

Oxford Retail, Leisure and Town Centre Needs Study Update

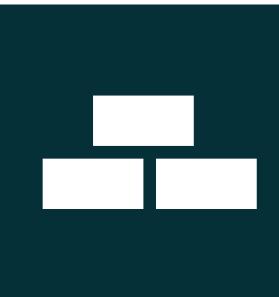
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Quality Assurance

This report has been prepared within the quality system operated at Rapleys LLP according to British Standard ISO 9001:2015.

We confirm that the undersigned is an appropriately qualified and experienced Chartered Planner experienced in the commercial property sector.

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1 INTRODUCTION

1.1 Purpose of the Advice Note

1.1.1 Rapleys LLP is commissioned by Oxford City Council to provide an update to the comparison retail forecasts that were identified as part of the Oxford Retail, Leisure and Town Centres Need Study, which was completed in May 2023.

1.1.2 The need for the update has primarily been triggered by significant changes that have occurred at Botley Road Retail Park ('BRRP'). The City Council has instructed Rapleys to consider the implications of those ongoing changes for the comparison retail floorspace requirements that were identified in 2023.

1.2 Background

1.2.1 The City Council is in the process of preparing a new Local Plan, which will replace the current version that was adopted in June 2020 and covers the 2016 to 2036 period. The outputs from the 2023 study were used to inform the replacement Local Plan, which was to be known as the Local Plan 2042, but a draft version of the plan was withdrawn at the start of this year. Over recent months, the decision has been taken to amend the plan's start and end dates. The replacement Local Plan will now cover the 2025 to 2045 period.

1.2.2 In tandem with the delays to the Local Plan programme, the landscape has been changing significantly at BRRP. The comparison retail turnover identified for BRRP in 2023, of £233m, made it the second most popular retail destination within Oxford City Council's administrative area, after the city centre (£340.1m). Since then, BRRP has been undergoing a transition from a 1980s-style retail park to a 'modern urban science district'. An approximate red line boundary for BRRP is shown on Figure 1, below, which is sourced from a plan in the public domain.

Figure 1 Locations of Proposed Science-Related Development at Botley Road Retail Park



Source - <https://inventaoxford.com/location.html>

1.2.3 The changes at BRRP are happening at pace. A number of comparison retail outlets have been replaced by flexible office space (research & development) to support growth in key sectors such as life sciences and the knowledge economy (including AI) that support Oxford's key strengths and will provide a positive contribution to the economy. Recent changes to the comparison retail offering at BRRP include the following:

- Inventa Lab (former Argos store): -3,641 sq.m GIA (complete). Application ref. 21/02053/FUL.
- Fabrica Lab (formerly DFS and Carpetright units): -3,485 sq.m GIA (under construction). Application ref. 22/03076/FUL.
- Live application relating to 195 Botley Road and Units 1 and 1A BRRP (Currys/Tapi Carpets and associated parking): -3,678 sqm GIA (approved, August 2025). Application ref. 24/02371/FUL.
- Live application at Units 2-5 BRRP (Pets at Home etc): -4,875 sq.m GIA (approved, August 2025). Application ref. 04/02372/FUL.

1.2.4 Further changes are anticipated and it therefore appears very likely that most or all of the comparison retail floorspace at BRRP will have been replaced by non-retail uses in the near term.

1.2.5 The 2023 study identified a quantitative need for approximately 18,000 sq.m of comparison retail floorspace (sales area) arising across the study area over the study period (2023-2042), which equated to a gross floorspace requirement of around 22,500 sq.m. Given the significant and ongoing changes at BRRP, and the recent decision to extend the Local Plan period to 2045, now is an opportune time to update the comparison retail forecasts so that the evidence underpinning the emerging Local Plan on this critically important sector remains robust and up-to-date.

1.2.6 Given the relatively recent publication date of the 2023 study, and the NPPF advice that Local Plan evidence should be proportionate, our update focuses on comparison retail. For the same reason, the update is based on the findings of the household telephone survey which informed the 2023 study.

1.3 **Structure of the Advice Note**

1.3.1 The remainder of our advice is structured as follows:

- Section 2 provides our thoughts regarding potential approaches to assessing the comparison retail floorspace losses at BRRP;
- Section 3 contains a high-level analysis of the latest population and comparison retail expenditure data to establish whether there are likely to be any further needs arising beyond those identified within the 2023 study; and
- Section 4 summarises our findings and provides our conclusion.

2 POTENTIAL APPROACHES TO ADDRESSING RETAIL LOSSES AT BOTLEY ROAD RETAIL PARK

2.1.1 As we explained in Section 1, BRRP is transitioning from a 1980s-style retail park to office uses. Whilst that process has not yet been completed, we anticipate that most or all of the comparison retail floorspace at BRRP that was operational at the time of the 2023 study will be lost in the near future.

2.1.2 An important point to emphasise at the outset is that the comparison retail expenditure which was previously accounted for by BRRP will still be spent somewhere; in other words, the fact that retail facilities at BRRP have ceased trading does not mean that the expenditure which was spent on those goods goes away. Local residents will instead spend their expenditure that is available for those goods at other facilities elsewhere.

2.1.3 There are several potential options in terms of how the retail evidence base could be updated to account for the loss of retail facilities at BRRP. To set the context for the remainder of our advice, the broad options are outlined, below:

- **Convert the £233m of comparison retail expenditure which was accounted for by BRRP in 2023 to a requirement for additional retail floorspace.** An approach along these lines is overly simplistic and therefore we do not regard it as robust. Such an approach assumes that providing a similar level of comparison retail floorspace to 'replace' the floorspace lost at BRRP will result in those residents who previously visited BRRP choosing to visit the new retail facility instead. In reality, when outlets cease trading at BRRP, local residents will choose to visit other existing facilities elsewhere. It is reasonable to assume that not all of that diverted expenditure would be recaptured if new retail facilities were to be provided. Some residents might choose to visit the new retail facility but others will be happy to continue visiting other facilities that they have been using recently. Furthermore, a single, like-for-like replacement for BRRP might not be provided in practice. If multiple new retail facilities were provided instead, in various locations, some of them might be attractive to residents who previously visited BRRP, but other residents might choose not to use the new facilities. For those reasons, we do not advocate this approach.
- **Obtain new evidence of shopping patterns via a fresh household survey.** A new household survey would identify current shopping patterns following the closure of facilities at BRRP and so, in theory, this option has some attractiveness. In practice, however, the process of BRRP transitioning from a retail park to office uses is still ongoing and so not all of the retail facilities at BRRP have ceased trading. Until that happens, some local residents will continue to shop there and that would be picked up a new household survey if one was undertaken in the short term, whereas those residents would then start using alternative facilities shortly thereafter. Another way of putting it is that commissioning a new household survey at the current time is not an efficient use of resources.
- **Manually adjusting the household survey results.** Such an approach, whereby the findings from the household survey underpinning the 2023 study are manually adjusted, is not advisable. The reason is because any such updating of the survey findings would be based on speculation as to where local residents might now be visiting for comparison retail purposes, in the absence of new survey evidence. Furthermore, manually updating the household survey findings would open up the evidence underpinning the replacement Local Plan to potential challenge.

2.1.4 Given that commissioning a new household survey is premature, and due to the other shortcomings outlined above, the most sensible way forward is to update the comparison retail forecasts for the study area as a whole, using the latest population and per capita expenditure data, for the adjusted Local Plan time horizon of 2025 to 2045. In the light of the updated findings arising from that exercise, decisions can then be taken regarding where any identified floorspace requirements should be directed to.

2.1.5 In the next section of our Advice Note, we therefore provide the findings from our updated assessment of the comparison retail requirements arising over the entire Local Plan period, and at each five-yearly interval.

3 UPDATED ASSESSMENT OF COMPARISON RETAIL NEEDS

3.1 Introduction

3.1.1 In this section, we undertake a high-level review of population and retail expenditure forecast data to help determine whether there are likely to be any further retail needs arising beyond those identified within the 2023 study. The same study area used for the 2023 study, and the nine constituent zones, remains unchanged, but we now use 2025 as the base year and 2045 as the end year, rather than 2023 and 2042. The current update is therefore based on a 20-year period, rather than 19 years. Furthermore, for the reasons that we outlined in the previous section, the update is based on the household survey findings which underpinned the 2023 study.

3.2 Population Forecasts

3.2.1 The predicted resident population figures for the study area are presented in Table 3.1 below, which shows that the study area is predicted to experience a growth in population over the 2025 to 2045 period of just over 36,000 persons, or 6 per cent.

Table 3.1 Population Projections for the Study Area used for the 2023 Study

Year	Resident Population
2025	593,996
2030	605,583
2035	614,384
2040	621,847
2045	630,077
Numeric change	36,081
Percentage change	6.0

Source: Experian App Library Micromarketer (2024 base)

3.2.2 Experian's latest population forecasts suggest the same level of population growth across the study area that was predicted at the time of the 2023 study, in percentage terms. The 6 per cent population growth arising over the updated study period of 2025 to 2045 equates, however, to an absolute population growth of 36,081 persons over that 20-year period, compared with a numeric change of 32,352 persons over the previous 19-year study period. As a consequence, there will be a significant increase in the volume of comparison expenditure available across the study area.

3.3 Comparison Retail Per Capita Expenditure Forecasts

3.3.1 We have obtained updated per capita comparison retail expenditure data for residents within the study area, from Experian MMG. The data are 2023-based, which we have rolled forward to the 2025 base year and each of the subsequent interval years using forecasts contained within Experian's Retail Planner Briefing Note 22 (March 2025).

3.3.2 The forecast expenditure growth rates in the latter part of the updated study period are significantly higher than the rates we used for the latter part of the study period for the 2023 study, and the average annual growth rate across the overall 2025 to 2045 period is also higher as a result.

3.4 Total comparison retail expenditure pot

3.4.1 As with the 2023 study, we have applied the market share for special forms of trading (in essence shopping via the internet, hereafter abbreviated to 'SFT') that was identified by the household survey and have grown this market share over the study period according to the growth rates implied by Experian's forecasts of adjusted market shares for SFT. Thus, we have applied the market share for SFT of 29.8 per cent in 2023, which has been grown to the 2025 base year and across the study period by applying the Experian growth rates for adjusted SFT market shares.

3.4.2 Table 3.2 summarises the resultant comparison retail expenditure that is available across the study area in the 2025 base year and at each forecast year, once the updated population data have been multiplied by the per capita data, and having adjusted for SFT growth.

3.4.3 Multiplying the population data within Table 3.1 by the latest per capita expenditure data, and adjusting for SFT using the same approach applied in the 2023 study, produces a total comparison retail expenditure 'pot' in 2025 across the study area of £1,800.59m, rising to £2,859.89m in 2045. The predicted growth in the overall amount of comparison retail expenditure over the 2025 to 2045 period is therefore £1,059.30m.

Table 3.2 Comparison Expenditure Growth Summary

Year	Comparison expenditure inc. SFT (£m)	SFT (£M)	Comparison expenditure exc. SFT (£m)
2025	2,564.91	764.35	1,800.59
2030	2,997.20	937.46	1,989.74
2035	3,376.18	1,152.22	2,223.97
2040	3,889.47	1,409.15	2,480.32
2045	4,484.69	1,624.80	2,859.89

3.5 Retained Expenditure

3.5.1 The quantitative forecasts of retail need take account of the total amount of comparison goods expenditure which is retained within the study area. Table 3.3 sets out the total amount of expenditure retained within the study area in the 2025 base year.

Table 3.3 Summary of Comparison Expenditure Retention in the Study Area at 2025

Retail category	Available expenditure within study area (£m)	% of expenditure retained within study area	Expenditure retained within study area (£m)
Comparison goods	1,800.59	76.6%	1,378.6

3.5.2 In total, 76.6 per cent of study area residents' expenditure on comparison retail goods is currently retained within the study area.

3.6 Claims on Expenditure

3.6.1 As set out above, spending on SFT (such as online shopping) has been removed from the expenditure forecasts. The total expenditure figures summarised in Tables 3.2 and 3.2 make an allowance for this.

3.6.2 In addition to SFT, it is necessary to take account of commitments for new retail floorspace (schemes implemented but not yet trading at the time of the household survey, or extant planning permissions which would result in additional retail floorspace); and sales density growth (which is the expected growth in turnover of existing retailers within the study area).

Sales Density Growth

3.6.3 As with the 2023 study, we have assumed an average annual increase in sales densities of 1.5 per cent.

Planning Commitments

3.6.4 Given the high-level nature of the current update, we have treated the same scheme which was identified as a planning commitment by Oxford City Council at the time of the last study – namely the Clarendon Centre scheme – as a planning commitment for the purposes of our update.

3.6.5 We estimate that this committed retail floorspace will generate a comparison goods turnover of £8.6 million in 2025, rising to £10.6m in 2045.

3.7 Need for Comparison Retail Floorspace

3.7.1 Taking account of the various data inputs described above – which essentially follows the same approach used for the 2023 study, but using updated data inputs in relation to population and per capita expenditure, and a 20-year study period running from 2025 to 2045 – our updated findings in respect of quantitative need for comparison retail floorspace are summarised below in Table 3.4.

Table 3.4 Summary of Comparison Retail Floorspace Requirements, 2025 to 2045

Comparison Retail Floorspace Requirement	2025-2045
Floorspace requirement (sales area floorspace, sq.m)	28,264
Floorspace requirement (gross sq.m)	35,331

3.7.2 Thus, a positive comparison retail floorspace requirement arises over the study period 2025 to 2045, of around 28,250 sq.m (sales area). Unlike in the 2023 study, however, when the positive floorspace requirements only arose after 2033 – with negative floorspace ‘requirements’ arising over the periods to 2028 and 2033 – our update has identified positive requirements arising during each forecast period, as follows:

- 2025-2030: requirement for an additional 3,024 sq.m of comparison retail sales area floorspace
- 2030-2035: requirement for an additional 5,676 sq.m of comparison retail sales area floorspace
- 2035-2040: requirement for an additional 5,553 sq.m of comparison retail sales area floorspace
- 2040-2045: requirement for an additional 14,031 sq.m of comparison retail sales area floorspace

3.7.3 The findings from our update show that around half of the overall floorspace requirement arising over the 2025 to 2045 study period is accounted for by the final five-year period. As with all forecasts of this nature, forecasts are less reliable over the longer term due to uncertainties regarding prevailing conditions many years into the future, and so the forecasts should be kept under regular review.

3.8 Summary

3.8.1 Our updated analysis, outlined above, suggests that the comparison retail requirements arising over the 2025 to 2045 period will be significantly higher than those identified in the 2023 study. The primary reasons for that change are a greater level of predicted population growth across the study area, and higher forecasts of per capita expenditure growth. The amended study period also covers an additional year vis-à-vis the 2023 to 2042 period used previously.

4 SUMMARY OF FINDINGS, AND CONCLUSION

4.1 Summary of Findings

4.1.1 Our updated analysis shows that the level of comparison retail need arising across the study area is likely to be significantly greater than that identified by the 2023 study. The primary reasons for the higher comparison retail floorspace requirements are:

- A greater level of population across the study in the 2025 base year than was the case with the previous study's 2023 base year, and a correspondingly larger pot of expenditure from the outset, as well as a greater level of predicted population growth over the study period than the level of growth forecast during the last study.
- Higher forecasts of per capita expenditure growth.
- The study period now covering 20 years (2025 to 2045), versus the 19-year period used for the previous study (2023 to 2042).

4.1.2 As a consequence of the factors described above, the positive comparison retail floorspace requirement arising over the updated study period 2025 to 2045, of around 28,250 sq.m (sales area), significantly exceeds the requirement for approximately 18,000 sq.m of comparison retail floorspace (sales area) arising across the previous study period (2023-2042).

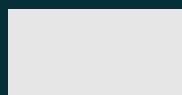
4.2 Conclusion

4.2.1 It is somewhat difficult to pinpoint the aggregate amount of comparison retail floorspace across BRRP as a whole, before the transition from retail to office uses began. We estimate, however, that BRRP previously accommodated around 30,000 sq.m of gross comparison retail floorspace, which equates to a sales area of around 21,000 sq.m.

4.2.2 It is not known whether a like-for-like 'replacement' for BRRP is a realistic expectation, particularly against the backdrop of structural changes which are affecting the retail market, or whether any new retail facilities offering the same range of comparison goods that were previously available at BRRP would be spread across multiple new developments.

4.2.3 Furthermore, as we have explained, some residents will continue to favour other retail destinations that they diverted to when the decline of BRRP's retail function commenced, and so it is not realistic to assume that all of that diverted expenditure could be recaptured if a replacement for BRRP was provided.

4.2.4 Nevertheless, the positive comparison retail floorspace requirement that we have identified across the study period via our updated analysis is substantial, and more than sufficient to cover the turnover requirement of a 'replacement' for BRRP, if such a facility (or facilities) was to emerge.



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