



Oxford Retail, Leisure and Town Centre Needs Study

Main Report

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1 Executive Summary

- 1.1.1 The purpose of this report is to assess retail and leisure needs arising within a study area encompassing Oxford City Council's administrative area, and several adjoining local authority areas. The study outputs will form part of the evidence base to support the preparation of the Oxford Local Plan 2040.
- 1.1.2 To set the context for our assessment of retail and leisure needs, Section 3 first highlights key market and economic trends. Most developers are building less retail floorspace, in line with reducing operator demand. Existing retail floorspace is being converted into alternative uses and the COVID-19 pandemic has accelerated a number of trends within the retail and leisure markets. Brexit-related uncertainty remains in some parts of the economy and the ongoing Russia-Ukraine conflict has resulted in high inflation, low growth and supply chain disruptions. The cost-of-living crisis has had a negative impact on retail sales. The retail market has experienced a significant decrease in rents although there are signs that rents in some stronger locations are stabilising. Regarding the convenience retail market, the 'Big Four' concept is outdated with Aldi now accounting for the same proportion of the UK grocery market share as Morrisons. There has been a significant reduction in average weekly household spending across all leisure sub-sectors (a result of repeated lockdowns).
- 1.1.3 We undertake performance analyses of Oxford City Centre and the five district centres in Section 4, and we review the uses present within each of the local centres to understand whether they are fulfilling the day-to-day needs of nearby residents. Overall, we consider Oxford City Centre to be a relatively healthy centre despite a number of notable national multiple retailers having closed since the last study was published in 2017 (which is reflective of national trends rather than an issue specifically affecting Oxford City Centre). The opening of the redeveloped Westgate Shopping Centre in 2017 has served to make some existing primary shopping frontages – such as the Clarendon Centre, Cornmarket Street and High Street – less attractive shopping destinations. Whilst the vacancy rate is significantly higher than the UK average for all centres and has increased significantly since the publication of the 2017 study, a number of these vacant units are within the Clarendon Centre – which has recently been granted permission for major redevelopment – and the proportion of vacant floorspace is below the UK average for all centres. We consider that the forthcoming redevelopment of the Clarendon Centre will transform this prominent site, enhancing the city centre's overall vitality and viability. We also welcome the plans for the Covered Market, which will improve its visibility, accessibility and use.
- 1.1.4 The performance of Oxford's five district centres varies slightly but we conclude that each centre is a vital and viable centre. With the exception of North Parade Local Centre, the other five local centres fulfil the day-to-day needs of immediate residents as well as serving a broader catchment/capturing passing trade from through traffic.
- 1.1.5 In Section 5 we use the results from a household telephone survey undertaken by NEMS to identify current patterns of retail and leisure spending by residents within the defined study area, which comprises nine study zones. The survey reveals that Oxford City Centre attracts £340.1m of the comparison retail expenditure available to study area residents (a market share of 18.1 per cent) and the study area has an aggregate retention rate of 77.7 per cent (comparison expenditure available to residents within the study area which is retained within the study area). In terms of convenience retail, 89.2 per cent of expenditure is retained within the study area.
- 1.1.6 In Section 6, we calculate the quantitative need for additional retail floorspace arising across the study area over the study period (2023-2042). It should be noted that the study period for this Retail, Leisure and Town Centre Needs Study runs to 2042 whereas the study period for the Oxford Local Plan runs to 2040. We acknowledge that the study period does not coincide with the end of the emerging Local Plan period, it represents 20 years from the commencement of the household telephone survey (November 2022) and allows for four reporting intervals each of five years. In any event, forecasts over the longer-term period should be treated with more caution and reviewed on a more regular basis. We identify a negative requirement for additional comparison retail sales area floorspace over the period to

2033, and a positive requirement for around 18,000 sq.m of comparison retail floorspace (sales area) arising over the longer term period to 2042, all of which arises after 2033. There is no quantitative requirement for new convenience retail floorspace across the study area in the period to 2042. That is not to say, however, that the Council should not support proposals for appropriate convenience retail provision that would cater for new residential developments or which would help to maintain or improve a centre's vitality and viability.

- 1.1.7 In Section 7 we calculate the quantitative need for additional leisure facilities, with a specific emphasis on food and beverage uses given that this is the largest expenditure category. Our assessment shows that, over the study period to 2042, there is no quantitative requirement for new food and beverage floorspace within the study area. A key reason is the relatively modest population growth across the study area over the period to 2042, which means that expenditure growth is also modest and easily exceeded by claims on that growth (productivity growth amongst existing businesses).
- 1.1.8 In Section 8, we summarise the findings of the study and set out our recommendations for the formulation of future planning policy in Oxford, some of which are summarised below:
- we consider that the retail hierarchy, set out within Policy V1 ('Ensuring the vitality of centres') of the current version of the Oxford Local Plan, continues to be appropriate;
 - to ensure the continued vitality and vibrancy of Oxford's centres, the Council should adopt a strong stance regarding out-of-centre development. The Council could bolster the wording of Option C within Policy Option Set C1: 'Focusing Town Centre Uses in Our District Centres', set out within Oxford Local Plan 2040 Preferred Options, by stating that the purpose of the policy is to minimise out-of-centre development; and
 - we consider that the Council should take a differential approach to the active frontages policy (that is, the threshold below which Use Class E cannot fall should be different for each centre, albeit some centres may have the same threshold). As a starting point, the Council should have regard to the existing thresholds included within Policies V2 and V4 of the adopted Local Plan and adjust those figures based on the current performance of each centre and in the light of the changes to the Use Classes Order.
- 1.1.9 In terms of the performance of Oxford City Centre, we conclude that it remains a relatively healthy centre and we make a number of recommendations including:
- we welcome the news that the planning application for the redevelopment of the Clarendon Centre has been granted planning permission. We were particularly in favour of the proposal to markedly reduce the retail component and retain main town centre uses in the light of the finding in Section 3 that most developers are building less retail floorspace in line with reducing operator demand;
 - we also welcome the plans for the Covered Market, which will improve its visibility, accessibility and usage;
 - given that residential development is to be encouraged within Oxford City Centre, as set out within the Oxford City Centre Action Plan, there needs to be a better representation of convenience goods retailers going forward to ensure that future residents can fulfil their day-to-day shopping needs; and
 - the Council should maximise the potential of both Bonn Square and Broad Street to become significant civic spaces.
- 1.1.10 We also make a number of recommendations in relation to each of the district centres, as follows:
- Cowley Centre: we support the current proposals for Templars Square Shopping Centre, including the plans to reduce the retail component of the scheme and introduce other uses such as residential. We particularly support the proposals to increase evening and night-time uses given that the district centre's current evening economy is limited. The proposals will help to ensure that Cowley Centre continues to fulfil its role as the Primary District Centre.

- Cowley Road: the Council should seek to maintain, wherever possible, the current mix of uses within the centre, which adds to its distinctiveness and therefore resilience. Attracting national multiple comparison retailers should not be a priority given the centre's proximity to Oxford City Centre.
- Headington: the Council should seek to capitalise on the footfall generated by Oxford Brookes University and John Radcliffe Hospital by, for example, improving wayfinding to the district centre, advertising businesses located within the district centre in bus stops outside the institutions, and introducing a cycle lane along Osler Road which connects John Radcliffe Hospital to Headington.
- Summertown: the aspiration for Summertown should be to continue to build on its quality retail offer, which distinguishes it from the other district centres.
- Blackbird Leys: we support the recently submitted hybrid planning application which seeks to transform Blackbird Leys District Centre (and land off Knights Road) through an expanded retail provision to meet the needs of future residents of the significant increase in dwellings within the district centre which is also proposed.

2 Introduction

2.1 Purpose of the Study

2.1.1 In October 2022, Oxford City Council commissioned Stantec UK Ltd¹ to undertake the Oxford Retail, Leisure and Town Centres Need Study on its behalf, to provide robust evidence to support the preparation of the Local Plan. In this main report, we provide our assessment of retail and leisure needs arising over the period to 2042, informed by a new telephone survey of households which establishes current retail and leisure expenditure patterns.

2.1.2 In accordance with the City Council's brief, this study provides:

- an overview of national trends in the retail and leisure markets;
- health checks to assess the performance of Oxford City Centre and each of the five district centres;
- an overview of current shopping and leisure expenditure patterns based on up-to-date survey data and the identification of existing market shares for defined centres and other destinations;
- a quantitative assessment of retail floorspace requirements in both the convenience and comparison goods sectors up to 2042, taking into account the latest population and expenditure data, and the effects of multi-channel retailing (the most significance of which is online shopping);
- recommendations in terms of how to meet the identified floorspace requirements, having regard to the performance of centres, their capacity to accommodate new development, and the need to increase consumer choice; and
- policy recommendations in respect of future strategies for Oxford City Centre and each of the district centres.

2.2 Structure of the Report

2.2.1 The remainder of our report is structured as follows:

- Section 3 summarises key market and economic trends of relevance to planning for town centres.
- Section 4 provides our performance analysis of Oxford City Centre and each of the district centres, and we review the uses present within each of the local centres within the City Council's administrative area to understand whether they are fulfilling the day-to-day needs of the residents they are meant to serve;
- Section 5 summarises current patterns of retail and leisure spending within the study area, based on the household telephone survey;
- Section 6 contains our assessment of quantitative and qualitative requirements for additional retail floorspace;
- Section 7 provides our assessment of requirements arising within the leisure sector, focusing on the key food and beverage sub-sector; and
- Section 8 provides a summary of our findings and our recommendations.

¹ Hereafter referred to as Stantec

3 Market and Economic Trends

3.1 Introduction

3.1.1 The study has been undertaken in the midst of a renewed focus on the changing role and function of town centres. It is widely accepted that the traditional role of town centres has been undermined by the continued attraction of out-of-centre retail locations, the growth in popularity of multi-channel shopping, recent socio-economic events and the associated decline in expenditure growth. In this section of our report, we highlight some of these challenges in order to set the context for the remainder of the report.

3.2 Market Trends

Introduction

3.2.1 There has been ongoing restructuring in the retail and commercial leisure market for many years, accelerated by events such as the global financial crisis in 2009 and the more recent COVID-19 pandemic. Online sales have continued to rise, most developers are building less retail floorspace in line with reducing operator demand, and existing floorspace is being converted into alternative uses. The COVID-19 pandemic has accelerated these trends. High streets in the UK were initially forced to close in March 2020, and again following several temporary easings of restrictions. Whilst high streets have now re-opened, some retailers have not returned, or have rationalised their store portfolio.

3.2.2 Previous rules on social distancing and Government guidance to work from home, the latter of which only ended in late January 2022, led to reduced custom in town centres. Many employers have moved to 'hybrid' working arrangements, with employees able to work from home for several days each week. These factors have created enormous challenges for town centres. Getting back to and then maintaining pre-COVID-19 levels of vitality and viability should be the objective for most town centres.

3.2.3 Below, we discuss the key trends of the last few years; we set out the main economic recovery scenarios; and we predict the likely implications of the COVID-19 pandemic.

Brexit

3.2.4 In 2019, the UK economy grew at its slowest rate in seven years, which was largely attributed to the uncertainty surrounding Brexit negotiations and a weaker global economy. The small growth in the UK economy was reflected in consumer spending, which only increased by 1.2 per cent, the smallest increase in eight years². Low consumer confidence and lacklustre income growth was blamed for the disappointing growth in consumer spending.

3.2.5 Brexit-related uncertainty was expected to end in 2022; however, it still remains in some parts of the economy as new legislation and regulations are created. Brexit-related uncertainty is blamed for a lack of business investment and subsequent slow economic growth, and has led to supply issues including a lack of certain perishable goods and a delay in restocking some items.

3.2.6 Over the medium term, it is expected that the outlook for retail sales volumes will be more favourable. However, spending volumes will be around 5 per cent lower than those expected prior to the pandemic as households, businesses and government face being in a weaker financial position³.

3.2.7 The long-term economic consequences of Brexit will depend on how the UK-EU's new trading relationship evolves.

² Experian, Retail Planner Briefing Note 17, February 2020

³ Experian, Retail Planner Briefing Note 19, January 2022

Russia-Ukraine Conflict and Inflation

- 3.2.8 The Russian invasion of Ukraine early in 2022 sent shock waves through the business community, which had been in the early stages of recovery following the lifting of COVID-19 restrictions.
- 3.2.9 The direct consequences of the conflict are high inflation, low growth and supply chain disruptions resulting from the shortage and rising cost of raw materials, energy and transport. It is expected that supply chain disruptions will last well into 2023⁴. For example, McDonald's announced earlier this year that it intended to exit Kazakhstan due to difficulties in procuring meat triggered by the Russia-Ukraine conflict⁵.
- 3.2.10 The conflict has driven inflation in food prices, which reached a record 13.3 per cent in December 2022, up from 12.4 per cent the previous month⁶. The British Retail Consortium announced this was the highest monthly rate since it began collecting data in 2005. As a result, it is expected that the sharp increase in food prices will cause consumers to spend less on discretionary items and commercial leisure pursuits.

Retail Sales

- 3.2.11 Retail sales volumes across Great Britain increased significantly upon the opening of non-essential retail in April 2021 and remained high during the first half of 2021 before diminishing as consumers spent less on durable goods and more in areas of the economy that had, up until that point, been 'locked down', such as travel and leisure.
- 3.2.12 More recently, price increases and the cost-of-living crisis have also affected retail sales volumes. Retail sales volumes are estimated to have decreased by 0.4 per cent in November 2022 following a rise of 0.9 per cent in October due to the impact of the additional Bank Holiday in September for the State Funeral of Her Majesty the Queen. Non-store retailing (predominantly online retailers) sales volumes decreased by 2.8 per cent in November 2022, continuing a downward trend since early 2021 when COVID-19 restrictions eased following the third national lockdown and people could return to shopping in store. However, non-store retailing sales volumes are still substantially higher than those in February 2020 (before the onset of the pandemic)⁷.

Store Closures

- 3.2.13 Table 3-1 below shows the net changes in Great Britain's retail units per year from over the 2013 to 2022 period. The gap between store openings and closures in 2022 was the narrowest since 2016. In 2022 there was a net loss of 3,365 retail units across Great Britain⁸. Whilst the net loss experienced in 2022 represents a 57 per cent year-on-year decrease from the 2021 figure of -7,902, it was the eighth consecutive year that the trend of a net loss of retail units had persisted.
- 3.2.14 There was a significant decrease in the number of store openings in 2020 but there was also a significant decrease in the number of store closures, down 6.8 per cent on the previous year. There are two reasons for this. Firstly, Government support schemes including the business rates holiday and protection from evictions effectively froze the property sector. This enabled most retailers to survive as landlords were forced to forego rental payments in some instances. Secondly, the temporary closure of 'non-essential' retail depressed closures as well

⁴ Deloitte European Chief Financial Officers Survey – Spring 2022

⁵ Caspian News, McDonald's Plans to Exit Kazakhstan due to Supply Chain Disruptions Caused by Russia-Ukraine War, January 2023. Available online at: [McDonald's Plans to Exit Kazakhstan due to Supply Chain Disruptions Caused by Russia-Ukraine War - Caspian News](#)

⁶ The Guardian, Record 13.3% UK food inflation raises fears of 'another difficult year', December 2022. Available online at: [Record 13.3% UK food inflation raises fears of 'another difficult year' | UK cost of living crisis | The Guardian](#)

⁷ Retail sales, Great Britain: November 2022 (January 2023). Available online at: [Retail sales, Great Britain - Office for National Statistics \(ons.gov.uk\)](#)

⁸ Local Data Company, FY 2022 Retail and Leisure Trends Analysis, March 2023

as openings with total activity (openings and closures) down by 9.6 per cent compared to 2019⁹.

- 3.2.15 The data below show there were 48,694 store closures in 2022, which is an increase of 2.6 per cent when compared with the number of store closures in 2013. Between 2013 and 2022, the net change in UK retail units was minus 44,856, which is clearly a substantial loss of retail units and reflective of the general trend of decline in demand for physical floorspace as the market share of online shopping continues to rise.

Table 3-1 Net change in UK retail units by year 2013-2022

Year	Store Openings	Store Closures	Net Change in UK Retail Units
2013	49,496	47,456	2,040
2014	47,624	47,514	110
2015	47,042	47,380	-338
2016	45,986	47,636	-1,650
2017	45,274	50,767	-5,493
2018	43,278	50,828	-7,550
2019	44,883	54,052	-9,169
2020	39,060	50,379	-11,319
2021	43,167	51,069	-7,902
2022	45,329	48,694	-3,365
2013-2022	451,139	495,775	-44,856

- 3.2.16 Across all retail location types – high streets, retail parks and shopping centres – there was a decrease in the vacancy rate between 2021 and 2022. The retail park vacancy rate dropped from 11.3 per cent in 2021 to 9.0 per cent in 2022, representing the largest year-on-year decline across all retail location types. In addition, the retail park vacancy rate is now only 0.9 percentage points above the pre-pandemic level of 8.1 per cent. The vacancy rate in retail parks (9.0 per cent) is significantly lower than the high street and shopping centres (13.8 per cent and 18.2 per cent, respectively). Retail parks are desirable shopping destinations due to their convenience, ease of access and ability to serve as last-mile delivery hubs and, from an operator’s perspective, they offer lower rents compared with other location types¹⁰.
- 3.2.17 Shortages in the labour market have somewhat hampered growth over recent months. The Russia-Ukraine crisis and rising inflation have led to an increase in uncertainty within global markets, which is causing occupiers to be more wary.
- 3.2.18 Changes to the Use Classes Order that were brought into effect on 1 September 2020 have led to more leisure units opening in what were previously retail units (thereby offsetting an increase in vacancy rates). A number of former standalone Use Classes (including A1 ‘Shops’, A3 ‘Restaurants and Cafés’ and D2 ‘Assembly and Leisure’) were subsumed into a new, expansive Use Class E (‘Commercial, Business and Service’). There is now much more flexibility for uses falling within Class E to change to another use within Class E without needing planning permission (provided that no building work is needed to enable the change of use and subject to any conditions on the existing planning permission to restrict the use).

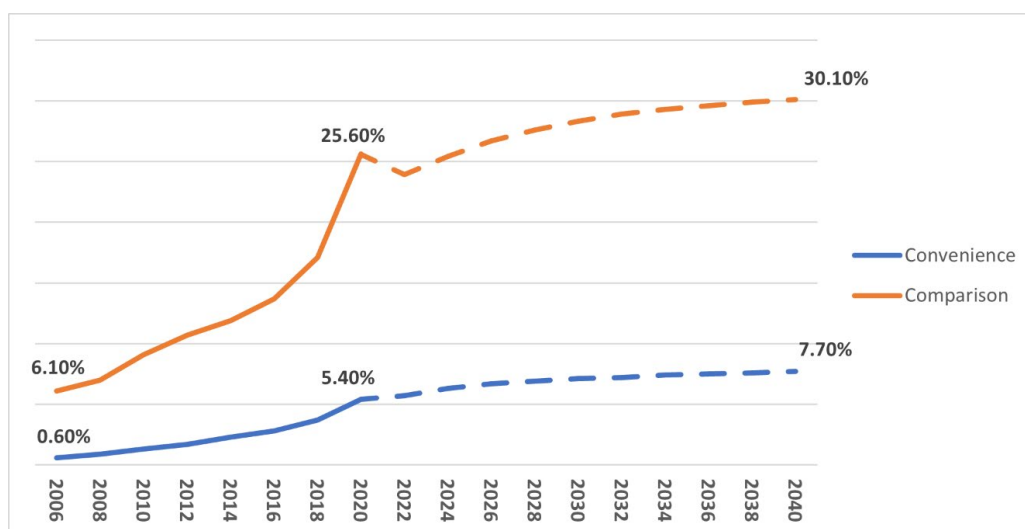
⁹ Local Data Company, GB Retail and Leisure Market Analysis Full Year 2020

¹⁰ Local Data Company, FY 2022 Retail and Leisure Trends Analysis, March 2023

Online Shopping/Special Forms of Trading

- 3.2.1 Figure 3-1 shows the market share of special forms of trading ('SFT', which includes online shopping) in both the convenience and comparison retail sectors up to 2020 and projected forward to 2040. Experian defines SFT as any non-store retailing including internet sales, mail order sales, market stalls, vending machines and door-to-door selling. Internet sales account for a large proportion of SFT.
- 3.2.2 The market share of SFT in both the comparison and convenience retail sectors is forecast to increase, but it is increasing more sharply within the comparison retail sector. One of the reasons is because foodstore operators find it difficult to make online shopping profitable. Experian predicts that, by 2040, SFT will account for nearly a third of the comparison goods retail sector. The obvious implication of this is that less comparison retail floorspace will be required.

Figure 3-1 Predicted SFT market shares



Source: Experian Retail Planner Briefing Note 19 (January 2022), Figure 5, Appendix 3

- 3.2.3 Generally speaking, the performance of the high street retail sector is weakening. Consideration should be given to introducing and expanding alternative uses in the city centre and the five district centres, including small-medium scale residential and office uses in more peripheral areas.

Commercial Retail Rents

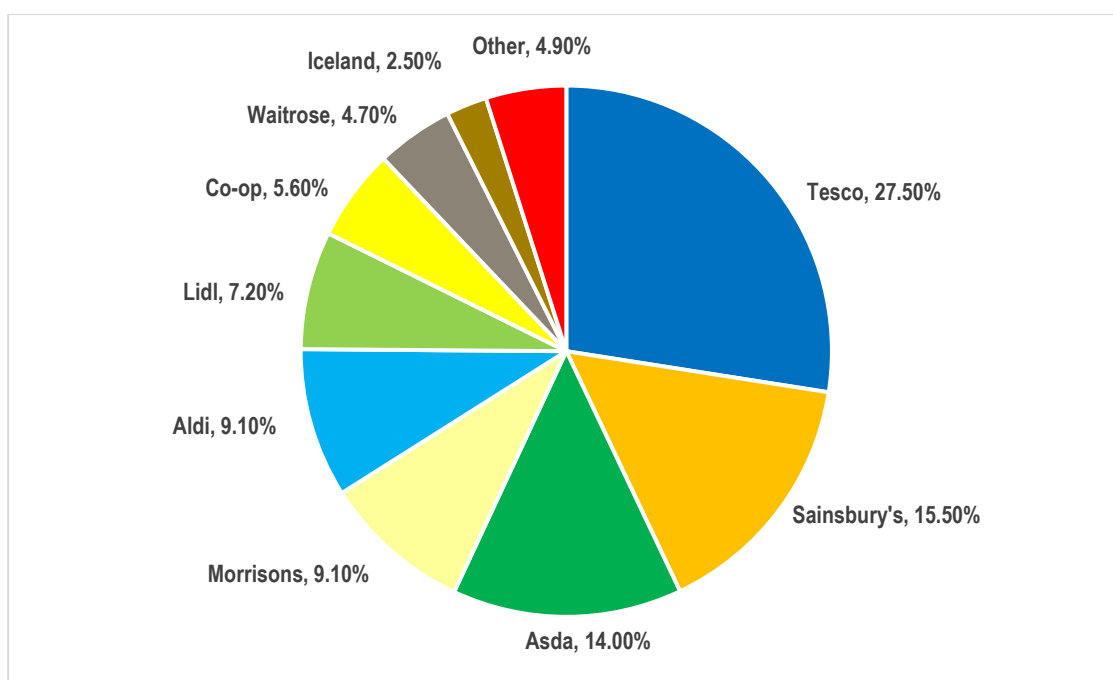
- 3.2.4 Due to the supply of retail space outstripping demand and the impact of successive lockdowns, the retail market has experienced a significant decrease in rents, with some having fallen as much as 50 per cent since their peak in the 2000s¹¹. The decline in rents has given new operators the chance to open stores in locations that were previously too expensive. While this pressure on retail rents will continue, there are signs that rents in some stronger locations are stabilising as occupiers settle with the new terms available. In addition, turnover rents, where rents are aligned with an occupier's turnover, are becoming more prevalent throughout the retail sector (this is the case with the Westgate Shopping Centre in Oxford City Centre).
- 3.2.5 Declining retail rents have led to a substantial drop in income for landlords as well as declining investment values given the higher risk associated with finding future tenants. One commercial agent noted that some landlords in Oxford City Centre are looking to alternative uses such as residential accommodation including student accommodation, which should encourage more people to live in the city centre.

¹¹ Colliers International, Midsummer Retail Report 2021

3.3 Convenience Retail Sector

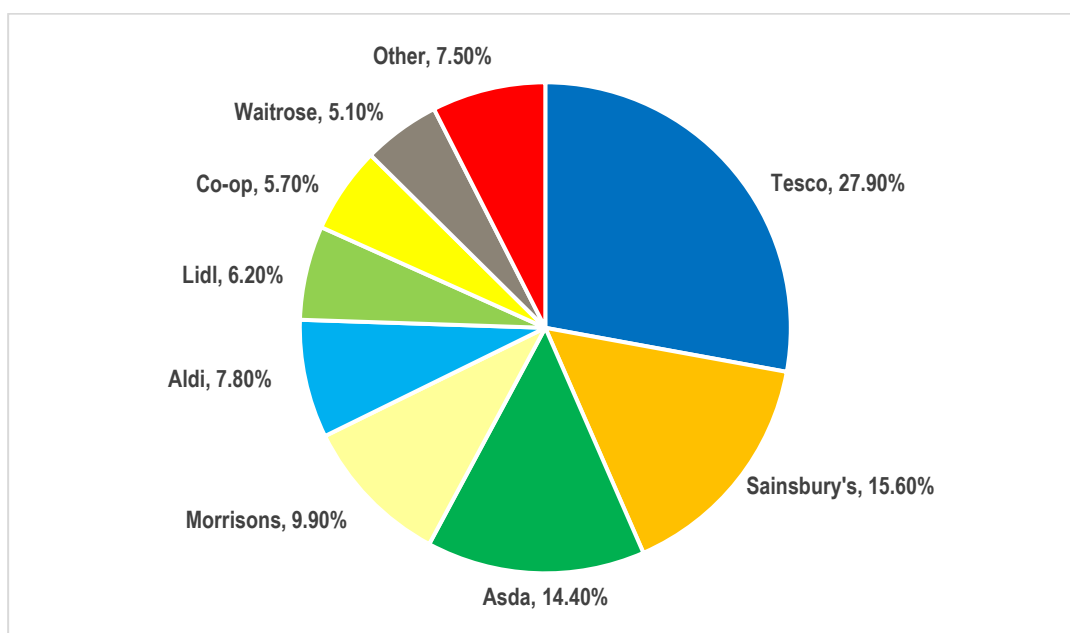
- 3.3.1 Prior to the global financial crisis, the convenience goods retail sector was a key driver of growth in the retail sector. The original 'Big Four' supermarket operators (Asda, Morrisons, Tesco and Sainsbury's), which have traditionally dominated the market, were building and operating increasingly larger stores and expanding the range of services that they provide (particularly in terms of comparison retail goods). Whilst many of these larger stores were built outside of town centres, new large foodstores also often served to anchor re-development schemes within smaller town centres.
- 3.3.2 Since the global financial crisis, the market dominance of the 'Big Four' has been increasingly challenged, both by higher-end operators, such as Waitrose and Marks & Spencer (Simply Food and Foodhall formats), and value/discount retailers. Aldi and Lidl have posted significant year-on-year growth over recent years and they have emerged as important forces in the convenience goods retail sector. Expenditure on convenience goods had been falling in recent years due to increasing competition between operators (leading to a reduction in prices and low inflation).
- 3.3.3 Figures 3-2 and 3.3 show the UK grocery market share as of January 2022 and January 2023, respectively. Aldi now accounts for the same proportion of the UK grocery market share as Morrisons – Aldi's market share increasing by 1.3 percentage points over that 12-month period alone, with Morrisons going in the opposite direction – and therefore the 'Big Four' is now an outdated concept. Aldi and the traditional 'Big Four' supermarket operators account for approximately three quarters of the convenience retail market share.

Figure 3-2 UK Grocery Market Share (January 2023)



Source: KANTAR

Figure 3-3 UK Grocery Market Share (January 2022)



Source: KANTAR

- 3.3.4 There has been an increasing move by the major convenience goods retail operators away from opening larger-format stores towards smaller supermarkets and establishing a network of 'top up' convenience goods shopping facilities. These smaller-format stores are often located in town centres, or district/neighbourhood shopping parades. The shift has been driven by changing consumer behaviour; shoppers are undertaking an increasing number of smaller 'top-up shopping' or 'basket shopping' trips instead of a weekly food shop at a large out-of-centre foodstore. For example, Amazon Go opened its first 'till-less' grocery store in west London in early 2021. Since then, a number of shops have opened up in the city. These shops enable customers to pick their goods and leave without having to visit a till. Similarly, Lidl has announced plans to open convenience goods stores in London.
- 3.3.5 One of the reasons which explains why retailers such as Aldi and Lidl have increased their market share over recent years is because they have successfully diversified their offers to include more premium products, thereby appealing to new categories of customers. Those retailers are no longer really 'discount operators' in the way they were 10 or more years ago, and they have effectively become mainstream foodstore operators. In contrast, Morrisons and Asda announced that they are competing on price, in light of high inflation in 2022. Asda launched its 'Just Essential' budget range in May 2022 and, following huge demand, had to temporarily limit the sale of products from this range. The range was introduced to help shoppers cope with the cost-of-living crisis¹².
- 3.3.6 In order to compete with the likes of Aldi and Lidl, Tesco opened its Jack's discount chain in 2018. Less than four years later, Tesco announced that it was closing all 13 Jack's stores. Six of the branches were converted into Tesco stores while the remaining seven closed indefinitely.
- 3.3.7 Both Sainsbury's and Tesco now have more convenience stores than large supermarkets and superstores, and they have withdrawn proposals for new superstores and from town centre redevelopment projects in recent years. In the last few years both Tesco and Morrisons have closed dozens of 'unprofitable' foodstores (with Morrisons also disposing of its portfolio of convenience stores to concentrate on its core business, demonstrating the complexity of changes within the market).

¹² Evening Standard, Asda limiting sales of budget Just Essentials range due to soaring demand, 14 September 2022. Available online at: [Asda limiting sales of budget Just Essentials range due to soaring demand | Evening Standard](#)

- 3.3.8 By way of comparison, Aldi and Lidl have investment plans to open more than 100 stores on an annual basis. Store formats are also evolving with new Aldi and Lidl foodstores now providing more floorspace than previous formats, along with the introduction of new facilities such as in-store bakeries.
- 3.3.9 In its aim to become the UK's leading 'omnichannel' retailer, Marks & Spencer recently announced a £480 million investment in its store rotation programme¹³. The retailer has identified a pipeline of 20 new, bigger and better stores to be opened in the 2023/24 financial year, which will fulfil its aim of creating a store estate fit for the future. The store rotation programme seeks to ensure the right stores in the right places, with the right space, and the company aims to rotate from the 247 stores it has today to 180 higher quality, higher productivity full line stores selling clothing, home and food whilst also opening over 100 bigger and better foodstores.
- 3.3.10 Marks & Spencer's recent announcement is on the back of the success of recently relocated and renewed stores. For example, in November 2022, Marks & Spencer relocated from an aging town centre site in Chesterfield to a new 46,000 sq.ft store in the nearby Ravenside Retail Park and offered free parking to customers. Overall sales were up 103 per cent in December 2022 compared to the previous year and the Council regarded the opening as a demonstration of 'confidence' in the town's future. Five new stores will open at former Debenhams sites in key city locations in 2023/24. As well as opening its own stores, Marks & Spencer has plans to grow its franchise model to expand its convenience retail offer, which will mean that more customers will have access to the Marks & Spencer Food range, building on the success of franchise partnerships with BP, Moto, SSP and Costa.

3.4 Comparison Retail Sector

- 3.4.1 Over the last few years there have been many notable failures and company restructurings within the comparison goods retail sector, including Dawsons Music, T M Lewin, Victoria's Secret, Jessops, Paperchase, Debenhams and Arcadia. Furthermore, the impacts of COVID-19 have led to some major operators not returning to the high street, such as Topshop. However, it is not just operators with physical store formats that have suffered the impacts of COVID-19. Missguided, the e-commerce fashion group, went into administration in May 2022. The company was particularly successful during the pandemic, when lockdown measures forced many clothing stores to temporarily close, but sales were affected upon the reopening of stores¹⁴.
- 3.4.2 Whilst the circumstances impacting each of the retailers are specific to them, a couple of common themes have led to companies failing or needing to restructure, including:
- **Relevance** – the format of certain retailers is becoming less relevant, a good example of this being Toys R Us. Due to the size of the stores, Toys R Us found itself competing against larger retailers such as foodstores and the likes of Argos. As Toys R Us was a specialist retailer, it was unable to change the type of goods being sold within its stores (in the way that supermarkets and catalogue retailers can) and therefore Toys R Us could not react to the market change as freely. Toys R Us also had to compete against large online retailers, such as Amazon, which can offer goods at cheaper prices due to lower overheads.
 - **Over-expansion** – some retailers over-expanded in the early 2000s and have not been able to respond to the growth in online retailing and decline in high street retailing. A good example of this is Maplin, which experienced rapid growth but found that its specialist product was more tailored to an online audience.
- 3.4.3 Whilst it is a common view that the prevalence of online retailing will increase, it would be naïve to dismiss the role of the high street and multi-channel retailing. Often, the most

¹³ [M&S Sets Out C.£500m Investment in its Store Rotation Programme That Will Create Over 3400 Jobs Nationwide | Marks & Spencer \(marksandspencer.com\)](#)

¹⁴ [Who's Gone Bust in Retail? The Centre For Retail Research](#)

successful online brands are built from their reputation on the high street (a good example being John Lewis).

- 3.4.4 The Consumer Prices Index increased by 10.5 per cent in the 12 months to December 2022, down from 10.7 per cent the previous month¹⁵. The largest upward contributions to the annual CPIH inflation rate in November 2022 came from housing and household services (especially from electricity, gas and other fuels), food and non-alcoholic beverages. With inflation surpassing wage growth, households will have less disposable income to spend on comparison goods, putting pressure on retailers¹⁶.

3.5 Commercial Leisure

- 3.5.1 Following the global financial crisis, the restaurant sector has felt the effects of the 'casual dining crunch', which is the result of a culmination of factors. First, a rapid growth of the casual-dining sector following the global financial crisis led to an over-saturation of the market and increased competition. Second, food costs, staff costs, rents and business rates have all increased. Third, despite customers spending more when they dine, they are eating out less often¹⁷.
- 3.5.2 Between May 2021 and May 2022, a total of 1,406 restaurants closed in the UK, up 64 per cent on the previous year¹⁸. This is the result of staff shortages and the cost-of-living crisis which has forced households to rein in their spending. It follows a number of restaurant chains, including Byron, Gourmet Burger Kitchen, Strada and Carluccio's, being forced to close dozens of restaurants in the peak of the pandemic as they could not withstand the various lockdowns and other COVID-related restrictions. One commentator notes that those restaurants kept afloat during the pandemic due to government support schemes are now faced with rising inflation, a post-Brexit labour shortage and consumers who have less spending power¹⁹. We envisage that there will be further restaurant closures, particularly amongst large chains.
- 3.5.3 The intermittent closure of the casual dining sector during the COVID-19 pandemic is partly responsible for the boost in fast-food takeaways, which is now the fastest growing category nationally. Many fast-food takeaways have expanded their estate to cater for increased demand and to take advantage of favourable trading conditions.
- 3.5.4 Many consider spending on leisure to be discretionary and therefore it is likely to be in line with the performance of the UK economy. Table 3-2 shows average weekly household spending on leisure between 2009 and 2021. It is worth noting that the 2009 data coincided with the start of the global financial crisis, 2014 was prior to the Brexit vote, data from the financial year ending 2020 relate to the period immediately prior to the COVID-19 pandemic and data from the financial year ending 2021 are the latest available figures.

¹⁵ Consumer price inflation, UK: January 2023. Available online at: [Consumer price inflation, UK - Office for National Statistics](#)

¹⁶ Local Data Company, H1 2022 Retail and Leisure Trends Analysis, September 2022

¹⁷ The Guardian, The casual dining crunch: why are Jamie's Italian, Strada, Byron (and the rest) all struggling? 22 February 2022. Available online at: [The casual dining crunch: why are Jamie's Italian, Strada, Byron \(and the rest\) all struggling? | Restaurants | The Guardian](#)

¹⁸ Data from UHY Hacker Young sourced in The Guardian, UK restaurant insolvencies jump by more than 60 per cent in year, data shows, July 2022. Available online at: [UK restaurant insolvencies jump by more than 60% in year, data shows | Hospitality industry | The Guardian](#)

¹⁹ Ibid.

Table 3-2 Average Weekly Household Spending Data 2009-2021

Spending Category	2009 (£)	2014 (£)	2020 (£)	2021 (£)	% change (2009-2020)	% change (2009-2021)	% change (2020-2021)
Cinema, theatre and museums etc.	2.30	2.80	3.30	0.80	43.5	-65.2	-75.8
Admissions to clubs, dances, disco and bingo	0.50	0.50	0.80	0.10	60	-80	-87.5
Restaurant and café meals	13.30	16.60	20.20	4.20	51.9	-68.4	-79.2
Takeaway meals and other snack food	8.00	8.80	10.90	5.30	36.3	-33.8	-51.4
Gambling payments	4.10	2.90	2.40	1.10	-41.5	-73.2	-54.2
Sports admission, subscriptions, leisure class fees and equipment hire	5.00	6.90	7.80	3.60	56	-28	-53.8

Source: ONS, Family Workbook Spending in the UK, March 2021 and July 2022

- 3.5.5 Between 2009 and 2020, the average weekly household spend increased across all of the sub-categories with the exception of gambling payments. There was significant growth in spending on sports admission subscriptions and leisure class fees, largely led by a doubling of spending on subscriptions to sports and social clubs, which reflects the growth in the discount gym market.
- 3.5.6 There was also a significant increase (51.9 per cent) in spending on restaurant and café meals since the start of the global financial crisis. The decrease in gambling payments (-41.5 per cent) was largely led by a significant fall in spending at bookmakers. However, online gambling has become much more prevalent in recent years. In 2020, almost one in four adults gambled during the last month compared to around one in six, five years prior²⁰.
- 3.5.7 When compared with the data for 2020, the data for 2021 show a vastly significant reduction in average weekly household spending across all of the sub-categories. This is the result of repeated lockdowns which effectively shut down the commercial leisure sector, preventing households from spending money on those activities for prolonged periods. The change in the average weekly household spending on takeaways, gambling payments and sports admissions and leisure class fees was less marked when compared to the other spending categories in rows 2-4 in the table. This could be due to lockdown restrictions generally being less stringent on takeaways, and gyms opening up earlier than large indoor venues such as cinemas, theatres and clubs.
- 3.5.8 Despite the average weekly household spend on takeaways decreasing between 2020 and 2021, many online food delivery operators witnessed sales soaring during the pandemic as restrictions were imposed on indoor and, to a lesser extent outdoor, seating in cafés and restaurants. Just Eat Takeaway experienced a 76 per cent increase in orders during the first six months of 2021, with the average customer ordering more than three times a month compared with 2.5 times in 2020²¹. This follows an increase in the popularity of online food deliveries in the years prior to the COVID-19 pandemic.

²⁰ [Taking a more in-depth look at online gambling - Gambling Commission](#)

²¹ The Guardian, Just Eat Takeaway orders soar 76% during six months of Covid restrictions, 17 August 2021. Available online at: [Just Eat Takeaway orders soar 76% during six months of Covid restrictions | Couriers/delivery industry | The Guardian](#)

- 3.5.9 One commercial agent noted that there is still demand for cafés and restaurants in Oxford City Centre, but the commercial leisure sector faces its own issues surrounding staffing.

3.6 Impacts of COVID-19

- 3.6.1 With three national lockdowns and some form of restrictions on economic life for almost two years, the short-term impacts of the global pandemic on retail have been stark. In 2020, total retail sales volumes fell by 1.9 per cent in Great Britain compared with 2019, the largest annual fall on record²². A number of national multiple retailers were forced to restructure or enter administration, including Clarks, Debenhams, Oasis, Warehouse, Cath Kidston and Brighthouse. In contrast, independent retailers performed better during the pandemic, with 804 units opening in the first half of 2021²³. This growth can be attributed in part to Government support measures, business rates relief and the moratorium on evictions for commercial tenants, all of which enabled them to remain operational.
- 3.6.2 Hybrid working models have had a notable impact on city centres. Regional town centres have been less affected as large numbers of workers have spent more time and money in local residential areas/local centres²⁴. City centres have also taken a longer time to recover from the pandemic compared with other sized centres. The long-term impacts of the global pandemic on consumer spending and behaviour are far more difficult to predict. Some patterns are beginning to emerge, however, which may impact the future of retail and leisure in the UK.
- 3.6.3 Interestingly, Marks & Spencer announced in May 2020 that 365,000 existing customers used the company's website for the first time and a further 315,000 had either tried it out or returned as shoppers. Steve Rowe, Chief Executive of Marks & Spencer, considers that the global pandemic will speed up the switch from the high street to the internet and trigger big shifts in how people shop, dress and eat. Marks & Spencer has experienced a significant decrease in sales of formalwear and a significant increase in casualwear, which reflects the movement towards working from home²⁵.
- 3.6.4 A commercial agent noted during our discussions that the COVID-19 pandemic started not too long after the opening of the redeveloped Westgate Centre and therefore it is relatively difficult to distinguish between the impacts of the pandemic on the retail and commercial leisure market in the city centre and the impacts of the opening of the redeveloped Westgate Centre. It was also noted that the city centre's retail offer is poorer following the pandemic and that many national multiple retailers have been replaced by secondary traders such as souvenir shops.

Potential Economic Scenarios

- 3.6.5 As well as outlining 'the central forecast' scenario for the UK's macro-economic performance in the context of the ongoing Russia-Ukraine conflict, Experian has put forward three alternative scenarios, namely 'Optimistic scenario', 'Downside Brexit scenario' and 'Severe downside scenario'²⁶.
- 3.6.6 The central forecast assumes that government measures will be somewhat successful in preventing swathes of businesses going bust and reducing the number of employees that are dismissed from their jobs. The medium to long term damage to the economy is assumed to be mild. Regarding the Russia-Ukraine conflict, the central forecast assumes that current

²² ONS, Impact of the coronavirus (COVID-19) pandemic on retail sales in 2020, February 2021

²³ Local Data Company, Looking Beyond Lockdown: GB Retail and Leisure Market Analysis H1 2021, September 2021

²⁴ Local Data Company, Looking Beyond Lockdown: GB Retail and Leisure Market Analysis H1 2021, September 2021

²⁵ 'Coronavirus changing shopping habits 'for ever', says M&S chief', The Guardian, 20 May 2020. Available online at: [Coronavirus changing shopping habits 'for ever', says M&S chief | Retail industry | The Guardian](#)

²⁶ Experian, Retail Planner Briefing Note 20, February 2023. The proceeding commentary regarding the various economic scenarios is also taken from the same document.

sanctions will remain, but no new sanctions will be imposed. As such, the global oil price is likely to be relatively stable in the short term. Great uncertainty surrounds the assumptions underpinning the central forecast. The assumption that there will be a smooth transition to the new trading environment in which more rigorous customs checks will be in place remains unchanged. COVID-19 cases in populations in which the take-up of vaccines is low may continue to cause supply chain disruption and high inflation.

- 3.6.7 There are a number of risks relating to the central forecast, including:
- downward pressure on wages resulting from pay disputes in the context of high inflation as well as older workers leaving the labour force and stricter post-Brexit immigration rules making it harder to employ those from Europe;
 - delayed rise in unemployment (projected to peak at 5.7 per cent by the end of 2024) as high inflation and rising interest rates affect businesses' profitability and intentions to hire. At the same time, the rise in economic inactivity (due to long-covid and backlogs in the NHS) among older age groups could continue or intensify, hindering potential growth; and
 - the long-term economic consequences of Brexit will be dependent on the UK-EU's relationship going forward. The impact on external trade, foreign direct investment and migration are of considerable importance as they can directly affect labour supply and productivity.
- 3.6.8 A 40 per cent probability is attached to the central forecast where annual growth in GDP is expected to average 1.8 per cent from 2021 to 2040.
- 3.6.9 In addition to the central forecast, Experian presents one upside and two downside scenarios. The alternative scenarios assess the different ways in which the Russia-Ukraine conflict could play out and the associated impacts on the UK economy. All of the scenarios assume that there will be no further COVID-19 restrictions and that Brexit will have an insignificant impact on trade. Moreover, it is assumed that the Energy Price Guarantee ('EPG') will cease to exist from April 2024.
- 3.6.10 A 30 per cent probability is attached to the optimistic scenario in which it is assumed that the Russia-Ukraine conflict begins to subside, and sanctions are gradually lifted. Russian oil and gas exports to Europe rise and prices slowly decrease. On the whole, global supply chain disruptions disappear quickly causing inflation to fall at a faster rate than in other scenarios, averaging less than 6 per cent in 2023. In this context, it is assumed that there are no further increases to the Bank Rate which, in turn, has a positive effect on business confidence and ultimately job hiring. The projected increase in the unemployment rate is capped at a peak of 4.4 per cent in 2024. The optimistic scenario assumes a better outlook for household finances which, in turn, results in a more robust economic recovery by the middle of 2023 (although it will not be until Q42023 that GDP returns to pre-pandemic levels).
- 3.6.11 A 25 per cent probability is attached to the downside scenario, in which it is assumed that there is no foreseeable end to the Russia-Ukraine conflict and Western sanctions on Russia continue and become more severe. Supply chain disruptions continue, and the global price of oil rises. In response, Russia cuts off gas supply to all of Europe and, when the EPG expires in April 2024, domestic energy prices rise and Consumer Price Index ('CPI') inflation takes longer to come back down than in the base case. The Bank Rate increases to 5.5 per cent in 2023, higher than the base case. As such, businesses have to make numerous cutbacks and the unemployment rate increases to a peak of 7.3 per cent in 2025. The decline in consumer spending is more pronounced than in the base case. The downside scenario assumes that it will not be until Q12027 when GDP returns to pre-pandemic levels.
- 3.6.12 A 5 per cent probability is attached to the severe downside scenario. As with the base and downside scenarios, the severe downside scenario assumes that the Russia-Ukraine conflict will continue indefinitely. This scenario assumes that Russia cuts off oil supply to all of Europe as well as gas, causing the prices of both commodities to increase sharply. Domestic energy prices spike following the expiration of the EPG in April 2024 and CPI remains higher for longer. Businesses are under more pressure to make cuts than in the downside scenario which sees the unemployment rate peak at 9.6 per cent in H12025 and remaining above 8 per cent until 2028. This scenario assumes that the Bank Rate rises to 6.75 per cent in 2023. The

cost-of-living crisis underpins a gradual decline in consumer spending, which lasts until the end of 2024. The severe downside scenario assumes that it will not be until Q42028 when GDP returns to pre-pandemic levels.

4 Performance Analyses

4.1 Introduction

- 4.1.1 We have undertaken performance analyses (otherwise known as ‘health checks’) of Oxford City Centre and each of the five district centres (Cowley Centre, East Oxford-Cowley Road, Headington, Summertown and Blackbird Leys) within Oxford City Council’s administrative area. Our appraisals were informed by visits to the centres on 21 and 22 December 2022, together with desk-based research which draws on published information from national data-providers.
- 4.1.2 Where possible, we describe the position in relation to key indicators of vitality and viability that are set out within the Planning Practice Guidance (‘PPG’), summarised below in Table 4-1, but information for some of the indicators is not readily available (or useful) for certain centres. For instance, commercial yield data are no longer regularly published for all centres and, in the absence of formal footfall surveys for all centres, we necessarily comment on pedestrian flows at a high level. Where relevant, we compare our findings with those from the Council’s previous retail and leisure study in order to track changes in the performance of the city centre and each of the district centres over the past six years.

Table 4-1 PPG Town Centre Vitality and Viability Indicators

Vitality and viability of town centres: key indicators
<ul style="list-style-type: none">■ Diversity of uses■ Proportion of vacant street level property■ Commercial yields on non-domestic property■ Customers’ experience and behaviour■ Retailer representation and intentions to change representation■ Commercial rents■ Pedestrian flows■ Accessibility – this includes transport accessibility and accessibility for people with different impairments or health conditions, as well as older people with mobility requirements■ Perception of safety and occurrence of crime■ State of town centre environmental quality■ Balance between independent and multiple stores■ Extent to which there is evidence of barriers to new businesses opening and existing businesses expanding■ Opening hours / availability / extent to which there is an evening and night-time economy offer

- 4.1.3 As well as providing the base position for the future monitoring of town centre vitality and viability, the performance analysis exercise identifies the key strengths of the centres as well as deficiencies and areas that would benefit from improvement. We then use this information to inform our recommendations in subsequent sections of our report.
- 4.1.4 Rather than simply describing the position in relation to the indicators we also provide an overview of key messages from various background documents to provide context to the centres in order to provide a more comprehensive appraisal of them.

- 4.1.5 For most of the centres, the diversity of uses audit is based on an Experian Goad plan, updated by Stantec in December 2022. An Experian Goad plan is not available for Blackbird Leys and so, for that centre, we recorded the uses present on a map at unit level and subsequently assigned each use a Goad code. This enabled us to analyse the diversity of uses present within the centre in a similar manner to the other study centres.
- 4.1.6 The Goad definition of Oxford City Centre broadly reflects the city centre's defined Primary Shopping Area. The Goad definition of Summertown District Centre and Headington District Centre broadly reflect the defined district centre boundaries²⁷. The defined district centre boundary includes the eastern stretch of Between Towns Road roughly between Barns Road and Oxford Road, but the Goad plan of Cowley Centre District Centre does not (although there are only a handful of additional retail and service outlets along this stretch of Between Towns Road, and all but one²⁸ are excluded from Experian's Centre Report – see below for more information). The Goad plan of East Oxford-Cowley Road does not cover the full extent of the retail and service outlets at the centre. There is a significant number of additional outlets to the east of the O2 Arena building, which marks the eastern end of the Goad plan, and there are additional outlets beyond the western end of the Goad plan, between Cowley Road District Centre and St Clement's Local Centre. As such, we took photographs of these units during our site visit and included them within our diversity of uses analysis.
- 4.1.7 It is also worth highlighting that some town centre uses such as public houses, bars, nightclubs, cinemas, theatres, solicitors, betting offices and dentists are not listed within Experian's Centre Report and are therefore excluded from the diversity of uses analyses. This results in a discrepancy between the actual number of units within a defined centre and the number of units reported within the diversity of uses analysis (as well as within the individual retail categories). Where relevant, however, we have referred to these common town centre uses within our qualitative appraisal of the centres. Furthermore, Experian Goad only records uses within ground floor units, except for shopping centres, where the uses on each floor are recorded. For example, an entrance to a first-floor restaurant or gym would not be assigned a Goad code.
- 4.1.8 We also reviewed the uses present within each of the six local centres, as defined on the adopted Policies Map, to understand whether they are fulfilling the day-to-day needs of nearby residents.

4.2 Review of Key Background Documents

Oxford Local Plan 2016-2036 (June 2020)

- 4.2.1 The Oxford Local Plan 2016-2036, which was adopted in June 2020, sets out the city's planning policies against which all planning applications are assessed. Oxford's retail and tourism offer is noted as one of the city's strengths, with high streets described as 'full and active' and vacancy rates reported as 'low'. As discussed in Section 3, however, the COVID-19 pandemic has had a significant impact on the high street and, in particular, vacancy rates.
- 4.2.2 Cowley Centre sits above the other district centres in Oxford's hierarchy of centres, as the Primary District Centre (whereas the others are Secondary District Centres).
- 4.2.3 One of the key elements of the Local Plan strategy is for the district centres to accommodate more growth and strengthen their function as 'hubs' for local communities. This would enable communities to access facilities more locally, reducing the need to travel and relieving the pressure on Oxford City Centre. The Council seeks to capitalise on the strengths of each centre (whether that be a focus on employment, community facilities, retail or the evening economy for example) and their potential for public transport connections and other infrastructure.
- 4.2.4 There is also an aspiration for the district centres to play a greater role in accommodating a variety of town centre uses. Whilst the city centre and the district centres will continue to

²⁷ The adopted Policies Map includes Alexandra Tennis Courts within Summertown District Centre and Bury Knowle Park in Headington District Centre whereas the respective Experian Goad plans do not.

²⁸ We have included this unit within our diversity of uses analysis.

provide the city's retail facilities (in the shopping frontages), changing shopping patterns have resulted in a new vision for the high street, one which encourages a variety of uses such as employment, leisure and cultural facilities as well as residential on upper floors and beyond the core shopping frontages.

- 4.2.5 Policy V1 'Ensuring the vitality of centres' adopts the broad thrust of the NPPF's approach to town centres. However, the Local Plan's threshold above which planning applications for retail and leisure development outside the defined centres require an impact assessment is much lower (350 sq.m of gross floorspace) compared with the NPPF (2,500 sq.m of gross floorspace in the absence of a locally set threshold). This demonstrates the threat that such applications pose to the vitality and viability of Oxford's City Centre and its District Centres.
- 4.2.6 The Local Plan states that a significant proportion of the forecast retail need over the plan period will be met by the Westgate Shopping Centre, which will affect shopping patterns and the function of other shopping streets in the city centre.

Authority Monitoring Report 2021-22 (December 2022)

- 4.2.7 The Authority Monitoring Report ('AMR') contains footfall data, which we refer to within our performance analysis of Oxford City Centre.

Oxford City Centre Action Plan (June 2022)

- 4.2.8 The Oxford City Centre Action Plan ('CCAP'), which was jointly prepared by Oxford City Council and other local stakeholders, identifies a series of actions to improve the resilience of the city centre following the COVID-19 pandemic. The CCAP is split into three volumes – Volume 1: Context and Approach; Volume 2: Action Plan and Implementation; and Appendix: Projects & Places – which collectively run to some 134 pages and so we do not provide a comprehensive review here, but instead highlight key points that are pertinent to this study.
- 4.2.9 As outlined in the foreword to the CCAP, the Action Plan will help to enable the Council and its partners to respond to the current challenges facing the high street and be equipped to respond to emerging and future trends.
- 4.2.10 According to the CCAP, the proportion of vacant retail units was c.13 per cent in Summer 2021²⁹ and retail's share of the market has decreased from 49 per cent in 2008 to 44 per cent³⁰. Retail rental rates increased from £50 per sq.ft to £65 per sq.ft prior to the pandemic³¹ and on average 150,000 people travelled in and out of the city centre each day, of which 33 per cent arrived by bus, 30 per cent by car, 15 per cent by foot and 12 per cent by cycle³².
- 4.2.11 Below, we summarise some of Oxford City Centre's key strengths, weaknesses, opportunities and threats that are identified within the CCAP.

²⁹ Experian GOAD, 2019 cited in Oxford City Centre Action Plan (June 2022)

³⁰ Experian GOAD, 2019 cited in Oxford City Centre Action Plan (June 2022)

³¹ Oxford City Council Homelessness and Rough Sleeping Evidence Base, 2021 cited in Oxford City Centre Action Plan (June 2022)

³² Oxford Transport Strategy 2015 cited in in Oxford City Centre Action Plan (June 2022)

Table 4-2 Oxford City Centre SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> ■ International brand that attracts businesses and visitors. ■ Oxford is considered the 'service centre' of the Oxfordshire economy. ■ Strong business confidence – more than 20 businesses opened in vacant city centre units between October 2020 and summer 2021. ■ A compact city – the whole city centre is within a c.20-minute walk. ■ A strong cultural and creative sector – Oxford boasts world-class museums, historic libraries and gardens and has a thriving theatre, music and entertainment scene. ■ A wide range of cultural and leisure uses and a diverse night-time economy. 	<ul style="list-style-type: none"> ■ High levels of congestion. ■ Lack of publicly accessible green space – most of the city centre's green spaces are within the city's colleges or on the periphery of the centre. Besides Bonn Square and Gloucester Green there are few places for pedestrians to dwell. ■ There is a lack of residential accommodation within the city centre and so there is a reliance on visitors and in-commuters, which proved a challenge during the COVID-19 pandemic. ■ Heritage sensitivities – most of the city centre is within a conservation area and there are lots of listed buildings. This poses some challenges in terms of converting buildings into alternative uses. ■ The city centre attracts national retail and hospitality brands but this has forced rent levels up which has made it more difficult for independent retailers and start-ups to set up.
Opportunities	Threats
<ul style="list-style-type: none"> ■ Use the pilots undertaken during the COVID-19 pandemic recovery, such as the part-pedestrianisation of Broad Street in summer 2021, to inform a strategy to reprioritise street space, noting that Broad Street and St Giles' have the potential to become significant civic spaces. ■ Maximise the potential of the West End and Osney Mead development – the largest mixed-use development ever to occur in Oxford City Centre, which will provide new homes and a range of new innovative businesses. ■ As well as public realm improvements, an organised programme of events, activation and animation would help diversify the city centre experience and boost dwell time. ■ Encourage residential development including student housing to increase footfall and overall vibrancy. ■ Explore opportunities to encourage longer visitor stays through increasing the provision of overnight accommodation and diversifying the range of attractions and experiences. ■ Enhance accessibility and sustainable travel options. 	<ul style="list-style-type: none"> ■ Competing pressure for street space – a lack of pedestrian space especially when visitor numbers are high. This is particularly a problem on High Street, Carfax, St Aldates and Magdalen Street. ■ A low residential population in the city centre means that the retail sector relies on workers and visitors for footfall. ■ Constrained SME and independent market – commercial rents rarely vary to enable growth of the independent sector. ■ Some big retailers have moved out leaving large units empty that are potentially difficult to fill. However, there is an opportunity for these spaces to be filled with independent businesses and community uses. ■ Working from home trends are likely to continue, reducing footfall within the city centre. ■ A rise in vacant units – the opening of the Westgate Shopping Centre has increased vacancies across the city centre.

4.2.12 The Action Plan focuses on four workstreams – ‘Connectivity and Access’, ‘Public realm and animation’, ‘Getting the right mix’ and ‘Getting the basics right’ – each of which is defined by a series of objectives and a list of projects. Below, we summarise those workstreams and objectives that are pertinent to this study and highlight some key projects that will support Oxford in achieving these objectives.

Connectivity and Access

4.2.13 This workstream focuses on limiting private vehicle use in order to reduce conflict and congestion and to create space for buses, cyclists and pedestrians. Objectives include:

- Reducing traffic congestion by limiting private vehicle trips to and through the city centre, thereby freeing up space for public transport, cyclists, pedestrians and businesses.
- Facilitating a world class public transport network in collaboration with bus and rail operators to improve gateways and interchanges and ensure faster, more reliable journeys into and through the city centre.
- Delivering better walking and cycling infrastructure.

4.2.14 Key projects include:

- Core Transport Scheme Proposals – proposed measures being considered include traffic filters, a workplace parking levy, new and improved bus, cycling and walking routes.
- Zero Emission Zone – further information can be found under the ‘Accessibility and Pedestrian Flows’ heading in the performance analysis for Oxford City Centre.
- Oxford Railway Station Redevelopment – the station will be transformed to accommodate an anticipated doubling of passengers and enable East-West rail service improvements including more and faster rail services to London, more frequent direct trains to Cambridge and a potential direct connection to Bristol. Improvements include two new railway lines and platforms, a new western entrance and station building on Botley Road and a multi-modal transport interchange.
- Oxpens and Osney Mead Connectivity – a new pedestrian and cycle bridge will be installed over the Thames between Oxpens and Grandpont. In addition, path improvements between the proposed bridge and Osney Mead will improve connectivity between the city centre, railway station and Osney Mead.

Public realm and animation

4.2.15 This workstream focuses on improving the public realm and creating a programme of events and experiences to animate the city centre and increase dwell times. Objectives include:

- Celebrating the city’s history and heritage assets through increasing people’s access to them and exploring opportunities to adapt and retrofit. In addition, improve the city centre’s public realm, lighting and activation.
- Re-prioritising street space to encourage different uses and create new civic spaces.
- Improving air quality and the waterways and create more green space.

4.2.16 Key projects include:

- City Centre Public Realm and Movement Strategy – subject to funding, the strategy will revisit traffic management and prioritisation in the city centre in a comprehensive manner. The strategy will also include wider public realm improvements such as creating more pedestrianised areas and increasing the amount of public green space and biodiversity within the core of the city centre.
- Interim Public Realm Improvements which support the city centre’s unique identity and strengthen its economy without undermining the longer-term City Centre Public Realm and Movement Strategy.

Getting the mix right

- 4.2.17 This workstream focuses on improving the city centre as a place to live, start and grow a business, visit and enjoy. Objectives include:
- Diversifying uses within the city centre by encouraging new development and repurposing existing buildings, which will ensure there are new places to live and work.
 - Supporting the retail, hospitality, leisure, cultural and service sectors to recover and evolve whilst fostering new business growth.
 - Encouraging more overnight visitor stays.
- 4.2.18 Key projects include:
- Oxford West End – the largest mixed-use development the city centre has seen to date. The development will ensure the delivery of an innovation district as well as new homes, including affordable homes.
 - Target and Reduce Vacant Units including ‘Meanwhile in Oxfordshire’ Project – the Council will work with landlords and agents to reduce the number of vacant units within the city centre. Long-term occupancy will be sought but the Council will also aim to fill units on a temporary basis, partly through the already established ‘Meanwhile in Oxfordshire’ project.
 - Covered Market Evolution – a number of strategies are being developed to ensure the sustainability of the Covered Market, including a leasing and operating strategy, a masterplan, a heritage-led asset management and maintenance plan, an activation and animation strategy, a branding and marketing strategy, and an environmental sustainability strategy.
 - Stimulate the Night-Time Economy – support business owners and managers to develop a series of recovery and rebuild measures for the night-time economy including exploring the potential to introduce new and diversified uses alongside the buildings’ primary uses.

Getting the basics right

- 4.2.19 This workstream focuses on creating an inclusive, safe and attractive city centre for all, one that encourages a diverse range of activities and uses. Objectives include:
- Ensuring that the needs of those that use the city centre on a regular basis (residents, students and workers) are balanced with those that visit once or intermittently (tourists).
 - Increasing perceptions of safety throughout the city centre.
- 4.2.20 Key projects include:
- Street Scene Management – continue to work with Oxford Direct Services and other stakeholders to develop and implement effective street scene management and cleaning and waste schemes.
 - Tourist and Visitor Management – explore funding options to work with destination management organisations and individual businesses to review visitor arrival points and the provision of visitor information and develop a strategy for visitor routes and signage.

West End and Osney Mead Supplementary Planning Document (‘SPD’) (November 2022)

- 4.2.21 The West End and Osney Mead development will bring transformational benefits to the area including new mixed-use developments that seek to complement existing uses in the city centre. The area already contains retail, residential, office, community, cultural and evening economy uses as well as City of Oxford College, University of Oxford colleges and the Said Business School as well as the city’s key areas of public transport provision and interchange, including Oxford Train Station and Gloucester Green bus and coach station. The SPD notes that the area must continue to provide these facilities and functions whilst maximising opportunities for regeneration.

- 4.2.22 The western area and Osney Mead provide the greatest opportunities for regeneration and transformational change. Given that there are multiple landowners, development will come forward on individual sites at different stages.
- 4.2.23 The vision is to transform the area from an underperforming, underdeveloped edge of city centre location to a vibrant mixed-use quarter where innovation and community come together. The Council seeks to strengthen and grow the diverse residential communities of St Ebbe's and St Thomas and therefore the development will contain high-quality residential uses at an appropriate density that is sensitive to the historic and environmental context of the area. As part of the development, Oxford Train Station will undergo significant investment. Part of the railway station development includes the provision of an improved public transport hub which will encourage more sustainable modes of travel to, from and within the city centre. An innovation district will be created at West End and Osney Mead which will support both the Oxford and Oxfordshire economies. The public realm strategy will encourage people to wander, stop and relax in the area rather than pass through as is so often the case at present.
- 4.2.24 The SPD provides detail and advice on how adopted policies should be applied in the West End and Osney Mead area. Many of the policies within the Oxford Local Plan 2036 will be relevant to the schemes across the West End and Osney Mead area, but those that are particularly relevant are referred to below:
- Policy AOC1, which designates the area as an 'Area of Change' and sets out principles for development in the area including that it creates high-density urban living that makes efficient use of land, maintains a vibrant mix of uses and maximises the area's contribution to Oxford's knowledge economy;
 - Policy SP1 of the Oxford Local Plan 2036 supports mixed use development across the West End, aiming to deliver at least 734 homes across five named sites: (a) Oxford Station / Becket Street; (b) Student Castle, Osney Lane; (c) Worcester Street Car Park; (d) Land between Park End and Hythe Bridge Street known as the 'Island site'; and (e) Oxpens.
 - In addition, Policy SP2 allocates Osney Mead Industrial Estate for a mixed use development including employment and academic uses, as well as affordable housing, employer-linked affordable housing, open market housing, and student accommodation.
- 4.2.25 The general principles and context that underpin the SPD are likely to remain relevant in the Local Plan 2040; however, if there are any changes in the approach to the emerging Local Plan that affect the SPD, the latter may need to be reviewed.

4.3 Performance Analyses

- 4.3.1 Oxford City Centre and the five district centres are identified on the Policies Map associated with the adopted Oxford Local Plan 2016-2036.
- 4.3.2 Table 4-3 below shows the average commercial rents achieved within the primary shopping area of each of the centres. Various factors affect the average commercial rents including the quality and supply of the units, as well as the demand for units. Our professional view is that this indicator is less illuminating than other indicators of vitality and viability because commercial rental data are not widely published in the way they were several years ago and so time series data are not readily available. Nevertheless, we present current rental data in the interests of completeness and to provide a baseline for any future updates. Average commercial rents in the centres range from £157 per sq.m (Blackbird Leys) to £1,545 per sq.m (Oxford City Centre).
- 4.3.3 The average commercial rent achieved in Blackbird Leys is significantly below the rent achieved in the other centres. We consider that this may be due to a perceived lack in demand within the district centre given the very limited number of retail units and the dominance of community and leisure uses described below.

Table 4-3 Average commercial rents achieved by the study centres³³

Centre	Average Commercial Rent (£ per sq.m)
Oxford City Centre	1,545
Cowley Road	410
Cowley Centre	349
Headington	405
Summertown	681
Blackbird Leys	157

- 4.3.4 A local commercial agent noted that retail rents have plummeted by c.60 per cent within the city centre’s traditional prime retail area³⁴ over the last five years. Moreover, retail rents have fallen by c.30 per cent within the city centre’s secondary retail area³⁵. In Summertown, retail rents have fallen by c.10 per cent, but they appear to have bounced back (albeit this observation is based on only a few recent deals). Retail rents have stayed pretty level in Headington over the last five years but have appeared to increase in Cowley Road. The commercial agent concluded that, overall, the district centres appear to be performing a lot better than the city centre.
- 4.3.5 Commercial yields data have not been updated by the Government for several years, and so it is also not possible to provide data or analysis for this particular indicator.
- 4.3.6 Similarly, we do not provide an analysis of crime statistics as the boundaries that are used to report on the level of crime cover a much wider area than the city and district centre boundaries defined on the adopted Policies Map.

4.4 Performance of Oxford City Centre

- 4.4.1 Oxford is the county town of Oxfordshire and a sub-regional centre providing a range of facilities and services for the city’s residents and those living in the sub-regional catchment area. Accordingly, the city is identified in the adopted Local Plan as a primary focus for shopping, employment, leisure, education and cultural activities as well as a major tourist destination. The city centre is home to The University of Oxford, the oldest university in the English-speaking world, and much of the city centre is covered by the Central Conservation Area. As such, the city attracts visitors from all over the world who come to appreciate its heritage. The rivers Thames and Cherwell converge to the south of the city centre. The Oxford-Cambridge Arc, which comprises the five counties of Bedfordshire, Buckinghamshire, Cambridgeshire, Northamptonshire and Oxfordshire, is home to one of the fastest-growing economies in England. The Council’s aspiration is to build on Oxford’s strengths and address its weaknesses in a positive manner to ensure the city is a vibrant and enjoyable place to live and visit.

Previous Findings

- 4.4.2 Oxford City Centre was found to be a ‘vital and viable’ centre when the ‘Oxford Retail and Leisure Study’ was published in May 2017. The report noted that while the redevelopment of the Westgate Shopping Centre would provide modern retail floorspace and a range of food and beverage outlets in the heart of the city centre, there was potential for it to divert expenditure and footfall from the existing primary frontages, especially the Clarendon Centre and Cornmarket Street. The report stated that the affected retail frontages would have to ‘re-invent’ themselves in order to remain viable, and that the structure of the city centre would inevitably change.

³³ Source: <https://www.tax.service.gov.uk/business-rates-find/search>

³⁴ The commercial agent was referring to Cornmarket Street and Queen Street when using the term ‘prime retail area’.

³⁵ The secondary retail area includes the likes of High Street.

Diversity of Uses

- 4.4.3 Oxford City Centre has a total of 442 retail/service units, with a combined floorspace of 119,600 sq.m gross. The diversity of uses present in the city centre in terms of the number and proportion of units is set out in Table 4-4, compared with the Goad UK average for all c. 1,950 centres and shopping locations covered by Experian³⁶. The full breakdown of uses can be found in Spreadsheet 1 of Appendix A of the Appendices Volume. The reader must take care when comparing a particular centre's diversity of uses to the UK average for all centres, which does not necessarily represent a like-for-like comparison.

Table 4-4 Diversity of Uses, Oxford City Centre (December 2022)

Oxford City Centre – Diversity of Uses						
Category	No. of units	% of total units	UK (%)	Floorspace sq.m	Floorspace (%)	UK (%)
Retail Services ³⁷	23	5.2	14.7	10,480	8.8	7.3
Leisure Services ³⁸	107	24.2	18.5	20,240	16.9	13.3
Comparison	156	35.3	34.0	55,180	46.1	38.6
Convenience	35	7.9	10.1	11,940	10.0	18.8
Financial and Business ³⁹	19	4.3	6.4	4,290	3.6	5.1
Miscellaneous ⁴⁰	2	0.5	1.0	650	0.5	0.7
Vacant ⁴¹	100	22.6	15.3	16,820	14.0	16.1
Total	442	100	100	119,600	100	100

Source: Stantec survey and Experian Goad (for UK averages). Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

- 4.4.4 The proportion of retail services (5.2 per cent) is significantly below the UK average for all centres (14.7 per cent), and a reduction on the 6.7 per cent recorded by the 2017 Study⁴². In contrast, retail services account for 8.8 per cent of floorspace in the city centre, which is greater than the UK average for all centres (7.3 per cent), reflecting the generally large nature of the units.
- 4.4.5 Just under a quarter (24.2 per cent) of city centre units are in leisure service use, equating to 16.9 per cent of floorspace. This is above the UK average for all centres both in terms of the

³⁶ Hereafter referred to as 'the UK average for all centres'.

³⁷ Retail services comprise hairdressers, beauty parlours and health centres (Experian GOAD code G3B), laundries and drycleaners (G3C) and travel agents (G3D).

³⁸ Leisure services comprise restaurants, cafés, coffee bars, fast food and takeaways (Experian GOAD code G3A). As mentioned earlier in our report, numerous town centre uses are excluded from the Experian Goad based diversity of uses analysis, such as a number of leisure services including bars and wine bars; bingo and amusements; casinos and betting offices; cinemas, theatres and concert halls; clubs; disco, dance and nightclubs; hotels and guest houses; public houses and sports and leisure facilities, including gyms. As such, the proportion of leisure services within each of the study centres is higher than that recorded in the Diversity of Uses tables. However, we include qualitative descriptions of the excluded leisure services elsewhere in the health checks to ensure they are not overlooked.

³⁹ Financial and business services comprise banks and financial services (Experian GOAD code G3E), building societies (G3F) and estate agents and auctioneers (G3G).

⁴⁰ Miscellaneous uses include employment, careers, post offices and information (Experian GOAD code G4A).

⁴¹ This includes all vacant retail / service units plus those under alteration (Experian GOAD code G4B).

⁴² Opticians and Post Offices are considered Retail Services within the 2017 Study whereas they are considered comparison retail and miscellaneous respectively in this study. The figures can therefore not be compared like for like.

proportion of units and floorspace. The high proportion of food and drink operators could reflect Oxford City Centre being a popular tourist destination. The 2017 Study reported that leisure services accounted for 31.7 per cent of the total units within Oxford City Centre in 2016, which is significantly above that recorded in December 2022. However, the 2017 Study included pubs and bars, betting shops, cinemas, theatres and nightclubs within 'leisure services', whereas this study does not, for the reasons described earlier in this section.

- 4.4.6 Comparison retail units account for 35.2 per cent of city centre units (almost the same as the figure recorded at the time of the last study, of 36.2 per cent), equating to 46.1 per cent of floorspace. This is broadly similar to the UK average for all centres in terms of the proportion of units, but higher than the UK average for all centres in terms of the proportion of floorspace, reflecting the generally large nature of the units (many of the comparison retail outlets being located within the Westgate Shopping Centre, which has relatively large retail units). The strongest comparison goods sub-sectors are '*mixed & general clothing*', '*books, arts/crafts, stationers/copy bureau*', '*chemists, toiletries & opticians*', '*gifts, china, glass & leather goods*' and '*women's, girl's, children's clothing*'. The proportion of '*charity shop, pets and other comparison*' is significantly below the UK average for all centres.
- 4.4.7 Convenience goods retail provision is below the UK average for all centres, both in terms of the proportion of total units and the proportion of floorspace. The 2017 Study also found this to be the case. City centres tend to accommodate smaller convenience stores, as opposed to larger foodstores, which explains the below-average proportion of floorspace. The 2017 Study reported that convenience retail accounted for 5 per cent of the total units in Oxford City Centre in 2016, slightly lower than the 7.9 per cent recorded in December 2022. If residential development is to be encouraged within Oxford City Centre, as set out in the Oxford City Centre Action Plan, there needs to be a better representation of convenience goods retailers going forward to ensure future residents can fulfil their day-to-day shopping needs. As alluded to within paragraph 4.4.1, Oxford City Centre performs two roles, one as the sub-regional centre serving those living within the sub-regional catchment area and the other as a district centre serving those living within the city, and the city centre more specifically. As such, the Council should give equal attention to serving the needs of both populations, thereby ensuring that Oxford is '*an enjoyable city to live in and visit*'.
- 4.4.8 The proportion of financial and business services is lower than the UK average for all centres, both in terms of the number of units and floorspace. Oxford City Centre has 13 '*banks and financial services*', three '*building societies*' and three '*estate agents & auctioneers*'. The 2017 Study reported that financial services accounted for 8.8 per cent of the total units in Oxford City Centre in 2016, which is more than double that recorded in December 2022, but the 2017 figure included employment and careers related uses and legal services whereas this study does not. Within this study, the former is considered a miscellaneous use and the latter is not captured within the Goad categories at all.
- 4.4.9 Oxford City Centre has two units which fall into the miscellaneous sub-sector, '*employment, careers, Post Offices & information*'.
- 4.4.10 Oxford City Centre also contains a number of town centre uses that are not included within Experian's Centre Report, including public houses, bars, nightclubs, betting offices, cinemas, theatres, doctors' surgery, solicitors, educational establishments and offices.

Proportion of Vacant Property

- 4.4.11 The proportion of vacant units (22.6 per cent) is significantly above the UK average for all centres (15.3 per cent), whereas the proportion of vacant floorspace (14.1 per cent) is below the UK average for all centres (16.1 per cent). The current figures differ markedly from those reported in the previous study, when vacant units accounted for 11.4 per cent of the city centre's total units, equating to 8.7 per cent of floorspace.
- 4.4.12 The number of vacant units recorded in December 2022 has been skewed by the high number of vacant units within the Clarendon Centre. The owner, the Lothbury Property Trust, decided not to renew tenants' leases within the Clarendon Centre in the light of the proposals to redevelop the centre, for which planning permission has now been granted (ref. 21/00110/FUL). Those tenants have moved elsewhere, resulting in a high number of vacant

units in the shopping centre. Excluding vacant units within the Clarendon Centre and the two directly outside the entrance on Queen Street, the city centre's overall vacancy rate in terms of the number of units would be 19.0 per cent. Whilst this is still significantly higher than the UK average for all centres, it provides a more accurate reflection of the proportion of vacant units within the city centre. Moreover, by removing those vacant units mentioned above, the proportion of vacant floorspace would be 12.2 per cent, significantly below the UK average for all centres.

Figure 4-1 Southern end of Clarendon Centre occupied by lots of vacant units (left) and northern end occupied by some retail units (right)



Source: Stantec

- 4.4.13 During our discussions to inform the study, a local commercial agent noted that the Westgate Centre is performing relatively poorly, albeit there is still some demand from retailers. Approximately 6 per cent of the units within the shopping centre are vacant, some of which are quite large and have been empty for some time. However, this was considered to be more a reflection of the retail market generally rather than the centre itself.
- 4.4.14 The Council has already established a 'Meanwhile in Oxfordshire' Project to work with landlords and agents to reduce the number of vacant units in the city centre. Such a project is supportive of an active frontage approach and will help to improve the physical environment and increase the city centre's overall vitality and vibrancy. Meanwhile spaces also allow for experimentation and, as they are not purpose-built, they often provide affordable space to occupiers who would typically be priced out. Temporary occupiers often find it difficult to identify vacant units and establish who owns them⁴³. The Council could release such information (which it should hold from collecting business rates) as well as register interest from potential temporary occupiers, which would help to improve 'match-making' between landlords and temporary occupiers. Whilst meanwhile uses can help to improve people's perceptions of centres, the Council should not lose sight of the overall aim of attracting long-term occupiers to vacant units. The Council should create the conditions to encourage long-term occupiers to occupy vacant city centre units, albeit the market will ultimately decide.

⁴³ [How to make use of vacant spaces after coronavirus \(architecture.com\)](https://www.architecture.com/news-and-views/feature/how-to-make-use-of-vacant-spaces-after-coronavirus)

- 4.4.15 The Council could also clad the windows of vacant units with reflective material to give the appearance of an active frontage, as can be seen in Summertown.

Retailer Representation

- 4.4.16 Unsurprisingly, given its role as the sub-regional centre, Oxford City Centre boasts the greatest range of national multiple retailers across the six study centres. Cornmarket Street, Westgate Shopping Centre, the Clarendon Centre, Queen Street and High Street contain concentrations of national multiple comparison retailers including stationers (Ryman, WHSmith); fashion and footwear operators (Clarks, Dr Marten's, Flannels, Fat Face, H&M, Hugo Boss, Jigsaw, Mint Velvet, Office, Reiss, River Island, Russell & Bromley, Ted Baker, T K Maxx, Tommy Hilfiger, Urban Outfitters, Zara); mobile phone shops (EE, Three, Vodafone); jewellers (Beaverbrooks, Claire's Accessories, Swarovski); opticians (Boots Opticians, Specsavers, Vision Express).
- 4.4.17 The previous Retail and Leisure Study reported that High Street was home to a number of high-end retailers (LK Bennett, Jigsaw, Reiss, Karen Millen and Hobbs). With the exception of Jigsaw, which remains on High Street, and LK Bennett, which has since closed⁴⁴, the other high-end retailers have relocated to the Westgate Shopping Centre and have been joined by similar retailers such as Cos, Gant, Mint Velvet, Phase Eight, Ted Baker, White Stuff, and Other Stories. The locational focus of high-end retail has therefore changed as a result of the opening of the redeveloped Westgate Shopping Centre.

Figure 4-2 Westgate Shopping Centre



Source: Stantec

- 4.4.18 Since the previous study, there has been multiple notable closures of comparison retail goods stores such as Argos, Cath Kidston, Debenhams, Laura Ashley, TM Lewin and Topshop⁴⁵. This is reflective of the ongoing restructuring of the high street/high profile casualties nationally and is not necessarily a reflection on the attraction of Oxford City Centre, but clearly the loss of these operators does affect the health of the city centre.
- 4.4.19 A number of independent retailers including florists, butchers, bakers, jewellers and clothing, and a range of eateries, are housed within the Covered Market, a Grade II listed building

⁴⁴ There is a LK Bennett concession within John Lewis at Westgate Shopping Centre.

⁴⁵ [Covid casualties: All the Oxfordshire stores that have closed | Oxford Mail](#)

dating back to the 1770s which underwent significant re-build and expansion in the 19th century. Its distinctive character makes it a unique and attractive shopping destination.

Figure 4-3 The Covered Market



Source: Stantec

- 4.4.20 The Council is currently consulting on a draft masterplan for the Covered Market to ensure its long-term sustainability. The proposals include the creation of a new 'public square' in the heart of the Market as well as a new 'pedestrian-friendly' space on Market Street. The Council's intention is to make the Market more accessible to a greater range of people and to improve connections between the Market and surrounding streets through wayfinding measures and signage improvements. Moreover, the Council wants to increase footfall and dwell time as well as make the Market a place where new businesses are incubated.
- 4.4.21 There are no large food superstores within Oxford City Centre due to the limited amount of development space and the blanket Central Conservation Area. The convenience stores are dispersed throughout the city centre along Park End Street, Magdalen Street, St Aldates and at Westgate Shopping Centre, increasing the likelihood of linked trips (that is, visitors to the convenience stores also shopping for comparison retail goods and services).
- 4.4.22 The Gloucester Green outdoor street market is located at Gloucester Green Town Square towards the north of the city centre, operating on Wednesday and Thursday between the hours of 09:00 and 16:00 and Friday and Saturday between the hours of 09:00 and 17:00. A variety of produce and goods is on offer including fresh fruit and vegetables, cakes, sweets, cheeses, flowers and plants, household goods, pet food, books, DVDs, mobile phone accessories, watches, haberdashery, clothing, hats and bags. During our visit we did not observe any vacant stalls, which is a sign of good health. The tenancies are typically long term, with the food trucks a more recent addition to the market and there appears to be some conflict between the more established traders and the 'newbies'.

Figure 4-4 Gloucester Green outdoor street market



Source: Stantec

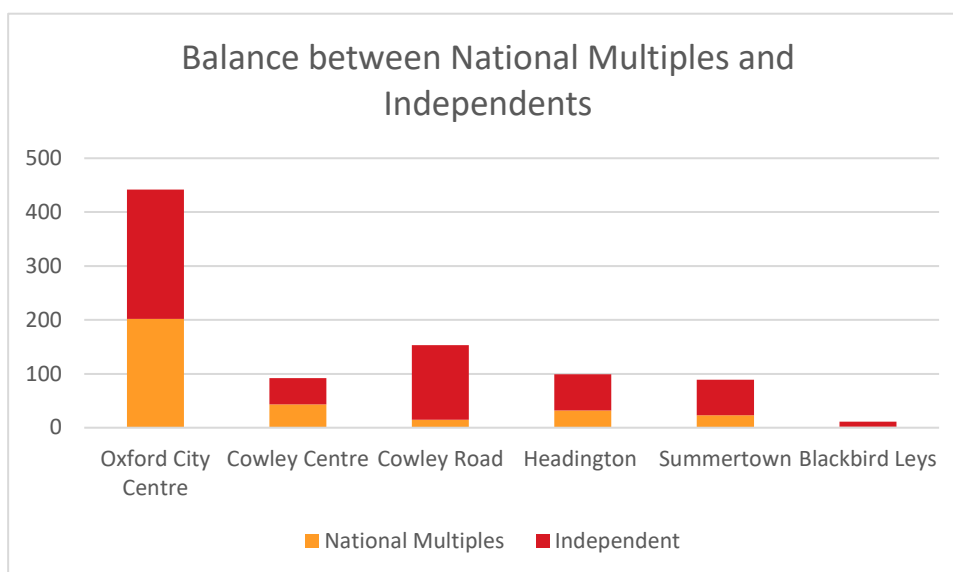
- 4.4.23 The city centre's food and drink offer comprises cafés (Café Crème, Caffé Nero, Costa Coffee, Fernando's Café, George & Danver Café, Pret a Manger, Starbucks, Triple Two Café), restaurants (Ask Italian, Banana Tree, Côte, Gourmet Burger Kitchen, Mowgli, Nando's, Thaikhun, Victor's, Zizzi), hot food takeaways (Burger King, Greggs, KFC, Leon, McDonald's, Tortilla), public houses (King's Arms, St Aldates Tavern, The Bear, The Chequers, The Cow & Creek, The Plough, The Wheatsheaf, White Horse), bars (All Bar One, OXO Bar, The Alchemist, The House Bar, Slug & Lettuce) and nightclubs (ATIK, Fever, The Bridge, Plush).

Balance between Independent Retailers and National Multiples

- 4.4.24 The chart, below, shows the balance between national multiples and independent retailers within each of the six study centres⁴⁶. As expected, Oxford City Centre boasts by far the highest number of national multiples (202), followed by Cowley Centre (43), Headington (32), Summertown (23), Cowley Road (15) and Blackbird Leys (2).
- 4.4.25 As a proportion of total units, Cowley Centre and Oxford City Centre have a similar proportion of national multiples (46.2 per cent and 45.7 per cent, respectively), with lower proportions in Headington (32.3 per cent), Summertown (25.8 per cent), Blackbird Leys (18.2 per cent) and Cowley Road (9.8 per cent). It is a little surprising that Blackbird Leys, a much smaller centre than Cowley Road, has a higher proportion of national multiples, but figures for smaller centres are less meaningful when considering the proportion of units.

⁴⁶ Those units that have not been assigned an Experian Goad code are not included within the analysis of the balance between national multiple and independent retailers. For example, as betting offices are not assigned a Goad code, Betfred, a national multiple, would not be included within the analysis. As a result, there is a discrepancy between the number of national multiples recorded in this study and the actual number of national multiples within each study centre.

Figure 4-5 Balance between National Multiples and Independents



- 4.4.26 To encourage more independent retailers to choose to locate within the centres, the Council should strive to achieve the correct conditions in which independent retailers can flourish. Examples include small financial incentives to encourage independent retailers to take up vacant ground floor units⁴⁷, campaigns to promote independent retailers, business rates relief and splitting large vacant units to create opportunities for smaller independent retailers. Oxford City Council put in place some of these measures during the pandemic by, for example, providing free advertising space in the Oxford Mail to small business owners and featuring them within digital adverts. The City Council also worked with Jesus College to provide smaller units within the redeveloped Northgate House and split existing units in the Covered Market to create opportunities for smaller traders⁴⁸.
- 4.4.27 A local commercial agent noted that those national multiple retailers that do not currently have a presence in Oxford City Centre probably want to as it is still regarded as a relatively healthy centre. However, against the backdrop of increasing pressures on landlords and the general decline in retail rents, such retailers are in a good negotiating position.

Accessibility and Pedestrian Flows

- 4.4.28 Oxford City Centre is accessible by a range of transport modes. Oxford Train Station is located approximately 370m west of the city centre and provides regular services to a wide range of locations including Stratford-upon-Avon, London Marylebone (via Oxford Parkway and Bicester Village), London Paddington, Reading, Manchester (via Banbury and Birmingham New Street) and Newcastle. Whilst the train station is on the edge of the city centre, it is reasonably accessible. As part of the West End and Osney Mead development, the provision of an improved public transport hub at the railway station will encourage more sustainable modes of travel to, from and within the city centre. Oxford Parkway Train Station is located approximately 3.4 miles north of the city centre adjacent to the Oxford Parkway Park and Ride site.
- 4.4.29 Oxford Bus Station is located to the west of Gloucester Green Town Square within the city centre. The three main bus companies that operate in Oxford are Oxford Bus Company, Stagecoach Oxfordshire and Thames Travel. Oxford Bus Company provides services to Rose Hill, Elms Rise, Cowley, Blackbird Leys, Minchery Farm, Barton, Risinghurst, Abingdon,

⁴⁷ As part of Test Valley Borough Council's strategy to support Andover and Romsey town centres, an Independent Retailer Grant of £1,200 is available to independently owned retailers to encourage them to take up vacant space. Applicants must meet a series of criteria to be eligible. For more information see: [Independent Retailer Grant | Test Valley Borough Council](#)

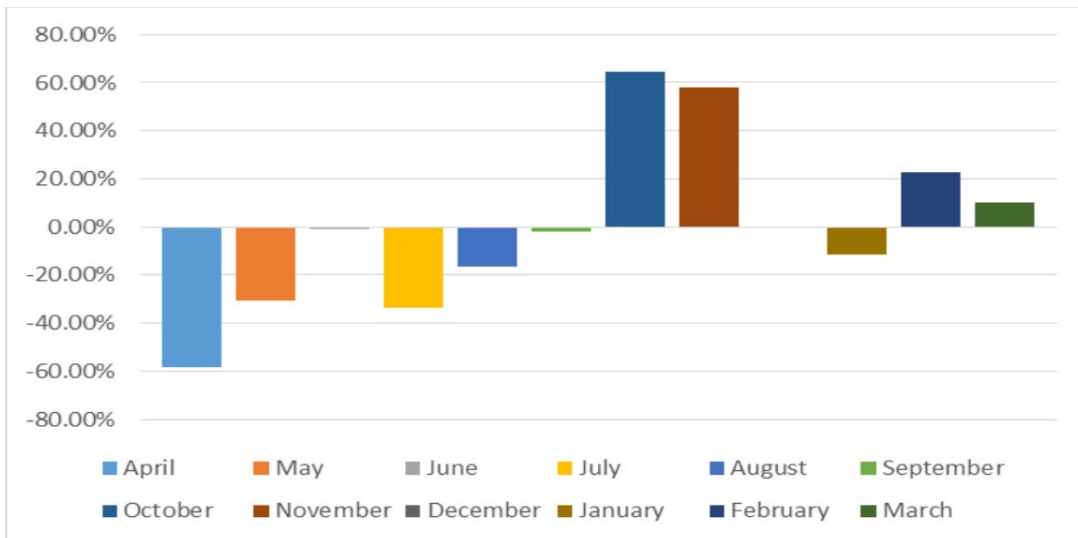
⁴⁸ [Oxford City Council encourages residents to shop local during Small Business Saturday | Oxford City Council](#)

Northway, Wood Farm amongst other locations, and it also operates a service called The Airline between Oxford and Heathrow and Gatwick Airports. Stagecoach provides services throughout the city of Oxford and Oxfordshire to locations such as Banbury, Bicester and Kidlington. Stagecoach's X5 service offers a regular service to Bicester Village, Milton Keynes, Bedford and Cambridge. Stagecoach's Oxford Tube coach services operates between Oxford and London. Thames Travel provides services to Cumnor, Wootton, Southmoor, Harwell Campus, John Radcliffe Hospital, Wytham, Abingdon, Didcot and Wantage.

- 4.4.30 Oxford is within easy reach of the A34 and A40 trunk roads, which ultimately connect to the M4 and M40 motorways, respectively. London is approximately 60 miles to the south-east of Oxford via the A40 and the M40.
- 4.4.31 The city centre has a medieval road network, meaning that the streets are narrow and there are issues with poor air quality and congestion. As such, Oxford City Council has introduced a number of measures to minimise private vehicle use within the city centre. For example, the Council operates five Park and Ride schemes (Oxford Parkway, Pear Tree Park, Redbridge, Seacourt and Thornhill), with the Park and Ride sites located around the periphery of the city centre. Visitors can pay for parking and a day return bus ticket using the machines on site.
- 4.4.32 To improve air quality, reduce carbon emissions and foster zero emission travel in the city, Oxfordshire County Council and Oxford City Council launched a Zero Emission Zone ('ZEZ') pilot in February 2022, which is the first of its kind in Britain. The pilot is in force along the following streets: New Road, between Bonn Square and its junction with Castle Street; Bonn Square; Queen Street; Cornmarket Street; New Inn Hall Street; Shoe Lane; Market Street, from Cornmarket junction east for 40 metres; Ship Street; and St Michael's Street. Within the ZEZ, all petrol and diesel vehicles, including hybrids, must pay a daily charge if they drive into the zone between 7am and 7pm unless they are eligible for a discount or exemption. In contrast, all zero emission vehicles such as electric cars can enter the zone for free. The charge ranges between £2 and £10 per day depending on the emission levels of the vehicle. A larger ZEZ covering the majority of the city centre will come into force in 2023, subject to further public consultation.
- 4.4.33 The two examples above highlight how the Councils are actively seeking to discourage private vehicle use in accessing and travelling within the city centre. In spite of this, there are three long-stay and overnight Pay and Display car parks within the city centre (Worcester Street Car Park, Oxpens Car Park and Gloucester Green Car Park), all of which had availability at the time of our visit. There is also a car park with a limited number of spaces at the Westgate Shopping Centre; however, The Westgate Oxford Alliance (a joint venture between Landsec and The Crown Estate), which owns the shopping centre, recommends using Park and Ride to visit the shopping centre. Becket Street Car Park at Oxford Train Station provides parking for railway users only.
- 4.4.34 The majority of the primary shopping area within Oxford City Centre is pedestrianised, including Bonn Square, Queen Street, Westgate Shopping Centre, Cornmarket Street, Gloucester Square and a short stretch of Broad Street. The areas are largely paved or resin bound, which means that these areas are highly accessible for pedestrians. Pedestrian activity was high when we visited, particularly around Cornmarket Street, High Street, Queen Street and Westgate Shopping Centre, albeit this could have been skewed by Christmas shopping. Footfall was significantly lower within the peripheral areas of the city centre along, for example, Beaumont Street, Worcester Street and Saint Ebbe's Street.
- 4.4.35 Some roads were heavily trafficked when we visited, such as Magdalen Street, George Street, High Street and St Aldates, but we did not witness any pedestrian-vehicular conflicts.
- 4.4.36 We refer to the most recent AMR to assess how many people visited the city centre in the 2021/22 monitoring period (1 April 2021 to 31 March 2022). Figure 3 within the AMR, which is reproduced below as Figure 4-6 for ease of reference, compares monthly footfall levels to the average during the monitoring period in terms of the percentage difference. On average, 502,353 persons visited Oxford City Centre per month. Footfall levels were below the average for the first six months of the monitoring period, especially in April, May and July 2021. Footfall levels reached a peak in October 2021 (656,536 persons) before decreasing slightly in November 2021. Footfall levels in December 2021 were just below the average for the

monitoring period at 501,030 persons. In January 2022, footfall levels were below average at 474,223 persons but in February 2022 footfall levels were above average at 556,329 persons.

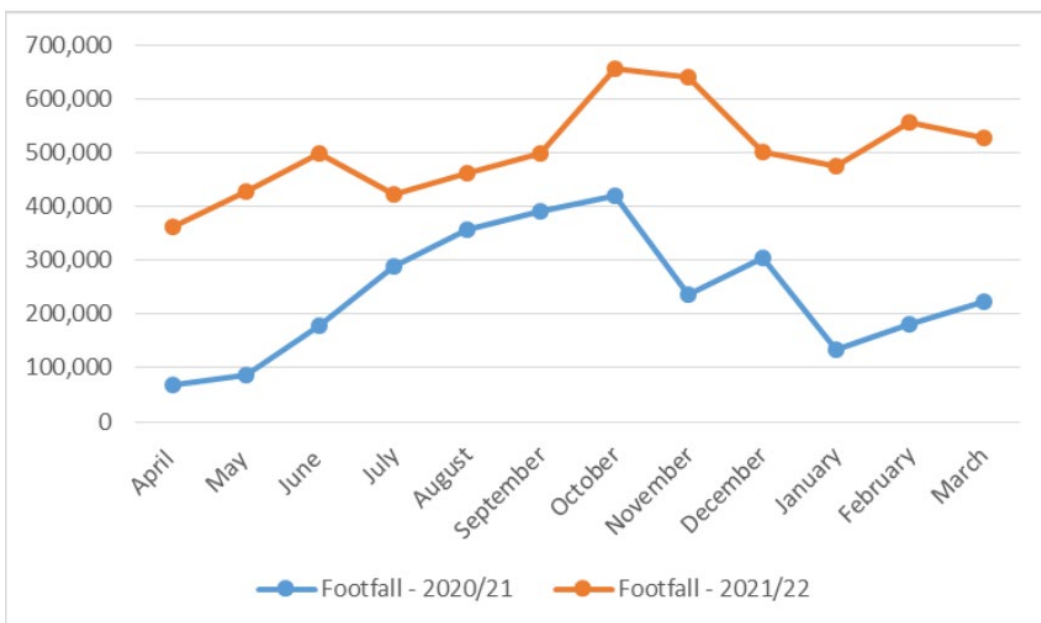
Figure 4-6 Monthly footfall levels compared to the average for the monitoring period in Oxford City Centre



Source: Oxford City Council Authority Monitoring Report 1 April 2021 to 31 March 2022 (December 2022)

4.4.37 Figure 4 in the AMR, which is reproduced below as Figure 4-7 for ease of reference, compares footfall during the 2021/22 monitoring period with the previous period (2020/21). Within both monitoring periods, footfall was lowest in April, peaked in October before declining to January and increasing again in the New Year. Footfall was consistently higher in the 2021/22 monitoring period compared to the previous period. For example, footfall reached 656,536 persons in October 2021 compared with 420,293 in October 2020.

Figure 4-7 Monthly footfall counts for 2020/21 and 2021/22 monitoring periods (Oxford City Centre)

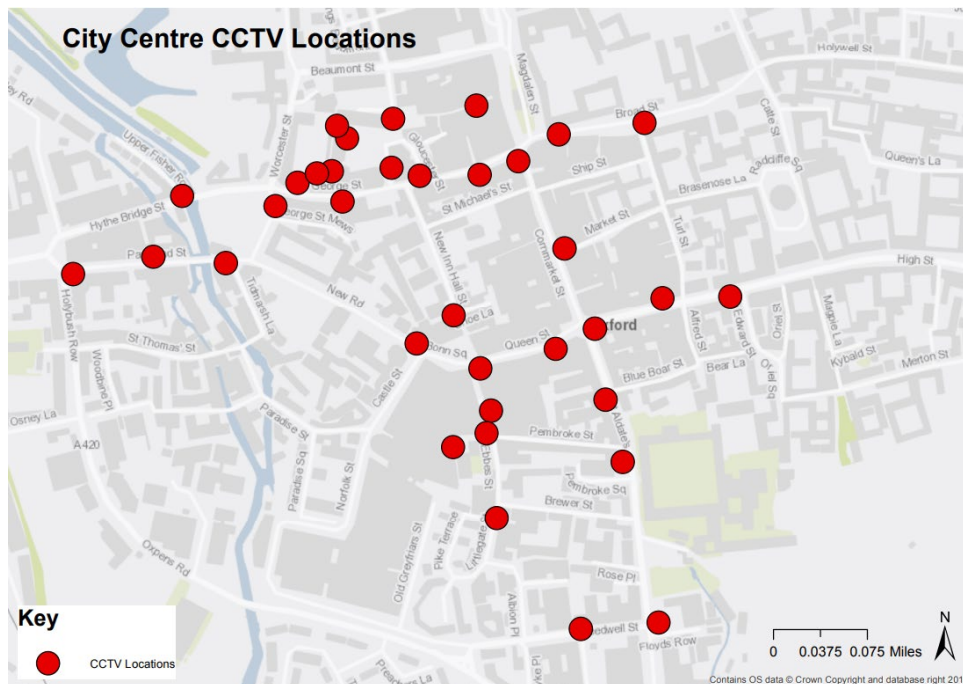


Source: Oxford City Council Authority Monitoring Report 1 April 2021 to 31 March 2022 (December 2022)

Perception of Safety and Occurrence of Crime

4.4.38 Most of the city centre benefits from strong levels of natural surveillance, with the majority of streets overlooked by buildings. There is also a high degree of street lighting available throughout the city centre, which helps to reduce the perception of crime, and the city centre is relatively busy during the day. A CCTV network (see Figure 4-8 below) operates throughout the city centre, which helps to increase feelings of safety. There are a number of uses present in the city centre, for example restaurants and bars, which extend the period of pedestrian activity into the evening. This means there is a regular flow of people throughout the day and into the evening which helps to increase the perception of safety.

Figure 4-8 Oxford City Centre CCTV locations



Source: Oxford City Council

Customer Views and Experience

4.4.39 To understand customers' views and experience, those household telephone survey respondents who indicated that they had visited Oxford City Centre for shopping purposes in the past year were asked what they liked most and least about Oxford City Centre.

4.4.40 Table 4-5 shows the most popular responses to the question 'What do you like most about Oxford City Centre?'

Table 4-5 What respondents liked most about Oxford City Centre

Response	Proportion of respondents within the study area who gave each response (%)
Attractive environment / nice place	13.5
Shops – good range of non-food shops generally	9.8
Good cafés / restaurants	4.9
Good layout / shops close together	4.7
Easy to get to by bus	4.6
Close to home	4.4
Shops – good range of 'high street' retailers	3.6
Good market	3.5

Response	Proportion of respondents within the study area who gave each response (%)
Good leisure facilities (e.g., leisure centres, cinema, health and fitness clubs, etc.)	3.1
Traditional / quaint	3.1

Source: Household telephone survey (NEMS)

- 4.4.41 The overwhelming reasons why respondents liked visiting Oxford City Centre were because of its attractive environment and good range of non-food shops. Other reasons included its food offer, layout and accessibility, range of 'high street' retailers, market and leisure facilities.
- 4.4.42 Table 4-6 shows the most popular responses to the question 'What do you like least about Oxford City Centre?'

Table 4-6 What respondents liked least about Oxford City Centre

Response	Proportion of respondents within the study area who gave each response (%)
Traffic congestion	11.5
Expensive parking	9.3
Too many empty shops	7.3
Too busy / noisy	6.7
Shops – need more / better range of non-food shops generally	4.4
Parking – not enough spaces available	4.0
Shops – need more affordable shops	2.4
Shops – need more independent shops	2.4
Dirty streets / poorly maintained	2.2
Poor access by car	1.8

Source: Household telephone survey (NEMS)

- 4.4.43 Traffic congestion, expensive parking, high proportion of vacant units and busyness were what respondents liked least about Oxford City Centre. Interestingly, three of the four most popular responses do not relate to Oxford's retail offer. These findings reflect those of the health check assessment.

Environmental Quality

- 4.4.44 Oxford City Centre is generally very attractive. The buildings at the intersection of Cornmarket Street, High Street, St Aldates and Queen Street, including Carfax Tower, are particularly attractive. The vacant unit which previously accommodated Edinburgh Woollen Mill does detract from the quality of the area (albeit it appears that a coffee shop is due to open in these premises in the near future). Buildings within the city centre vary in terms of age and architectural style; for example, Laird Hatters at the top of Cornmarket Street is situated in a

building which dates back to 1362 whilst 13-21 Cornmarket Street was recently demolished and redeveloped (see Figure 4-9 below).

Figure 4-9 Laird Hatters (left) and 13-21 Cornmarket Street (right)



Source: Stantec

- 4.4.45 Oxford as a whole has around 1,500 listed buildings, with more than twice the national average of Grade I and II* buildings. Many of these buildings are located within the city centre, enhancing its character and identity. However, one commercial agent noted that the historic nature of Oxford City Centre prevents it from expanding and accommodating new retailers which was noted as a barrier to business.
- 4.4.46 The redeveloped Westgate Shopping Centre enhances the overall environmental quality of the city centre, albeit c.6 per cent of units are vacant (this includes those units under alteration).
- 4.4.47 A number of large vacant units within the city centre, such as the former Topshop/Topman on Queen Street and Debenhams on the corner of Magdalen Street and George Street, detract from the overall quality of the area.
- 4.4.48 There is a lack of publicly accessible green space within the city centre, with the majority housed within private spaces such as the city's colleges or on the periphery of the city centre. As such, there are few places for people to dwell besides Bonn Square, Broad Street and Gloucester Green. Incorporating more green infrastructure into the existing public realm would therefore be beneficial.

Figure 4-10 Bonn Square



Source: Stantec

Evidence of Barriers to Business

- 4.4.49 A number of retailers (such as H&M, Next, River Island and Zara) have relocated from the Clarendon Centre and Cornmarket Street to Westgate Shopping Centre. Similarly, a number of high-end retailers have relocated from High Street to Westgate Shopping Centre.
- 4.4.50 As a result, Westgate Shopping Centre is more likely to attract new national multiple retailers at the expense of the Clarendon Centre, Cornmarket Street and High Street, as evidenced by the recently granted planning permission to part demolish the Clarendon Centre and broaden the uses present to include retail, offices, research and development and student accommodation with a new public square.

Extent of Evening and Night-time Economy Offer

- 4.4.51 Unsurprisingly, of the six study centres, Oxford City Centre has the greatest variety of evening economy uses. As well as restaurants and bars/pubs, including well-known chains such as Prezzo, Côte, The Ivy, All Bar One and Slug & Lettuce, the city centre's offer also includes theatres (Burton Taylor Studio, New Theatre Oxford, Old Fire Station, Oxford Playhouse), live music venues (Sandy's Piano Bar), cinemas (Curzon Oxford, ODEON George Street, ODEON Magdalen Street) and nightclubs (such as ATIK, Fever, The Bridge and Plush).

Summary

- 4.4.52 Whilst a number of notable national multiple retailers have closed since the last study was published in 2017, that is reflective of national trends and, in our assessment, Oxford City Centre remains a healthy centre. The city centre has a strong comparison retail and leisure offer, a healthy mix of national multiple and independent retailers and two successful markets (Gloucester Green outdoor market and the Covered Market). We welcome the plans for the Covered Market, which will improve its visibility, accessibility and use.
- 4.4.53 The Westgate Shopping Centre provides modern retail floorspace and a range of food and beverage outlets in the heart of the city centre, albeit its reopening has served to make some existing primary shopping frontages such as the Clarendon Centre, Cornmarket Street and High Street less attractive shopping destinations. We consider that the forthcoming redevelopment of the Clarendon Centre will transform this prominent city centre site, enhancing the centre's overall vitality and viability.

- 4.4.54 The West End and Osney Mead mixed-use developments will greatly enhance vitality and vibrancy by increasing the city centre's resident population and providing an improved gateway to the city.
- 4.4.55 Whilst the vacancy rate is significantly higher than the UK average for all centres and has increased significantly since the publication of the 2017 Study, a number of these vacant units are within the Clarendon Centre – which has recently been granted permission for major redevelopment – and the proportion of vacant floorspace is below the UK average for all centres.
- 4.4.56 The Goad definition of Oxford City Centre broadly reflects the city centre's defined Primary Shopping Area. We do not feel there is a need to amend the defined Primary Shopping Area boundary as it covers the areas where retail development is concentrated. We cannot comment on the defined city centre boundary as this covers a much larger area than the section that we surveyed.

4.5 Performance of Cowley Centre

- 4.5.1 Cowley Centre sits above the other district centres in Oxford's hierarchy of centres as the Primary District Centre. As noted in the adopted Local Plan, this is due to the scale of its retail and service provision, the range of retail on offer (particularly comparison goods), the size of its catchment area, the importance users afford it (many would prefer to visit the Cowley Centre over the city centre), its status as a public transport interchange and its capacity to accommodate growth as well as opportunities for redevelopment.
- 4.5.2 Cowley Centre is a relatively compact centre and effectively comprises the Templars Square Shopping Centre and Templars Shopping Park either side of the busy B4495 (Between Towns Road) but also extends eastwards to Oxford Road. We understand that the Shopping Centre is more commonly used by local residents whereas the Shopping Park also attracts visitors from a wider catchment.
- 4.5.3 Real estate investment manager and developer Redevco bought Templars Square Shopping Centre in March 2022 and seeks to regenerate the site to respond to the changing retail and leisure markets and the inherent problems associated with a 1960s shopping centre. Through discussions with representatives of Redevco and CBRE, acting on its behalf, we understand that the scheme will be residential led, with a mix of uses on the ground floor and the retail component will be much smaller than at present. The reduced retail offer will continue to be of a lower order as it is acknowledged that this serves the needs of the existing users. The repurposed centre will accommodate both daytime and night-time uses, which will serve the needs of the area's rapidly growing student population in particular. There has been no operator interest of note, which substantiates the finding that there is less demand from operators for retail floorspace and calls for the wholesale demolition and redevelopment of the site. We understand that a planning application is due to be submitted early in 2024.
- 4.5.4 The project already benefits from pre-existing planning permission (application ref. 16/03006/FUL), including 226 apartments. Residents' and businesses' views were sought during a period of consultation which ended in December 2022⁴⁹. During the consultation, people were asked how they visited the centre and approximately 50 per cent of survey respondents said they walked there. The main reason why people visit the centre is because of its convenience, the value of its food offer and services such as a dentist. Despite this finding, a significant proportion of existing residents do not shop at Templars Square Shopping Centre due to its current offer; this includes many families who tend to visit the retail park across the road but avoid going into the city centre for transport and cost reasons.
- 4.5.5 Redevco commissioned CACI to undertake research⁵⁰ to answer the question '*How can Redevco make sure they develop a scheme that is commercially successful on the ground*

⁴⁹ 'Oxford's Templars Square must have 'sustainable' future, say owners', Oxford Mail, 18th November 2022. Available online at: [Oxford's Templars Square must have 'sustainable' future, say owners | Oxford Mail](#)

⁵⁰ Templars Square Retail and Residential Development (April 2023), CACI

floor and continues to engage the local residents of Cowley?’ Below, we summarise the key findings of the CACI research:

- Cowley Centre is a district centre that serves the needs of the local population. Some 58 per cent of visitors travel to the centre in under 10 minutes.
- The district centre does not cater for more affluent residents. Templars Square could therefore incorporate more aspirational retail into its offer, which would help to attract more affluent local residents, retain their expenditure in the local area and reduce the need to travel to Oxford City Centre.
- Templars Square offers everyday essentials whilst Templars Shopping Park serves purpose-led shopping missions. Fewer than 30 per cent of visitors to Templars Square use the Shopping Park, substantiating the finding that the centres fulfil different shopping needs, and they are perceived as two distinct shopping destinations. The low level of cross over may be partially due to the busy B4495 which dissects the district centre. Templars Square should continue to focus on catering for the everyday essential needs of the local population.
- The quantum of comparison retail floorspace in Cowley Centre needs to reduce by 60 per cent to create a more balanced retail destination. The proposed reduction would not affect the size of the catchment and would only marginally reduce the local spend captured. Templars Shopping Park would remain the comparison goods retail destination within the district centre supported by a reduced retail offer in a redeveloped Templars Square.
- There is scope to increase the food and beverage (‘F&B’) offer in Templars Square.
- Notwithstanding the increase in resident population, the quantum of amenities at Templars Square will remain optimal; however, there is scope to consolidate services into hubs and introduce a higher quality offer.
- The optimal floorspace for amenity use, F&B, comparison and convenience retail is said to be c.97,000 sq.ft (9,000 sq.m).
- Flexibility should be incorporated into the development to ensure it is resilient to changing consumers requirements.

Previous Findings

- 4.5.6 The previous study found that Cowley Centre serviced both local residents as well as the wider catchment, reiterating the point that it performs a specific role in Oxford’s retail hierarchy. Generally speaking, the centre had above average convenience and comparison goods provision. Other strengths reported included a low vacancy rate and very good accessibility from the surrounding settlements. The planned refurbishment of the Templars Square Shopping Centre was expected to *‘create a more vibrant and thriving community across the Centre’* which would increase the district centre’s overall vitality and viability⁵¹. The regularly congested access to the retail park (a result of the busy B4495) was noted as a key weakness.

Diversity of Uses

- 4.5.7 Cowley Centre has a total of 93 retail / service units⁵². The diversity of uses present in the district centre in terms of the number and proportion of units is set out in Table 4-7, compared with the Goad UK average for all centres (i.e., city, town and district centres). The full breakdown of uses can be found in Spreadsheet 2 of Appendix A.

⁵¹ ‘The planned refurbishment’ relates to previous plans for the Shopping Centre, rather than the most recent ones brought forward by Redevco.

⁵² Please note the point raised earlier in this section in terms of the discrepancy regarding the number of units.

Table 4-7 Diversity of Uses, Cowley Centre (December 2022)

Cowley Centre District Centre – Diversity of Uses						
Category	No. of units	% of total units	UK (%)	Floorspace sq.m	Floorspace (%)	UK (%)
Retail Services	11	11.8	14.7	1,270	4.2	7.3
Leisure Services	11	11.8	18.5	1,470	4.9	13.3
Comparison	40	43.0	34.0	16,930	56.5	38.6
Convenience	12	12.9	10.1	6,770	22.6	18.8
Financial and Business	4	4.3	6.4	590	2.0	5.1
Miscellaneous	2	2.2	1.0	280	0.9	0.7
Vacant	13	14.0	15.3	2,650	8.9	16.1
Total	93	100	100	29,960	100	100

Source: Stantec survey and Experian Goad (for UK averages). Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

- 4.5.8 The proportion of comparison goods retailers within Cowley Centre is significantly above the UK average for all centres, as is the proportion of comparison retail floorspace. This is no surprise considering the district centre primarily comprises a retail park and shopping centre which are more likely to accommodate comparison goods retailers. The 2017 Study contained similar findings in relation to the proportion of comparison retail units and floorspace.
- 4.5.9 The proportion of convenience goods retailers within the district centre is above the UK average for all centres which is no surprise given the recent opening of CC Butchers, Lidl, Nepalese Mart and World Food and Wine.
- 4.5.10 The proportion of retail services is lower than the UK average for all centres, with most within the health and beauty sub-sector, particularly hairdressers/barbers and beauty salons. Similarly, the proportion of leisure services is below the national average, which again reflects the composition of the district centre.
- 4.5.11 The proportion of financial and business services in Cowley Centre is below the UK average for all centres, but the centre benefits from a bank (Lloyds Bank), building society (Coventry Building Society) and two estate agents.
- 4.5.12 Cowley Centre also contains a number of common town centre uses that are not included within Experian's Centre Report including a social club, public houses (JD Wetherspoon and The Original Swan), a solicitor, offices and student accommodation.

Proportion of Vacant Property

- 4.5.13 Whilst the current unit vacancy rate of 14.0 per cent is higher than the 7.7 per cent reported in the 2017 Study, it is lower than the UK average for all centres of 15.3 per cent. The proportion of vacant floorspace is also significantly below the UK average for all centres. The vacancy rate is likely to slightly improve at the next count as Deichmann is due to open soon in one of the vacant units in the shopping park (this comment also assumes that any new openings are not offset by store closures).
- 4.5.14 The majority of the vacant units are located within Templars Square Shopping Centre, with just four vacant units located outside of the shopping centre (one of which is under alteration and will soon become Deichmann).

Retailer Representation

- 4.5.15 Cowley Centre contains a high proportion of national multiple comparison retailers including fashion and footwear operators (JD Sports, Shoezone, TK Maxx), household goods (ASDA Living, Wilko), mobile phone shops (O2), jewellers (F Hinds), discount operators (B&M Bargains, Poundland) and health and beauty shops (Savers, Superdrug). This is more than one would expect for a district centre and is an indicator of good health.
- 4.5.16 Since the previous study, stores such as Dorothy Perkins, New Look, Peacocks and Claire's Accessories have closed down. This highlights the vulnerability of Cowley Centre to market change, including in the key clothing and fashion retail sector. Shoezone has moved from its previous location in Templars Square Shopping Centre to Templars Shopping Park, and recent store openings including CC Butchers, KFC, Lidl, Nepalese Mart and Orinoco. The opening of Lidl in particular is good news for the district centre since it occupies a large floorspace and is located in a prominent position in Templars Shopping Park.
- 4.5.17 All of the independent retailers are either located on the southern side of the B4495 or in Templars Square Shopping Centre (that is, not within the retail park).
- 4.5.18 There are four convenience goods operators within Cowley Centre: Co-operative Food and Iceland are located within the shopping centre and Lidl and Sainsbury's are in the retail park. The challenge is to ensure linked trips between the foodstores and comparison retail goods and services.
- 4.5.19 The district centre's food and drink offer mainly comprises cafés (Beeyoutiful, Boswells Café, Cagneys, Costa, KK Cappuccino & Baguette Bar) and hot food takeaways (Chicken Hut, Delight Kebab House, Domino's Pizza, Greggs, Oriental Express) but there is also a couple of restaurants (Olivia's Greek Food, Templars Bar & Kitchen) and a public house (The William Morris – JD Wetherspoon). The proportion of leisure services (13.2 per cent) is still significantly below the national average (18.5 per cent), however.

Balance between Independent Retailers and National Multiples

- 4.5.20 Of the 93 units present within Cowley Centre, 43 are national multiple retailers, which equates to just under half of the total number of units (46.2 per cent). This proportion is the highest amongst the six study centres, closely followed by Oxford City Centre (45.7 per cent). Compared to other types of retailers and services, comparison goods retailers are more likely to be national multiple retailers.

Accessibility and Pedestrian Flows

- 4.5.21 The district centre is easily accessible by bus with Templars Square and Beauchamp Lane bus stops located at either end of the retail park/shopping centre along the B4495 offering services to the city centre, Abingdon, Great Milton, John Radcliffe Hospital, Chalgrove and Watlington.
- 4.5.22 Cowley Centre is highly accessible by car via the B4495 (Between Towns Road), but the road is heavily congested especially during peak hours. During our visit we noted a build-up of cars waiting to exit John Allen Way (which leads to the retail park) onto the B4495. There was also a queue of cars and buses along Barns Road waiting to turn onto the B4495.
- 4.5.23 There are three long-stay multi-storey car parks associated with the Templars Square Shopping Centre (Barn's Road Car Park, Castle Car Park and Knights Car Park) although the latter is currently closed for refurbishment. However, no progress had been made with the refurbishment during the time of our visit in December 2022. Discounting Knights Car Park, there are 666 car parking spaces available. Visitors can park their cars for £0.80 for two hours or £2.60 all day.
- 4.5.24 There are also 467 car parking spaces at Templars Shopping Park. Visitors can park for up to three hours for free with no return within two hours. During our visit we observed that the car park was busy but there were spaces available.

Figure 4-11 Parking in Templars Shopping Park



Source: Stantec

- 4.5.25 There is limited short stay on-street car parking along the B4495 directly outside the parade of shops. E-scooters are available to hire along Barns Road and there are parking sites throughout the city⁵³.
- 4.5.26 Pedestrian movement within the district centre is good. There is a pelican crossing at either end of the retail park/shopping centre along the B4495 enabling pedestrians to cross the busy road, and we understand there are plans to improve connectivity across the B4495.
- 4.5.27 Zebra crossings and pedestrianised areas facilitate pedestrian movement within Templars Shopping Park and pedestrian movement within the Templars Square Shopping Centre is very good. Mobility scooters are also available to hire for use within the shopping centre.

Perception of Safety and Occurrence of Crime

- 4.5.28 The vast majority of the district centre benefits from strong levels of natural surveillance by virtue of the inward-facing nature of Templars Shopping Park and the presence of a security team in Templars Square Shopping Centre. The district centre is busy during the day and there is a strong degree of lighting, further helping to reduce the perception of crime.
- 4.5.29 Whilst activity within the district centre will naturally reduce in the evening, especially given that Templars Square Shopping Centre closes at 6pm Monday-Saturday and 4pm on Sunday, the district centre did not appear to be particularly unsafe when we visited.
- 4.5.30 We observed a significant number of cars parking illegally along Hockmore Street, with its easy access to the shopping centre.

Environmental Quality

- 4.5.31 We consider the physical environment of the district centre to be of moderate quality. The retail park and the shopping centre both appear to be well-managed and generally devoid of litter and the recently built student accommodation buildings are modern and attractive, but the busy B4495 bisects the district centre, reducing its overall quality.
- 4.5.32 The exterior of the shopping centre is very tired and urgently in need of refurbishment. The area to the rear of Wilko, which is cordoned off with temporary fence panels, particularly detracts from the district centre's overall environmental quality. Castle Car Park and the outdoor part of the shopping centre nearest Barns Road would also benefit from significant refurbishment.

⁵³ The zero-emission e-scooters are being trialled through Oxford to encourage key workers and people getting back to work and scootering for leisure.

Figure 4-12 Exterior of shopping centres and temporary fence panels



Source: Stantec

- 4.5.33 The environmental quality of Hockmore Street, to the rear of the shopping centre, is particularly poor. At the end nearest Crowell Road, there are locked up garages, on one side of the street and the shops' service areas on the other. The central part of Hockmore Street backs onto by the shopping centre (including service areas) and the dilapidated Knights Car Park albeit this is due to undergo refurbishment. The end nearest Barns Road is of better quality as it is essentially a residential street at that point.

Figure 4-13 Hockmore Street



Source: Stantec

- 4.5.34 The recently built Curve residential development at the intersection of the B4495 and Barns Road and the buildings along the eastern side of Barns Road, particularly the building that houses The Venue@Cowley Community Centre and Emmaus charity shop, enhance the environmental quality of the eastern end of the district centre.

Figure 4-14 Curve residential development (left) and building which accommodates The Venue@Cowley Community Centre and Emmaus charity shop (right)



Source: Stantec

- 4.5.35 Cowley Workers Social Club, the former Cowley Conservative Club and the adjacent units detract from the overall environmental quality.

Evidence of Barriers to Business

- 4.5.36 Some types of town centre uses – such as bars, public houses, cinemas and theatres – are less appropriate for retail park and shopping centre type formats. This may deter some leisure operators from investing in Cowley Centre.

Extent of Evening and Night-time Economy Offer

- 4.5.37 The evening and night-time economy offer in Cowley Centre is limited to the takeaways along the southern side of the B4495, JD Wetherspoon and The Original Swan given that Templars Square Shopping Centre closes at 6pm on Monday-Saturday and 4pm on Sunday. There is only one dine-in hot food takeaway (KFC) and no bars/public houses in the retail park.

Summary

- 4.5.38 Cowley Centre is a relatively healthy centre that serves a wide catchment. It has a very good comparison and convenience retail offer and, although there have been some notable closures of comparison retail goods outlets since the 2017 Study was published, there have been a number of store openings since the last survey was undertaken by Experian in June 2022, which is a sign of recent growth. Whilst the vacancy rate has increased since the last study was published, it remains below the UK average for all centres, both in terms of the number of units and floorspace. Cowley Centre has a relatively poor leisure offer, limited to food and drink operators and a social club. Although the centre is highly accessible by a range of transport modes, the B4495 is heavily congested. Parts of the district centre would benefit from significant refurbishment and modernisation.
- 4.5.39 We welcome the proposals for Templars Square Shopping Centre given its tired physical appearance. We do not propose any amendments to the defined Cowley Centre District Centre boundary as it incorporates both Templars Shopping Park and Templars Square Shopping Centre, where the vast majority of retail use is concentrated, as well as other common town centre uses along the stretch of road between the Shopping Centre and Oxford Road. We also do not propose any changes to the defined Primary Shopping Area.

4.6 Performance of East Oxford-Cowley Road District Centre

4.6.1 East Oxford-Cowley Road⁵⁴ is classified as a district centre in the Oxford Local Plan 2036 (Spatial Strategy). The district centre is linear and extends along the section of Cowley Road between The Plain roundabout in the west and Magdalen Road in the east. As noted in the adopted Local Plan, Cowley Road is the main centre for the large and diverse population of East Oxford which includes many students. It serves the convenience retail needs of nearby residents but generally performs a less significant retail function than the other district centres. In contrast, the centre has a range of leisure and service uses and a strong evening economy. The farmers' market and the annual Cowley Road Carnival provide evidence of the street's vibrant and dynamic nature and ensure a strong sense of community.

Previous Findings

4.6.2 The previous study found that the district centre was largely meeting the needs of its resident catchment population. Accessibility into the centre was very good, by a range of transport modes. Cowley Road had a very good convenience retail provision and services when compared to the national average. The centre's cafés and restaurants were found to generate footfall and ensure visitors make linked trips (customers shopping for comparison retail goods as well as eating out). The centre has a thriving evening economy with a range of leisure uses. The study called for the East Oxford Farmers' Market and Community Market to be maintained as they drew people into the centre. The centre had a low vacancy rate and had benefitted from recent investment which improved the centre's overall vitality and viability. However, the centre had a poor comparison retail provision and, due to its linear nature, lacked a coherent retail core.

Diversity of Uses

4.6.3 Cowley Road District Centre has a total of 153 retail/service units⁵⁵, as set out in Table 4-8. Table 4-8 does not contain floorspace data because the Goad plan did not cover the full extent of the retail and service outlets at the centre. As such, we only had floorspace data for the units included within the Goad plan. The full breakdown of uses can be found within Spreadsheet 3 of Appendix A.

Table 4-4 Diversity of Uses, Cowley Road (December 2022)

Cowley Road District Centre – Diversity of Uses			
Category	No. of units	% of total units	UK (%)
Retail Services	23	15.0	14.7
Leisure Services	62	40.5	18.5
Comparison	26	17.0	34.0
Convenience	25	16.3	10.1
Financial and Business	6	3.9	6.4
Miscellaneous	0	0.0	1.0
Vacant	11	7.2	15.3
Total	153	100	100

Source: Stantec survey and Experian Goad (for UK average). Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

4.6.4 Most notably, the proportion of leisure services (40.5 per cent) is more than double the UK average for all centres (18.5 per cent), which could reflect the large and diverse population

⁵⁴ Hereafter referred to as 'Cowley Road'.

⁵⁵ Please note the point raised earlier in this section in terms of the discrepancy regarding the number of units.

close to the district centre, including a substantial student population. The proportion of leisure services in Cowley Road is the highest out of the six study centres.

- 4.6.5 Comparison goods outlets in Cowley Road comprise just 17.0 per cent of the total units, half the UK average for all centres (34 per cent). This is explained by Cowley Road's close proximity to Oxford City Centre and its different role in the hierarchy.
- 4.6.6 The proportion of convenience goods retailers is significantly higher than the UK average for all centres. The vast majority are convenience stores as opposed to larger foodstores. Again, this could reflect the large and diverse population.
- 4.6.7 The proportion of retail services (15.0 per cent) is broadly the same as the UK average for all centres (14.7 per cent).
- 4.6.8 The proportion of financial and business services is lower than the UK average for all centres. Of note, Cowley Road has five estate agents.
- 4.6.9 Cowley Road also contains a number of common town centre uses that are not included within Experian's Centre Report including public houses, bars, a cinema, live music venues and a place of worship.

Proportion of Vacant Property

- 4.6.10 Whilst there has been a slight increase in the vacancy rate since the Council's previous Retail and Leisure Study in 2017, the proportion of vacant units (7.8 per cent) is significantly lower than the UK average for all centres (15.3 per cent), which is a sign of good health.
- 4.6.11 Vacant property is dispersed throughout the district centre, with no particular concentrations.

Retailer Representation

- 4.6.12 There are few national multiple comparison retailers in the district centre, which is limited to a health & beauty operator (Superdrug), charity shops (Barnardo's, Oxfam) and a chemist (Boots). This is to be expected due to the district centre's close proximity to the city centre.
- 4.6.13 There are a number of independent convenience retail operators present within the district centre (Eastern & Continental Store Ltd, Euro Supermarket, GG Oriental Snack Shack, Jing Jing Oriental Food Store, Souya Supermarket), reflecting the diverse population of east Oxford, as well as national multiple retailers (Sainsbury's Local, Tesco Express).
- 4.6.14 Cowley Road has a strong provision of food and drink operators, comprising restaurants (Atomic Burger, Greece, Le Kesh, Majliss, Nando's, Sushi Corner, Temple Lounge, Taberu), cafés (Costa, George & Delila, Jojo's, Karak Café, Pomegranate, Rick's Diner, Vintage Refresh), hot food takeaways (Aleppo's Falafel, Kebab Kid, Rice Box, Subway, The Paste-Tree), public houses (James Street Tavern, The Cowley Retreat) and bars (Big Society, BrewDog, The Library Bar). The large number of food and drink outlets in Cowley Road ensures the night-time economy is very healthy for a district centre.
- 4.6.15 East Oxford Farmers' and Community Market is located at East Oxford Primary School, to the rear of Union Street Car Park. Whilst the facility lies outside of the district centre boundary, it contributes to the overall vitality of the centre. The market operates every Saturday between the hours of 10:00 and 13:00. A variety of produce and goods are on offer such as bread, eggs, milk, vegetables, cheese, various meats, jewellery, clothing and second-hand books. The market also has a café serving breakfast, lunch, cakes and fairtrade teas and coffees.

Balance between Independent Retailers and National Multiples

- 4.6.16 Of the 153 units present within Cowley Road, only 15 are national multiple retailers, which equates to just 9.8 per cent. This is the lowest proportion out of the six study centres, which could be explained by the large number of independent takeaways and other eateries.

Accessibility and Pedestrian Flows

- 4.6.17 By virtue of its location on a busy arterial route into Oxford City Centre, Cowley Road is accessible by a range of transport modes. There are three bus stops within the district centre boundary (some lie just outside the boundary) with services to the city centre, Oxford Train Station, Templars Square, Minchery Farm and Blackbird Leys, amongst other locations.
- 4.6.18 Access to the district centre by car is very good, being located on Cowley Road (B480). Union Street Car Park (80 spaces) is the only car park within the district centre but St Clement's Car Park (80 spaces) is located nearby, just off St Clement's Street. There is also short-stay layby parking along Cowley Road which enables visitors to make quick trips into the district centre. As such, the district centre has sufficient car parking.
- 4.6.19 Cowley Road is a main cycle route in Oxford. However, the cycle lane on the southbound side of Cowley Road terminates just before Rector Road, after which the cycle route continues but there is no cycle lane. The cycle route is usable for adults, teenagers and accompanied older children. There is ample kerb-side cycle parking along Cowley Road. As such, the district centre is accessible by cycle.
- 4.6.20 Pedestrian access to the district centre is good. There are relatively frequent crossing points (several pelican crossings and a zebra crossing) as well as road narrowing features that enable pedestrians to cross the busy road in two stages. The width of the pavements varies but they are wide enough to encourage pedestrian flow.

Perception of Safety and Occurrence of Crime

- 4.6.21 The district centre benefits from excellent levels of natural surveillance given its linear nature and the consistent flow of traffic passing through the centre.

Figure 4-15 Linear nature of Cowley Road



Source: Stantec

- 4.6.22 The amount of traffic driving through the centre, the presence of on-street parking and loading bays and the lack of cycle lanes could give rise to a conflict between pedestrians, cyclists and vehicles and compromise pedestrian and cyclist safety.

- 4.6.23 There is intermittent street lighting along Cowley Road which could lead to a higher perception of crime at night, but there is light spill from shops and businesses and the centre's thriving evening economy ensures that strong levels of natural surveillance continue into the evening.
- 4.6.24 Union Street Car Park is accessed off Union Street, a quiet predominantly residential street. The street benefits from street lighting and there is also sufficient lighting within the car park itself.

Environmental Quality

- 4.6.25 The district centre is generally quite attractive. The buildings vary in age and architectural style, which adds some interest to the long linear nature of the district centre. The architectural heritage of Cowley Road Methodist Church Centre, The Ultimate Picture Palace building and Big Society bar, all Grade II listed buildings, juxtaposes the modern street art on the side of the building on the corner of Cowley Road/Stockmore Street (street art can also be found elsewhere within the district centre).
- 4.6.26 The buildings are generally well-kept although some of the frontages look tired and have been the subject of graffiti.
- 4.6.27 There is a distinct lack of seating within the district centre. Motorised vehicles are prohibited turning into some of the side streets off Cowley Road and large planters have been placed to enforce such a measure. Other examples of street furniture include litter bins, inverted U-shaped cycle racks and street lighting.

Evidence of Barriers to Business

- 4.6.28 The close proximity of Cowley Road to Oxford City Centre (approximately 1km) is likely to be its main barrier to attracting new national multiple outlets to the district centre.

Extent of Evening and Night-time Economy Offer

- 4.6.29 Cowley Road has a thriving evening economy offer with a range of restaurants, hot food takeaways, public houses and bars which are spread evenly throughout the district centre. The district centre's offer also includes two live music venues (O2 Academy and The Bullingdon) and an independent cinema (The Ultimate Picture Palace). The significant number of evening economy uses and leisure facilities available is consistent with the large student population close to Cowley Road.

Figure 4-16 The district centre's leisure offer



Source: Stantec

Summary

- 4.6.30 Cowley Road is a vital and viable centre. Whilst the centre has a limited comparison goods retail offer, that is to be expected due to its close proximity to Oxford City Centre. The centre

boasts a range of retail and leisure services and has a very good convenience retail offer. Cowley Road has a low vacancy rate and a thriving evening economy.

- 4.6.31 Despite the Goad plan of East Oxford-Cowley Road not covering the full extent of the retail and service outlets at the centre, the defined district centre boundary does and therefore we do not propose any amendment of the boundary. We also do not propose any changes to the Primary Shopping Area.

4.7 Performance of Headington District Centre

- 4.7.1 Headington District Centre extends along London Road, a main arterial road, and primarily serves local residents. The centre's retail and service provision is primarily focused at the intersection of London Road, Windmill Road and Old High Street. The centre boasts a range of convenience retail shops, retail services and a local market but has fewer comparison shops. Most of the food and beverage operators are independent.
- 4.7.2 Headington is close to John Radcliffe Hospital and Oxford Brookes University Campus, resulting in a large potential catchment. Both sites also have their own town centre facilities.

Previous Findings

- 4.7.3 The previous study found that the district centre had a strong convenience retail and service sector offering, and the street market enhanced the overall vitality and viability of the centre. Whilst the vacancy rate was low there was a limited comparison goods provision. Accessibility into the district centre was found to be good, but there were issues with congestion particularly during peak hours.

Diversity of Uses

- 4.7.4 Headington District Centre has a total of 99 retail/service units⁵⁶. The diversity of uses present in the centre in terms of the number and proportion of units is set out within Table 4-9, compared with the Goad UK average for all centres (i.e., city, town and district centres). The full breakdown of uses can be found within Spreadsheet 4 of Appendix A.

Table 4-5 Diversity of Uses, Headington (December 2022)

Headington District Centre – Diversity of Uses						
Category	No. of units	% of units	UK (%)	Floorspace sq.m	Floorspace (%)	UK (%)
Retail Services	16	16.2	14.7	2,010	11.2	7.3
Leisure Services	25	25.3	18.5	3,630	20.1	13.3
Comparison	25	25.3	34.0	4,090	22.7	38.6
Convenience	15	15.2	10.1	5,820	32.3	18.8
Financial and Business	9	9.1	6.4	1,300	7.2	5.1
Miscellaneous	1	1.0	1.0	60	0.3	0.7
Vacant	8	8.1	15.3	1,110	6.2	16.1
Total	99	100	100	18,020	100	100

Source: Stantec survey and Experian Goad (for UK averages). Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

- 4.7.5 The proportion of comparison goods retailers in Headington District Centre is significantly below the UK average for all centres. The 2017 Study also found that the proportion of

⁵⁶ Please note the point raised earlier in this section in terms of the discrepancy regarding the number of units.

comparison goods retailers was below the UK average for all centres, but to a lesser degree. There is a decent representation from national multiple operators, which mostly include charity shops (British Heart Foundation, Cancer Research UK, Helen & Douglas House, Oxfam, Sobell House Hospice, The Children's Air Ambulance Shop).

- 4.7.6 The proportion of convenience goods retailers is significantly above the UK average for all centres. There is a healthy mix of foodstores (Iceland, The Co-operative Food, Waitrose & Partners) as well as convenience retailers (Food Plus, Headington Butchers & Groceries, Headington Food & Wine, Little Waitrose & Partners, Medina Foods Market, Oxon Groceries, Sainsbury's Local, Tesco Express, Thong Heng).
- 4.7.7 The proportion of retail services is higher than the UK average for all centres, mostly within the health and beauty sub-sector, particularly hairdressers/barbers. However, there is also three laundrettes/dry cleaners. Similarly, the proportion of leisure services is above the UK average for all centres. As would be expected for the size of the district centre, there is a range of coffee shops, cafés, hot food takeaways and restaurants.
- 4.7.8 The proportion of financial and businesses services is above the UK average for all centres, with one bank (NatWest), one building society (Skipton Building Society) and seven estate agents.
- 4.7.9 Headington also contains a number of common town centre uses that are not included within Experian's Centre Report including public houses (The Britannia, The Royal Standard and Tile Shop Ale House), betting offices and a petrol filling station (Shell).

Proportion of Vacant Property

- 4.7.10 The proportion of vacant units in Headington District Centre (8.1 per cent) is significantly lower than the UK average for all centres (15.3 per cent). Whilst the low level of unit vacancy across the district centre as a whole is an indicator of a strong centre, there is a small concentration of vacant units at the intersection of Windmill Road and London Road, which could suggest that this part of the district centre is less viable.
- 4.7.11 According to the 2017 Retail and Leisure Study, Headington District Centre had six vacant units, which represented 5.4 per cent of the total units present within the centre.

Retailer Representation

- 4.7.12 As noted above, Headington has few comparison shops. National multiple comparison retailers are limited to a chemist (Boots), a healthy & beauty operator (Savers), a cards/gifts operator (Card Factory), and charity shops (British Heart Foundation, Cancer Research, Oxfam).
- 4.7.13 The centre is well-served in terms of national multiple convenience goods retailers with a Co-operative Food, Iceland, Sainsbury's Local, Tesco Express and Waitrose. The centre also boasts a number of independent convenience retailers (Headington Butchers & Groceries, Medina Foods Market, Oxon Groceries).
- 4.7.14 Headington Market is held at London Road (near the top of New High Street) every Saturday between the hours of 09:00 and 14:00. The market predominantly sells food including olives, eggs, cheeses, local honeys, artisan jams, homemade cakes, fruit and vegetables, baked goods, meats and poultry as well as wines and craft beers, handcrafted bowls, chopping boards and plants.
- 4.7.15 Headington has a good provision of food and drink operators, which comprises restaurants (ABC, Acropolis, Adria, Beirut, Bhoomi Kitchen, Craft Burger, Grounded Kitchen, Jacobs & Field, Posh Fish!), public houses (The Britannia, The Royal Standard, Tileshop Ale House), hot food takeaways (Asian Mama, Domino's, Flipping Burgerz, Greggs, Kazan, Reina Grill, Rio's Piri Piri, Shanghai House, Subway), coffee shops (Costa, Starbucks) and cafés (Heavenly Desserts, La Croissanterie Café, Lemon Garden, Mojo's).

Balance between Independent Retailers and National Multiples

4.7.16 Of the 99 units present within Headington, 33 are national multiple retailers (32.3 per cent of the total number of units).

Accessibility and Pedestrian Flows

4.7.17 Vehicular access to Headington District Centre is very good, with the A420 (London Road) running directly through the centre. The A40, which connects onto the M40, a key route to London, is located approximately 900m to the east of the centre. Headington Car Park, adjacent to Waitrose and accessed off Old High Street, has 120 parking spaces and customers can park for up to 24 hours. St Leonard's Car Park, located at St Leonard's Road just south of the district centre, has 47 parking spaces and is also a long-stay car park. There is a lack of on-street parking in the centre, and we noticed some motorists illegally parking in loading bays along London Road.

Figure 4-17 London Road



Source: Stantec

- 4.7.18 The district centre is accessible by public transport, with numerous bus stops situated along London Road in addition to a bus stop near the intersection of Windmill Road and London Road. There are bus services to Oxford City Centre, London (Oxford Tube service) and Heathrow and Gatwick Airports.
- 4.7.19 London Road is a main cycle route in Oxford, albeit the cycle lanes effectively stop at one end of the centre and restart at the other end. The Council could explore the possibility of extending the cycle lanes along the stretch of London Road within the district centre boundary, which may help to capture potential custom from cyclists passing through the centre, aided by the already ample provision of kerb-side cycle parking along London Road.
- 4.7.20 Pedestrian facilities within the centre are good, the centre containing wide pavements and several pelican crossings and one zebra crossing.

Perception of Safety and Occurrence of Crime

- 4.7.21 The district centre benefits from excellent levels of natural surveillance given its linear nature and the consistent flow of traffic passing through the centre. The centre is well lit and busy during the day, which helps to reduce the perception of crime.
- 4.7.22 The amount of traffic (including emergency vehicles) passing through the centre, the presence of loading bays and the break in cycle lanes could give rise to a conflict between pedestrians, cyclists and vehicles and compromise pedestrian and cyclist safety.

Environmental Quality

- 4.7.23 We consider the physical environment of Headington to be of moderate quality. Apart from The Headington Shark, a 25-foot long fibreglass shark nose-diving into the roof of a dwellinghouse along New High Street, and the shark sculpture on top of Posh Fish! (a fish and chip restaurant at London Road), the rest of the district centre lacks buildings of significant architectural merit or interest.

Figure 4-18 The Headington Shark



Source: Stantec

- 4.7.24 The buildings are generally well-kept although some are starting to look a bit tired, such as the upper floors of Sainsbury's and Boots Chemist.
- 4.7.25 There is ample street furniture within the district centre including benches, cycle racks, street lighting and litter bins. Despite the provision of litter bins, we did observe some litter during our visit. The presence of benches encourages people to utilise the space and increase dwell time.
- 4.7.26 The heavily trafficked London Road, especially where it forms a crossroad with Old High Street and Windmill Road, detracts from the centre's overall environmental quality.
- 4.7.27 Bury Knowle Park on the edge of the centre provides some welcome green space along the busy London Road, enhancing the centre's overall environmental quality.

Figure 4-19 Bury Knowle Park



Source: Stantec

Evidence of Barriers to Business

- 4.7.28 Headington is close to John Radcliffe Hospital and Oxford Brookes University Campus, which have their own town centre facilities. Some businesses, particularly convenience goods retailers, may prefer to be located within either of these two establishments.

Extent of Evening and Night-time Economy Offer

- 4.7.29 The district centre's evening and night-time economy offer is limited to its restaurants, hot food takeaways and public houses.

Summary

- 4.7.30 We consider Headington to be a vital and viable district centre that has a strong convenience retail and service offer. Whilst the centre has a limited comparison retail offer it also has a low vacancy rate. The centre is highly accessible by a variety of transport modes but suffers from congestion. These findings also reflect the findings of the 2017 Study.
- 4.7.31 The defined district centre boundary could be amended to exclude Bury Knowle Park which, whilst enhancing the overall environmental quality of the centre, does not necessarily need to be included within the defined boundary. We do not propose any changes to the Primary Shopping Area.

4.8 Performance of Summertown District Centre

- 4.8.1 Summertown District Centre is located along Banbury Road and South Parade. The wider suburb is home to a number of independent schools and some of the city's most expensive houses. BBC Radio Oxford is located at Banbury Road and there are a number of other office uses within and surrounding the centre. Summertown boasts a number of independent retailers and higher end national multiples, as well as good provision of services and community and leisure facilities such as the Ferry Sports Centre and the North Oxford Centre.

Previous Findings

- 4.8.2 The previous study found that Summertown performs well against the key indicators of vitality and vibrancy. The centre had a strong convenience offer, an appropriate mix of comparison retailers and a range of services and leisure facilities. The Summertown Farmers Market was said to add to the centre's vitality by generating footfall. There were no concentrations of vacant units, and the centre had a relatively healthy rent level. The centre had a vibrant evening economy. The study identified that the centre lacked identity as well as having no pedestrianised zones or public open spaces, which were noted as key weaknesses.

Diversity of Uses

- 4.8.3 Summertown District Centre has a total of 89 retail/service units⁵⁷, as set out within Table 4-10. The full breakdown of uses can be found in Spreadsheet 5 of Appendix A.

Table 4-10 Diversity of Uses, Summertown (December 2022)

Summertown District Centre – Diversity of Uses						
Category	No. of units	% of total units	UK (%)	Floorspace sq.m	Floorspace (%)	UK (%)
Retail Services	14	15.7	14.7	1,360	8.7	7.3
Leisure Services	15	16.9	18.5	2,170	13.9	13.3
Comparison	25	28.1	34.0	3,690	23.6	38.6
Convenience	10	11.2	10.1	3,740	23.9	18.8
Financial and Business	12	13.5	6.4	1,670	10.7	5.1
Miscellaneous	0	0.0	1.0	0	0.0	0.7
Vacant	13	14.6	15.3	3,000	19.2	16.1
Total	89	100	100	15,630	100	100

Source: Stantec survey and Experian Goad (for UK averages). Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

- 4.8.4 The proportion of retail services is above the UK average for all centres, as is the proportion of retail service floorspace. Health and beauty businesses are the most prevalent sub-sector, followed by laundries/drycleaners.
- 4.8.5 The proportion of leisure services is slightly below the UK average for all centres. As would be expected for the size of the district centre, there is a range of coffee shops, cafés, hot food takeaways and restaurants.
- 4.8.6 There is a lower proportion of comparison goods retailers in Summertown than the UK average for all centres. Despite this, there is a healthy mix of both independents and national multiples.
- 4.8.7 The proportion of convenience goods retailers is broadly the same as the UK average for all centres, including both foodstores (Marks & Spencer Foodhall) and convenience shops (Sainsbury's Local, Tesco Express). The closure of The Co-operative Food has slightly reduced the proportion of convenience goods retailers present within the district centre.
- 4.8.8 The proportion of financial and business services (13.5 per cent) is significantly above the UK average for all centres (6.4 per cent), albeit they are limited to estate agents and there are no banks or building societies in Summertown District Centre since the closure of Lloyds Bank on Banbury Road. The closest bank/building society is located within Oxford City Centre, which is approximately a 30-minute walk from the district centre.

⁵⁷ Please note the point raised in paragraph 4.1.7 in terms of the discrepancy regarding the number of units.

- 4.8.9 Summertown also contains a number of common town centre uses that are not included within Experian's Centre Report including public houses, betting offices, accountants, offices and hotel.

Proportion of Vacant Property

- 4.8.10 The last study recorded a unit vacancy rate of 4.8 per cent (in 2015), and so the current vacancy rate of 14.6 per cent represents a significant increase since then. The proportion of vacant units in Summertown District Centre (14.6 per cent) remains below the current UK average for all centres (15.3 per cent), however. Some of the vacant units occupy very prominent locations such as the former The Co-operative Food and the former Lloyds Bank along Banbury Road, the unit on the corner of Banbury Road/South Parade and the cluster of vacant units along South Parade.

Retailer Representation

- 4.8.11 There are a number of national multiple comparison retailers present within the district centre including fashion operators (JoJo Maman Bébé, Oliver Bonas), home furnishings (Farrow & Ball), charity shops (Helen & Douglas House, Oxfam), chemist (Boots, Rowlands Pharmacy) and opticians (Boots Opticians). These retailers are concentrated along Banbury Road.
- 4.8.12 Summertown is well served in terms of national multiple convenience retailers, with Marks & Spencer Foodhall, Sainsbury's Local and Tesco Express. The centre also has an independent organic health foodstore (Wild Honey), a greengrocer and a baker as well as two off licences.
- 4.8.13 Summertown Artisan Farmers Market operates every Sunday at Banbury Road between the hours of 10:00 and 14:00. The market sells fresh local and organic produce including meat, vegetables and cheese as well as street food.
- 4.8.14 In addition to the centre's food and drink offer described below, services present including hairdressers, accountants and estate agents as well as a beauty salon. There are some 11 estate agents along Banbury Road, potentially reflecting the desirability of the area as a place to live. Various office uses are within and on the fringes of the centre, which also boasts a hotel (easyHotel) and a library.
- 4.8.15 The centre's food and drink offer comprises restaurants (Joe's Bar & Grill, LB's, Spice Lounge, Xi'an), coffee shops (Costa), cafés (Colombia, Kitchen Food Company) and public houses (The Dew Drop Inn).
- 4.8.16 Ferry Leisure Centre is situated just outside of the Goad district centre boundary but is an important attraction within Summertown and has a swimming pool. Other leisure attractions include North Oxford Association Community Centre (at Diamond Place) and North Wall Arts Centre, which runs a nationally significant public theatre and gallery (at South Parade).

Balance between Independent and Multiple Stores

- 4.8.17 Of the 89 units present within Summertown District Centre, roughly a quarter (23) are national multiple retailers.

Accessibility and Pedestrian Flows

- 4.8.18 Summertown is accessible by a range of transport modes. Oxford Parkway Train Station is located approximately 1.6 miles north of the district centre adjacent to the Oxford Parkway Park and Ride site. Buses running from the Park and Ride site into Oxford City Centre stop at Summertown. Chiltern Railways operates a service from Oxford Parkway to London Marylebone every 30 minutes, which stops at Bicester Village and High Wycombe amongst other locations.
- 4.8.19 There are several bus stops along Banbury Road, with services to Oxford City Centre, Kidlington, Woodstock, Banbury and Oxford Parkway Train Station amongst other locations. The bus route from Pear Tree Park and Ride to Oxford City Centre also stops at the end of South Parade nearest St Edward's School.

- 4.8.20 Vehicular access to Summertown is good, with the district centre located off the A40. There are three pay and display car parks serving the centre. Summertown Car Park, at the end of Diamond Place, has 122 parking spaces and was quite busy on our visit but there were spaces available. Several public toilets are adjacent to the car park. Ferry Leisure Centre Car Park is accessed from Ferry Pool Road via Marston Ferry Road and has 75 parking spaces. Alexandra Courts Car Park is accessed from Middle Way via South Parade and has 26 parking spaces.
- 4.8.21 There is some on-street short-stay parking provision along the northbound side of Banbury Road and South Parade. Much of the parking on the side streets is for resident permit holders only.
- 4.8.22 The district centre is accessible by cycle given that there are cycle lanes on both sides of Banbury Road and ample cycle parking.
- 4.8.23 There are four pelican crossings along the stretch of Banbury Road that lies within the district centre (near its junctions with Marston Ferry Road, Oakthorpe Road, Summerfield Road and South Parade), which facilitate pedestrian movement, observed to be quite high on our visit.

Perception of Safety and Occurrence of Crime

- 4.8.24 Summertown benefits from a good degree of natural surveillance thanks to the streets being overlooked by buildings and the regular flow of traffic through the district centre. The street lighting and CCTV along Banbury Road help to increase perceptions of safety. In contrast, there is limited street lighting along South Parade and the other side streets.
- 4.8.25 We did observe some vehicular conflict along the northbound side of Banbury Road where the one way stretch of road commences.

Environmental Quality

- 4.8.26 Summertown is a pleasant district centre, and the buildings are generally very well-kept with attractive façades. This is particularly so along the western portion of South Parade near Middle Way and Stratford Road (see Figure 4-20 below). The environmental quality deteriorates slightly further east along South Parade where there is a cluster of vacant units. Moreover, the parade of shops along Banbury Road that includes Tesco Express and Sainsbury's Local is rather unattractive and would benefit from redevelopment.

Figure 4-20 Attractive façades along South Parade



Source: Stantec

4.8.27 The buildings range in age and architectural style, with modern buildings such as that accommodating the easyHotel adjacent to older, more historic buildings such as Summertown United Reformed Church and Breckon & Breckon estate agent (see Figure 4-21 below). The buildings along the northbound side of Banbury Road are particularly attractive; the ground floor façades are well-maintained, and the upper floors contain architectural features such as bay windows, arch windows and nice brickwork.

Figure 4-21 Buildings of varying ages and architectural styles



Source: Stantec

4.8.28 There are two sizeable vacant units either side of Banbury Road (the former Lloyds Bank and The Co-operative Food), but they appear to be well managed and do not detract from the environmental quality within the district centre. Moreover, the windows of the former foodstore are boarded with reflective material which provides the appearance of an active frontage.

Figure 4-22 Sizeable vacant units



Source: Stantec

4.8.29 Summertown is noticeably leafier than the other district centres and includes high quality street furniture including seating, raised garden beds, tiered planters, cycle parking, litter bins and bollards. We found the centre to be clean and well maintained during our visit.

Figure 4-23 Example of attractive public realm



Source: Stantec

- 4.8.30 The pavements are generally well-maintained and are particularly wide along the southbound side of Banbury Road which provides for a more enjoyable shopping experience. The public realm is particularly attractive in front of easyHotel, Crêpeaffaire and Majestic with plentiful seating including outdoor seating for the customers of Crêpeaffaire, raised garden beds and cycle parking.

Evidence of Barriers to Business

- 4.8.31 We do not consider there are any barriers to new businesses opening up within the district centre, but there may be limited opportunities for existing businesses to expand.

Extent of Evening and Night-time Economy Offer

- 4.8.32 The previous study noted that Summertown had a thriving evening economy, although we found there to be a relatively small provision of restaurants, hot food takeaways and pubs. However, North Wall Arts Centre hosts comedy nights, music gigs and theatre performances which enhance the district centre's evening economy offer.

Summary

- 4.8.33 We consider Summertown to be a relatively healthy district centre that has an appropriate mix of comparison goods retailers and a healthy representation of independent and national multiple retailers. While the vacancy rate is below the UK average for all centres it has risen significantly since the publication of the 2017 study and as such we would recommend that the City Council should continue to monitor this indicator carefully.
- 4.8.34 We do not propose any significant amendments to the district centre boundary although the Council might want to consider excluding Alexandra Tennis Courts from the defined centre for the same reason as excluding Bury Knowle Park from the Headington district centre boundary. We do not propose any changes to the Primary Shopping Area.

4.9 Performance of Blackbird Leys District Centre

- 4.9.1 Blackbird Leys is located beyond the Eastern By-Pass Road approximately 5km to the south east of Oxford City Centre. The district centre is located along Blackbird Leys Road, Cuddesdon Way and Knights Road and is situated at the centre of a 1960s residential estate. It contains some small-scale convenience retail facilities as well as a range of community and leisure facilities such as the leisure centre and swimming pools (Leys Pools and Leisure Centre), community centre with function room (Blackbird Leys Community Centre and Glow Hall Venue), library (Blackbird Leys Library & Learning Centre), health centre (Older People's Directorate), church (The Church of the Holy Family) and college (City of Oxford College). Whilst the convenience retail facilities serve the local community, some of the community facilities, in particular the leisure swimming pools and college, serve a much wider catchment.

Previous Findings

- 4.9.2 The previous study identified the Nisa Local foodstore as an important anchor within the district centre, increasing footfall and the number of linked trips for nearby shops, businesses, services and facilities. The leisure and community facilities were noted as one of the centre's key strengths. The centre also contained no vacant units and could be accessed by foot and other modes of transport. The study noted the complete absence of comparison goods retailers and the deteriorating built environment as key weaknesses.

Diversity of Uses

- 4.9.3 Blackbird Leys District Centre has a total of 11 retail/service units⁵⁸, as set out within Table 4-11, compared with the Goad UK average for all centres. The full breakdown of uses can be found in Spreadsheet 6 of Appendix A.

Table 4-6 Diversity of Uses, Blackbird Leys (December 2022)

Blackbird Leys District Centre – Diversity of Uses			
Category	No. of units	% of total units	UK (%)
Retail Services	2	18.2	14.7
Leisure Services	4	36.4	18.5
Comparison	1	9.0	34.0
Convenience	4	36.4	10.1
Financial and Business	0	0.0	6.4
Miscellaneous	0	0.0	1.0
Vacant	0	0.0	15.3
Total	11	100	100

Source: Stantec survey and Experian Goad (for UK averages). Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

- 4.9.4 Blackbird Leys has by far the fewest retail/service units of the district centres, and it has fewer retail/service units than each of the local centres. However, the centre's plentiful community and leisure facilities, some of which serve a large catchment, elevate its position within Oxford's retail hierarchy above the local centres. It should be noted that some of these leisure uses are not assigned an Experian Goad code and therefore are excluded from the diversity of uses analysis. Comparing the diversity of uses present within Blackbird Leys with the UK average for all centres is a less fruitful exercise than it is for the other district centres considering the very small number (11) of retail/service units.
- 4.9.5 The proportion of convenience goods retailers is significantly above the UK average for all centres, with three convenience shops and one bakery.
- 4.9.6 Blackbird Leys has only one comparison goods retail outlet (Leys Pharmacy).
- 4.9.7 The proportion of retail services (18.2 per cent) is above the UK average for all centres (14.7 per cent), and the proportion of leisure services (36.4 per cent) is significantly above the UK average for all centres (18.5 per cent).
- 4.9.8 The proportion of financial and business services and miscellaneous uses, both in terms of number of units and floorspace, is below the UK average for all centres.
- 4.9.9 There are no vacant units with Blackbird Leys, which reflects the finding of the previous study.

Proportion of Vacant Property

- 4.9.10 We did not record any vacant units during our survey, which is a good indicator of strong centre health.

Retailer Representation

- 4.9.11 Nisa Local, Premier Oxford and Ladbrokes are the only national multiples present within Blackbird Leys. All other retailers and operators are independents, comprising hot food takeaways (Jake's Takeaway, Smart Fish & Chips, Sun Hong House) as well as a public house (The Blackbird), a café (Communi-tea), a baker (Nash's Bakery), a foodstore (Region to Season – Jamaican & Afro Caribbean Food Specialists), a hairdresser (Beyond Hair &

⁵⁸ Please note the point highlighted in paragraph 4.1.7 regarding the discrepancy with the number of units.

Beauty), a funeral director (Jackson & Browning Independent Funeral Services) and an advice centre (Agnes Smith Advice Centre).

- 4.9.12 The only comparison goods retailer within Blackbird Leys is a pharmacy (The Leys Pharmacy), which reflects the size of the centre and the catchment it serves.

Balance between Independent and Multiple Stores

- 4.9.13 Of the 11 units present within Blackbird Leys, just two⁵⁹ are national multiple retailers (equating to 18.2 per cent). The proportion of national multiple retailers present within Blackbird Leys is still higher than that for Cowley Road, but figures for smaller centres are less meaningful when considering the proportion of units.

Accessibility and Pedestrian Flows

- 4.9.14 The centre is easily accessible via car from the surrounding residential areas and there is free on street parking along Blackbird Leys Road, Knights Way and Cuddesdon Way. However, we did observe a couple of cars parking illegally along Blackbird Leys Road in front of the parade of shops, which suggests that further on street parking would be beneficial. Blackbird Leys West Controlled Parking Zone operates across residential streets to the west and south of the district centre on Sundays between the hours of 8:00 and 13:00 and during stadium event times (Saturday afternoons and evenings), thereby reducing the provision of parking during these hours.
- 4.9.15 Most of the leisure and community facilities also have their own parking facilities. For example, users of Leys Pools and Leisure Centre can park for up to three hours free of charge.

Figure 4-24 Parking offer at Leys Pool and Leisure Centre



Source: Stantec

⁵⁹ As betting offices are not assigned an Experian Goad code, Ladbrokes is not included within the analysis of the balance between national multiple and independent retailers. This explains the discrepancy between the number of national multiple retailers that we have quoted.

- 4.9.16 The local community can easily walk or cycle into the district centre (there are cycle racks outside of the Nisa Local foodstore and an e-scooter parking site outside Sun Hong House hot food takeaway).
- 4.9.17 There are several bus stops within the centre and on surrounding residential streets with services to Oxford City Centre, Oxford Train Station, John Radcliffe Hospital and Cowley Centre amongst other locations.
- 4.9.18 There was some pedestrian activity during our visit but noticeably less than the other district centres. This is most likely due to Blackbird Leys being a predominantly residential area and a lack of shops to attract footfall.

Perception of Safety and Occurrence of Crime

- 4.9.19 Most of the district centre benefits from strong levels of natural surveillance given the proximity of the surrounding residential development and high-rise flats. There is also a high degree of street lighting available throughout the centre, which helps to reduce the perception of crime. Blackbird Leys Park, while benefitting from some lighting, was very quiet during our visit, which could reduce perceptions of safety.
- 4.9.20 The area in front of the Nisa Local foodstore is a popular place for teenagers to gather, which could give rise to anti-social behaviour, thereby reducing perceptions of safety.

Environmental Quality

- 4.9.21 The district centre was generally clean and tidy during our visit in December 2022 although we did note some litter despite the provision of litter bins. Other street furniture included a community notice board, cycle racks, bollards and seating.
- 4.9.22 Within the centre of Blackbird Leys is an oval shaped grassed area with trees, footpaths and benches (although the benches warrant replacement). This encourages people to utilise the space and facilitates pedestrian movement within the district centre.

Figure 4-25 Grassy area with trees



Source: Stantec

- 4.9.23 Blackbird Leys Park, sandwiched between Cuddesdon Way and Pegasus Road, provides some welcome green space and the playground is impressive.
- 4.9.24 The majority of the buildings within the district centre are dated, which is no surprise considering that many of them were built in the 1950/60s and have not since been refurbished. However, the façades of the units along Blackbird Leys Road are acceptable.

Figure 4-26 Parade of shops along Blackbird Leys Road ('Top Shops')



Source: Stantec

- 4.9.25 Blackbird Leys is identified as an area for comprehensive regeneration in the Oxford Local Plan 2036. Policy SP4 ('Blackbird Leys Central Area') states that '*Planning permission will be granted for a mixed use development that includes retail, start-up employment units, residential development and community facilities at the Blackbird Leys Central Area site. The minimum number of homes to be delivered is 200. Other uses should be appropriate to a district centre and could include education, live / work units, sport and commercial leisure. Other complementary uses will be considered on their merits. Planning permission will not be granted for development that prejudices the comprehensive development of the whole site. Regard should be had for any regeneration plan for the Blackbird Leys area.*'
- 4.9.26 A hybrid planning application for the redevelopment of Blackbird Leys District Centre and land off Knights Road was submitted in February 2023 (ref. 23/00405/OUTFUL). The applicant, Catalyst Homes Ltd, seeks full planning permission for up to 210 apartments and up to 1,300 sq.m of retail/commercial space across four buildings on Blackbird Leys Road and the erection of up to 84 dwellings at Knights Road. All of the dwellings are proposed as affordable housing. Outline planning permission is sought for a community centre and public open space.
- 4.9.27 The refurbishment of Evenlode and Windrush Towers, the two high-rise flats at either end of the district centre, forms the start of this work⁶⁰.

Evidence of Barriers to Business

- 4.9.28 The close proximity of Blackbird Leys to Cowley Centre (approximately 1.4km) is likely to be its main barrier to attracting new businesses.

⁶⁰ [Evenlode & Windrush Towers, Oxford → BM3 Architects](#)

- 4.9.29 The existing services and facilities available within the centre appear to be well utilised by the local community and there were no vacant units within the centre as of December 2022, which means there is limited capacity for additional businesses to invest in Blackbird Leys. That in itself is a sign of strong centre health, rather than a weakness.

Extent of Evening and Night-time Economy Offer

- 4.9.30 The centre's evening economy offer is limited to a public house (The Blackbird) and hot food takeaways (Jake's Takeaway and Sun Hong House). However, this is proportionate to the size of the centre.

Summary

- 4.9.31 We consider Blackbird Leys to be a vital and viable centre that principally serves the day-to-day needs of the immediate residential population but, by virtue of its community and leisure facilities, also serves a much larger catchment. There is a distinct lack of comparison goods retailers within the centre, but this is not a significant issue given the close proximity of Cowley Centre which has a high proportion of comparison goods retailers.
- 4.9.32 The centre also has no vacant units and has therefore maintained its overall performance since 2017.
- 4.9.33 We consider that the proposals for the Blackbird Leys Central Area will further enhance the vitality and viability of the centre.
- 4.9.34 The Council might want to consider excluding Blackbird Leys Park, Pegasus Primary School and Mabel Prichard School from the defined district centre boundary for the reasons mentioned above. However, Blackbird Leys District Centre is unlike the other centres in that it primarily contains community and leisure uses as opposed to retail uses and so it may be appropriate in this instance to keep the boundary as it is to reflect the unique offering. We do not propose any changes to the Primary Shopping Area.

4.10 Review of Local Centres

Introduction

- 4.10.1 Oxford's six local centres (North Parade, Jericho, Little Clarendon, St Clement's, Rose Hill and New Marston) sit at the bottom of the city's hierarchy of centres and their boundaries are shown on the adopted Policies Map.
- 4.10.2 Below, we review the uses present within each of the local centres to understand whether they are fulfilling the day-to-day needs of the neighbouring residents, and we consider whether the centres provide neighbouring residents with good accessibility to a range of shops and services.

North Parade

- 4.10.3 North Parade is a charming centre that extends along North Parade Avenue and a short stretch of Banbury Road. It is one of the smaller local centres along with New Marston, but it boasts a selection of independent retailers and operators including a produce store (2 North Parade), a boutique (Ruskin), a haberdashers (Oxford Yarn Store), a music store (Oxford Violins) and two art galleries (Meakin and Parsons Gallery and Tom Constantine). North Parade lacks a foodstore suitable for undertaking a top-up shop, and so nearby residents would either have to visit Summertown, Jericho or Little Clarendon, all within a relatively short walk.

Figure 4-27 North Parade Local Centre



Source: Stantec

- 4.10.4 North Parade also contains a number of food and drink outlets including coffee shops and cafés (Barefoot Coffee & Cake, Brew, Viny's Café), restaurants (Gees Restaurant & Bar, Jee Saheb, Little Venice Pizzeria) and a public house (The Rose & Crown). At the time of our visit in December 2022, The Gardener's Arms was closed but there was a notice stating that the pub is under new management and will be reopening soon.
- 4.10.5 The local centre also accommodates several services including a hairdresser (Popham), architects (Riach Architects), estate agents (Hunters), a veterinary surgery (The Vets) and several health clinics (Cavendish Imaging, Clear Ear Clinic Oxford, Lars Christensen Orthodontics, Oxford Hormone Clinic).
- 4.10.6 North Parade Market operates twice a month with organic and artisan producers from the local area selling a range of produce and goods including breads, pies and quiches, paintings, fabrics, wallets and bags, earrings and flowers.
- 4.10.7 North Parade largely fulfils the day-to-day needs of its neighbouring residents although they would have to visit one of the above-mentioned centres in order to undertake a top-up shop. With its independent retailers, range of eateries and services and characterful appearance it not only serves residents but visitors alike.

Jericho

- 4.10.8 Jericho is located to the north west of Oxford City Centre and extends along Walton Street between St Bernard's Road and Great Clarendon Street. The local centre contains a high proportion of food and drink operators including restaurants (Branca, Brasserie Blanc, Giggling Squid, Jamal's, Jericho Grill, Koto, Mamma Mia, The Standard, Zheng Restaurant), public houses (Jude the Obscure, The Jericho Tavern, The Victoria), coffee bars (Barefoot, Edge), cafés (Manos, The Jericho Café), cocktail bar (Freud) and hot food takeaway (Peppers Burgers).

Figure 4-28 Jericho Local Centre



Source: Stantec

- 4.10.9 In addition to the food and drink operators, the centre contains three convenience goods retailers (Lynacre Spirit and Cocktail Merchant, Your Co-op Food, VG Foodstores) and a number of comparison goods retailers including a charity shop (Mind), cycle store (Walton Street Cycles), florist (Daisies Flower Shop) and pharmacy (Jhoots Pharmacy).
- 4.10.10 Jericho also contains services including hairdressers (Edge Barber Shop, Silvia Hair & Beauty), estate agents (James C Penny, Thomas Merrifield Lettings) and health centre (Walton Street Wellness).
- 4.10.11 In terms of leisure, the local centre boasts an independent cinema (The Phoenix Picturehouse) and a yoga studio (Prana Yoga).
- 4.10.12 Jericho therefore not only serves the day-to-day needs of the nearby population but also residents within a broader catchment and visitors by virtue of its plentiful food and drink operators and independent cinema. Jericho provides a range of essential services and facilities for local residents to access by walking and cycling.
- 4.10.13 The building which previously accommodated the Jericho Health Centre is currently being redeveloped and once finished will comprise eight existing apartments, nine new flats and the ground floor will be offered to let for commercial use.

Little Clarendon

- 4.10.14 Little Clarendon is situated close to Jericho and is primarily located along Little Clarendon Street.

Figure 4-29 Little Clarendon Local Centre



Source: Stantec

- 4.10.15 The local centre contains a number of comparison goods retailers including fashion and footwear operators (Olivia May), a furniture shop (Central Living Furniture Shop) and a charity shop (Sobell House Hospice Shop).
- 4.10.16 The centre also boasts a national multiple convenience goods retailer (The Co-operative Food) as well as an organic health food store and refill station (Wild Honey) and a cheese shop (Jericho Cheese Company).
- 4.10.17 Little Clarendon contains a good range of food and drink operators including cafés and coffee bars (Common Ground, Gail's, Opera Café, The Oxford Wine Café, Tree Artisan Café), restaurants (Al-Andalus Tapas Bar, Browns, Moshi, Pierre Victorie, Wilding Wine), bars (Angels Cocktail Bar, Love Jericho, Raoul's Bar and Liquor Store), public houses (The Duke of Cambridge) and a sandwich bar (Taylors Oxford).
- 4.10.18 The centre contains several hairdressers (Blushes, Idlewild, Mahogany, Oxford Little Barber, Popham), a nail parlour (Le Fam Nails Lounge) and a tailor and dry cleaner (Afrin Tailoring and Dry Cleaning). Little Clarendon also boasts two galleries (Lucie Rie Ceramics Gallery and Rona Painting) and a post office (St Giles Post Office).
- 4.10.19 Similarly, Little Clarendon performs a broader function than merely fulfilling the day-to-day needs of its neighbouring residents. Given its proximity to Oxford City Centre and its array of independent shops and high-end eateries it is likely to attract people from a broader catchment and visitors alike.

Rose Hill

- 4.10.20 Rose Hill is situated to the south east of Oxford City Centre and to the west of the A4158 (Rose Hill).

Figure 4-30 Rose Hill Local Centre



Source: Stantec

- 4.10.21 The centre contains a high proportion of hot food takeaways (Café Spice, Gzanos, House of Tim, Papa John's Pizza, Pizza Hut Delivery, Polish Kitchen, Salt & Vinegar) as well as a café (The Eggs Coffee & Sandwich Shop) and two convenience retail operators (Old Man's Premier and The Co-operative Food).
- 4.10.22 The centre also contains some services including hairdressers (Royal Barber), estate agents (Allen & Harris, Wallers Estate Agents) and funeral directors (S & R Childs, The Individual Funeral Company).
- 4.10.23 KIA Motors is the largest unit within the local centre in terms of floorspace. Other comparison goods retailers include Oxford Heating Supplies (a heating equipment supplier) and Helen & Douglas House (charity shop). The centre also contains two betting shops (Betfred and Ladbrokes).
- 4.10.24 Rose Hill fulfils the day-to-day needs of its neighbouring residents and potentially captures through traffic aided by the provision of free short stay on-street parking and a car park to the rear of The Co-operative Food. Rose Hill provides a range of essential services and facilities for local residents to access by walking and cycling.

New Marston

4.10.25 New Marston is located at the intersection of the B4150 and B4495 and is one of the smallest local centres.

Figure 4-31 New Marston Local Centre



Source: Stantec

4.10.26 By virtue of its location, the local centre contains a BP petrol station and accompanying Londis foodstore. The centre is well-served in terms of convenience goods retailers as it also contains The Co-operative Foodstore and an off license (The Bottle Top).

4.10.27 The centre contains a number of hot-food takeaways (Papa John's Pizza, Pizza Hut Delivery) and restaurants (Chosen Bun Burgers, Mediterranean Fish Bar, Oxford Café Grill).

4.10.28 Comparison goods retailers are limited to a charity shop (Sobell House) and a motor accessories shop (Oxford Car Audio). There is also a hairdresser (Studio E), a veterinary surgery (Oxford Cat Clinic), a funeral directors (Sandra Homewood Funerals) and a betting shop (Betfred).

4.10.29 New Marston serves the immediate residential catchment and captures through traffic given that it contains a petrol station and has some free short stay on-street parking. As such, New Marston provides residents and fleeting visitors with good accessibility to a range of shops and services.

St Clement's

4.10.30 St Clement's is a linear local centre situated to the immediate north of East Oxford-Cowley Road District Centre, running approximately 400m from The Plain roundabout in the west to the junction of St Clement's Street and Morrell Avenue in the east.

Figure 4-32 St Clement's Local Centre



Source: Stantec

- 4.10.31 The centre contains a handful of comparison goods retailers including specialist operators (Karwals Jewellers, Marcus Roberts Pianos, Kina Ceramics), a furniture shop (And So To Bed) and a charity shop (Age UK).
- 4.10.32 St Clement's local centre also has a couple of small independent convenience outlets (Zenobia, Kaura's Local Food), as well as Sainsbury's Local at the northern end of the centre and an off-licence.
- 4.10.33 The centre contains an array of food and drink operators, including restaurants and take-aways (Delish Vegan/Indian Restaurant, Pan Pan Street Food, Gourdans Steak Frites, the Greek Takeaway, Philly's Burger, Coconut Street Sri Lankan Street Food, Bamboo Korean Restaurant, Cuttlefish Seafood, Cucina Trattoria and Pizzeria, Moya Slovakian Restaurant), coffee shops (Rachel's Asian Home Baking and Coffee, Lost Coffee), and public houses (Old Black Horse, Half Moon, Angel & Greyhound, Port Mahon, Cape of Good Hope), as well as Ballroom Emporium and Glamorous Bar and Nightclub.
- 4.10.34 The centre also contains several hairdressers (Annie Veck Hair Salon, Plain Barbers, Rookery Barbers, Pulchra Beauty Salon), a Post Office, a bed & breakfast (Coach & Horses), Oxford International College and several estate agents (Penny & Sinclair, Taylors, College & County, Hutton Parker, Northwood). There are no banks or building societies within the centre.
- 4.10.35 St Clement's therefore performs a primarily service sector function, the most notable feature being the array of food and drink outlets on offer which cater for a broad range of international cuisines, reflecting the large and diverse population nearby, including a substantial student cohort. The relative lack of retail facilities is not an issue given the close proximity to East Oxford-Cowley Road District Centre as well as Oxford City Centre.

5 Current Retail and Leisure Expenditure Patterns

5.1 Introduction

- 5.1.1 In this section we utilise the results from the household telephone survey to identify the current patterns of comparison and convenience retail spending, by residents across the defined study area.

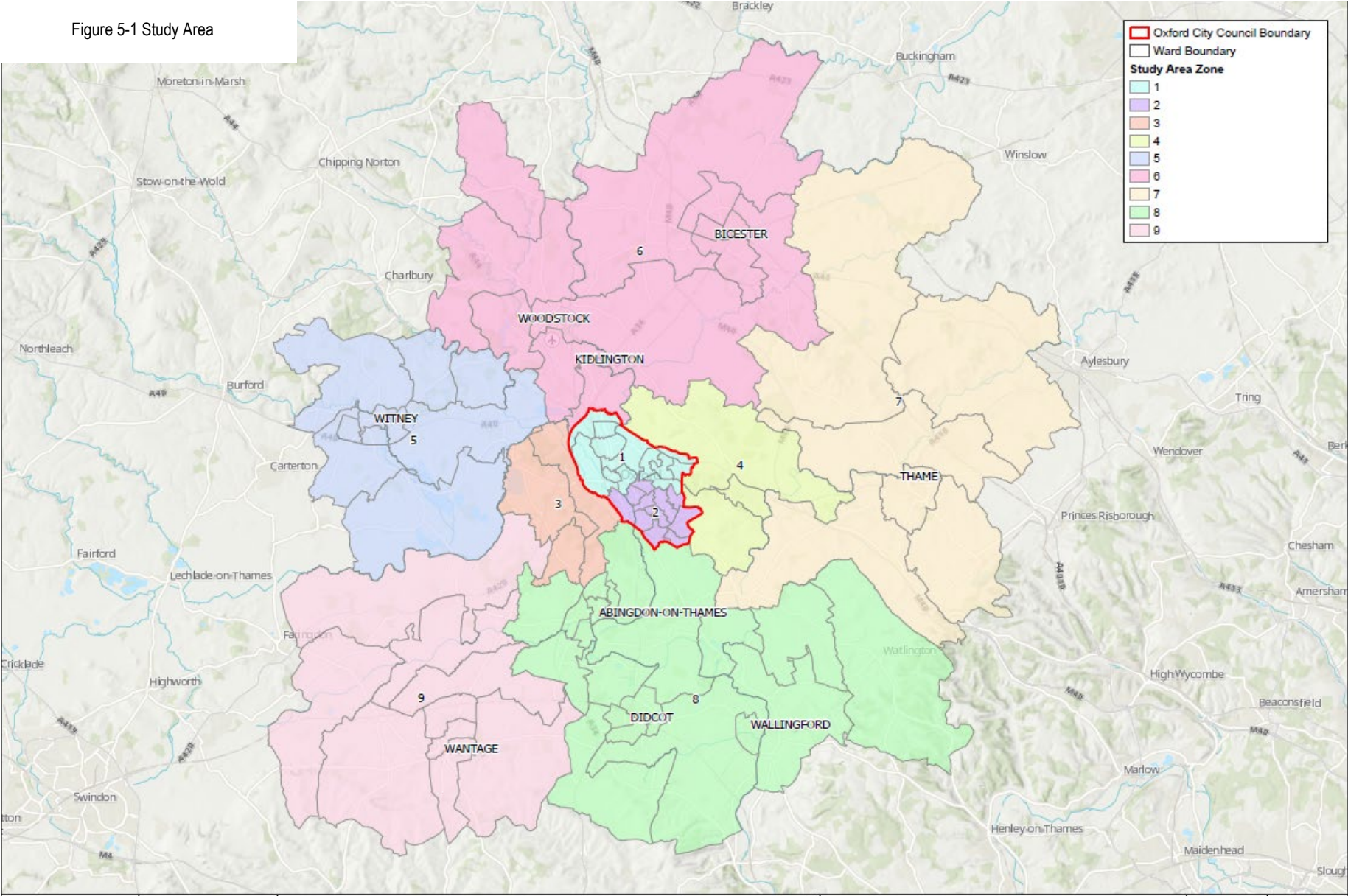
5.2 Household Survey Methodology

- 5.2.1 The last comprehensive Borough-wide survey of shopping patterns was undertaken over six years ago, in December 2016, as part of the Oxford City Council Retail and Leisure Study, which was published in 2017. A new household telephone survey has therefore been undertaken as part of this study – conducted between November 2022 and January 2023 – to provide up-to-date evidence of current shopping and leisure patterns.

5.3 Study Area

- 5.3.1 The study area used for this Retail, Leisure and Town Centre Needs Study is shown on the plan within Appendix B of the Appendices Volume and by Figure 5-1 overleaf. The study area comprises nine study zones. Two of the study zones are wholly within Oxford City Council's administrative boundary while the remaining seven are within neighbouring local authority areas. The relatively extensive study area has been adopted to establish the role performed by Oxford City Centre and each of the five district centres within the sub-region.

Figure 5-1 Study Area



Survey Questionnaire

- 5.3.2 The questionnaire used for the telephone household survey, which is reproduced within Appendix C of the Appendices Volume, sought to establish:
- Patterns of convenience goods spending, based on the location of:
 - the store where the household last undertook a main food and grocery shop, the store visited the time before that, the amount spent per week and the frequency of visits to convenience stores;
 - the shop where the household last undertook a 'top-up' food and grocery shop, the shop visited the time before that, the amount spent per week and the frequency of visits; and
 - spending on food and groceries in small shops and markets.
 - Patterns of comparison goods spending, based on the locations of the last purchase of:
 - clothes and shoes;
 - furniture, carpets or soft household furnishings;
 - DIY and decorating goods;
 - electrical items, such as TVs, DVD players, digital cameras, MP3 players, mobile phones, computers;
 - domestic appliances, washing machines, fridges or cookers;
 - health, beauty and chemist items);
 - recreational goods, such as sports equipment, bicycles, musical instruments and toys; and
 - other non-food items, such as books, CDs, jewellery, glass and china products.

5.4 Composite Patterns of Spend on Comparison Retail Goods

- 5.4.1 The composite pattern of spending for comparison retail goods, as shown in Spreadsheet 4 of Appendix D, was achieved on the basis of expenditure data supplied by Experian. Table 5-1 below provides the weightings of each comparison retail category used to achieve the composite comparison figure.

Table 5-1 Composite Patterns of Comparison Goods Spend

Category	Percentage Weighting
Clothes and footwear	24.22
Furniture, floorcoverings, household textiles	12.21
Hardware, DIY	6.19
Domestic appliances	21.92
TV, AV, phones & computers	3.51
Chemist goods	3.89
Recreational goods	10.46
Other non-food	17.6

- 5.4.2 The resident population of the study area in 2023, disaggregated by zone, is shown in the second row of figures in Spreadsheet 1 of Appendix D. The overall population in the 2023 base year amounts to approximately 566,063 persons, which is ONS based. Future year population projections to 2042 (also shown within Spreadsheet 1) are sourced from Experian MM3.

- 5.4.3 The per capita spend on comparison goods in 2023 (Spreadsheet 2 of Appendix D) varies from a low of £3,760 in Zone 2 to a high of £5,590 in Zone 3. The total amount of comparison goods spending for residents of the whole of the study area in 2023 is £2,676m (Spreadsheet 3 of Appendix D), of which £797m, or 29.8 per cent, is spent on special forms of trading (internet, catalogue and TV shopping, which we subsequently abbreviate as SFT), based on the findings of the household survey.
- 5.4.4 Spreadsheet 4 of Appendix D shows the market shares that each zone of the study area achieves in terms of the total spend on comparison goods by residents of each zone within the study area, and Spreadsheet 5 of Appendix D sets out the pattern of expenditure flows for the comparison goods sector as a whole, as revealed by the household survey.
- 5.4.5 Table 5-2, which is derived from the final column of Spreadsheets 4 and 5 of Appendix D, summarises the top five main destinations for comparison goods expenditure within the study area. Oxford City Centre is the dominant destination for comparison shopping within the study area, attracting £340.1m (18.1 per cent). The other major destination for comparison shopping within the study area is Botley Road Retail Park, which attracts £233m, or 12.4 per cent.
- 5.4.6 Three other destinations within the study area (Fairacres Retail Park, Didcot Local Centre and Witney Town Centre) collectively account for a further £242.3m of comparison goods spending, equating to 12.9 per cent of the comparison goods expenditure available to residents of the study area. Overall, some 77.7 per cent of expenditure on comparison goods available to the study area's residents is spent within the study area. This is known as the aggregate retention rate.

Table 5-2 Comparison Goods Expenditure Retained Within the Study Area

Destination	Expenditure (£m)	Expenditure (%)
Oxford City Centre	340.1	18.1
Botley Road Retail Park	233.0	12.4
Fairacres Retail Park, Marcham Road, Abingdon	86.2	4.6
Didcot Local Centre	78.8	4.2
Witney Town Centre	77.3	4.1
Total Retained Expenditure	1,458.9	77.7
Total Leakage outside of the Study Area	419.6	22.3
Total	1,878.6	100.0

- 5.4.7 Table 5-2 confirms that 22.3 per cent or £419.6m of the comparison retail expenditure available within the study area (in 2023) leaks to destinations outside of the study area. The market shares and estimated comparison goods turnovers of the main centres and retail parks/freestanding stores outside of the study area are also set out in the last two columns of Spreadsheets 4 and 5 of Appendix D and are summarised in Table 5-3 below.

Table 5-3 Main Destinations for Comparison Goods Expenditure Leakage

Defined centres outside the Study Area	Expenditure (£m)	Expenditure (%)
Aylesbury	51.4	2.7
Banbury	85.8	4.6
High Wycombe	83.5	4.4
Milton Keynes	37.8	2.0
Reading	38.2	2.0
Other	41.9	2.2

- 5.4.8 The principal destinations for comparison goods expenditure leakage are Banbury and High Wycombe, which attract £85.8m and £83.5m respectively of the study area's available comparison goods expenditure, equating to a combined market share of 9.0 per cent. The remaining comparison goods expenditure leakage is accounted for by a combination of areas including Aylesbury, Milton Keynes and Reading as well as many smaller retail centres.

Summary of influence within the Study Area

- 5.4.9 Spreadsheets 4 and 5 of Appendix D reveal that:
- Oxford City Centre attracts more than 30 per cent of available comparison retail expenditure in two zones:
 - Zone 1: 32.3 per cent
 - Zone 2: 34.4 per cent
 - Oxford City Centre attracts between 20 and 30 per cent of available comparison retail expenditure in two zones:
 - Zone 3: 29.8 per cent
 - Zone 4: 20.6 per cent
 - Oxford City Centre attracts between 10 and 20 per cent of available comparison retail expenditure in three zones:
 - Zone 5: 19.4 per cent
 - Zone 6: 15.4 per cent
 - Zone 9: 15.7 per cent
 - Oxford City Centre therefore attracts less than 10 per cent of available comparison retail expenditure in two zones:
 - Zone 7: 5.2 per cent
 - Zone 8: 9.8 per cent
 - Oxford City Centre clearly exerts a significant influence across the entire study area. The city centre does not, however, attract the greatest proportion of comparison retail expenditure in all zones:
 - Botley Road Retail Park is the dominant comparison retail destination in Zone 8 (11.7 per cent), ahead of Oxford City Centre which attracts a market share of 9.8 per cent in this zone.
 - Fairacres Retail Park is the dominant comparison retail destination in Zone 8 (14.2 per cent), ahead of Oxford City Centre which attracts a market share of 9.8 per cent in this zone.
 - Didcot Local Centre is the dominant comparison retail destination in Zone 8 (14 per cent), ahead of Oxford City Centre which attracts a market share of 9.8 per cent in this zone.
 - Witney Town Centre is the dominant comparison retail destination in Zone 5 (32.4 per cent), ahead of Oxford City Centre which attracts a market share of 19.4 per cent in this zone.

5.5 Current Patterns of Spending on Convenience Retail Goods

- 5.5.1 Per capita expenditure on convenience retail goods in 2023, based on Experian MMG3 data, varies across the study area from a low of £2,720 in Zone 1 to a high of £3,376 in Zone 4. The total amount of convenience goods spending for residents of the whole study area in 2023 is £1,723m (Spreadsheet 3 of Appendix E), of which £182.6m is spent on SFT. The pattern of expenditure flows for the convenience goods sector as a whole, as revealed by the survey of households, is set out in Spreadsheets 4 and 5 of Appendix E.

- 5.5.2 Table 5-4 – which is derived from the final column of Spreadsheet 5 of Appendix E – reveals that, overall, some £1,374.4m, or 89.2 per cent, of the expenditure on convenience retail goods available to residents of the study area is spent in defined centres and in freestanding stores which are located within the study area; this is known as the aggregate retention rate (see Spreadsheet 5, final column, ‘Total Inside Study Area’ row).

Table 5-4 Broad Destinations for Convenience Goods Expenditure

Destination	Expenditure (£m)	Expenditure (%)
Total retained expenditure within the Study Area	1,374.4	89.2
Total expenditure leakage	166.0	10.8
Total Expenditure	1,540.4	100.0

Main destinations for food and grocery shopping

- 5.5.1 Table 5-5 shows that the most popular destination for food and grocery shopping within the study area is Tesco Extra at Marcham Road in Abingdon, which has a convenience goods turnover of around £64.4m, and a market share of 4.2 per cent. The next most popular destinations for convenience shopping within the study area are the Tesco Superstore at Oxford Retail Park and the Sainsbury’s Superstore on Witan Way, Witney, with convenience retail turnovers of £62.4m and £51.5m, respectively, equating to market shares of 4 per cent and 3.4 per cent each. Whilst all of the stores identified in Table 5-5 have a relatively low share of total expenditure across the study area – of 4.2 per cent or under – the absolute value of that expenditure is high, with the lowest survey-derived turnover of the 11 foodstores with a market share of 2.0 per cent or greater being £30.4m.

Table 5-5 Main Destinations for Convenience Goods Expenditure Retained within the Study Area

Foodstores within the Study Area	Expenditure (£m)	Expenditure (%)
Tesco Extra, Marcham Road, Abingdon	64.4	4.2
Tesco Superstore, Oxford Retail Park, Oxford	62.4	4.0
Sainsbury’s Superstore, Witan Way, Witney	51.6	3.4
Tesco Superstore, Wallingford Road, North Moreton, Didcot	51.1	3.3
Tesco Superstore, Lakeview Drive, Bicester	51.0	3.3
Sainsbury’s Superstore, Oxford Road, Kidlington	42.1	2.7
Sainsbury’s Superstore, Heyford Hill Roundabout, Littlemore, Oxford	36.7	2.4
Aldi, Botley Road, Oxford	34.5	2.2
Lidl, Marcham Road, Abingdon	33.2	2.2
Sainsbury’s Superstore, Limborough Road, Wantage	33.5	2.2
Sainsbury’s Superstore, Pioneer Square, Bure Place, Bicester	30.4	2.0

- 5.5.1 The main ‘leakage’ destinations for the relatively small amount of convenience goods expenditure that is not spent at centres/stores within the study area are set out in Table 5-6.

Table 5-6 Main Destinations for Convenience Goods Expenditure Leakage

Foodstores outside of the Study Area	Expenditure (£m)	Expenditure (%)
Tesco Superstore, Oxford Road, Brackley	19.1	1.2
Aldi, Henry Blake Way, Faringdon	16.1	1.0
Other	62.4	4.1

5.5.2 The localised convenience goods retention rate – the proportion of expenditure on convenience retail goods available to residents in a specific zone which is spent in centres and stores located within that zone – is highest for zones 2, 5, 6 and 8. These four zones each achieve a localised retention rate of over 70 per cent (see Spreadsheet 4 of Appendix E, and Table 5-7).

5.5.3 Only two zones achieve a localised convenience goods retention of below 40 per cent, namely zone 3 which has a localised retention rate of 24.3 per cent, and zone 4 which has a localised retention rate of 36.8 per cent.

Table 5-7 Localised Convenience Goods Retention Rates

Zone	Zonal retention rate (%)
1	47.9
2	77.2
3	24.3
4	36.8
5	84.1
6	75.7
7	46.2
8	90.6
9	44.6

Convenience Goods Market Shares

5.5.1 Table 5-8 shows, for each zone, stores with a zonal market share of over 10 per cent, and stores with shares between 5 and 10 per cent.

Table 5-8 Convenience Goods Stores with Zonal Market Shares over 5 Per Cent

Zone	Expenditure (£m) (greater than 10% market share)	Expenditure (%) (market share between 5% and 10%)
1		<ul style="list-style-type: none"> ▪ Aldi, Botley Road, Oxford ▪ Tesco Express, London Road, Headington ▪ Waitrose, Old High Street, Headington ▪ Other, Zone 1
2	<ul style="list-style-type: none"> ▪ Sainsbury's Superstore, Heyford Hill Roundabout, Littlemore, Oxford ▪ Tesco Superstore, Oxford Retail Park, Oxford ▪ Other, Zone 2 	<ul style="list-style-type: none"> ▪ Lidl, Templars Shopping Park, Oxford ▪ Lidl, Watlington Road, Oxford

Zone	Expenditure (£m) (greater than 10% market share)	Expenditure (%) (market share between 5% and 10%)
3		<ul style="list-style-type: none"> Co-Op Food, Westway Square, Botley Other, Zone 3
4	<ul style="list-style-type: none"> Asda, London Road, Wheatley 	<ul style="list-style-type: none"> Local shops, Wheatley Village Centre
5	<ul style="list-style-type: none"> Lidl, New Close Lane, Witney Sainsbury's Superstore, Witan Way, Witney Waitrose, The Woolgate Centre, Market Square, Witney 	<ul style="list-style-type: none"> Witney Town Centre
6	<ul style="list-style-type: none"> Aldi, Launton Road, Bicester Sainsbury's Superstore, Pioneer Square, Bure Place, Bicester Tesco Superstore, Lakeview Drive, Bicester Other, Zone 6 	<ul style="list-style-type: none"> Sainsbury's Superstore, Oxford Road, Kidlington
7	<ul style="list-style-type: none"> Waitrose, Greyhound Lane, Thame 	<ul style="list-style-type: none"> Sainsbury's Superstore, High Street, Thame Other, Zone 7
8	<ul style="list-style-type: none"> Sainsbury's Superstore, Central Drive, Didcot Tesco Extra, Marcham Road, Abingdon Tesco Superstore, Wallingford Road, North Moreton, Didcot 	<ul style="list-style-type: none"> Lidl, Marcham Road, Abingdon Tesco Express, Oxford Road, Abingdon Other, Zone 8
9	<ul style="list-style-type: none"> Sainsbury's Superstore, Limborough Road, Wantage 	<ul style="list-style-type: none"> Waitrose, Wallingford Street, Wantage Other, Zone 9

5.5.2 Table 5-8 shows that:

- Zones 5, 6 and 8 contain three or more foodstores which each achieves a zonal market share of 10 per cent or greater.
- There are only two zones where no retail destination achieves a zonal market share of 10 per cent or greater (Zones 1 and 3).

5.5.3 The survey findings confirm that most convenience shopping is undertaken on a highly localised basis.

5.6 Current Patterns of Spending on Leisure Services and Cultural Activities

5.6.1 As noted at the beginning of this section, the household survey questionnaire also sought to identify patterns of spending on various types of leisure and cultural services. The most popular destinations for these different activities for residents of each survey zone are set out in Table 5-9 and are described below in order to provide an insight into whether any centres within the study area potentially have greater roles to play in the provision of leisure and cultural services.

Table 5-9 Most Popular Destinations for Expenditure on Leisure Services and Culture

Zone	Restaurants	Pubs, bars, nightclubs and social clubs	Cinemas	Ten-Pin Bowling	Bingo	Casino	Theatres / concerts / museums / art galleries & other cultural facilities	Indoor sports or health and fitness centres
1	Oxford City Centre	Oxford City Centre	Phoenix Picturehouse, Walton St, Oxford	Hollywood Bowl, Ozone Leisure Park	Coronet Bingo, Broadway, Didcot	-	New Theatre, George St, Oxford	Kidlington & Gosford Sport Centre
2	Oxford City Centre	Oxford City Centre	Vue Cinema, Ozone Leisure Park	Hollywood Bowl, Ozone Leisure Park	Cowley Road District Centre	-	Oxford City Centre	David Lloyd, Business Park North
3	Oxford City Centre	Abingdon Town Centre	Vue Cinema, Ozone Leisure Park	Hollywood Bowl, Ozone Leisure Park	-	-	Oxford Playhouse, Beaumont St, Oxford	Brookes Sport Botley, Oxford
4	Oxford City Centre	Oxford City Centre	Vue Cinema, Ozone Leisure Park	Hollywood Bowl, Ozone Leisure Park	Buzz Bingo, Kassam Leisure Complex, Grenoble Road, Oxford	Abroad	New Theatre, George Street, Oxford	David Lloyd, Business Park North
5	Witney Town Centre	Witney Town Centre	Cineworld, Marriotts Walk, Witney	Hollywood Bowl, Ozone Leisure Park	Buzz Bingo and The Slots Room, Greenbridge Retail Park, Garrard Way, Swindon	-	Central London / West End	Windrush Leisure Centre, Witan Way, Witney
6	Oxford City Centre	Bicester Town Centre	Vue Cinema, Pioneer Centre, Bure Place, Bicester	Hollywood Bowl, Xscape, Marlborough Gate, Bucks, Milton Keynes	Tackley Village Centre	-	New Theatre, George Street, Oxford	Kidlington & Gosford Sport Centre
7	Thame Town Centre	Thame Town Centre	Odeon Luxe, The Exchange, Exchange Street, Aylesbury	Hollywood Bowl, Ozone Leisure Park	Bradmoor Farm, Stanbridge Road, Haddenham, Aylesbury	-	Aylesbury Town Centre	Thames Leisure Centre, Oxford Road, Thame
8	Oxford City Centre	Abingdon Town Centre	Cineworld Cinema, Station Road, Didcot	Hollywood Bowl, Ozone Leisure Park	Coronet Bingo, Broadway, Didcot	-	Oxford City Centre	Anytime Fitness, Kimber Road, Stratton Way, Abingdon
9	Wantage Town Centre	Wantage Town Centre	Cineworld Cinema, Station Road, Didcot	Hollywood Bowl, Ozone Leisure Park	Coronet Bingo, Broadway, Didcot	-	New Theatre, George Street, Oxford	Anytime Fitness, Kimber Road, Stratton Way, Abingdon

Leisure Services and Cultural Activities Sub-Sectors

Restaurants

- 5.6.1 Almost two thirds (56.9 per cent) of all respondents answered that they visit a restaurant. The most popular destinations for visits to restaurants were Oxford City Centre (21.5 per cent), Bicester Town Centre (6.8 per cent) and Witney Town Centre (6.4 per cent).

Pubs, bars, nightclubs and social clubs

- 5.6.2 Approximately 42.8 per cent of all respondents answered that they visit pubs, bars, nightclubs and social clubs. The most popular destinations for visits to this category of leisure spend were Oxford City Centre (13 per cent), Abingdon Town Centre (8.4 per cent) and Witney Town Centre (8.2 per cent).

Cinemas

- 5.6.3 Approximately 44.9 per cent of all respondents answered that they visit a cinema. The most popular destinations for visits to a cinema were Vue Cinema, Ozone Leisure Park (19.9 per cent), Cineworld Cinema, Station Road, Didcot (11.3 per cent) and Cineworld, Marriotts Walk, Witney (10.3 per cent).

Ten-Pin Bowling

- 5.6.4 Only 14.1 per cent of respondents answered that they visit ten-pin bowling venues. Of those that do the most popular destinations for visits to a ten-pin bowling alley are Hollywood Bowl, Ozone Leisure Park (66 per cent), Hollywood Bowl, Eden Centre, Denmark Street, High Wycombe (10.8 per cent) and Oxford City Centre (4.3 per cent).

Bingo

- 5.6.5 Only 2 per cent of respondents answered that they visit a bingo hall. The most popular destinations for visits to a bingo hall were Coronet Bingo, Broadway, Didcot (48.5 per cent), Buzz Bingo and The Slots Room, Greenbridge Retail Park (21.4 per cent) and Bradmoor Farm, Stanbridge Road, Haddenham, Aylesbury (6.3 per cent).

Casino

- 5.6.6 Only 0.3 per cent of respondents answered that they visit a casino. The most popular destinations for visits to a bingo hall was abroad at 17.6 per cent. No other destinations account for more than 0 per cent of responses.

Theatres/concerts/museums/art galleries & other cultural facilities

- 5.6.7 Almost half of all respondents (41.9 per cent) of all respondents answered that they visit a cultural facility. The most popular destinations for visits to a cultural facility were New Theatre, George Street (19.2 per cent), Oxford City Centre (19 per cent) and Central London / West End (18.6 per cent).

Indoor sports or health and fitness centres

- 5.6.8 Almost a quarter (24.1 per cent) of all respondents answered that they visit a indoor sports or health and fitness centre. The most popular destinations for visits to an indoor sports or health and fitness centre were Kidlington & Gosford Sport Centre (8.6 per cent), David Lloyd, Business Park North (8 per cent) and Anytime Fitness, Kimber Road (5.4 per cent).

6 Assessment of Retail Needs

6.1 Introduction

6.1.1 Based on the retail spending patterns identified in the previous section, and forecasts of future population and retail expenditure growth, this section of the report sets out the quantitative need for additional retail floorspace across the study period. The section also outlines the findings from the qualitative questions that respondents were asked in the telephone household survey.

6.2 Quantitative Assessment

Methodology

- 6.2.1 The key inputs and assumptions that have been applied as part of our quantitative assessment of retail needs are explained below.
- 6.2.2 At the outset, we emphasise that capacity forecasts should, in line with national guidance, be subject to regular review throughout the plan period, in order to ensure an up-to-date evidence base which is based on accurate economic and market trends. Related to that general point, we advise that the longer-term quantitative forecasts set out in this assessment should be treated as indicative given the inherent uncertainties in respect of longer-term economic and demographic trends. This is particularly the case for the period after 2042 which are not included in published forecasts of expenditure or population growth.

Population and Expenditure Growth

- 6.2.3 Spreadsheets 1, 2 and 3 within Appendices D and E set out details of predicted population and retail expenditure growth in the study area over the period to 2042. The population and expenditure figures are derived from Experian, and the former are based on ONS subnational population projections.
- 6.2.4 The total population figures for the study area are presented below in Table 6-1, which shows that the study area is predicted to experience only modest population growth over the 19-year study period. The predicted population growth is just over 32,000 persons, from the 566,000 base population across the study area in 2023.

Table 6-1 Summary of Population Growth

Year	Population	Population Growth relative to 2023
2023	566,063	-
2028	577,038	10,975
2033	585,959	19,896
2038	592,651	26,588
2042	598,415	32,352

- 6.2.5 Table 6-2 provides a summary of overall levels of convenience retail spending growth across the study period. An allowance is made for special forms of trading ('SFT'), taken from Experian's Retail Planner Briefing Note 20 ('RPBN') of February 2023. Expenditure on SFT is excluded from our assessment as it is not considered to be available to support the future development of retail floorspace.
- 6.2.6 Experian provides adjusted forecasts of SFT market shares to account for online transactions that are serviced through stores (that is, items which are 'picked' for home delivery from stores and purchases made via 'click and collect'). Localised rates of SFT were captured by the

household survey (see Spreadsheet 3 within Appendices D and E), although we recognise that these do not take account of how individual transactions are serviced.

- 6.2.7 The localised rates vary for convenience and comparison goods. For convenience goods, the SFT market share identified by the household survey was 10.6 per cent. We have applied the market share identified by the household survey without making any further adjustments in the base year 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. Experian's forecasts cover the period to 2035 and we have applied the 2035 forecast to the rest of the study period, reflecting the decreasing rate of SFT growth anticipated in the convenience retail sector up to the mid-2030s.

Table 6-2 Convenience Expenditure Growth Summary

Year	Convenience expenditure inc. SFT (£m)	SFT (£m)	Convenience expenditure exc. SFT (£m)
2023	1,723.04	182.64	1,540.4
2028	1,739.18	223.86	1,515.32
2033	1,772.52	244.92	1,527.6
2038	1,803.21	262.82	1,540.39
2042	1,829.25	270.08	1,559.17

- 6.2.8 Table 6-3 provides an equivalent summary for comparison goods expenditure. We have adopted a market share for SFT of 29.8 per cent in the base year of 2023, which has been increased over the study period by applying the Experian growth rate for adjusted SFT market shares.

Table 6-3 Comparison Expenditure Growth Summary

Year	Comparison expenditure inc. SFT (£m)	SFT (£m)	Comparison expenditure exc. SFT (£m)
2023	2,676.01	797.45	1,878.56
2028	2,911.39	969.09	1,942.30
2033	3,351.31	1,172.05	2,179.26
2038	3,877.38	1,390.91	2,486.47
2042	4,359.77	1,583.57	2,779.20

Retained Expenditure

- 6.2.9 The quantitative forecasts of retail need take account of the total amount of comparison and convenience goods expenditure which is retained within the study area. Table 6-4 sets out the total amount of expenditure retained within the study area in 2023.

Table 6-4 Summary of Expenditure Retention in the Study Area at 2023

Retail category	Available expenditure within study area (£m)	% of expenditure retained within study area	Expenditure retained within study area (£m)
Comparison goods	1,878.6	77.7%	1,458.9
Convenience goods	1,540.4	89.2%	1374.4

6.2.10 In total, 77.7 per cent of study area residents' expenditure on comparison retail goods is currently retained within the study area, and 89.2 per cent of study area residents' expenditure on convenience retail goods is retained within the study area.

Claims on Expenditure

6.2.11 As set out in the previous section, spending on SFT (such as online shopping) has been removed from the expenditure forecasts. The total expenditure figures summarised above in Tables 6-2 to 6-3 make an allowance for this.

6.2.12 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

6.2.13 Sales density growth relates to the improved productivity or efficiency of retail floorspace over time. In assessing the amount of expenditure that is available to support the development of new retail floorspace, we make an allowance for sales density growth associated with existing retail floorspace within the study area. For both convenience and comparison retail floorspace, we assume an average annual increase in sales densities of 1.5 per cent.

Planning Commitments

6.2.14 The planning commitment which has been identified by Oxford City Council and is taken account of in the quantitative need assessment is identified in Table 6-5 below.

Table 6-5 Retail Commitments

	Sales Area Floorspace (sq.m)	Convenience Sales Area Floorspace (sq.m)	Comparison Sales Area Floorspace (sq.m)
Clarendon Centre	2,946	2,057	889
Total	2,946	2,057	889

6.2.15 We estimate that this committed retail floorspace will generate a convenience goods turnover of £23.7 million in 2023, and a comparison goods turnover of £8.6 million in the same year. Further details of the assumptions applied in estimating the turnover of committed retail floorspace are contained within Spreadsheet 6 of Appendices D (comparison) and E (convenience).

Need for Convenience Retail Floorspace

6.2.16 Spreadsheet 7 of Appendix E provides our forecasts of convenience retail floorspace requirements in the study area. Floorspace requirements have been calculated to the end of the study period and for the interval years of 2023, 2028, 2033, 2038 and 2042. The spreadsheet is structured as set out below in Table 6-6, where we explain some of the other assumptions that we have applied in calculating these quantitative requirements.

Table 6-6 Methodology for Convenience Retail Assessment

Row	Explanation/Description
A&B	Total population and convenience retail expenditure available in the study area. These figures are taken from Spreadsheets 1 and 3.
C&D	Proportion of convenience retail expenditure which is retained within the study area (£m & %) based on the findings of the household telephone survey in 2023 (as detailed in Spreadsheet 5).
E&F	Inflow of convenience retail expenditure to destinations within the study area from residents outside the study area.
G	Total convenience retail turnover of destinations within the study area (£m).
H	Residual growth in convenience retail expenditure (£m), which is calculated by deducting the baseline convenience retail turnover of existing stores within the study area from the total sum of available convenience retail expenditure and inflow.
I&J	Claims on residual growth in convenience retail expenditure including sales density growth in existing stores within the study area and turnover from committed convenience retail floorspace. Commitments are expected to be implemented and trading by 2023 and the total turnover figure is taken from Spreadsheet 6. An annual sales density growth rate of 1.5% is applied to both existing stores and committed convenience retail floorspace.
K	Total claims on expenditure (£m) from sales density growth in existing stores and committed convenience retail floorspace.
L	Final residual convenience retail expenditure (£m), calculated by deducting total claims on expenditure from residual growth in retained convenience goods expenditure
M-0	Final residual convenience retail expenditure converted into floorspace requirements by applying an average convenience retail sales density of £11,500 per sq.m in 2023 (grown over the study period to allow for sales density growth). This produces a net floorspace requirement (i.e. total required convenience retail sales floorspace), which is converted to a gross convenience retail floorspace figure on the basis of an assumed net:gross floorspace ratio of 70:30.

6.2.17 Our findings in respect of quantitative need for convenience retail floorspace are summarised below in Table 6-7 (figures are cumulative and relate to sales area floorspace only).

Table 6-7 Summary of Convenience Retail Floorspace Requirements

Floorspace Requirement	2023-2042
Floorspace requirement (sales area floorspace sq.m)	-33,094
Floorspace requirement (gross sq.m)	-47,277

6.2.18 Thus, there is a negative floorspace 'requirement' throughout the entire study period to 2042, which is due to claims exceeding expenditure growth, and against the background of relatively modest population growth over the study period. That is not to say, however, that the Council should not look favourably upon proposals for appropriate convenience retail provision that would support new residential developments, whether that be a large site or a cluster of smaller sites where cumulatively there would be a requirement for some small-scale convenience retail floorspace.

Need for Comparison Retail Floorspace

6.2.19 Spreadsheet 7 of Appendix D calculates requirements for comparison retail floorspace over the study period. Table 6-8 below explains the structure of this assessment, which is similar to the approach used for convenience retail floorspace, albeit the assumptions differ in terms of sales densities and net:gross floorspace ratios.

Table 6-8 Methodology for Comparison Retail Assessment

Row	Explanation/Description
A&B	Total population and comparison retail expenditure available in the study area. These figures are taken from Spreadsheets 1 and 3.
C&D	Proportion of comparison retail expenditure which is retained within the study area (£m & %) based on the findings of the household telephone survey in 2023 (as detailed in Spreadsheet 5).
E&F	Inflow of comparison retail expenditure to destinations within the study area from residents outside the study area.
G	Total comparison retail turnover of destinations within the study area (£m).
H	Residual growth in comparison retail expenditure (£m) which is calculated by deducting the baseline comparison retail turnover of existing stores within the study area from the total sum of available comparison retail expenditure and inflow.
I&J	Claims on residual growth in comparison retail expenditure including sales density growth in existing stores within the study area and turnover from committed comparison retail floorspace. Commitments are expected to be implemented and trading by 2023 and the total turnover figure is taken from Spreadsheet 6. An annual sales density growth rate of 1.5% is applied to both existing stores and committed comparison retail floorspace.
K	Total claims on expenditure (£m) from sales density growth in existing stores and committed comparison retail floorspace.
L	Final residual comparison retail expenditure (£m), calculated by deducting total claims on expenditure from residual growth in retained convenience goods expenditure
M-0	Final residual comparison retail expenditure converted into floorspace requirements by applying an average comparison retail sales density of £9,685 per sq.m in 2023 (grown over the study period to allow for sales density growth). This produces a net floorspace requirement (i.e. total required comparison retail sales floorspace), which is converted to a gross comparison retail floorspace figure on the basis of an assumed net:gross floorspace ratio of 80:20.

6.2.1 Our findings in respect of quantitative need for comparison retail floorspace are summarised below in Table 6-9 (figures are cumulative).

Table 6-9 Summary of Comparison Retail Floorspace Requirements

Floorspace Requirement	2023-2042
Floorspace requirement (sales area floorspace sq.m)	18,017
Floorspace requirement (gross sq.m)	22,521

6.2.2 Thus, a positive comparison retail floorspace requirement arises over the entire study period 2023 to 2042, of around 18,000 sq.m (sales area). It is important to note, however, that the

positive floorspace requirements only arise after 2033. The floorspace requirements arising over the periods to 2028 and 2033 are negative.

Customer Views

- 6.2.3 In this section we set out the key responses from the telephone household survey undertaken by NEMS and consider whether they suggest a qualitative need for additional comparison and convenience retail provision in Oxford City Centre. Some of the household survey questions refer to both retail and leisure and so we have included them in this section (as opposed to Section 7: Assessment of Leisure Needs). Figures are provided to one decimal place.
- 6.2.4 Respondents were first asked 'Where did you or a member of your household last make a purchase of clothes, shoes or other fashion items?'. Respondents were not prompted and could only provide one answer. The most popular responses to this question were 'internet/delivery' (31.1 per cent), followed by Oxford City Centre (11.5 per cent) and Westgate, Queen Street, Oxford (5.1 per cent). Given that the majority of respondents last purchased clothes, shoes or other fashion items on the internet suggests a weakening of demand for additional comparison retail floorspace in Oxford City Centre.
- 6.2.5 Those respondents that did not answer 'internet/delivery', 'don't know/can't remember' or 'don't do this type of shopping' were asked how often their household shops at the store/location they mentioned in response to question 14. The most popular response was 'once every two months' (23.0 per cent) closely followed by 'once a month' (20.7 per cent) and '3 or 4 times a year' (20.7 per cent). These respondents were also asked how their household normally travels to the store/location and the overwhelming majority (59.4 per cent) said car / van in which they were the driver. The second most popular response was bus (19.6 per cent) and third was walking (10.3 per cent).
- 6.2.6 Respondents were asked what they like most about Oxford City Centre. Whilst 14.4 per cent said 'nothing', 18.0 per cent referred to the centre's attractive environment and 10.5 per cent liked the good range of non-food shops generally. Less popular responses included 'easy to get to by bus' (7.1 per cent), 'good layout / shops close together' (5.1 per cent), 'good cafés/restaurants' (4.7 per cent), 'good leisure facilities' (3.4 per cent) and 'good range of 'high street' retailers' (3.4 per cent). There was a plethora of other things respondents liked most about Oxford City Centre, but these were less commonly cited.
- 6.2.7 Respondents were also asked what they like least about Oxford City Centre. Whilst 29.0 per cent said 'nothing', 13.7 per cent noted the expense of parking, 10.7 per cent referred to traffic congestion and 5.4 per cent said the centre was too busy/noisy. There was a plethora of other things respondents liked least about Oxford City Centre, but these were less commonly cited. When asked if there were any measures that would encourage them to visit the city centre more often, 32.8 per cent said 'nothing'. However, 15.5 per cent said, 'cheaper parking', 9.8 per cent said 'increased general choice and range of shops' and 9.3 per cent said 'more parking'. Less popular responses included 'less traffic congestion/better road access' (9.0 per cent), 'improved non-food shops within the town centre' (6.4 per cent) and 'increased public transport' (5.8 per cent). There was a plethora of other responses, but these were less commonly cited.
- 6.2.8 The responses to questions regarding convenience shopping are less illuminating given that the majority of convenience shopping is undertaken on a highly localised basis. However, when asked 'where did your household last undertake its main food and grocery shopping?', 13.6 per cent said 'internet/delivery'. This is less than half of those who last purchased clothes, shoes or other fashion items online or via delivery (31.1 per cent), which could suggest a greater need for additional convenience retail floorspace compared to comparison retail floorspace.

7 Assessment of Leisure Needs

7.1 Introduction

7.1.1 The primary purpose of the study is to assess the performance of Oxford City Centre and to identify retail needs over the study period. In this section we briefly consider needs in the commercial leisure sector over the study period, albeit at a necessarily higher level than our assessment of retail needs.

7.2 Approach to Assessment of Quantitative Need for Leisure Uses

7.2.1 Appendix F provides our assessment of expenditure growth in respect of various sub-categories of leisure spending, with a specific emphasis on food and beverage uses (including spending in cafés, restaurants, pubs and bars) given that this accounts for just over 54 per cent of leisure spending in 2023 and is by some margin the most significant expenditure category.

7.2.2 The leisure capacity spreadsheets are structured as follows:

- Spreadsheet 1 in Appendix F presents the population projections for the individual study area zones (these reflect the figures shown in Spreadsheet 1 of the convenience and comparison capacity assessments).
- Spreadsheet 2 presents per capita expenditure on different leisure categories in 2023.
- Spreadsheet 3 multiplies data from Spreadsheets 1 and 2 together to show the total spending for each main leisure category, by zone and for each interval year across the overall study period.
- Spreadsheet 4 identifies the growth in leisure services spending for each of the main leisure categories over the entire 2023-42 study period, and for each interval (2023-28, 2028-33, 2033-38 and 2038-42).
- Spreadsheet 5 sets out details of various leisure commitments and their predicted turnovers.
- Spreadsheets 6 and 7 provide our expenditure capacity forecasts for food and beverage uses across the study area over the period to 2042.

7.3 Leisure Spending Growth

7.3.1 Spreadsheets 3 and 4 of Appendix F set out estimates of existing and future leisure expenditure for six sub-categories, namely 'accommodation services' (mainly spending on hotels), 'cultural services' (such as cinemas, museums, galleries and theatres), 'games of chance' (including spending on bingo and bookmakers), 'hairdressing and personal grooming', 'recreational and sporting services (including gyms, spectator and participant sports) and 'restaurants, cafes, pubs etc'. Table 7-1 below summarises expenditure growth for each of these sub-categories.

Table 7-1 Leisure Spending Growth (£m)

Category	2023	2042	Growth 2023-2042
Accommodation services	107.10	125.87	18.77
Cultural services	165.52	194.96	29.44
Games of chance	139.79	164.87	25.08
Hairdressing salons and personal grooming establishments	52.97	62.47	9.5
Recreational and sporting services	113.95	134.05	20.1
Restaurants, cafés etc	642.37	739.19	96.82
All categories total	1,221.71	1,421.40	199.69

7.3.1 Table 7-1 shows that total leisure services expenditure is predicted to grow by approximately £199.69 million in the period to 2042. The 'restaurants, cafés etc' sub-category will account for a substantial proportion of that growth, far exceeding the growth in the 'cultural services' and 'accommodation services' sub-categories.

7.3.2 Given the dominance of the food and beverage sub-sector, and its ever-increasing importance to the vitality and viability of town centres, we discuss expenditure capacity in this sub-sector in greater detail below.

7.4 Food and Beverage Spending

7.4.1 Spreadsheet 6 of Appendix F summarises existing spending patterns on food and beverage facilities by residents of the study area.

7.4.2 Given that food and beverage expenditure accounts for more than half of all available leisure services expenditure within the study area, and that such uses are increasingly important to the vitality and attractiveness of town centres, we have undertaken an assessment of expenditure capacity for this sub-sector. Our detailed findings are set out in Spreadsheet 7 of Appendix F.

7.4.3 Spreadsheet 7 calculates future growth in expenditure within the food and beverage sub-category, and then deducts the claims on that expenditure growth (sales density growth of existing businesses, and commitments). The findings are summarised below in Table 7.2.

Table 7-2 Food and Beverage Expenditure Capacity

2028 (£m)	2033 (£m)	2038 (£m)	2042 (£m)
-18.93	-12.72	-8.02	-11.63

7.4.1 Our assessment shows that, over the study period to 2042, there could be a deficit of expenditure of approximately £11.6 million. Based on our analysis, there is no quantitative requirement for new food and beverage floorspace within the study area. As we explained in relation to our convenience and comparison retail forecasts, a key reason for this finding is the relatively modest population growth that is predicted to arise across the study area over the period to 2042, which means that expenditure growth is also modest and easily exceeded by claims on that growth.

7.5 Customer Views

7.5.1 We now set out the key responses from the telephone household survey that relate to leisure. Respondents were asked if they participated in various leisure activities. We set out, below, the percentages of respondents who answered 'yes' for each leisure activity:

- Indoor sports or health and fitness activity, such as gyms, leisure centres, and so on (24.1 per cent)
- Restaurants (56.9 per cent)
- Pub/bars/nightclubs/social clubs (42.8 per cent)
- Theatres/concert halls/museums/art galleries and other cultural facilities (41.9 per cent)
- Cinema (44.9 per cent)
- Ten pin bowling (14.1 per cent)
- Bingo (2 per cent)
- Casino (0.3 per cent)

7.5.2 A minority (18.9 per cent) of respondents did not mention participation in any leisure activity.

8 Conclusions and Recommendations

8.1 Introduction

- 8.1.1 In this concluding section we summarise the findings of this study and set out our recommendations for the formulation of future planning policy in Oxford.

8.2 The Performance of Oxford's centres

Oxford City Centre

- 8.2.1 We consider Oxford City Centre to be a healthy centre. The Westgate Shopping Centre provides modern retail floorspace and a range of food and beverage outlets, albeit its reopening has served to make other parts of the city centre such as the Clarendon Centre, Cornmarket Street and High Street less attractive shopping destinations. This finding is consistent with the previous retail study which concluded that the existing primary retail frontages, namely the Clarendon Centre and Cornmarket Street, may need to 're-invent' themselves to remain attractive and viable. We consider that the forthcoming redevelopment of the Clarendon Centre will transform this prominent site, enhancing the city centre's overall vitality and viability. We also welcome the plans for the Covered Market which will improve its visibility, accessibility and use. Whilst the vacancy rate is significantly higher than the UK average for all centres, a number of these vacant units are within the Clarendon Centre – which has recently been granted permission for major redevelopment – and the proportion of vacant floorspace is below the UK average for all centres. The city centre continues to boast a strong comparison retail and leisure offer and two successful markets (Gloucester Green outdoor market and the Covered Market).

Cowley Centre District Centre

- 8.2.2 Cowley Centre remains a relatively healthy centre that serves a wide catchment. The 2017 Study welcomed the previous plans to refurbish Templars Square Shopping Centre, and commented that the scheme would '*help elevate its overall vitality and viability*'. We welcome the current plans to regenerate the centre, which will ensure it serves the changing needs of the diverse and large catchment. The previous study found the district centre to have a 'generally pleasant environment', whereas we consider that parts of the centre would benefit from significant refurbishment and modernisation. The centre has a good comparison and convenience retail offer, with the former concentrated at the lower end of the market, but its leisure offer is relatively poor, limited to food and beverage operators and a social club. We therefore welcome the plans to accommodate both daytime and night-time uses within the repurposed shopping centre site. The heavily congested B4495 detracts from the overall centre environment. The vacancy rate is below the UK average for all centres, both in terms of the number of units and floorspace, albeit it has increased by a considerable degree since the last study was published.

East Oxford-Cowley Road District Centre

- 8.2.3 We consider Cowley Road to be a vital and viable centre which serves its large and diverse catchment. The centre boasts a range of retail and leisure services and has a very good convenience retail offer. The centre has a limited comparison goods retail offer, but this is not a particular issue given the close proximity of Oxford City Centre. Cowley Road has a low vacancy rate and a thriving evening economy.

Headington District Centre

- 8.2.4 We consider Headington to be a vital and viable district centre that has a strong convenience retail and service offer. Whilst the centre has a relatively limited comparison retail offer it also has a low vacancy rate. The centre is highly accessible by a variety of transport modes but suffers from congestion.

Summertown District Centre

- 8.2.5 We consider Summertown to be a relatively healthy district centre that has an appropriate mix of comparison goods retailers and a healthy representation of independent and national multiple retailers. Summertown is noticeably leafier than the other district centres. The 2017 Study noted that Summertown had a thriving evening economy although we found there to be a relatively small provision of restaurants, hot food takeaways and pubs. However, North Wall Arts Centre hosts comedy nights, music gigs and theatre performances, which enhance the district centre's evening economy offer. While the vacancy rate is below the UK average for all centres it has risen significantly since the publication of the 2017 study and, as such, we recommend that the City Council should continue to monitor this indicator carefully.

Blackbird Leys District Centre

- 8.2.6 We consider Blackbird Leys to be a vital and viable district centre that principally serves the day-to-day needs of the immediate residential population but, by virtue of its community and leisure facilities, also serves a much larger catchment. There is a distinct lack of comparison goods retailers within the centre, but this is not a significant issue given the close proximity of Cowley Centre which has a high proportion of comparison goods retailers. The centre also contains no vacant units and has therefore maintained its overall performance since 2017. We consider that the proposals for the Blackbird Leys Central Area will further enhance the vitality and viability of the centre. We acknowledge that Blackbird Leys has by far the fewest retail/service units when compared with the other district centres and that it has fewer retail/service units than each of the local centres. We consider, however, that the centre's plentiful community and leisure facilities, some of which serve a large catchment, elevate its position within Oxford's retail hierarchy above the local centres.

8.3 Retail Needs arising over the Study Period

- 8.3.1 Based on the findings of our quantitative assessment of retail needs, we identify a need for around 18,000 sq.m of additional comparison retail sales area floorspace across the study area over the period to 2042, all of which arises after 2033. Initially, the 18,000 sq.m requirements may appear quite high but it must be emphasised that this covers a c.20-year study period and relates to the whole of the extensive study area. In the first instance, new retail floorspace should be directed to Oxford City Centre, which should remain the priority for retail investment.
- 8.3.2 There is realistically no scope for a proportion of the identified floorspace requirements to be accommodated within the redeveloped Clarendon Centre given that it will include a rationalised comparison retail component (although there is some flexibility in terms of the precise floorspace mix) and the developer seeks to relocate existing tenants into the redeveloped shopping centre where possible.
- 8.3.3 There is also limited scope for some of the identified floorspace requirement to be accommodated by the redeveloped Templars Square Shopping Centre given that there is a need to reduce comparison retail floorspace substantially within Cowley Centre District Centre to create a more balanced retail destination, and it is proposed that Templars Shopping Park will remain the comparison retail destination within the district centre supported by a reduced retail offer at Templars Square Shopping Centre.
- 8.3.4 There is scope for a small proportion of the c.18,000 sq.m of additional comparison retail sales area to be accommodated within the proposed scheme at Blackbird Leys District Centre, but it should be noted that, whilst the proposal includes an expanded retail provision, space will be provided for existing retailers.
- 8.3.5 We calculate that there is a significant negative 'requirement' for additional convenience retail floorspace (approximately minus 33,000 sq.m sales area) arising in the study area over the study period and at each interval (2028, 2033, 2038 and 2042). That is not to say, however, that the Council should not look favourably upon proposals for appropriate convenience retail provision that would support new residential developments, whether that be a large site or a

cluster of smaller sites where cumulatively there would be a requirement for some small-scale convenience retail floorspace.

8.4 Need for Leisure Uses over the Study Period

- 8.4.1 We have considered the quantitative need for additional leisure facilities, with a specific emphasis on food and beverage uses given that this is the largest expenditure category. Our assessment shows that, over the study period to 2042, there is no quantitative requirement for new food and beverage floorspace within the study area. A key reason is the relatively modest population growth across the study area over the period to 2042, which means that expenditure growth is also modest and easily exceeded by claims on that growth.

8.5 Recommendations and Advice

- 8.5.1 In view of our findings in respect of the current performance of Oxford City Centre and the five district centres, current expenditure patterns and retail and leisure floorspace requirements arising over the study period, we set out below our recommendations to inform the formulation of future planning policy in Oxford.
- 8.5.2 We consider that the retail hierarchy within Oxford, currently set out within Policy V1 (Ensuring the vitality of centres), continues to be appropriate. The city centre performs a range of functions that distinguishes it from the other, smaller centres within Oxford. As such, the city centre should remain the priority for retail and leisure investment. Cowley Centre deserves its title as the Primary District Centre due to the size of its retail and service provision, the range of retail on offer (particularly comparison goods), the size of its catchment area, the importance users afford it (many would prefer to visit the Cowley Centre over the city centre). The current plans for the Templars Square Shopping Centre will help the district centre to maintain its role as the Primary District Centre. For the reasons mentioned above, we consider that Blackbird Leys deservedly sits above the local centres within Oxford's retail hierarchy. Oxford's local centres vary in size and function. With the exception of North Parade Local Centre, the other five local centres fulfil the day-to-day needs of immediate residents as well as serving a broader catchment/capturing passing trade.
- 8.5.3 To ensure the vitality and vibrancy of Oxford's centres, the Council should continue to adopt a strong stance against out-of-centre development in line with paragraph 87 of the National Planning Policy Framework. The Council could bolster the wording of Option C within Policy Option Set C1: 'Focusing Town Centre Uses in Our District Centres', set out within the Oxford Local Plan 2040 Preferred Options, by stating that the purpose of this policy is to minimise out-of-centre development.
- 8.5.4 Policy V2 ('Shopping Frontages in the city centre') within the adopted Local Plan provides guidance for the appropriate mix of uses (identified through thresholds which A1 and A uses cannot fall below) in designated shopping frontages across the city centre (more detail is provided by footnote 62). Policy V4 ('District and Local Centre Shopping Frontages') provides similar guidance in relation to Oxford's district and local centres. Both policies are outdated in that they refer to the Use Classes that were applicable up to 31 August 2020. Changes to the Use Classes Order were brought into effect on 1 September 2020. A number of former standalone Use Classes were subsumed into a new, expansive Use Class E. Aside from permitted development rights, there is much more flexibility for development falling within Class E to change to another use within Class E without needing planning permission (provided that no building work is needed to enable the change of use and subject to any conditions on the existing planning permission to restrict the use). Furthermore, from 1 August 2021, new permitted development rights came into force to reflect the new Class E. Class MA permits a change of use of any building and land within its curtilage from a use within Class E to use as a dwellinghouse.
- 8.5.5 One idea being explored in the Oxford Local Plan 2040 Preferred Options document is an 'active' frontage approach, whereby there is activity along the full length of streets and venues for social interaction. Policy Option Set C2 ('Active Frontages') includes four options (A, B, C and D) and the preferred option is Option A in combination with Option B. Option A involves

designating frontages in the city centre and district centres and requiring that a high proportion of these frontages remain in Use Class E use on the ground floor (the proportions would maintain current thresholds, with some allowance for flexibility). Option B involves setting criteria for what is expected in a ground floor frontage to bring activity and vibrancy to centres. The criteria would assess the impacts of design, positioning, proportions, materials, colours and illumination. Further advice would be provided within a technical advice note.

- 8.5.6 With reference to Policies V2 and V4 in the adopted Local Plan, the thresholds below which A1 Use cannot fall differ by centre (albeit they are the same for the city centre and Cowley Centre; Headington and Summertown; and Blackbird Leys and the Local Centres). The threshold below which A Uses cannot fall is the same across all centres.
- 8.5.7 We consider that the Council should take a differential approach to the active frontages policy; that is, the threshold below which Use Class E cannot fall should be different for each centre (albeit some centres may have the same threshold as mentioned above). As a starting point, the Council should have regard to the existing thresholds referred to in Policies V2 and V4 and adjust these figures based on the current performance of each centre, as detailed within Section 4, and in the light of the changes to the Use Classes Order described above. We consider this approach the most appropriate given that each centre is different in size and function and has a unique character. We consider that the remainder of uses should be a mixture of other town centre uses such as public houses and drinking establishments, takeaways, cinemas, community facilities, visitor attractions and flexible workspaces. As noted in the Preferred Options document, there would still be a lot of flexibility with this approach to have other uses such as residential on the upper floors. This would help generate additional footfall for the centres but can raise issues with ground floor / upper floor refuse collection, residential amenity and parking for example which the Council should have regard to. If the Council is particularly concerned about the threat imposed by Class MA, it could consider the imposition of Article 4 Directions⁶¹. Local planning authorities can put in place Article 4 Directions if they want to limit the ability of owners to change the use of their properties without the need for planning permission. Paragraph 53 of the NPPF states that:
- ‘The use of Article 4 direction to remove national permitted development rights should, where they relate to change from non-residential use to residential use, be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre).’*
- 8.5.8 As such, it is clear that the threshold for which Article 4 Directions should be proposed is high and that they should only be used in exceptional circumstances. Also, the threat imposed by Class MA may not be as significant as one might initially assume. Much of the stock within the centres may not be vulnerable to permitted development if, for example, the retail space is purpose-built, with a deep profile and limited opportunity to secure natural light into most of the space, as opposed to retail uses trading from previously converted residential properties or other buildings designed very similarly to residential property, which potentially lend themselves more readily to conversion to residential use.
- 8.5.9 When centres are relatively healthy, as we have concluded within this study, there is less scope to further improve the conditions in which to help centres flourish and attract new retailers. However, in order to maintain vitality and vibrancy, the Council should enforce the minimum thresholds within the active frontages policy and implement other localised improvements to address each of the centre’s weaknesses as set out in Section 4 and below.

Oxford City Centre

- 8.5.10 We make the following recommendations in terms of Oxford City Centre (in addition to those contained within our performance analysis):

⁶¹ A direction made under Article 4 of the Town and Country Planning (General Permitted Development) (England) Order 2015 which withdraws permitted development rights granted by that Order.

- We welcome the news that the planning application for the redevelopment of the Clarendon Centre has been granted planning permission (ref. 21/00110/FUL). The application seeks a significant reduction in the quantum of comparison retail floorspace (former Use Class A1), from 9,300 sq.m to approximately 900 sq.m (gross internal floorspace), which is a reduction of around 8,400 sq.m. Although the application seeks to reduce the retail component and retain main town centre uses, flexibility is sought in terms of the precise floorspace mix. The Retail Assessment confirmed that, if the proposal was to be taken forward, the percentages of each Use Class across the city centre would be above those outlined in Policy V2 (Shopping Frontage in the city centre) in the adopted Local Plan⁶². Nevertheless, given that most developers are building less retail floorspace in line with reducing operator demand, our view is that shopping centres require a mix of uses in order to remain vital and vibrant.
- We welcome the plans for the Covered Market, which will improve its visibility, accessibility and use. The Covered Market currently supports a number of independent businesses and therefore its long-term sustainability is important to the city centre's overall vitality and vibrancy.
- If residential development is to be encouraged within Oxford City Centre, as set out in the Oxford City Centre Action Plan, there needs to be a better representation of convenience goods retailers going forward to ensure future residents can fulfil their day-to-day shopping needs.
- We are supportive of a larger Zero Emission Zone covering the majority of the city centre given that the most popular response in the household survey to the question 'What do you like most about Oxford City Centre?' was 'attractive environment/nice place' and the most popular response to the question 'What do you like least about Oxford City Centre?' was 'traffic congestion'.
- There is a lack of publicly accessible green space within the city centre. The Council should therefore look for opportunities to incorporate more green infrastructure into the existing public realm for example by planting trees along the principal shopping streets.
- The Council should maximise the potential of both Bonn Square and Broad Street to become significant civic spaces. Bonn Square occupies a prime position located directly outside of the Westgate Shopping Centre although it is rather soulless with just a few benches, trees and rubbish bins dotted about as well as an events space⁶³. The Square could be made more welcoming and attractive using innovative design approaches that are sensitive to the surrounding heritage and retain the flexible events space. Broad Street is a wide street which offers great potential to be transformed into a place where people come to relax and enjoy. The Council transformed the western stretch of Broad Street into 'Broad Meadow' – an outdoor space which contained wildflower meadows, lawns and seating – between July and October 2021. The scheme was hugely successful, so much so that a new scheme – which offers a larger public space with seating and planting – is provisionally set to stay in place between autumn 2022 and spring 2024. We understand that, depending on the successes and experiences of the scheme, there is

⁶² Policy V2 ('Shopping Frontages in the city centre') stipulates that planning permission will only be granted at ground floor level within the city centre for (former) Class A1 (retail) uses or (former) Class A2-A5 (financial and professional services, restaurant, pub and take-away) uses where the proposed development would not result in the proportion of units at ground floor level in (former) Class A1 use falling below 60 per cent of the total number of units within the defined Primary Shopping Frontage or 40 per cent of units in the Secondary Shopping Frontage or other town centre uses where the proposed development would not result in the proportion of units at ground floor level in (former) Class A1 use falling below 60 per cent of the total number of units in the Primary Shopping Frontage or below 40 per cent of the total number of units in the Secondary Frontage and where the proportion of (former) Class A units at ground floor level does not fall below 85 per cent in the Primary Shopping Frontage or the Secondary Shopping Frontage. Policy V2 goes on to state that planning permission will be granted for development of upper storeys for housing, student accommodation and other uses appropriate to a town centre as long as the functioning of the ground floor unit(s) in the shopping frontage is not undermined.

⁶³ We understand that the Council commissioned an architect to reimagine Bonn Square over 15 years ago. The objective was to transform it into a high-quality contemporary city square given that it had a fractured spatial character and low overall quality.

scope to extend it further or repeat it in the future. We are supportive of this but consider that the Council could go further and reintroduce something more akin to Broad Meadow.

- The Council should incentivise the conversion of vacant upper floor units into residential accommodation. This would help to address the shortfall of residential accommodation within the city centre and, together with the West End and Osney Mead developments, increase footfall and improve the centre's overall vitality and vibrancy.
- We support the proposals to improve public access to the River Thames as noted in the West End Spatial Framework and would welcome the opportunity for the riverside to be a key place of activity, leisure and play. This would improve people's overall shopping experience as well as enhance the town centre environment.

District Centres

8.5.11 We make the following recommendations in terms of Oxford's district centres (in addition to those contained within the health check assessments):

- We understand that there has been a number of residential conversions at upper floor level within the district centres; however, a lot of the units are still vacant. Policies A0C2 ('Cowley Centre District Centre') and A0C4 ('East Oxford-Cowley Road District Centre') in the adopted Local Plan promote new residential development on upper floors of existing commercial premises, other than offices that are protected. The Council should incentivise the conversion of vacant upper floor units into residential accommodation across all of the district centres to improve vitality and vibrancy.

Cowley Centre

- We support the current proposals for Templars Square Shopping Centre. At present, the shopping centre significantly detracts from the district centre's environment and is in need of more than a cosmetic uplift. We support the proposals to introduce other uses such as residential. The proposals support the findings of the CACI research; specifically, that the quantum of comparison retail floorspace at Cowley Centre needs to reduce to create a more balanced retail destination and Templars Square should perform a supporting retail role, with Templars Shopping Park remaining the comparison goods retail destination. Shops and businesses will benefit from the increased custom and footfall generated by future residents of the scheme. We particularly support the proposals to increase evening and night-time uses given that the district centre's current evening economy is limited. The proposals will help to ensure that Cowley Centre continues to fulfil its role as the Primary District Centre.
- The repurposed shopping centre should be aspirational in design to enhance the centre's overall town centre environment.
- We understand that current users of the shopping centre value its convenience and therefore we support the idea of consolidating services within a hub, which represents an economical use of floorspace. We also support the proposal to introduce a higher-quality offer.
- Reducing congestion along Between Towns Road should be a priority. It significantly detracts from Cowley Centre's environment and will inevitably detract from customers' shopping experience.
- Although Templars Square Shopping Centre and Templars Shopping Park fulfil different shopping needs and are perceived as two distinct shopping destinations, the Council should seek to maximise the opportunities afforded by the centres' proximity to each other. As described above, one option is to reduce congestion along the B4495 to remove the physical and perceived barrier. Another option is to use a different surface treatment / material to delineate the path between the centres across the B4495.
- Hockmore Street significantly detracts from the town centre environment and should be targeted for enhancement due to its proximity to Templars Square Shopping Centre. The

Council should also tighten up on the enforcement of parking restrictions along this street as the parked cars inhibit access to the rear of the shopping centre.

Cowley Road

- The Council should seek to maintain, wherever possible, the current mix of uses within the centre as they add to its distinctiveness and therefore resilience. Cowley Road serves the convenience retail needs of nearby residents but generally performs a less significant retail function than the other district centres. In contrast, the centre has a range of leisure and service uses and a strong evening economy, which some of the other district centres lack (for example Cowley Centre's evening economy offer is limited). The proportion of comparison goods outlets is half the UK average for all centres and the district centre has the lowest proportion of national multiple retailers out of the six centres; however, seeking to attract national multiple comparison retailers should not be a priority given the centre's proximity to Oxford City Centre and because the district centre's current mix of uses enables it to perform a unique function.
- The Council should seek to reduce congestion along Cowley Road and better manage the competing uses of the road.
- The Council should install more seating within the district centre, to increase dwell time and ensure the district centre is accessible to all.
- The Council could commission local artists to produce modern street art, such as that present within the district centre already, which would help to enhance Cowley Road's distinctiveness.

Headington

- The Council should seek to capitalise on the footfall generated by Oxford Brookes University and John Radcliffe Hospital by, for example, improving wayfinding to the district centre, advertising businesses located within the centre in bus stops outside the institutions and introducing a cycle lane along Osler Road which connects John Radcliffe Hospital to Headington.
- The Council could explore the possibility of extending the cycle lanes along the stretch of London Road within the district centre boundary. This may help to capture potential custom from cyclists passing through the centre, aided by the already ample provision of kerb-side cycle parking along London Road.
- The Council could install signage warning people of the number of emergency vehicles which pass through the centre each day given its proximity to John Radcliffe Hospital. This would help to improve the safety of pedestrians, cyclists and road users.
- The Council could improve signage and wayfinding to Bury Knowles Park. This may encourage people to spend more time in the district centre, increasing the likelihood of customer spending.
- The Council should seek to reduce congestion within the district centre and better manage the competing uses of the road.

Summertown

- Summertown should strive to build on its quality retail offer, which distinguishes it from the other district centres.
- Notwithstanding the prevalence of online banking, Summertown would benefit from a bank and/or building society, albeit the market will ultimately decide.
- The district centre would benefit from some additional high-quality food and beverage outlets to serve the needs of office workers and the affluent catchment.
- The parade of shops along Banbury Road which includes Tesco Express and Sainsbury's Local would benefit from redevelopment.

- The public realm at the corner South Parade and Banbury Road should be improved so it is more obvious that the district centre continues westwards along the side road. Wayfinding measures would have a similar effect.

Blackbird Leys

- The current mix of uses is appropriate for the size and function of the centre at present (that is, ahead of any forthcoming redevelopment). Attracting a range of comparison retail goods outlets should not be the objective for this district centre given its primarily convenience retail, community and leisure function and the close proximity of Cowley Centre District Centre.
- We support the recently submitted hybrid planning application which seeks to transform Blackbird Leys District Centre (and land off Knights Road) by replacing existing outdated facilities. Blackbird Leys currently only has 11 retail/service units and given that the proposals will significantly increase the number of dwellings within the district centre there is a need to ensure the needs of future residents are met.
- The proposals would address the district centre's deteriorating built environment and provide high-quality public open space.

8.6 Monitoring and Review

- 8.6.1 There are a number of indicators that should be monitored by the Council to determine possible changes to retail floorspace requirements over the development plan period, which include:
- the implementation of existing retail commitments. Non-implementation of commitments or the expiry of existing planning permissions will slightly reduce the negative floorspace 'requirement';
 - expenditure growth rates. These reflect general economic conditions and therefore an acceleration in economic growth is likely to reduce the negative floorspace 'requirement' as a result of increased expenditure growth rates. Conversely, any future economic downturn is likely to increase the negative floorspace 'requirement' as a result of lower or negative expenditure growth rates; and
 - the market share of non-store retail sales (special forms of trading). Such market shares have increased considerably in recent years, but it remains to be seen whether this growth will be maintained.
- 8.6.2 In addition to monitoring, we recommend that the Council should maintain an up-to-date picture of the performance of Oxford City Centre and the five district centres as well as any qualitative retail needs by continuing to review the composition of the centres and their vacancy rates.
- 8.6.3 Any sustained and significant changes in any of the key indicators should prompt a review and update of this assessment to ensure that the Council is meeting objectively assessed retail and leisure needs, encouraging sustainable shopping patterns and implementing the most appropriate strategy to support the vitality and viability of Oxford's centres.