


Oxford Core Strategy Examination Statement of Oxford City Council		
C/M3/2	<b>Matter 3 – Retail and the hierarchy of centres</b> <b>Issue 2 – Retail need</b>	

**i) What is the scale of need for additional retailing across the city?**

The assessment of retail need undertaken by consultants Roger Tym and Partners in Oxford's Retail Needs Study Update (CD14/8) is based on a standard methodology, which forecasts future expenditure and population growth to determine the amount of additional floorspace that can be supported. The consultants included a 'sensitivity test' for non-food comparison goods to reflect the generally lower levels of growth anticipated, and the amount of floorspace that Oxford can reasonably support as a very compact city taking into account the limited availability of sites and the competition from a range of other uses.

Broadly speaking there is only a limited amount of need for comparison (non-food) floorspace in the short-term. Taking into account the re-development of the Westgate shopping centre there would still be a requirement for a further 6,350 sqm, which then rises to 10,325 sqm to 2016. It is however proposed that retail capacity reviews will be undertaken at five yearly intervals. Given the Retail Needs Study Update (CD14/8) was carried out in 2008 the first review should take place in 2013.

In 2011 the expenditure available for convenience (food) could support additional floorspace for 1,527 sqm (discount store) or 763 sqm (top-end supermarket). At 2016 available expenditure could support between 3,210 sqm and 1,650 sqm. This could rise in the longer-term to between 2,300 sqm and 4,700 sqm. But if some key commitments come forward the figures produced for 2016 could even be negative.

**ii) What is the evidence base for this assessment? Is this as up-to-date as possible?**

The Background Paper: Retail in Oxford (CD5/15) and in particular section 9 refers to the key studies that provide the evidence base.

The most important are Oxford's Retail Needs Study (Feb 2004) (CD14/7) and Oxford's Retail Needs Study Update (March 2008) (CD14/8). Both studies were carried out by consultants Roger Tym and Partners.

The Retail Needs Study Update (CD14/8) provides the most recent assessment, and was specifically commissioned to provide the evidence base for the Core Strategy. This is considered to be as up-to-date as it is reasonable to expect, and although prepared in advance of the current economic difficulties the sensitivity analysis was carried out amongst other reasons to ensure that the assessment of retail need was robust in the face of any changing circumstances.

**iii) What assumptions should be made about the latter half of the plan period?**

It is difficult to forecast with any accuracy the amount of need that could be supported in the longer-term. Estimates have however been made and are set out in detail in the Proposed Changes to the Submission Document.

Long-term forecasting is difficult to predict with any accuracy but it is estimated that need for non-food will rise to 24,500 sqm by 2021 and 47,500 sqm by 2026. The amount of expenditure available for food by 2021 is estimated to increase by between 2,338 to 4,677 sqm and by 2026 will have risen to between 3,156 to 6,322 sqm. Government advice in Para.3.10 of PPS6 advises that the need for additional floorspace should normally be assessed no more than five years in advance, which accords with the City Council's approach to undertake regular reviews of capacity.