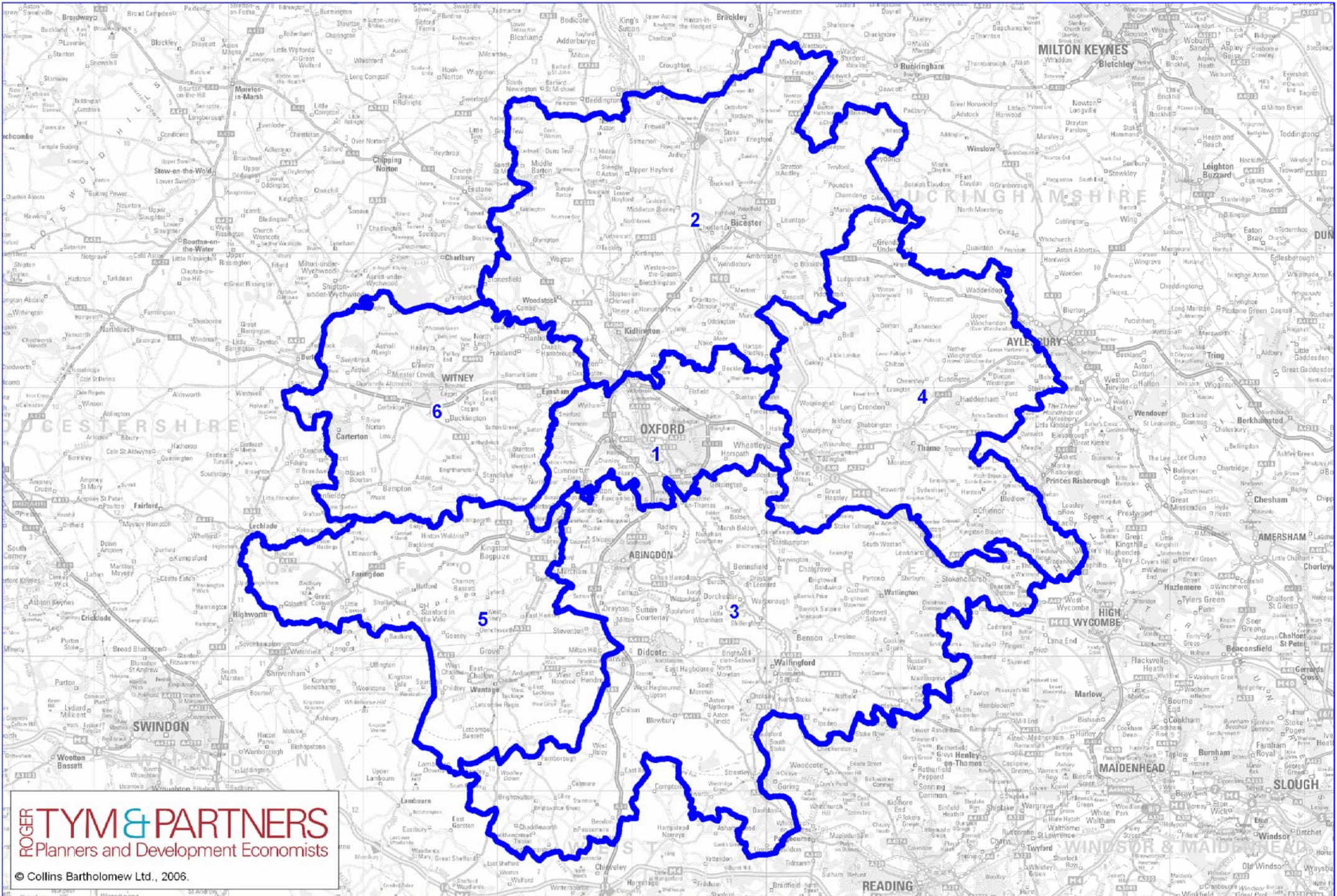
Strategy

- 6.43 The table shows that in the **short term** (up to 2011) there is sufficient residual expenditure to support the commitments at 2008, including the Aldi application (as demonstrated under Scenario B). In the **medium term**, up to 2016, the addition of three new commitments means that there is a negative requirement for convenience floorspace since there is not enough residual expenditure to support them. However the local authority will consider favourably schemes, which come forward on allocated development sites within District centres during this period, We recommend that the estimated floorspace requirement for the long term should be treated with caution due to possible changes to assumptions in the future.

APPENDIX 1

Map 1: Study Area (Comparison Retail Capacity Modelling)

Map 1: Oxford Retail Needs Study Update – Study Area (Comparison goods)



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APPENDIX 2

Comparison Goods Retail Capacity Modelling Tables 1 - 8

Table 1

| 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 |

Table 2
Population Projections at Base and Forecast Years

| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | All Zones Total |
|-------------------------------------|----------------|---------------|----------------|---------------|---------------|---------------|-----------------|
| 2005 Total Population | 156,678 | 82,429 | 144,483 | 47,263 | 40,412 | 63,856 | 535,121 |
| Resident (non-student) Population | 126,527 | 79,793 | 139,335 | 45,575 | 39,007 | 61,773 | 492,010 |
| Student Population | 30,151 | 2,636 | 5,148 | 1,688 | 1,405 | 2,084 | 43,111 |
| 2011 Total Population | 167,002 | 86,232 | 147,073 | 48,798 | 41,069 | 65,361 | 555,535 |
| Resident (non-student) Population | 134,686 | 83,474 | 141,828 | 47,053 | 39,641 | 63,229 | 509,911 |
| Student Population | 32,316 | 2,758 | 5,245 | 1,745 | 1,427 | 2,133 | 45,624 |
| 2005-2011 Numeric Increase | 10,325 | 3,803 | 2,590 | 1,535 | 657 | 1,505 | 20,414 |
| Percentage Increase | 6.6% | 4.6% | 1.8% | 3.2% | 1.6% | 2.4% | 3.8% |
| 2016 Total Population | 173,151 | 89,405 | 149,524 | 50,027 | 41,795 | 66,735 | 570,637 |
| Resident (non-student) Population | 139,572 | 86,546 | 144,189 | 48,237 | 40,342 | 64,558 | 523,444 |
| Student Population | 33,578 | 2,859 | 5,335 | 1,790 | 1,453 | 2,177 | 47,193 |
| 2011-2016 Numeric Increase | 6,148 | 3,173 | 2,451 | 1,229 | 726 | 1,374 | 15,102 |
| Percentage Increase | 3.7% | 3.7% | 1.7% | 2.5% | 1.8% | 2.1% | 2.7% |
| 2021 Total Population | 178,321 | 92,643 | 152,452 | 51,489 | 42,694 | 68,436 | 586,035 |
| Resident (non-student) Population | 143,706 | 89,680 | 147,010 | 49,645 | 41,210 | 66,203 | 537,455 |
| Student Population | 34,615 | 2,963 | 5,442 | 1,844 | 1,484 | 2,233 | 48,580 |
| 2016-2021 Numeric Increase | 5,171 | 3,238 | 2,928 | 1,462 | 899 | 1,701 | 50,915 |
| Percentage Increase | 3.3% | 3.9% | 2.0% | 3.1% | 2.2% | 2.7% | 2.9% |
| 2026 Total Population | 183,743 | 95,558 | 155,333 | 53,028 | 43,558 | 70,007 | 601,226 |
| Resident (non-student) Population | 148,034 | 92,502 | 149,786 | 51,127 | 42,044 | 67,722 | 551,216 |
| Student Population | 35,709 | 3,056 | 5,547 | 1,901 | 1,514 | 2,284 | 50,010 |
| 2021-2026 Numeric Increase | 5,421 | 2,915 | 2,881 | 1,539 | 864 | 1,570 | 45,691 |
| Percentage Increase | 3.0% | 3.1% | 1.9% | 3.0% | 2.0% | 2.3% | 2.6% |
| 2005 - 2026 Total Population | | | | | | | |
| 2005-2025 Numeric Increase | 27,065 | 13,128 | 10,850 | 5,765 | 3,146 | 6,150 | 66,105 |
| Percentage Increase | 17.3% | 15.9% | 7.5% | 12.2% | 7.8% | 9.6% | 12.4% |

NOTES:
Source: All population figures are based on 2001 ward-level Census data, and projected forward to 2005, 2011, 2016, 2021 and 2026 using the latest district level forecasts from Oxfordshire and Buckinghamshire County Councils. (ONS growth rate is used)

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.

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 £ |
|---|-------------|-------------|-------------|-------------|-------------|-------------|
| 2005 Resident (non-student) Expenditure | 2,721 | 2,900 | 2,853 | 2,952 | 2,948 | 2,810 |
| Student Expenditure | 1,296 | 1,296 | 1,296 | 1,296 | 1,296 | 1,296 |
| 2011 Resident (non-student) Expenditure | 3,196 | 3,407 | 3,352 | 3,467 | 3,463 | 3,301 |
| Student Expenditure | 1,621 | 1,621 | 1,621 | 1,621 | 1,621 | 1,621 |
| 2016 Resident (non-student) Expenditure | 3,834 | 4,086 | 4,020 | 4,159 | 4,154 | 3,960 |
| Student Expenditure | 1,953 | 1,953 | 1,953 | 1,953 | 1,953 | 1,953 |
| 2021 Resident (non-student) Expenditure | 4,589 | 4,890 | 4,811 | 4,977 | 4,971 | 4,739 |
| Student Expenditure | 2,354 | 2,354 | 2,354 | 2,354 | 2,354 | 2,354 |
| 2026 Resident (non-student) Expenditure | 5,529 | 5,893 | 5,798 | 5,998 | 5,990 | 5,710 |
| Student Expenditure | 2,836 | 2,836 | 2,836 | 2,836 | 2,836 | 2,836 |

NOTES:

Source: All data derived from Experian 2005 per capita annual comparison goods expenditure estimates. Resident (non student) expenditure figures are based on the local area estimates. The student expenditure figures are taken as 50% of Experian 2005 base (UK) comparison goods expenditure estimates.

Growth rates are sourced from Experian Retail Planner Briefing Note 4.0 (October 2006). Resident (non student) and student expenditure growth rates are 3.8% for the Study period (EBS Forecast 2006 - 2015)

SFT has been deducted, based on Experian Retail Planner Briefing Note 4.0 (October 2006) - using the proportions set out for 'Broad Definition of Non-Retail sales'.

For Resident (non-student). 2005: 6.3% deducted; 2011: 12.0% deducted; 2016: 12.4% deducted; 2021 - 2026: 13% deducted.

SFT deducted for students held constant throughout study period: 6.3% for 2005 - 2026.

All monetary values are held constant at 2005 prices.

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 |
| 2005 Total Expenditure | 383.4 | 234.8 | 404.2 | 136.7 | 116.8 | 176.3 | 1,452.2 |
| Resident (non-student) Expenditure | 344.3 | 231.4 | 397.5 | 134.5 | 115.0 | 173.6 | 1,396.3 |
| Student Expenditure | 39.1 | 3.4 | 6.7 | 2.2 | 1.8 | 2.7 | 55.9 |
| 2011 Total Expenditure | 482.9 | 288.8 | 483.9 | 166.0 | 139.6 | 212.2 | 1,773.3 |
| Resident (non-student) Expenditure | 430.5 | 284.4 | 475.4 | 163.1 | 137.3 | 208.7 | 1,699.4 |
| Student Expenditure | 52.4 | 4.5 | 8.5 | 2.8 | 2.3 | 3.5 | 74.0 |
| Total Growth in Expenditure 2005-2011 | 99.5 | 54.0 | 79.6 | 29.3 | 22.8 | 35.9 | 321.1 |
| 2016 Total Expenditure | 600.7 | 359.2 | 590.1 | 204.1 | 170.4 | 259.9 | 2,184.5 |
| Resident (non-student) Expenditure | 535.1 | 353.7 | 579.7 | 200.6 | 167.6 | 255.6 | 2,092.3 |
| Student Expenditure | 65.6 | 5.6 | 10.4 | 3.5 | 2.8 | 4.3 | 92.2 |
| Total Growth in Expenditure 2005-2016 | 217.4 | 124.4 | 185.9 | 67.4 | 53.6 | 83.6 | 732.3 |
| 2021 Total Expenditure | 740.9 | 445.5 | 720.1 | 251.4 | 208.3 | 319.0 | 2,685.3 |
| Resident (non-student) Expenditure | 659.4 | 438.6 | 707.3 | 247.1 | 204.8 | 313.7 | 2,570.9 |
| Student Expenditure | 81.5 | 7.0 | 12.8 | 4.3 | 3.5 | 5.3 | 114.3 |
| Total Growth in Expenditure 2005-2021 | 357.5 | 210.7 | 315.9 | 114.7 | 91.5 | 142.7 | 1,233.1 |
| 2026 Total Expenditure | 919.8 | 553.8 | 884.1 | 312.0 | 256.1 | 393.2 | 3,319.0 |
| Resident (non-student) Expenditure | 818.5 | 545.1 | 868.4 | 306.6 | 251.8 | 386.7 | 3,177.2 |
| Student Expenditure | 101.3 | 8.7 | 15.7 | 5.4 | 4.3 | 6.5 | 141.8 |
| Total Growth in Expenditure 2005-2026 | 536.4 | 318.9 | 479.9 | 175.3 | 139.3 | 216.9 | 1,866.8 |

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 2005 prices.

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 |
| 2005 Total Expenditure | 383.4 | 234.8 | 404.2 | 136.7 | 116.8 | 176.3 | 1,452.2 |
| Out-of-centre Retail Warehousing | 38.3 | 23.5 | 40.4 | 13.7 | 11.7 | 17.6 | 145.2 |
| All other Retailing | 345.0 | 211.3 | 363.8 | 123.0 | 105.1 | 158.7 | 1,307.0 |
| 2011 Total Expenditure | 482.9 | 288.8 | 483.9 | 166.0 | 139.6 | 212.2 | 1,773.3 |
| Out-of-centre Retail Warehousing | 48.3 | 28.9 | 48.4 | 16.6 | 14.0 | 21.2 | 177.3 |
| All other Retailing | 434.6 | 260.0 | 435.5 | 149.4 | 125.6 | 191.0 | 1,596.0 |
| 2016 Total Expenditure | 600.7 | 359.2 | 590.1 | 204.1 | 170.4 | 259.9 | 2,184.5 |
| Out-of-centre Retail Warehousing | 60.1 | 35.9 | 59.0 | 20.4 | 17.0 | 26.0 | 218.4 |
| All other Retailing | 540.7 | 323.3 | 531.1 | 183.7 | 153.4 | 233.9 | 1,966.0 |
| 2021 Total Expenditure | 740.9 | 445.5 | 720.1 | 251.4 | 208.3 | 319.0 | 2,685.3 |
| Out-of-centre Retail Warehousing | 74.1 | 44.6 | 72.0 | 25.1 | 20.8 | 31.9 | 268.5 |
| All other Retailing | 666.8 | 401.0 | 648.1 | 226.3 | 187.5 | 287.1 | 2,416.7 |
| 2026 Total Expenditure | 919.8 | 553.8 | 884.1 | 312.0 | 256.1 | 393.2 | 3,319.0 |
| Out-of-centre Retail Warehousing | 92.0 | 55.4 | 88.4 | 31.2 | 25.6 | 39.3 | 331.9 |
| All other Retailing | 827.8 | 498.4 | 795.7 | 280.8 | 230.5 | 353.9 | 2,987.1 |

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 estimate 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 2005 prices, and are in millions of pounds (£m).

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Table 6
Comparison Goods Spending Patterns across the Study Area Zones in 2005

| 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 | 244.5 | 97.7 | 184.2 | 27.3 | 41.4 | 63.8 | 658.8 | 50.4 |
| Cowley Centre and Retail Park | 24.6 | 5.1 | 16.9 | 3.2 | - | 2.0 | 51.8 | 4.0 |
| Other Oxford | 6.1 | - | 1.0 | - | - | - | 7.0 | 0.5 |
| Oxford City Total | 275.2 | 102.8 | 202.0 | 30.4 | 41.4 | 65.8 | 717.6 | 54.9 |
| Other Centres | | | | | | | | |
| Reading | 10.9 | - | 75.1 | 0.8 | 4.2 | 3.3 | 94.3 | 7.2 |
| Aylesbury | 4.2 | 2.0 | 1.0 | 56.0 | - | - | 63.2 | 4.8 |
| Swindon Centre | 4.0 | 0.5 | 4.5 | - | 26.8 | 14.4 | 50.2 | 3.8 |
| Witney | 3.1 | 5.1 | 1.8 | - | 2.6 | 35.6 | 48.3 | 3.7 |
| Banbury | 5.0 | 37.7 | 1.8 | 0.4 | - | 7.6 | 52.4 | 4.0 |
| Abingdon | 3.0 | - | 18.0 | - | 6.4 | 1.0 | 28.4 | 2.2 |
| Milton Keynes | 5.1 | 14.7 | 2.3 | 1.6 | - | 1.4 | 25.1 | 1.9 |
| Bicester Village Outlet | 3.9 | 12.3 | 3.6 | 1.2 | 2.2 | - | 23.1 | 1.8 |
| Cheltenham | 3.1 | 2.0 | - | - | 0.4 | 15.5 | 21.1 | 1.6 |
| Bicester Centre | 1.1 | 19.9 | 1.0 | 0.8 | - | - | 22.8 | 1.7 |
| Wallingford | - | - | 18.7 | - | - | - | 18.7 | 1.4 |
| High Wycombe | - | 0.5 | 3.7 | 9.5 | - | - | 13.7 | 1.0 |
| Other Locations | 26.4 | 13.8 | 30.3 | 22.4 | 21.1 | 14.1 | 128.1 | 9.8 |
| Sub-total Other Centres | 69.8 | 108.6 | 161.7 | 92.6 | 63.7 | 92.9 | 589.4 | 45.1 |
| Total | 345.0 | 211.3 | 363.8 | 123.0 | 105.1 | 158.7 | 1,307.0 | 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 Oxford Retail Needs Study 2004, and are based on the household survey undertaken for this Study in 2004). All monetary values in the table are held constant at 2005 prices, and are in millions of pounds (£m)

Table 7
Comparison Goods Centre Turnover and Sales Densities 2005

| Zone | Turnover Derived from Study Area 1 £m | Turnover Derived from Beyond the Study Area 2 % | £m | Tourist Expenditure 3 £m | Total Turnover £m | Sales Area 4 sqm net | Current Sales Density £/sqm |
|-------------------------------|--|--|--------|--------------------------------|-------------------------|----------------------------|-----------------------------------|
| Oxford City Centres | | | | | | | |
| Oxford City Centre | £658.8 | 10% | £73.20 | 54.1 | £786.1 | 92,379 | 8,509 |
| Cowley Centre and Retail Park | £51.8 | 5% | £2.73 | | £54.5 | 13,864 | 3,933 |
| Other Oxford | £7.0 | 5% | £0.37 | | £7.4 | | |
| Total | £717.6 | | | | £848.0 | | |

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) . Tourist expenditure for 2003 from ORNS 2004 (£58.80m) has been rebased to 2005 prices using Experian Retail Planner Briefing Note 4.0 (£52.50m). A growth rate of 1.5% has then been applied. Therefore tourist expenditure in 2005 is £54.90m at 2005 prices.

(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 2005 prices

Table 8
Comparison Goods Floorspace Requirement at Base and Forecast Years

| | 2003 | 2005 | 2011 | 2013 | 2016 | 2021 | 2026 |
|--|---------------|---------------|-----------------|------------------|-----------------|-----------------|-----------------|
| Total Study Area Expenditure (£m) (1) | £1,015.6 | £1,307.0 | £1,596.0 | £1,744.0 | £1,966.0 | £2,416.7 | £2,987.1 |
| Expenditure Retention (2) | | | | | | | |
| Current Market Shares (%) (Oxford City Centres) | 53.7 | 54.9 | 54.9 | 54.9 | 54.9 | 54.9 | 54.9 |
| Retained Expenditure (£m) | £545.4 | £717.5 | £876.2 | £957.5 | £1,079.3 | £1,326.8 | £1,639.9 |
| Expenditure Inflow (3) | | | | | | | |
| From Beyond the Study Area (£m) | £60.6 | £79.7 | £99.7 | £107.4 | £120.2 | £144.8 | £174.5 |
| Tourist Expenditure (£m) | £52.5 | £54.1 | £59.1 | £60.9 | £63.7 | £68.6 | £73.9 |
| Total Consumer Expenditure Attracted to Oxford City Centres | £658.5 | £851.3 | £1,035.1 | £1,125.8 | £1,263.2 | £1,540.2 | £1,888.3 |
| Oxford City Centres' Turnover (£m) 2003 - 2005 (4) | £658.5 | £691.8 | | | | | |
| Commitments (£m) (5) | £0.0 | £0.0 | £52.5 | £274.40 | £0.0 | £0.0 | £0.0 |
| Oxford City Centres' Turnover (£m) 2011 - 2026 (6) | | | £854.8 | £1,025.65 | £1,088.4 | £1,201.7 | £1,326.8 |
| Residual Expenditure (£m) (7) | £0.0 | £159.5 | £180.3 | £100.18 | £174.8 | £338.5 | £561.6 |
| Assumed Sales Density for New Development (£/sqm) (8) | | | | | | | |
| | £7,500.0 | £7,500 | £7,500 | £8,000 | £7,500 | £7,500 | £7,500 |
| Floorspace Requirement (sqm net) (9) | 0 | 21,269 | 24,033 | 12,523 | 23,307 | 45,136 | 74,875 |

NOTES:

(1) The total Study Area expenditure net of expenditure currently going to out-of-centre retail warehouses (see Table 5). For 2003 figures we have taken ORNS 2004 figures which are in 2000 prices and rebased them to 2005 prices.

(2) Market share is 53.7% in 2003 for Oxford City Centres (see ORNS 2004); market share rises to 54.9% in 2005 due to an increase in population in Zone 1 since ORNS 2004.

(3) Expenditure inflow - from beyond the Study Area at 10% of the total turnover of the centre in 2003 and 2005, and grown at 3.8% per annum from 2005 onwards.
Tourist expenditure source : Table 11 , The Economic Impact of Tourism in Oxford City (1996), Southern Tourist Board (April 1997): ORNS 2004 values for 2003 rebased from 2000 prices to 2005 prices, and grown at 1.5% per annum in accordance with assumptions in ORMS 2004. Comparison goods estimated to account for 90% of the total tourist retail expenditure (£65.3m).

(4) Oxford City centres' turnover 2003 - 2005 - base year figure from Table 6, with an allowance for growth in forecast years: 2.5% for 2005 -2011;

(5) At 2011 St Aldates redevelopment will create an additional 7,000 sq m of comparison retail floorspace. We have assumed that turnover will be £7,500 / sq m, with sales density increasing by 2% per annum for the period 2011 - 2026.
At 2013 Westgate Centre redevelopment will create an additional 34,300 sq m of comparison retail floorspace. We have assumed turnover to be £8000/ sq m, with an increase in turnover at 2% per annum for the period 2013 - 2026.

(6) Oxford City centre's turnover 2011 - 2026: includes Oxford City centre turnover growth at 2.5% per annum until 2011, then 2% from 2011 - 2026 (taking a 10% impact at 2013); and turnover of Westgate and St Aldates centres, with a turnover growth at 2% per annum 2011 - 2026

(7) The residual expenditure is the product of the available expenditure minus commitments.

(8) Assumed sales density for new development reflects prime shopping provision (Westgate and St Aldates) up to 2011 and secondary location thereafter.

(9) 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 2005 prices.

APPENDIX 3

Convenience Goods Retail Capacity Modelling Tables 9 - 11A & 11B

Table 9
Total Population and Population Growth in the Convenience Goods Study Area at Base and Forecast Years

| Year | 2005 (3) | 2011 | 2016 | 2021 | 2026 |
|---------------------------------------|----------------|----------------|----------------|----------------|----------------|
| Total Population | 146,366 | 157,346 | 163,679 | 168,827 | 174,269 |
| Resident (non-student) Population (1) | 117,472 | 126,288 | 131,371 | 135,502 | 139,870 |
| Student Population (2) | 28,894 | 31,058 | 32,308 | 33,325 | 34,399 |
| 2005-2011 Numeric Increase | | 10,980 | | | |
| Percentage Increase | | 7.4% | | | |
| 2011-2016 Numeric Increase | | | 6,333 | | |
| Percentage Increase | | | 4.0% | | |
| 2016 -2021 Numeric Increase | | | | 5147 | |
| Percentage Increase | | | | 3.1% | |
| 2021-2026 Numeric Increase | | | | | 5443 |
| Percentage Increase | | | | | 3.2% |

NOTES:

Source : All the population figures are based on 2001 ward-level Census data , and projected forward to 2006, 2011, 2016, 2021 and 2026 using the latest district level forecasts from Oxfordshire County Council.

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.

Table 10
Convenience Goods Expenditure and Expenditure Growth at Base and Forecast Years

| Year | 2005 | 2011 | 2016 | 2021 | 2026 |
|---|---------------|---------------|---------------|---------------|---------------|
| Per Capita Resident (non-student) Expenditure (£) (1) | 1,443 | 1,505 | 1,550 | 1,597 | 1,646 |
| Per Capita Student Expenditure (£) (2) | 1,190 | 1,240 | 1,278 | 1,317 | 1,357 |
| Total Resident (non-student) Expenditure (£M) | 169.5 | 190.0 | 203.7 | 216.5 | 230.2 |
| Total Student Expenditure (£M) | 34.4 | 38.5 | 41.3 | 43.9 | 46.7 |
| Total Expenditure (£M) (3) | 203.88 | 228.55 | 244.96 | 260.34 | 276.89 |
| Total Growth in Expenditure since 2005 (£M) | | 24.7 | 41.08 | 56.46 | 73.01 |

NOTES:

(1) Source: BSL Experian 2005 per capita annual expenditure estimates at 2005 prices, projected forward using BSL Experian Consensus expenditure growth rate 0.7% for the period 2005 - 2011 (Experian Consensus Forecast 2006 - 2015); 0.6% for the period 2011 -2026 (Experian Ultra Long Term Forecast 2006 - 2015). No deduction made for Special Forms of Trading.

(2) Student expenditure is estimated by RTP to be 75% of the national average Experian (2005) annual expenditure figure (ie 75% of the all persons figure of £1,586 in 2005 at 2005 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 Table 9.

All monetary values are held constant at 2005 prices.

Table 11A - Scenario A
Convenience Goods Floorspace Requirement at Base and Forecast Years

Commitments at 2011: Lidl, M&S Summertown, M&S Oxford Retail Park

| | 2003 | 2005 | 2008 | 2011 | 2016 | 2021 | 2026 |
|--|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Total Study Area Expenditure (£m) (1) | 175.6 | 203.9 | 216.21 | 228.5 | 245.0 | 260.3 | 276.9 |
| Expenditure Retention (2) | | | | | | | |
| Current Market Shares (%) | 86.3 | 86.3 | 86.3 | 86.3 | 86.3 | 86.3 | 86.3 |
| Retained Expenditure (£m) | £151.5 | £175.9 | £186.6 | £197.2 | £211.4 | £224.7 | £239.0 |
| Expenditure Inflow (3) | | | | | | | |
| From Beyond the Study Area (£m) | £16.8 | £19.5 | £20.0 | £20.4 | £21.0 | £21.6 | £22.3 |
| Total Consumer Expenditure Attracted to Oxford City Centres | £168.36 | £195.5 | £206.6 | £217.6 | £232.4 | £246.3 | £261.3 |
| Oxford City Centres' Turnover 2003 - 2005 (£m) (4) | £168.36 | £170.4 | | | | | |
| Commitments (5) | £0.0 | £0.0 | £29.48 | £0.0 | £0.0 | £0.0 | £0.0 |
| Oxford City Centres' Turnover (£m) 2011 -2026 (6) | | | £203.0 | £206.6 | £212.9 | £219.4 | £226.0 |
| Residual Expenditure (£m) (6) | £0.0 | £25.1 | £3.6 | £11.0 | £19.5 | £26.9 | £35.2 |
| Assumed Sales Density (£/sqm) (7) | £5,000 | £5,000 | £5,000 | £5,000 | £5,000 | £5,000 | £5,000 |
| Floorspace Requirement (sqm net) (8) | 0 | 5,022 | 720 | 2,198 | 3,901 | 5,389 | 7,045 |
| Assumed Sales Density (£/sqm) (7) | £10,000 | £10,000 | £10,000 | £10,000 | £10,000 | £10,000 | £10,000 |
| Floorspace Requirement (sqm net) (8) | 0 | 2,511 | 360 | 1,099 | 1,950 | 2,695 | 3,523 |

NOTES:

(1) Total Study Area Expenditure (see Table 11). Expenditure figure for 2003 are taken from ORNS 2004 and rebased to 2005 prices. Expenditure figure for 2008 is taken as mid-way point between study years 2005 and 2011.

(2) The current market share of stores within centres in Oxford City, plus Sainsbury, Kidlington (refer to household survey Table 15 in ORNS 2005). 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 (0.7% per annum for years 2005 - 2011; 0.6% for years 2011 - 2026) in the forecast years. (See Table 10)

(4) Oxford City centre's convenience goods turnover 2003 - 2005: In 2003 turnover and consumer expenditure attracted to Oxford City Centres is in equilibrium. Turnover growth is at 0.6% per annum (see Experian Retail Planner Briefing Note 4.0, October 2006 - para 8.2)

(5) Commitments: Lidl (1029 sq m net convenience floorspace, turnover £2798 / sq m net), M&S at Oxford Retail Park (929 sq m net convenience floorspace) and M&S at Summertown (1857 sq m net convenience floorspace; turnover £9,457 / sq m net for both M&S stores) are included.

2008 is assumed to be year at which these supermarkets will have settled trading patterns. (Retail Rankings 2006 - taking most up to date information available) Aldi has not been included in this scenario.

(6) Oxford City centres' turnover for 2011 - 2026 includes: turnover of the existing centres and turnover of commitments (including turnover growth at 0.6% per annum, see Experian Retail Planner Note 4.0 para 8.2)

(7) The residual expenditure is the product of the available expenditure minus commitments.

(8) 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 2005 prices.

Table 11B - Scenario B
Convenience Goods Floorspace Requirement at Base and Forecast Years

commitments at 2011: Aldi, Lidl, M&S Summertown, M&S Oxford Retail Park

| | 2003 | 2005 | 2008 | 2011 | 2016 | 2021 | 2026 |
|---|---------|---------|---------|---------|---------|---------|---------|
| Total Study Area Expenditure (£m) (1) | 175.6 | 203.9 | 216.21 | 228.5 | 245.0 | 260.3 | 276.9 |
| Expenditure Retention (2) | | | | | | | |
| Current Market Shares (%) | 86.3 | 86.3 | 86.3 | 86.3 | 86.3 | 86.3 | 86.3 |
| Retained Expenditure (£m) | £151.5 | £175.9 | £186.6 | £197.2 | £211.4 | £224.7 | £239.0 |
| Expenditure Inflow (3) | | | | | | | |
| From Beyond the Study Area (£m) | £16.8 | £19.5 | £20.0 | £20.4 | £21.0 | £21.6 | £22.3 |
| Total Consumer Expenditure Attracted to Oxford City Centres | £168.36 | £195.5 | £206.6 | £217.6 | £232.4 | £246.3 | £261.3 |
| Oxford City Centres' Turnover 2003 - 2005 (£m) (4) | £168.36 | £170.4 | | | | | |
| Commitments (5) | £0.0 | £0.0 | £32.78 | £0.0 | £0.0 | £0.0 | £0.0 |
| Oxford City Centres' Turnover (£m) 2011 -2026 (6) | | | £206.3 | £210.0 | £216.4 | £222.9 | £229.7 |
| Residual Expenditure (£m) (6) | £0.0 | £25.1 | £0.3 | £7.6 | £16.0 | £23.4 | £31.6 |
| Assumed Sales Density (£/sqm) (7) | £5,000 | £5,000 | £5,000 | £5,000 | £5,000 | £5,000 | £5,000 |
| Floorspace Requirement (sqm net) (8) | 0 | 5,022 | 61 | 1,527 | 3,209 | 4,677 | 6,311 |
| Assumed Sales Density (£/sqm) (7) | £10,000 | £10,000 | £10,000 | £10,000 | £10,000 | £10,000 | £10,000 |
| Floorspace Requirement (sqm net) (8) | 0 | 2,511 | 30 | 763 | 1,605 | 2,338 | 3,156 |

NOTES:

- (1) Total Study Area Expenditure (see Table 11). Expenditure figure for 2003 are taken from ORNS 2004 and rebased to 2005 prices. Expenditure figure for 2008 is taken as mid-way point between study years 2005 and 2011.
- (2) The current market share of stores within centres in Oxford City, plus Sainsbury, Kidlington (refer to household survey Table 15 in ORNS 2005). 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 (0.7% per annum for years 2005 - 2011; 0.6% for years 2011 - 2026) in the forecast years. (See Table 10)
- (4) Oxford City centre's convenience goods turnover 2003 - 2005: In 2003 turnover and consumer expenditure attracted to Oxford City Centres is in equilibrium. Turnover growth is at 0.6% per annum (see Experian Retail Planner Briefing Note 4.0, October 2006 - para 8.2)
- (5) Commitments: Aldi (810 sq m net convenience floorspace, turnover £4069 / sq m), Lidl (1029 sq m net convenience floorspace, turnover £2798 / sq m net), M&S at Oxford Retail Park (929 sq m net convenience floorspace) and M&S at Summertown (1857 sq m net convenience floorspace; turnover £9,457 / sq m net for both M&S stores) are included. 2008 is assumed to be year at which these supermarkets will have settled trading patterns. (Retail Rankings 2006 - taking most up to date information available)
- (6) Oxford City centres' turnover for 2011 - 2026 includes: turnover of the existing centres and turnover of commitments (including turnover growth at 0.6% per annum, see Experian Retail Planner Note 4.0 para 8.2)
- (7) The residual expenditure is the product of the available expenditure minus commitments.
- (8) 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 2005 prices.

APPENDIX 4

**Comparison Goods Retail Capacity Modelling:
Sensitivity test and additional commitments at
2016 and 2021**

**Convenience Goods Retail Capacity Modelling:
Additional commitments at 2016**

Appendix 4

Sensitivity Test and Additional Commitments Table 2
Population Projections at Base and Forecast Years

| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | All Zones Total |
|-------------------------------------|----------------|---------------|----------------|---------------|---------------|---------------|-----------------|
| 2005 Total Population | 156,678 | 82,429 | 144,483 | 47,263 | 40,412 | 63,856 | 535,121 |
| Resident (non-student) Population | 126,527 | 79,793 | 139,335 | 45,575 | 39,007 | 61,773 | 492,010 |
| Student Population | 30,151 | 2,636 | 5,148 | 1,688 | 1,405 | 2,084 | 43,111 |
| 2011 Total Population | 167,002 | 86,232 | 147,073 | 48,798 | 41,069 | 65,361 | 555,535 |
| Resident (non-student) Population | 134,686 | 83,474 | 141,828 | 47,053 | 39,641 | 63,229 | 509,911 |
| Student Population | 32,316 | 2,758 | 5,245 | 1,745 | 1,427 | 2,133 | 45,624 |
| 2005-2011 Numeric Increase | 10,325 | 3,803 | 2,590 | 1,535 | 657 | 1,505 | 20,414 |
| Percentage Increase | 6.6% | 4.6% | 1.8% | 3.2% | 1.6% | 2.4% | 3.8% |
| 2016 Total Population | 173,151 | 89,405 | 149,524 | 50,027 | 41,795 | 66,735 | 570,637 |
| Resident (non-student) Population | 139,572 | 86,546 | 144,189 | 48,237 | 40,342 | 64,558 | 523,444 |
| Student Population | 33,578 | 2,859 | 5,335 | 1,790 | 1,453 | 2,177 | 47,193 |
| 2011-2016 Numeric Increase | 6,148 | 3,173 | 2,451 | 1,229 | 726 | 1,374 | 15,102 |
| Percentage Increase | 3.7% | 3.7% | 1.7% | 2.5% | 1.8% | 2.1% | 2.7% |
| 2021 Total Population | 178,321 | 92,643 | 152,452 | 51,489 | 42,694 | 68,436 | 586,035 |
| Resident (non-student) Population | 143,706 | 89,680 | 147,010 | 49,645 | 41,210 | 66,203 | 537,455 |
| Student Population | 34,615 | 2,963 | 5,442 | 1,844 | 1,484 | 2,233 | 48,580 |
| 2016-2021 Numeric Increase | 5,171 | 3,238 | 2,928 | 1,462 | 899 | 1,701 | 50,915 |
| Percentage Increase | 3.3% | 3.9% | 2.0% | 3.1% | 2.2% | 2.7% | 2.9% |
| 2026 Total Population | 183,743 | 95,558 | 155,333 | 53,028 | 43,558 | 70,007 | 601,226 |
| Resident (non-student) Population | 148,034 | 92,502 | 149,786 | 51,127 | 42,044 | 67,722 | 551,216 |
| Student Population | 35,709 | 3,056 | 5,547 | 1,901 | 1,514 | 2,284 | 50,010 |
| 2021-2026 Numeric Increase | 5,421 | 2,915 | 2,881 | 1,539 | 864 | 1,570 | 45,691 |
| Percentage Increase | 3.0% | 3.1% | 1.9% | 3.0% | 2.0% | 2.3% | 2.6% |
| 2005 - 2026 Total Population | | | | | | | |
| 2005-2025 Numeric Increase | 27,065 | 13,128 | 10,850 | 5,765 | 3,146 | 6,150 | 66,105 |
| Percentage Increase | 17.3% | 15.9% | 7.5% | 12.2% | 7.8% | 9.6% | 12.4% |

NOTES:

Source: All population figures are based on 2001 ward-level Census data, and projected forward to 2005, 2011, 2016, 2021 and 2026 using the latest district level forecasts from Oxfordshire and Buckinghamshire County Councils. (ONS growth rate is used)

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.

Appendix 4

Sensitivity Test and Additional Commitments 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 |
|---|--------|--------|--------|--------|--------|--------|
| | £ | £ | £ | £ | £ | £ |
| 2005 Resident (non-student) Expenditure | 2,721 | 2,900 | 2,853 | 2,952 | 2,948 | 2,810 |
| Student Expenditure | 1,296 | 1,296 | 1,296 | 1,296 | 1,296 | 1,296 |
| 2011 Resident (non-student) Expenditure | 3,051 | 3,252 | 3,200 | 3,310 | 3,306 | 3,151 |
| Student Expenditure | 1,547 | 1,547 | 1,547 | 1,547 | 1,547 | 1,547 |
| 2016 Resident (non-student) Expenditure | 3,608 | 3,845 | 3,783 | 3,913 | 3,908 | 3,726 |
| Student Expenditure | 1,838 | 1,838 | 1,838 | 1,838 | 1,838 | 1,838 |
| 2021 Resident (non-student) Expenditure | 4,255 | 4,535 | 4,462 | 4,616 | 4,610 | 4,395 |
| Student Expenditure | 2,183 | 2,183 | 2,183 | 2,183 | 2,183 | 2,183 |
| 2026 Resident (non-student) Expenditure | 5,054 | 5,387 | 5,300 | 5,482 | 5,475 | 5,219 |
| Student Expenditure | 2,592 | 2,592 | 2,592 | 2,592 | 2,592 | 2,592 |

NOTES:

Source: All data derived from Experian 2005 per capita annual comparison goods expenditure estimates. Resident (non student) expenditure figures are based on the local area estimates. The student expenditure figures are taken as 50% of Experian 2005 base (UK) comparison goods expenditure estimates.

Growth rates are sourced from Experian Retail Planner Briefing Note 4.0 (October 2006). Resident (non student) and student expenditure growth rates are 3.8% for the Study period (EBS Forecast 2006 - 2015)

SFT has been deducted, based on Experian Retail Planner Briefing Note 4.0 (October 2006) - using the proportions set out for 'Broad Definition of Non-Retail sales'.

For Resident (non-student). 2005: 6.3% deducted; 2011: 12.0% deducted; 2016: 12.4% deducted; 2021 - 2026: 13% deducted.

SFT deducted for students held constant throughout study period: 6.3% for 2005 - 2026.

All monetary values are held constant at 2005 prices.

Appendix 4

Sensitivity Test and Additional Commitments 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 |
| 2005 Total Expenditure | 383.4 | 234.8 | 404.2 | 136.7 | 116.8 | 176.3 | 1,452.2 |
| Resident (non-student) Expenditure | 344.3 | 231.4 | 397.5 | 134.5 | 115.0 | 173.6 | 1,396.3 |
| Student Expenditure | 39.1 | 3.4 | 6.7 | 2.2 | 1.8 | 2.7 | 55.9 |
| 2011 Total Expenditure | 461.0 | 275.7 | 461.9 | 158.4 | 133.3 | 202.5 | 1,692.9 |
| Resident (non-student) Expenditure | 411.0 | 271.5 | 453.8 | 155.7 | 131.0 | 199.2 | 1,622.3 |
| Student Expenditure | 50.0 | 4.3 | 8.1 | 2.7 | 2.2 | 3.3 | 70.6 |
| Total Growth in Expenditure 2005-2011 | 77.6 | 40.9 | 57.7 | 21.7 | 16.4 | 26.3 | 240.7 |
| 2016 Total Expenditure | 565.2 | 338.0 | 555.2 | 192.1 | 160.3 | 244.5 | 2,055.4 |
| Resident (non-student) Expenditure | 503.5 | 332.8 | 545.4 | 188.8 | 157.7 | 240.5 | 1,968.7 |
| Student Expenditure | 61.7 | 5.3 | 9.8 | 3.3 | 2.7 | 4.0 | 86.7 |
| Total Growth in Expenditure 2005-2016 | 181.9 | 103.2 | 151.0 | 55.3 | 43.5 | 68.2 | 603.2 |
| 2021 Total Expenditure | 687.1 | 413.2 | 667.8 | 233.2 | 193.2 | 295.8 | 2,490.3 |
| Resident (non-student) Expenditure | 611.5 | 406.7 | 656.0 | 229.2 | 190.0 | 290.9 | 2,384.3 |
| Student Expenditure | 75.6 | 6.5 | 11.9 | 4.0 | 3.2 | 4.9 | 106.0 |
| Total Growth in Expenditure 2005-2021 | 303.7 | 178.4 | 263.6 | 96.5 | 76.4 | 119.5 | 1,038.1 |
| 2026 Total Expenditure | 840.7 | 506.2 | 808.2 | 285.2 | 234.1 | 359.4 | 3,033.8 |
| Resident (non-student) Expenditure | 748.2 | 498.3 | 793.8 | 280.3 | 230.2 | 353.5 | 2,904.2 |
| Student Expenditure | 92.6 | 7.9 | 14.4 | 4.9 | 3.9 | 5.9 | 129.6 |
| Total Growth in Expenditure 2005-2026 | 457.4 | 271.4 | 404.0 | 148.5 | 117.3 | 183.1 | 1,581.7 |

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 2005 prices.

Appendix 4

Sensitivity Test and Additional Commitments 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 | |
|----------------------------------|--------|--------|--------|--------|--------|--------|-------------|--|
| | £m | £m | £m | £m | £m | £m | Total £m | |
| 2005 Total Expenditure | 383.4 | 234.8 | 404.2 | 136.7 | 116.8 | 176.3 | 1,452.2 | |
| Out-of-centre Retail Warehousing | 38.3 | 23.5 | 40.4 | 13.7 | 11.7 | 17.6 | 145.2 | |
| All other Retailing | 345.0 | 211.3 | 363.8 | 123.0 | 105.1 | 158.7 | 1,307.0 | |
| 2011 Total Expenditure | 461.0 | 275.7 | 461.9 | 158.4 | 133.3 | 202.5 | 1,692.9 | |
| Out-of-centre Retail Warehousing | 46.1 | 27.6 | 46.2 | 15.8 | 13.3 | 20.3 | 169.3 | |
| All other Retailing | 414.9 | 248.2 | 415.7 | 142.6 | 119.9 | 182.3 | 1,523.6 | |
| 2016 Total Expenditure | 565.2 | 338.0 | 555.2 | 192.1 | 160.3 | 244.5 | 2,055.4 | |
| Out-of-centre Retail Warehousing | 56.5 | 33.8 | 55.5 | 19.2 | 16.0 | 24.5 | 205.5 | |
| All other Retailing | 508.7 | 304.2 | 499.7 | 172.8 | 144.3 | 220.1 | 1,849.9 | |
| 2021 Total Expenditure | 687.1 | 413.2 | 667.8 | 233.2 | 193.2 | 295.8 | 2,490.3 | |
| Out-of-centre Retail Warehousing | 68.7 | 41.3 | 66.8 | 23.3 | 19.3 | 29.6 | 249.0 | |
| All other Retailing | 618.4 | 371.9 | 601.1 | 209.9 | 173.9 | 266.2 | 2,241.3 | |
| 2026 Total Expenditure | 840.7 | 506.2 | 808.2 | 285.2 | 234.1 | 359.4 | 3,033.8 | |
| Out-of-centre Retail Warehousing | 84.1 | 50.6 | 80.8 | 28.5 | 23.4 | 35.9 | 303.4 | |
| All other Retailing | 756.7 | 455.6 | 727.4 | 256.7 | 210.7 | 323.5 | 2,730.5 | |

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 estimate 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 2005 prices, and are in millions of pounds (£m)

Appendix 4

Sensitivity Test and Additional Commitments Table 6
Comparison Goods Spending Patterns across the Study Area Zones in 2005

| 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 | 244.5 | 97.7 | 184.2 | 27.3 | 41.4 | 63.8 | 658.8 | 50.4 |
| Cowley Centre and Retail Park | 24.6 | 5.1 | 16.9 | 3.2 | - | 2.0 | 51.8 | 4.0 |
| Other Oxford | 6.1 | - | 1.0 | - | - | - | 7.0 | 0.5 |
| Oxford City Total | 275.2 | 102.8 | 202.0 | 30.4 | 41.4 | 65.8 | 717.6 | 54.9 |
| Other Centres | | | | | | | | |
| Reading | 10.9 | - | 75.1 | 0.8 | 4.2 | 3.3 | 94.3 | 7.2 |
| Aylesbury | 4.2 | 2.0 | 1.0 | 56.0 | - | - | 63.2 | 4.8 |
| Swindon Centre | 4.0 | 0.5 | 4.5 | - | 26.8 | 14.4 | 50.2 | 3.8 |
| Witney | 3.1 | 5.1 | 1.8 | - | 2.6 | 35.6 | 48.3 | 3.7 |
| Banbury | 5.0 | 37.7 | 1.8 | 0.4 | - | 7.6 | 52.4 | 4.0 |
| Abingdon | 3.0 | - | 18.0 | - | 6.4 | 1.0 | 28.4 | 2.2 |
| Milton Keynes | 5.1 | 14.7 | 2.3 | 1.6 | - | 1.4 | 25.1 | 1.9 |
| Bicester Village Outlet | 3.9 | 12.3 | 3.6 | 1.2 | 2.2 | - | 23.1 | 1.8 |
| Cheltenham | 3.1 | 2.0 | - | - | 0.4 | 15.5 | 21.1 | 1.6 |
| Bicester Centre | 1.1 | 19.9 | 1.0 | 0.8 | - | - | 22.8 | 1.7 |
| Wallingford | - | - | 18.7 | - | - | - | 18.7 | 1.4 |
| High Wycombe | - | 0.5 | 3.7 | 9.5 | - | - | 13.7 | 1.0 |
| Other Locations | 26.4 | 13.8 | 30.3 | 22.4 | 21.1 | 14.1 | 128.1 | 9.8 |
| Sub-total Other Centres | 69.8 | 108.6 | 161.7 | 92.6 | 63.7 | 92.9 | 589.4 | 45.1 |
| Total | 345.0 | 211.3 | 363.8 | 123.0 | 105.1 | 158.7 | 1,307.0 | 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 Oxford Retail Needs Study 2004, and are based on the household survey undertaken for this Study in 2004). All monetary values in the table are held constant at 2005 prices, and are in millions of pounds (£m).

Appendix 4

Sensitivity Test and Additional Commitments Table 7
Comparison Goods Centre Turnover and Sales Densities 2005

| Zone | Turnover Derived | | | Tourist Expenditure 3 | Total Turnover | Sales Area 4 | Current Sales Density |
|-------------------------------|------------------------------------|------------------------------|--------|-----------------------|----------------|--------------|-----------------------|
| | Turnover Derived from Study Area 1 | from Beyond the Study Area 2 | | | | | |
| | £m | % | £m | £m | £m | sqm net | £/sqm |
| Oxford City Centres | | | | | | | |
| Oxford City Centre | £658.8 | 10% | £73.20 | 54.1 | £786.1 | 92,379 | 8,509 |
| Cowley Centre and Retail Park | £51.8 | 5% | £2.73 | | £54.5 | 13,864 | 3,933 |
| Other Oxford | £7.0 | 5% | £0.37 | | £7.4 | | |
| Total | £717.6 | | | | £848.0 | | |

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) .

Tourist expenditure for 2003 from ORNS 2004 (£58.80m) has been rebased to 2005 prices using Experian Retail Planner Briefing Note 4.0 (£52.50m).

A growth rate of 1.5% has then been applied. Therefore tourist expenditure in 2005 is £54.90m at 2005 prices.

(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 2005 prices

Appendix 4

Sensitivity Test and Additional Commitments Table 8
Comparison Goods Floorspace Requirement at Base and Forecast Years

| | 2003 | 2005 | 2011 | 2013 | 2016 | 2021 | 2026 |
|---|-----------------|-----------------|-----------------|------------------|-----------------|-----------------|-----------------|
| Total Study Area Expenditure (€m) (1) | €1,015.6 | €1,307.0 | €1,523.6 | €1,654.1 | €1,849.9 | €2,241.3 | €2,730.5 |
| Expenditure Retention (2) | | | | | | | |
| <i>Current Market Shares (%)</i> | <i>53.7</i> | <i>54.9</i> | <i>54.9</i> | <i>54.9</i> | <i>54.9</i> | <i>54.9</i> | <i>54.9</i> |
| <i>Retained Expenditure (€m)</i> | <i>€545.4</i> | <i>€717.5</i> | <i>€836.4</i> | <i>€908.1</i> | <i>€1,015.6</i> | <i>€1,230.5</i> | <i>€1,499.0</i> |
| Expenditure Inflow (3) | | | | | | | |
| <i>From Beyond the Study Area (€m)</i> | <i>€60.6</i> | <i>€79.7</i> | <i>€99.7</i> | <i>€107.4</i> | <i>€120.2</i> | <i>€144.8</i> | <i>€174.5</i> |
| <i>Tourist Expenditure (€m)</i> | <i>€52.5</i> | <i>€54.1</i> | <i>€59.1</i> | <i>€60.9</i> | <i>€63.7</i> | <i>€68.6</i> | <i>€73.9</i> |
| Total Consumer Expenditure Attracted to Oxford City Ctrs | €658.5 | €851.3 | €995.3 | €1,076.5 | €1,199.5 | €1,443.9 | €1,747.4 |
| Oxford City Centres' Turnover (€m) 2003 - 2005 (4) | €658.5 | €691.8 | | | | | |
| Commitments and Additional Capacity Sites (€m) (5) | €0.0 | €0.0 | €52.5 | €274.40 | €33.6 | €21.0 | €0.0 |
| Oxford City Centres' Turnover (€m) 2011 - 2026 (6) | | | €854.8 | €1,025.65 | €1,122.0 | €1,259.8 | €1,390.9 |
| Residual Expenditure (€m) (7) | €0.0 | €159.5 | €140.5 | €50.83 | €77.4 | €184.1 | €356.5 |
| Assumed Sales Density for New Development (€/sqm) (8) | €7,500.0 | €7,500 | €7,500 | €8,000 | €7,500 | €7,500 | €7,500 |
| Floorspace Requirement (sqm net) (9) | 0 | 21,269 | 18,734 | 6,354 | 10,325 | 24,547 | 47,536 |

NOTES:

(1) The total Study Area expenditure net of expenditure currently going to out-of-centre retail warehouses (see Table 5).

For 2003 figures we have taken ORNS 2004 figures which are in 2000 prices and rebased them to 2005 prices.

(2) Market share is 53.7% in 2003 (see ORNS 2004); market share rises to 54.9% in 2005 due to an increase in population in Zone 1 since ORNS 2004.

(3) Expenditure inflow - from beyond the Study Area at 10% of the total turnover of the centre in 2003 and 2005, and grown at 3.8% per annum from 2005 onwards.

Tourist expenditure source : Table 11 , The Economic Impact of Tourism in Oxford City (1996), Southern Tourist Board (April 1997):

ORNS 2004 values for 2003 rebased from 2000 prices to 2005 prices, and grown at 1.5% per annum in accordance with assumptions in ORNS 2004.

Comparison goods estimated to account for 90% of the total tourist retail expenditure (€65.3m).

(4) Oxford City centres' turnover 2003 - 2005 - base year figure from Table 6, with an allowance for growth in forecast years: 2.5% for 2005 -2011;

(5) At 2011 St Aldates redevelopment will create an additional 7,000 sq m of comparison retail floorspace. We have assumed that turnover will be €7,500 / sq m, with sales density increasing by 2% per annum for the period 2011 - 2026.

At 2013 Westgate Centre redevelopment will create an additional 34,300 sq m of comparison retail floorspace. We have assumed turnover to be €8000/ sq m net, with sales density increasing 2% per annum for the period 2013 - 2026.

At 2016 an additional 12,000 sq m gross / 8,400 sq m net (assuming net is 70% of gross) on additional capacity sites at John Allen Centre, Diamond Place, BMW Garage, Blackbird Leys Community Centre and Blackbird Leys Garage Site will be developed; we have assumed a turnover of €4000 / sq m net, with sales density increasing by 2% per annum from 2016 to 2026.

At 2021 an additional 7,500 sq m gross / 5,250 sq m net (assuming net is 70% of gross) on additional capacity sites at Barns Road Car Park, Barns Road Community Centre and County Hall will be developed; we have assumed a turnover of €4,000 / sq m net, with sales density increasing by 2% per annum from 2021 to 2026.

(6) Oxford City centre's turnover 2011 - 2026: includes Oxford City centre turnover growth at 2.5% per annum until 2011, then 2% from 2011 - 2026 (taking a 10% impact at 2013); and turnover of Westgate and St Aldates centres, with a turnover growth at 2% per annum 2011 - 2026

(7) The residual expenditure is the product of the available expenditure minus commitments and additional capacity sites.

(8) Assumed sales density for new development reflects prime shopping provision (Westgate and St Aldates) up to 2011 and secondary location thereafter.

(9) 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 2005 prices.

Appendix 4

Additional Commitments Table 9
Total Population and Population Growth in the Convenience Goods Study Area at Base and Forecast Years

| Year | 2005 (3) | 2011 | 2016 | 2021 | 2026 |
|---------------------------------------|----------|---------|---------|---------|---------|
| Total Population | 146,366 | 157,346 | 163,679 | 168,827 | 174,269 |
| Resident (non-student) Population (1) | 117,472 | 126,288 | 131,371 | 135,502 | 139,870 |
| Student Population (2) | 28,894 | 31,058 | 32,308 | 33,325 | 34,399 |
| 2005-2011 Numeric Increase | | 10,980 | | | |
| Percentage Increase | | 7.4% | | | |
| 2011-2016 Numeric Increase | | | 6,333 | | |
| Percentage Increase | | | 4.0% | | |
| 2016 -2021 Numeric Increase | | | | 5147 | |
| Percentage Increase | | | | 3.1% | |
| 2021-2026 Numeric Increase | | | | | 5443 |
| Percentage Increase | | | | | 3.2% |

NOTES:

Source : All the population figures are based on 2001 ward-level Census data , and projected forward to 2006, 2011, 2016, 2021 and 2026 using the latest district level forecasts from Oxfordshire County Council.

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.

Appendix 4

Additional Commitments Table 10
Convenience Goods Expenditure and Expenditure Growth at Base and Forecast Years

| Year | 2005 | 2011 | 2016 | 2021 | 2026 |
|---|--------|--------|--------|--------|--------|
| Per Capita Resident (non-student) Expenditure (£) (1) | 1,443 | 1,505 | 1,550 | 1,597 | 1,646 |
| Per Capita Student Expenditure (£) (2) | 1,190 | 1,240 | 1,278 | 1,317 | 1,357 |
| Total Resident (non-student) Expenditure (£M) | 169.5 | 190.0 | 203.7 | 216.5 | 230.2 |
| Total Student Expenditure (£M) | 34.4 | 38.5 | 41.3 | 43.9 | 46.7 |
| Total Expenditure (£M) (3) | 203.88 | 228.55 | 244.96 | 260.34 | 276.89 |
| Total Growth in Expenditure (£M) | | 24.7 | 16.42 | 15.38 | 16.55 |

NOTES:

(1) Source: BSL Experian 2005 per capita annual expenditure estimates at 2005 prices, projected forward using BSL Experian Consensus expenditure growth rate 0.7% for the period 2005 - 2011 (Experian Consensus Forecast 2006 - 2015); 0.6% for the period 2011 -2026 (Experian Ultra Long Term Forecast 2006 - 2015).

No deduction made for Special Forms of Trading.

(2) Student expenditure is estimated by RTP to be 75% of the national average Experian (2005) annual expenditure figure

(ie 75% of the all persons figure of £1,586 in 2005 at 2005 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 Table 9.

All monetary values are held constant at 2005 prices.

Appendix 4

Additional Commitments Table 11A - Scenario A

Convenience Goods Floorspace Requirement at Base and Forecast Years

Commitments at 2008: Lidl, M&S Summertown, M&S Oxford Retail Park

Commitments at 2016: sites at Crowell Road, Diamond Place and Blackbird Leys

| | 2003 | 2005 | 2008 | 2011 | 2016 | 2021 | 2026 |
|--|---------|---------|---------|---------|---------|---------|---------|
| Total Study Area Expenditure (£m) (1) | 175.6 | 203.9 | 216.21 | 228.5 | 245.0 | 260.3 | 276.9 |
| Expenditure Retention (2) | | | | | | | |
| Current Market Shares (%) | 86.3 | 86.3 | 86.3 | 86.3 | 86.3 | 86.3 | 86.3 |
| Retained Expenditure (£m) | £151.5 | £175.9 | £186.6 | £197.2 | £211.4 | £224.7 | £239.0 |
| Expenditure Inflow (3) | | | | | | | |
| From Beyond the Study Area (£m) | £16.8 | £19.5 | £20.0 | £20.4 | £21.0 | £21.6 | £22.3 |
| Total Consumer Expenditure Attracted to Oxford City Centres (4) | £168.36 | £195.5 | £206.6 | £217.6 | £232.4 | £246.3 | £261.3 |
| Oxford City Centres' Turnover 2003 - 2005 (£m) (4) | £168.36 | £170.4 | | | | | |
| Commitments (5) | £0.0 | £0.0 | £29.48 | £0.0 | £39.4 | £0.0 | £0.0 |
| Oxford City Centres' Turnover (£m) 2011 -2026 (6) | | | £203.0 | £206.6 | £252.3 | £259.9 | £267.8 |
| Residual Expenditure (£m) (6) | £0.0 | £25.1 | £3.6 | £11.0 | -£19.9 | -£13.6 | -£6.6 |
| Assumed Sales Density (£/sqm) (7) | £5,000 | £5,000 | £5,000 | £5,000 | £5,000 | £5,000 | £5,000 |
| Floorspace Requirement (sqm net) (8) | 0 | 5,022 | 720 | 2,198 | -3,974 | -2,725 | -1,315 |
| Assumed Sales Density (£/sqm) (7) | £10,000 | £10,000 | £10,000 | £10,000 | £10,000 | £10,000 | £10,000 |
| Floorspace Requirement (sqm net) (8) | 0 | 2,511 | 360 | 1,099 | -1,987 | -1,362 | -658 |

NOTES:

(1) Total Study Area Expenditure (see Table 11). Expenditure figure for 2003 are taken from ORNS 2004 and rebased to 2005 prices. Expenditure figure for 2008 is taken as mid-way point between study years 2005 and 2011.

(2) The current market share of stores within centres in Oxford City, plus Sainsbury, Kidlington (refer to household survey Table 15 in ORNS 2005).

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 (0.7% per annum for years 2005 - 2011; 0.6% for years 2011 - 2026) in the forecast years. (See Table 10)

(4) Oxford City centre's convenience goods turnover 2003 - 2005: In 2003 turnover and consumer expenditure attracted to Oxford City Centres is in equilibrium. Turnover growth is at 0.6% per annum (see Experian Retail Planner Briefing Note 4.0, October 2006 - para 8.2)

(5) Commitments: Lidl (1029 sq m net convenience floorspace, turnover £2798 / sq m net), M&S at Oxford Retail Park (929 sq m net convenience floorspace) and M&S at Summertown (1857 sq m net convenience floorspace; turnover £9,457 / sq m net for both M&S stores) are included.

2008 is assumed to be year at which these supermarkets will have settled trading patterns. (Retail Rankings 2006 - taking most up to date information available)

Additional commitments included at 2016: sites at Crowell Road, Diamond Place and Blackbird Leys

Aldi has not been included in this scenario.

(6) Oxford City centres' turnover for 2011 - 2026 includes: turnover of the existing centres and turnover of commitments (including turnover growth at 0.6% per annum, see Experian Retail Planner Note 4.0 para 8.2)

(7) The residual expenditure is the product of the available expenditure minus commitments.

(8) 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 2005 prices.

Appendix 4

Additional Commitments Table 11B - Scenario B

Convenience Goods Floorspace Requirement at Base and Forecast Years

Commitments at 2008: Aldi, Lidl, M&S Summertown, M&S Oxford Retail Park

Commitments at 2016: sites at Crowell Road, Diamond Place and Blackbird Leys

| | 2003 | 2005 | 2008 | 2011 | 2016 | 2021 | 2026 |
|--|---------|---------|---------|---------|---------|---------|---------|
| Total Study Area Expenditure (£m) (1) | 175.6 | 203.9 | 216.21 | 228.5 | 245.0 | 260.3 | 276.9 |
| Expenditure Retention (2) | | | | | | | |
| Current Market Shares (%) | 86.3 | 86.3 | 86.3 | 86.3 | 86.3 | 86.3 | 86.3 |
| Retained Expenditure (£m) | £151.5 | £175.9 | £186.6 | £197.2 | £211.4 | £224.7 | £239.0 |
| Expenditure Inflow (3) | | | | | | | |
| From Beyond the Study Area (£m) | £16.8 | £19.5 | £20.0 | £20.4 | £21.0 | £21.6 | £22.3 |
| Total Consumer Expenditure Attracted to Oxford City Centres | | | | | | | |
| Oxford City Centres | £168.36 | £195.5 | £206.6 | £217.6 | £232.4 | £246.3 | £261.3 |
| Oxford City Centres' Turnover 2003 - 2005 (£m) (4) | £168.36 | £170.4 | | | | | |
| Commitments (5) | £0.0 | £0.0 | £32.78 | £0.0 | £39.4 | £0.0 | £0.0 |
| Oxford City Centres' Turnover (£m) 2011 -2026 (6) | | | £206.3 | £210.0 | £255.7 | £263.5 | £271.5 |
| Residual Expenditure (£m) (6) | £0.0 | £25.1 | £0.3 | £7.6 | -£23.3 | -£17.2 | -£10.2 |
| Assumed Sales Density (£/sqm) (7) | £5,000 | £5,000 | £5,000 | £5,000 | £5,000 | £5,000 | £5,000 |
| Floorspace Requirement (sqm net) (8) | 0 | 5,022 | 61 | 1,527 | -4,666 | -3,437 | -2,049 |
| Assumed Sales Density (£/sqm) (7) | £10,000 | £10,000 | £10,000 | £10,000 | £10,000 | £10,000 | £10,000 |
| Floorspace Requirement (sqm net) (8) | 0 | 2,511 | 30 | 763 | -2,333 | -1,719 | -1,025 |

NOTES:

(1) Total Study Area Expenditure (see Table 11). Expenditure figure for 2003 are taken from ORNS 2004 and rebased to 2005 prices. Expenditure figure for 2008 is taken as mid-way point between study years 2005 and 2011.

(2) The current market share of stores within centres in Oxford City, plus Sainsbury, Kidlington (refer to household survey Table 15 in ORNS 2005).

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 (0.7% per annum for years 2005 - 2011; 0.6% for years 2011 - 2026) in the forecast years. (See Table 10)

(4) Oxford City centre's convenience goods turnover 2003 - 2005: In 2003 turnover and consumer expenditure attracted to Oxford City Centres is in equilibrium.

Turnover growth is at 0.6% per annum (see Experian Retail Planner Briefing Note 4.0, October 2006 - para 8.2)

(5) Commitments: Lidl (1029 sq m net convenience floorspace, turnover £2798 / sq m net), M&S at Oxford Retail Park (929 sq m net convenience floorspace) and M&S at Summertown (1857 sq m net convenience floorspace; turnover £9,457 / sq m net for both M&S stores) are included.

2008 is assumed to be year at which these supermarkets will have settled trading patterns. (Retail Rankings 2006 - taking most up to date information available)

Additional commitments included at 2016: sites at Crowell Road, Diamond Place and Blackbird Leys

Aldi has been included in this scenario.

(6) Oxford City centres' turnover for 2011 - 2026 includes: turnover of the existing centres and turnover of commitments (including turnover growth at 0.6% per annum, see Experian Retail Planner Note 4.0 para 8.2)

(7) The residual expenditure is the product of the available expenditure minus commitments.

(8) 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.

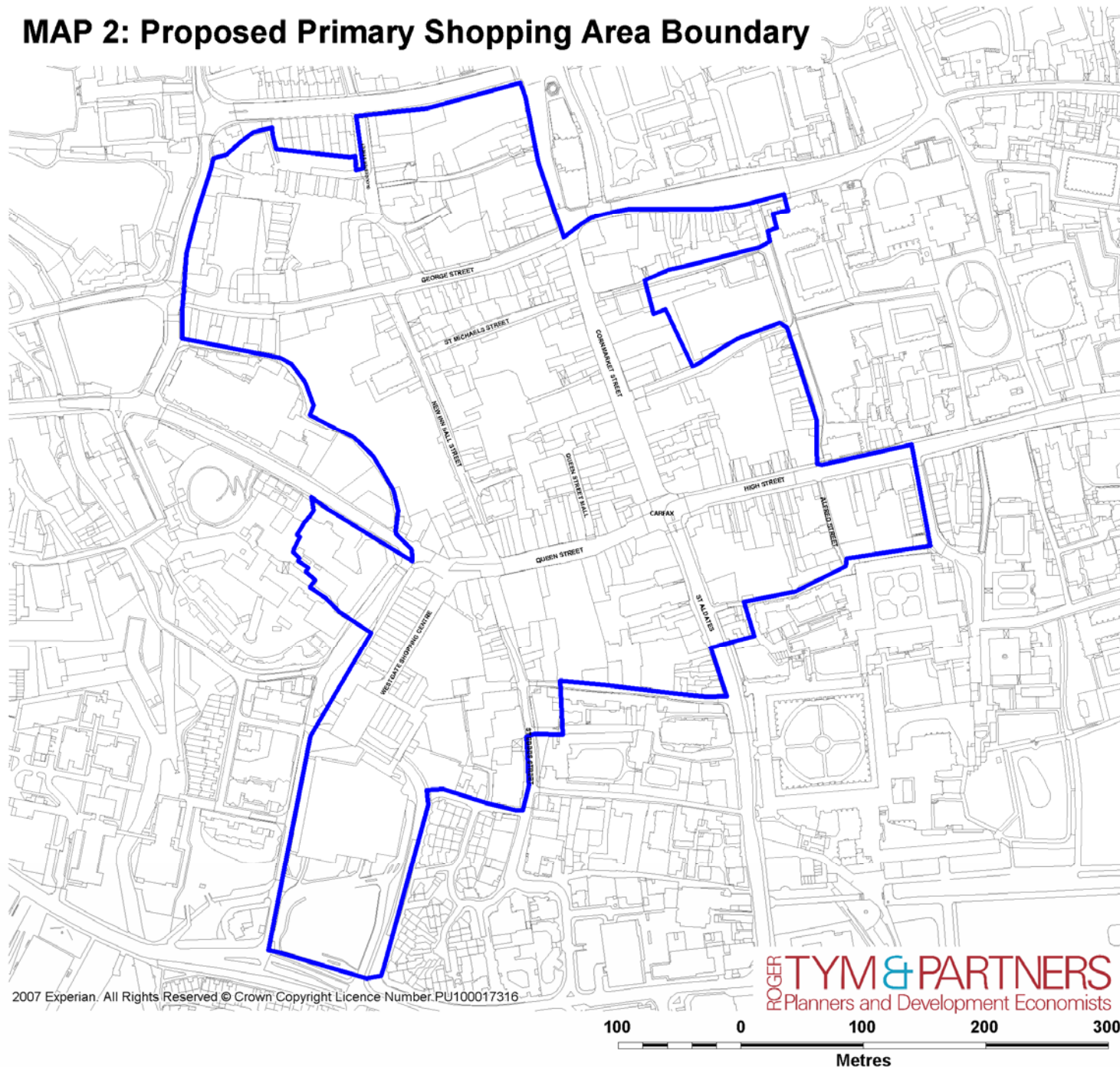
Appendix 4

All monetary values are held constant at 2005 prices.

APPENDIX 5

Map 2 Proposed Primary Shopping Area in Oxford City Centre

MAP 2: Proposed Primary Shopping Area Boundary



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OGER TYM & PARTNERS
Planners and Development Economists

100 0 100 200 300
Metres

APPENDIX 6

Development Sites

Appendix 5 Development Sites

Sites in the proposed Primary Shopping Area

DS 1 Abbey Place Car Park, Oxford City Centre

- 1.1 This site is to the west of Westgate surface car park which will be redeveloped as part of the new proposals for the shopping centre. It is occupied by a car park and a public house. The Adopted Local Plan states that redevelopment of this site should include land uses that are complementary with and relate to the development of Westgate and Oxpens, and the site should be well linked by pedestrian routes to Westgate and other surrounding sites. Retail use is encouraged on this site.

DS 77 Land to the West of St Aldates & South of Queen Street

- 1.2 The site fronts onto Queen Street, St Aldates and Pembroke Street. The adopted plan states that permission will be granted for retail development (class A1) and food and drink (class A3 - 5) on the ground floor to create an active frontage, with complementary uses (residential and offices) mainly on the upper floors.
- 1.3 We understand that an application to develop this site for retail uses has been submitted, and we have included the additional 7,000 sq m (net) of retail floorspace proposed as a commitment in our capacity modeling calculations.

DS 54 Odeon Cinema, George Street

- 1.4 The adopted plan seeks to resist the loss of the Odeon cinema which is considered to be an important public arts venue, unless an alternative provision is made. Retail A1 use is considered an appropriate reuse of the site, as are food and drink uses. The upper floors are considered appropriate for commercial leisure, art-related uses and tourist attractions.

Other sites in the City Centre

DS 14 Castle Site

- 1.5 The adopted Plan states that planning permission will be granted for mixed-use development which includes all of the following uses: museum, leisure and recreation, retail (including class A1 and A3 - 5), hotel and public open space. The site is located adjacent to the proposed Primary Shopping Frontage, and is therefore defined as edge of centre.

DS 17 Cooper Callas Site, Paradise Street

- 1.6 This site is located to the west of the proposed Primary Shopping Area, and it is designated primarily for residential development, with some employment uses and a limited amount of small retail units as complementary uses.

DS 35 Hythe Bridge Street and Park End Street

- 1.7 This site is located to the west of the proposed new Primary Shopping Area boundary. The site is considered to be under used. Planning permission will be granted for a range of uses, including retail, food and drink uses principally on upper floors, and commercial leisure uses.

DS 78 St Aldates Regeneration Zone

- 1.8 This regeneration zone lies to the south of the proposed Primary Shopping Area. The adopted Plan states that planning permission will be granted for new developments, changes of use, and environmental improvements that make better

use of land and building and enhance the area. Changes of use to Class A1 and Class A3 - 5 uses will be permitted on the ground floor.

DS 91 Worcester Street Car Park

- 1.9 This site is located at the end of George Street and between Park End Street and Hythe Bridge Street. It is identified as a key City centre site which could be redeveloped for mixed use, including retail, creating a lively entertainment quarter that is attractive to a range of age groups.

Sites in Cowley

DS 8 Between Towns Road

- 1.10 This site is considered underused; it is currently occupied by a mix of uses including a garage, petrol filling station and a club. A mix of uses is encouraged in the redevelopment of this site, including small A1 retail uses on the ground floor.

DS 18 Cowley Centre: Templars Square Shopping Centre and Crowell Road Car Park, Between Towns Road

- 1.11 Templars Square Shopping Centre has potential for enhancement, extension and reorganisation. Planning permission will be granted for the primarily retail (A1) development and other complementary uses which include other retail classes (A3 - 5) and commercial leisure.
- 1.12 Part of Crowell Road car park has already been granted planning permission for change of use to a bingo hall. The adopted plan states that permission will be granted for mixed use development for a number of uses, one of which is retail (A1) use. The plan states that the redevelopment of the car park needs to take account of the effect on Beauchamp Lane residential properties, and reduce traffic and improve cycle safety on Beauchamp Lane.
- 1.13 The plan states that these sites should be treated together.

Sites in Summertown

DS 11 BMW Garage Site

- 1.14 This site is located at the northern end of the defined shopping frontage on Banbury Road. Mixed use development will be permitted here, including retail uses on the ground floor frontage to Banbury Road, and employment and residential uses on the upper floors, or Mayfield Road frontage. Primary health care and childcare facilities will also be permitted.

DS 24 Diamond Place, Ferry Pool Car Park

- 1.15 This site is located at the southern end of the defined shopping frontage on Banbury Road. It is the largest development site in Summertown. The adopted Plan states that it will permit a mix of uses on the site including A1 retail, residential, employment, and commercial leisure uses which are of an appropriate scale to a District centre.

DS 81 Suffolk House, Banbury Road

- 1.16 A mixed use redevelopment of Suffolk House, which lies at the northern end of the defined shopping frontage on Banbury Road, is encouraged by the adopted plan. Retail A1 use will be permitted, located on the ground floor in 4 - 6 units