

WESTGATE, OXFORD

TABLE 4: ANTICIPATED TRADING EFFECTS OF THE PROPOSAL

Designation	2013	2018	2023	Trade Draw	2018	2023	2018	2023	Resilient Turnover (€m)	2018	2023	Impact	2023	Change in Turnover 2013 to 2023 (€m)
	Turnover - Pre Development (€m)	Turnover - Pre Development (€m)	Turnover - Pre Development (€m)		Trade Diversion (€m)	Trade Diversion (€m)	2018	2023	2018	2023	2018	2023	2023	2013 to 2023 (€m)
Oxford City														
Oxford City Centre	516.00	674.64	876.62	23.2%	69.97	75.38	604.67	801.24	801.24	801.24	-10.4%	-8.6%	285.24	
District Centres (Oxford)	82.07	107.30	139.42	2.2%	6.52	7.03	100.78	132.40	132.40	132.40	-6.1%	-5.0%	50.33	
Retail Parks (Oxford)	149.38	195.31	253.79	9.1%	27.30	29.41	168.01	224.38	224.38	224.38	-14.0%	-11.6%	74.99	
Oxford City Total	747.45	977.25	1,269.82	34.4%	103.79	111.81	873.46	1,158.01	1,158.01	1,158.01	-10.6%	-8.8%	410.56	
Other Main Centres in Study Area														
Bicester (including Bicester Village)	75.95	98.30	129.02	3.3%	10.00	10.77	89.30	118.25	118.25	118.25	-10.1%	-8.3%	42.31	
Abingdon	120.02	156.92	203.90	1.7%	5.11	5.50	151.81	198.40	198.40	198.40	-3.3%	-2.7%	78.38	
Dicot	96.87	126.26	164.06	0.6%	1.70	1.83	124.56	162.23	162.23	162.23	-1.3%	-1.1%	65.66	
Wallingford	19.25	25.17	32.70	0.2%	0.71	0.76	24.46	31.94	31.94	31.94	-2.8%	-2.3%	12.69	
Thame	31.60	41.32	53.69	0.1%	0.28	0.31	41.03	53.38	53.38	53.38	-0.7%	-0.6%	21.78	
Wantage	45.14	59.01	76.68	0.1%	0.43	0.46	58.59	76.22	76.22	76.22	-0.7%	-0.6%	31.09	
Witney	147.27	192.54	250.19	0.6%	1.96	2.11	190.59	248.08	248.08	248.08	-1.0%	-0.8%	100.81	
Main Centres Outside Study Area														
Hwycombe	73.35	95.90	124.62	12.2%	36.91	39.77	58.99	84.85	84.85	84.85			11.50	
Aylesbury	76.91	100.56	130.67	3.8%	11.39	12.27	89.17	118.40	118.40	118.40			41.48	
Milton Keynes	42.26	55.25	71.79	7.1%	21.27	22.82	33.98	48.88	48.88	48.88			6.62	
Swindon	53.13	69.46	90.25	11.2%	33.88	36.50	35.58	53.76	53.76	53.76			0.63	
Banbury	65.76	85.88	111.72	2.0%	5.96	6.42	80.02	105.30	105.30	105.30			39.54	
Reading	82.83	108.30	140.72	14.4%	43.32	46.67	64.97	94.04	94.04	94.04			11.21	
London	17.79	23.25	30.21	2.4%	7.09	7.64	16.16	22.58	22.58	22.58			4.79	
Other				5.8%	17.56	18.92								
				100.0%	301.35	324.64								

NOTES:

1. Turnover - Pre Development based on rolling forward current market share to available expenditure (Table 1)
2. Trade draw of the proposal based on Turley Associates' assumptions, informed by the Oxford Household Survey (March 2013), the type of development proposed and the location and strength of competing provision
3. Impact = trade diversion expressed as a proportion of existing floorspace
4. Change in turnover = resultant turnover in 2013 minus existing turnover in 2013
5. Turnover of proposal taken from Table 4A

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