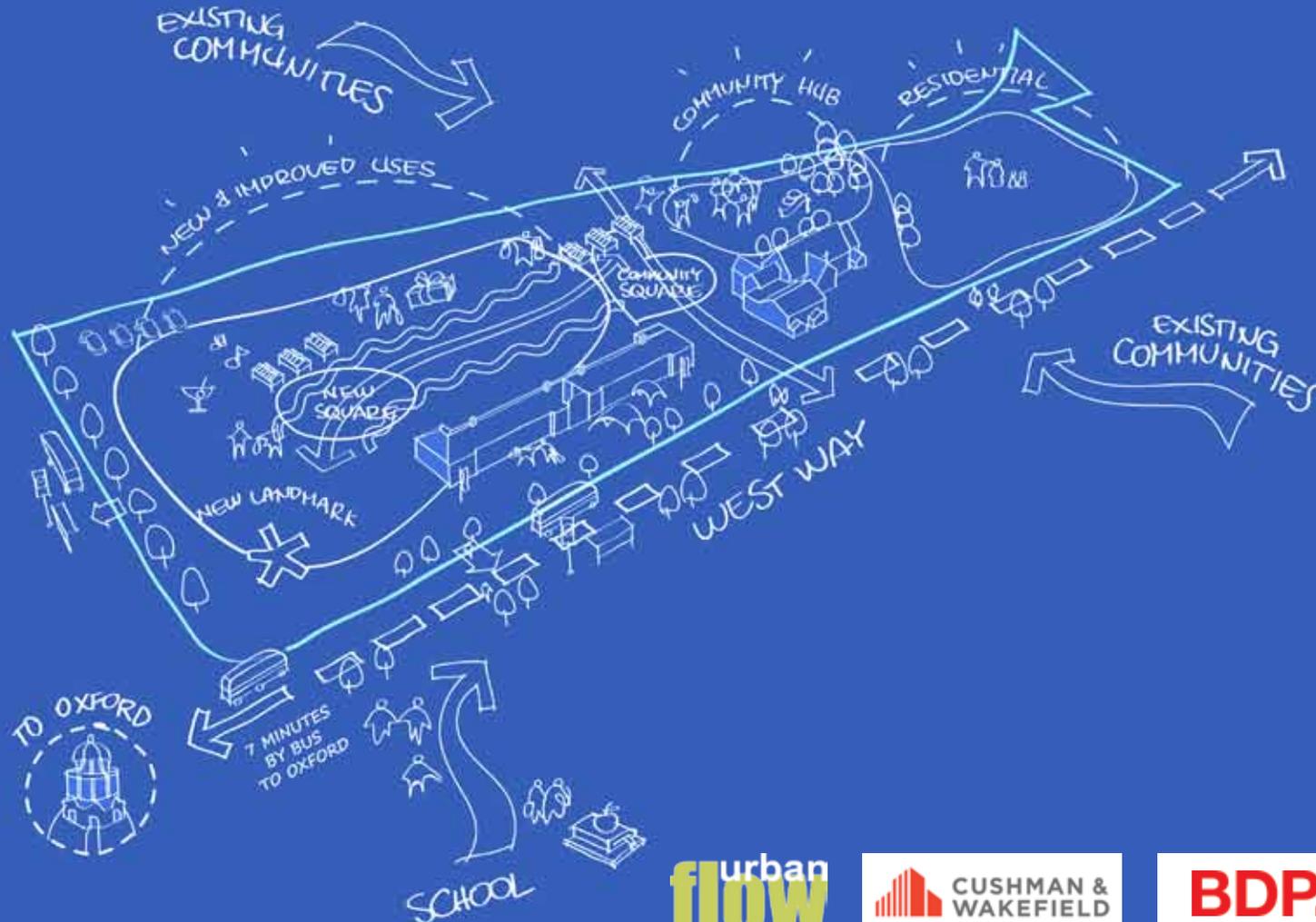


Botley Centre Supplementary Planning Document

Background Report: Viability & Transport



August 2015

urban
flow

CUSHMAN &
WAKEFIELD

BDP.

Vale
of White Horse
District Council

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1 INTRODUCTION

This report presents the viability and transport background information, which supports the Botley Centre Supplementary Planning Document (SPD) prepared by the Vale of White Horse District Council (the Vale).

Paragraph 158 of the National Planning Policy Framework (March, 2012) requires planning policy to be based on adequate, up-to-date and relevant evidence about the characteristics and prospects of the area to which it relates. The Botley Centre SPD is underpinned by an evidence base to ensure it is grounded in an understanding of the existing social, physical and economic context of Botley Centre, and to ensure the guidance promotes realistic and deliverable development.

The Botley Centre SPD evidence base consists of a baseline analysis, site visits, an urban design analysis, a transport and movement analysis, a review of the surrounding development context and viability, and baseline information, including census data, Interdepartmental Business Register (IDBR), environmental records, base mapping data and statutory records. The findings of the baseline analysis are summarised in Section 2 of the Draft SPD.

The technical elements of the evidence base relating to viability analysis and appraisal, and transport analysis and appraisal of the emerging SPD are contained in this report.

Information from the evidence base contained within the Draft SPD (Section 2), Sustainability Appraisal Report, consultation feedback and the transport and viability appraisals was used to produce development scenarios to explore forms of development, inform the development of the vision, objectives and development principles, and test feasibility.

1.1 Purpose of Development Scenarios

Section two of this report provides an overview of four development scenarios. These represent the range of potential forms the development could take, from minimum intervention (scenario one), medium mixed-use intervention (scenario two), medium residential-led intervention (scenario three) to a higher level intervention (scenario four).

The development scenarios were informed by the urban design, transport and viability analysis and debated with the local community and key stakeholders, before subsequently being refined in accordance with feedback. It is important to note that these scenarios do not represent alternate proposals for future development but rather a range of potential scenarios, and other forms of development could come forward, if they accord with the guidance included in the SPD.

The development scenarios provide a mechanism to test the SPD vision, objectives and development principles for their ability to: meet the aspirations of the local community, address the issues and opportunities of the site in urban design terms, limit transport effects and deliver a viable and realistic development. The development scenarios have played an important role in exploring the possible forms of development and fine tuning the SPD to ensure it encourages an appropriate balance between community aspirations, placemaking, sustainability, transport impact and viability.

Following workshops with the local community and stakeholders it is understood that development scenario one, which largely consists of the refurbishment of existing buildings, is considered a short term fix that does not sufficiently

address the existing site issues and does not meet community aspirations. As such, both the viability and transport review did not undertake an appraisal of development scenario one.

1.2 Viability

The viability appraisal, prepared by commercial consultants Cushman & Wakefield (formerly known as DTZ), is contained in Section 3 of this report and provides a baseline analysis detailing the possible uses on site, with a focus on potential demand. The report also includes an appraisal of the development scenarios regarding market demand, deliverability and commercial value.

In undertaking the viability assessment, it is recognised that the work is intended to examine scenarios and support the evolution of the broad principles of the planning framework within the Draft SPD. The appraisal is not intended to be a full viability appraisal but rather is used to inform the scenarios. The expectation is that the proposals for Botley will evolve as more detailed design is undertaken as the scheme progress through the development pipeline. Thus, the viability testing is undertaken to determine the broad likelihood of the deliverability of the Draft SPD.

1.3 Transport

The transport review, prepared by transport and movement consultants Urban Flow, is included in Section 4 of this report and provides a summary of existing site conditions with a focus on public transport, pedestrian movement, cycling, roads, parking and servicing. The report also summarises the estimation of movements generated by the development scenarios along with the required on-site parking capacity.

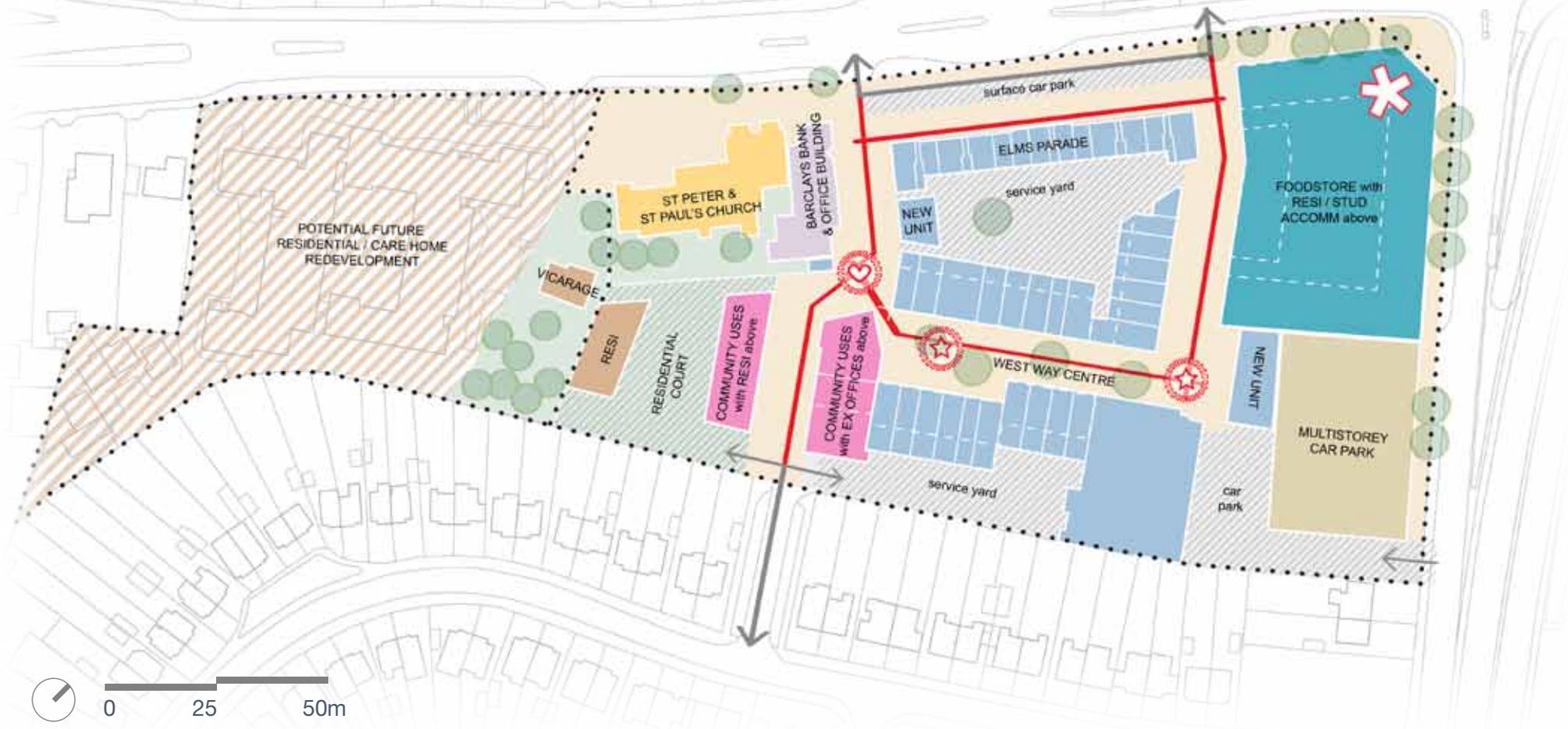
2.1 SCENARIO 01

Minimum intervention

The minimum intervention scenario maintains and enhances Botley's role as a Local Service Centre; retaining a high proportion of existing buildings and increasing and upgrading the retail and residential offer across the site.

Botley Centre		SCENARIO 1
	Site boundary	22,000
Use class	Land use	
A1	Existing retail (excluding Elms Parade)	3,600
A1	Foodstore(s)	3,400
A3	Leisure (resturants and cafes)	2,000
D2	Multiplex cinema	0
D2	Fitness	500
B1	Offices	2,400
C1	Hotel	0
Sui generis	Student accommodation	8,000
	average number of units	229
C3	Residential	4,000
	average number of units	57
D1	Nursery	0
D1	Community Hall	300
D1	Library	200
D1	Baptist Church + Hall	400
D1	St Peter & Paul's Church	700
-	Decked car park	0
	(total number of car parking spaces)	200
	TOT GIA (gross internal area)	25,500

- EXISTING RETAIL with RESI above
 - FOODSTORE
 - SS PETER & PAUL CHURCH
 - RESIDENTIAL
 - CINEMA
 - STUDENT ACCOMMODATION
 - HOTEL
 - OFFICES
 - COMMUNITY USES
 - MULTISTOREY CAR PARK
 - CAR PARKING AND SERVICING
- ♥ TOWN SQUARE
 - ★ RETAIL SQUARE



2.2 SCENARIO 02

Medium Mixed Use Intervention

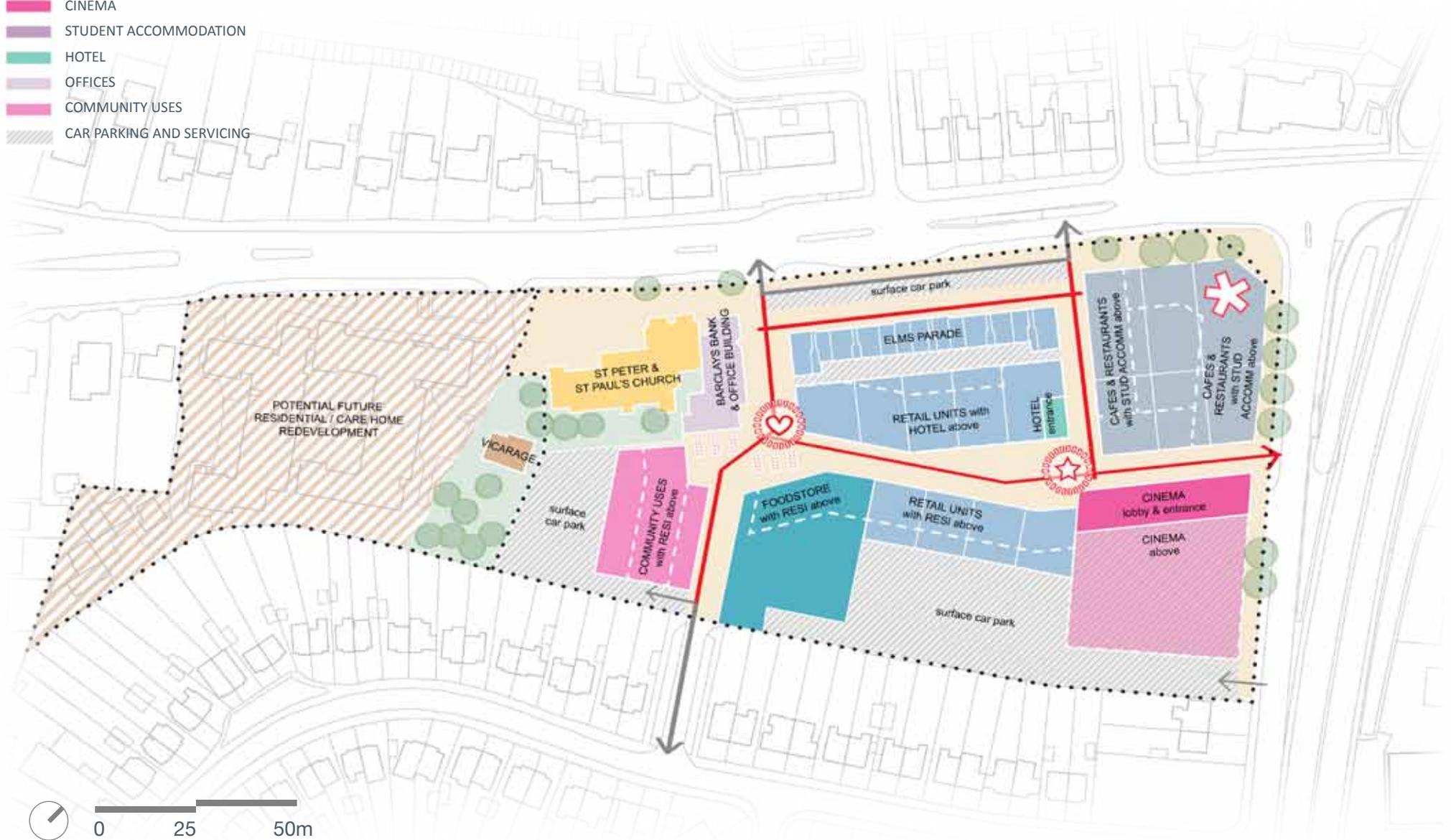
Scenario two provides a medium intervention mixed use development comprising a vibrant mix of uses and activities, and increasing Botley's role in the wider area.

There is an opportunity to provide, an alternative configuration that swaps the location of the food store and the cinema.

Botley Centre		SCENARIO 2
Site boundary		22,000 m ²
Use class	Land use	
A1	New retail (excluding Elms Parade)	2,600 m ²
A1	Foodstore(s)	1,500 m ²
A3	Leisure (resturants and cafes)	2,400 m ²
D2	Multiplex cinema	2,900 m ²
B1	Offices	800 m ²
C1	Hotel	3,900 m ²
Sui generis	Student accommodation	10,600 m ²
	average number of units	424
C3	Residential	2,600 m ²
	average number of units	37
D1	Nursery	0
D1	Community Hall	300 m ²
D1	Library	300 m ²
D1	Baptist Church + Hall	400 m ²
D1	St Peter & Paul's Church	700 m ²
-	Decked car park	2,200 m ²
	(total number of car parking spaces)	240
TOT GIA (gross internal area)		31,200 m ²

- RETAIL
- FOODSTORE
- SS PETER & PAUL CHURCH
- RESIDENTIAL
- CINEMA
- STUDENT ACCOMMODATION
- HOTEL
- OFFICES
- COMMUNITY USES
- CAR PARKING AND SERVICING

- ♥ TOWN SQUARE
- ☆ RETAIL SQUARE



2.3 SCENARIO 03

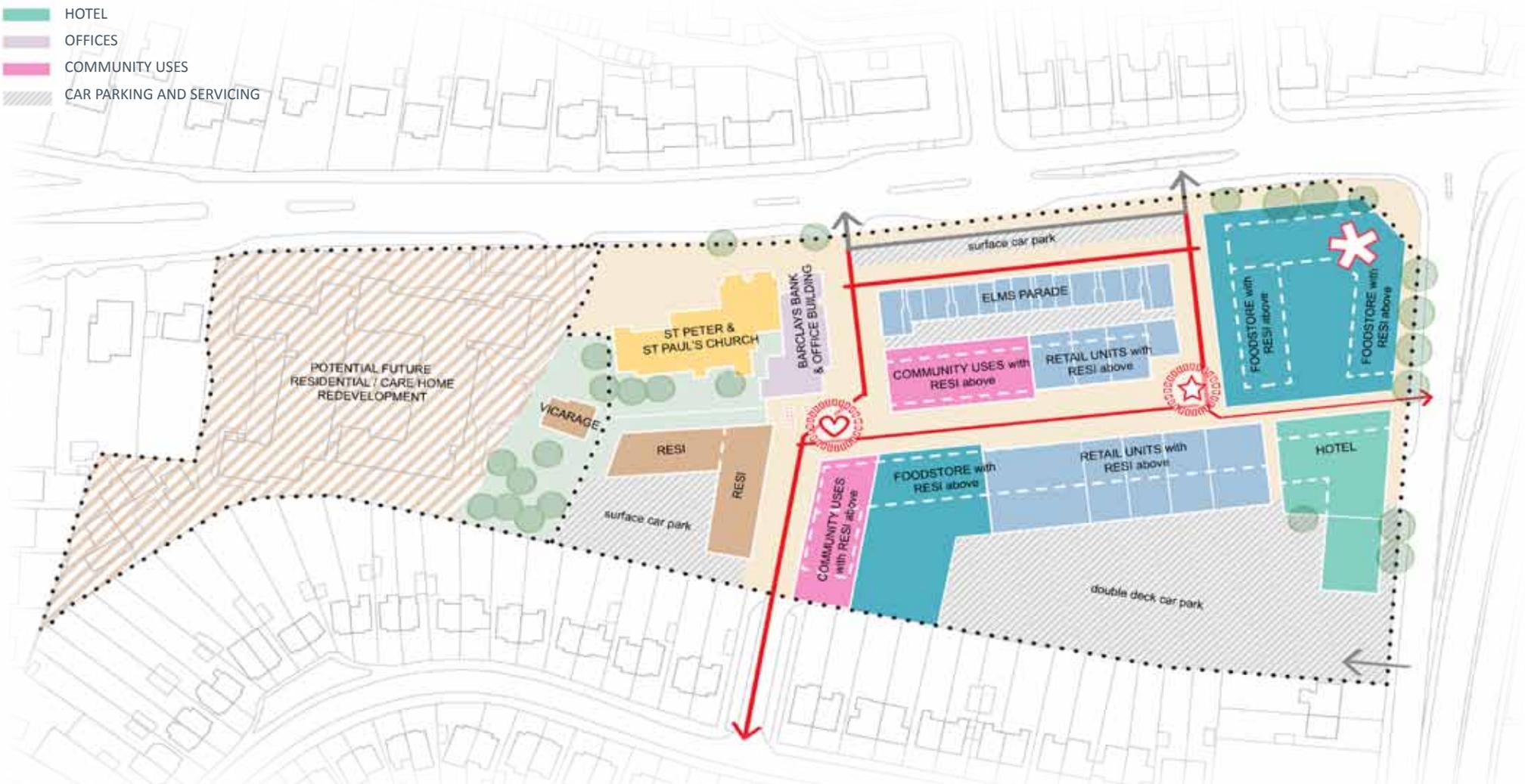
Medium Intervention Residential-led Scenario

Scenario three provides the highest number of residential units, whilst providing upgraded town centre uses and activities towards the north east of the site. This scenario retains Botley's role as a Local Service Centre.

Botley Centre		SCENARIO 3
Site boundary		22,000 m ²
Use class	Land use	
A1	New retail (excluding Elms Parade)	2,200 m ²
A1	Foodstore(s)	3,700 m ²
A3	Leisure (restaurants and cafes)	0
D2	Multiplex cinema	0
B1	Offices	800 m ²
C1	Hotel	3,900 m ²
Sui generis	Student accommodation	0
	average number of units	0
C3	Residential	14,900 m ²
	average number of units	213
D1	Nursery	200 m ²
D1	Community Hall	300 m ²
D1	Library	400 m ²
D1	Baptist Church + Hall	300 m ²
D1	St Peter & Paul's Church	700 m ²
-	Decked car park	3,700 m ²
	(total number of car parking spaces)	305
TOT GIA (gross internal area)		31,100 m ²

- RETAIL
- FOODSTORE
- SS PETER & PAUL CHURCH
- RESIDENTIAL
- CINEMA
- STUDENT ACCOMMODATION
- HOTEL
- OFFICES
- COMMUNITY USES
- CAR PARKING AND SERVICING

- ♥ TOWN SQUARE
- ★ RETAIL SQUARE



2.4 SCENARIO 04

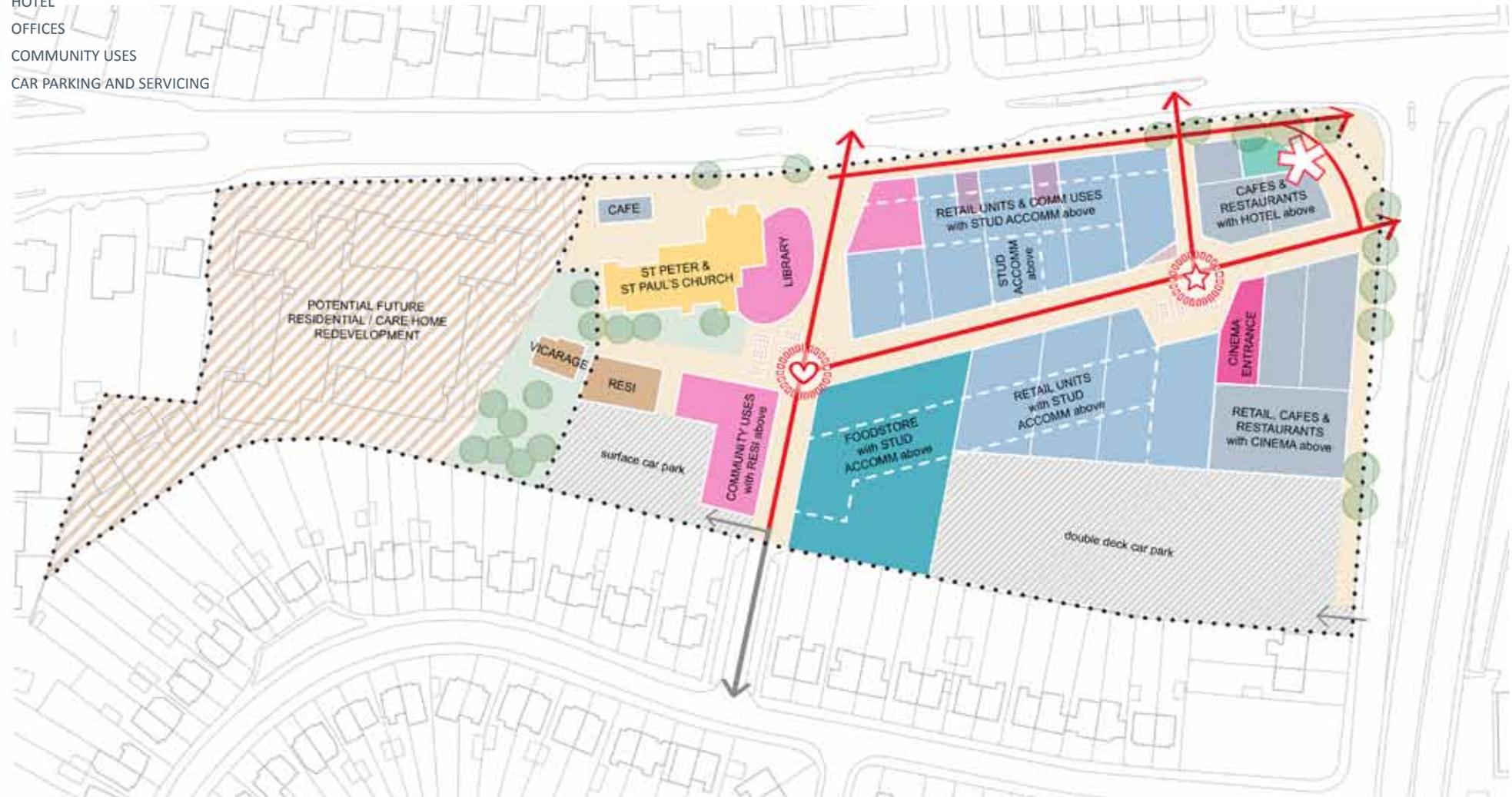
Higher Level Intervention

Scenario four proposes a higher level of intervention across the site, creating a vibrant mixed use development and increases the offer of facilities and services of Botley Local Service Centre.

Botley Centre		SCENARIO 4
Site boundary		22,000 m ²
Use class	Land use	
A1	New retail (excluding Elms Parade)	5,000 m ²
A1	Foodstore(s)	2,000 m ²
A3	Leisure (resturants and cafes)	2,400 m ²
D2	Multiplex cinema	2,900 m ²
B1	Offices	0
C1	Hotel	4,000 m ²
Sui generis	Student accommodation	10,600 m ²
	average number of units	424
C3	Residential	1,600 m ²
	average number of units	23
D1	Nursery	300 m ²
D1	Community Hall	300 m ²
D1	Library	400 m ²
D1	Baptist Church + Hall	300 m ²
D1	St Peter & Paul's Church	700 m ²
-	Decked car park	3500 m ²
	(total number of car parking spaces)	300
TOT GIA (gross internal area)		34,000 m ²

- RETAIL
- FOODSTORE
- SS PETER & PAUL CHURCH
- RESIDENTIAL
- CINEMA
- STUDENT ACCOMMODATION
- HOTEL
- OFFICES
- COMMUNITY USES
- CAR PARKING AND SERVICING

- ♥ TOWN SQUARE
- ☆ RETAIL SQUARE



VIABILITY

3

3.1 INTRODUCTION

The Vale has prepared a Draft SPD for Botley Centre. Cushman Wakefield (formerly know as DTZ) were instructed by the Vale to provide a Baseline Analysis and appraise three development scenarios prepared by BDP. These development scenarios are medium mixed use development, a medium residential led scheme and higher level intervention.

The subject site is located off the West Way, close to the A34 trunk road, approximately 1.5 miles west of Oxford City Centre. Current occupiers include the Co-op Supermarket, Iceland and Lloyds Pharmacy. The scheme is predominately occupied by local, independent retailers.

The Baseline Analysis details the possible uses on site, with a particular focus on potential demand for the subject site. The retail which makes up a core component of the development scenarios has been analysed on the basis of the offer in the Vale, Oxford City Centre and the retail warehousing near the site, as these areas are all considered to be relevant as possible competition to this site and have been used as comparable information for the development appraisals. There is a section on the foodstore market and the changing nature of this sector, as well as the current coverage in Oxford.

The hotel market analysis has highlighted possible demand for beds in this area, by investigating current supply in Oxford and requirements of hotel operators. The office market is showing increased demand but due to the low rentals achievable, makes this sector less viable. The leisure sector, including cinemas have also been analysed and have highlighted demand for this location near Oxford.

Residential and student accommodation are likely to improve the viability of a scheme in this location. This was therefore analysed to establish possible demand and likely rental and sales values. In terms of residential, Botley was compared to Oxford and national averages. The possibility of student accommodation including post graduate/family was also explored.

The three development scenarios that have been appraised have been compiled by BDP informed by stakeholder workshops and a range of technical appraisals including advice from consultants regarding demand and value. All of the scenarios include a continued retail hub, with differing types of retail offer. Scenario one proposes only improvements to the existing accommodation and has not been tested for viability (as discussed in Section 1 of this report). Scenario two and three see the retention of Elms Parade, while scenario four is a comprehensive redevelopment. Two of the scenarios provide a mix of uses, while one development is predominately residential led.

3.2 ANALYSIS OF LAND USES

Potential land uses for the subject site have been analysed by outlining the baseline analysis, an assessment of what makes land use more or less viable in this location and a conclusion of the suitability of this land use for the site.

3.2.1 RETAIL

Baseline Analysis

The Vale of White Horse District Council (the Vale)

Abingdon is the largest centre within the Vale with its main retail destination being Bury Street Shopping Centre. Bury street is predominantly occupied by national brands, these include: Boots, Clarks, Dorothy Perkins, Holland & Barrett, H. Samuel, New Look, Poundland and WHSmith. Bath Street also offers some retail, this is predominantly independent retailers and cafes. Stert Street, St Helens and High Street offer independent retailers. The total floor space of Abingdon was circa 31,521 sq metres in 2013. This figure includes the Fairacres Retail Park, which accounts for a large amount of this retail.

Wantage, the second largest retail centre is also a historic market town situated to the south-west of Abingdon. The main shopping destinations in Wantage include Market Place, with Grove Street and Wallingford Street, with the majority being independent retailers. The estimated floor space in 2013 was 8,325 sq metres.

Faringdon is smaller than Wantage, a small historic market town. The relatively small settlement does not offer much retail space. The retail consists of predominately independent retailers with a few nationals, including Boots. The retail floor space was circa 1,729 sq metres.

Botley has the fourth largest number of retail units, but has the third largest amount of comparison goods sales floorspace of 4,490 sq metres. A large proportion of the retail units are occupied by independents.

The adjacent table shows that Abington and Wantage town centres are the top of the retail hierarchy in the district.

Centre	Town Centre Shop Units	Convenience Goods Sales Floorspace sq.m net	Comparison Goods Sales Floorspace sq.m net
Abingdon	179	8,379	31,521 ⁽¹⁾
Wantage	144	4,036	8,325
Faringdon	49	1,174	1,729
Botley	40	1,637	4,490 ⁽²⁾
Grove	14	582	274
Total	426	15,809	46,339

Source: VOWH Retail and Town Centre Study 2013

Oxford City Centre

Botley is located approximately 2 miles to the west of Oxford city centre. The retail offer of Oxford City Centre would therefore have an impact on the type of retail scheme that could be delivered in Botley. Oxford has remained fairly stable within PMA's hierarchy of 200 PROMIS centres, falling by only six places to 25 in 2005, to a position of 31 by 2015. Like many other centres, Oxford lost some mid-market fashion retailers during 2007 – 2015 with Levi Strauss, Miss Selfridge, Faith and Kaliko all having left the city.

There has been no significant new retail floorspace in the city centre since the 1980s. Given the protracted nature of the Westgate Centre project, the city centre has not been able to fully capitalise on retailer interest and take advantage of the area's inherent strengths.

However, in early 2015, construction began on the refurbishment and extension of the Westgate Centre. The scheme will be extended to provide 805,000 sq ft of overall retail floorspace, including a 100,000 sq ft John Lewis department store and a Curzon cinema. The existing centre will also be refurbished. The development, which will be configured over two floors, is scheduled for completion by the end of 2017 & pre-lets have also been agreed with H&M, Superdry, Michael Kors, Schuh and Goldsmiths.

3.2 ANALYSIS OF LAND USES

Retail Warehousing

Retail warehousing supply was estimated to be 1,156,000 sq ft ranking the city 50 of the PROMIS centres. Overall, provision per household of retail warehousing floorspace is below the PROMIS average.

The table below demonstrates the high proportion of out of town fashion retailing. The market underrepresented in Oxford is DIY, but these retailers are downsizing rather than acquiring new space.



Oxford Retail Park is considered to be the main open A1 retail park within Oxford. The park has a prominent location, situated approximately four miles south east of the city centre on the Eastern By-pass in Cowley. The development comprises five retail warehouses occupied by Next, Mothercare, Sports Direct, Boots and Marks & Spencer's Simply Food.

Botley Road is home to three of Oxford's retail parks, as well as a number of freestanding stores. Botley Retail Park lies on the south side of Botley Road, one of the main routes into Oxford city centre. It consists of a terrace of four units created from the subdivision of a former Courts store in 2006, now occupied by Maplin, Multiyork, Wren Kitchens and Pets at Home. Harveys and Currys also trade from the park. The park is connected to a cluster of units under separate ownership, referred to simply as Botley Road. Wickes and Toys R Us trade from sizeable units alongside Argos Extra, Oak Furniture Land and Aldi.

Meadowside Retail Park, completed in 2012, is situated near to the small clusters of retail warehousing just off Botley Road, next to Oatlands Road recreation ground. The park has open A1 consent and houses Dunelm Mill, Halfords and Hobbycraft. DFS and Carpetright operate from two solus stores on the same side of Botley Road.

In 2014, a redevelopment of the former Habitat and Carpetright units at Seacourt Retail Park, at the junction of Botley Road (A420) and West Way (B4044), was completed allowing Decathlon, Sports Direct and Dreams to trade from the park. Homebase has continued to operate from this unit.

The largest park in the area is Fairacres Retail Park situated on Nuffield Way, just off the A34 in Abingdon. Tenants include Pets at Home, Carpetright, Beales, Homebase and Dreams. Other tenants include B&M Bargains, Topps Tiles, Vineys and Anglia Home Furnishings. Tesco trade from a superstore adjacent to the park.

Independent Retailers

West Way is currently occupied by a high percentage of independent retailers. These retailers, while performing a useful function, are not able to pay a similar rent to national brands and do not offer as strong a covenant to investors, therefore impacting on the yield achievable for the end sale.

3.2 ANALYSIS OF LAND USES

Land Use Viability

The rents achievable on the scheme will depend on the extent of the redevelopment of the retail components and the types of retailers secured for the site, i.e. a continuation of independent retailers versus national brands. The rents will also affect the preferred direction for the scheme, for example fashion based retailing will provide higher rents compared to a lifestyle focus.

The most viable retail on site will see the introduction of national brands to ensure the financial viability and deliverability of the scheme. Without national brands, a developer would not deliver the scheme as smaller retailers would not be able to pay a similar rental figure and the end investment would be significantly lower due to weaker covenant strength.

Suitability on the Subject Site

An element of retail is vital to maintain Botley town centre. The form of retail will be larger in nature than is current form to ensure it is suited towards modern retailing requirements required by national retailers. The attracting of national retailers will enable the development to be financially viable and therefore deliverable.

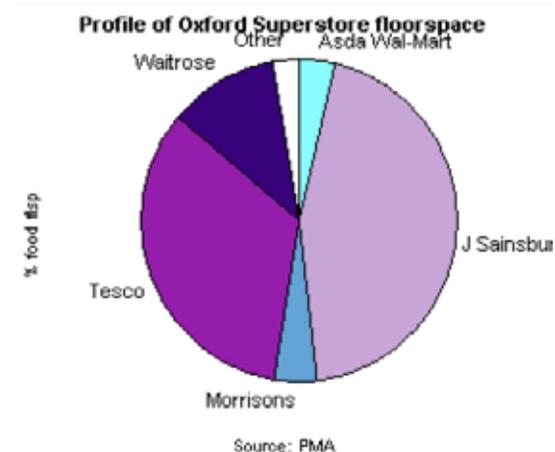
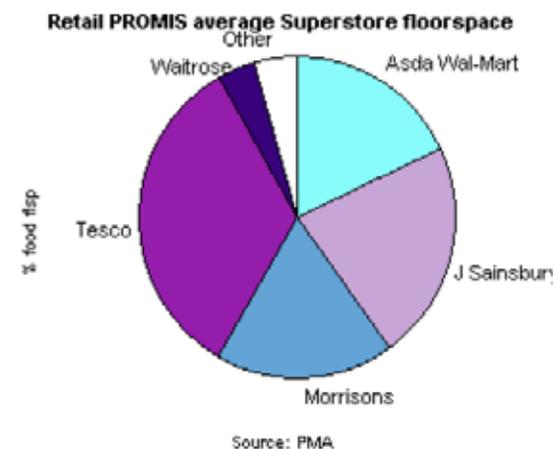
The overall retail offer of West Way Shopping Centre should be improved to provide modern retailing space suited to national retailers. The size and form of the new retail will be dependent on demand from retailers.

3.2.2 FOODSTORES

Baseline Analysis

The struggling foodstore market has been well documented. There have been a number of large retailers disposing of development sites/stores, particularly large format stores. There has been a growing trend of online shopping and more convenience based food shopping which has had a significant impact on the viability of superstores. The map in appendix 1 shows the foodstores located within Oxford and the surrounds.

The Oxford market is well covered by a number of supermarkets, including Sainsbury's and Tesco. Waitrose has recently commenced construction of their Botley Road store; of the discount retailers, Aldi have a store located in close proximity.



The graphs above show the superstore floor space in Oxford by retailer. The pie charts demonstrate that Asda and Morrison's are underrepresented in Oxford compared to the PROMIS average, while Sainsbury's and Waitrose are overrepresented in Oxford compared to the average city.

3.2 ANALYSIS OF LAND USES

Land Use Viability

Foodstores help generate revenue for the development and will be one of the more viable components of the scheme. Despite the slowing of the foodstore market, there is still investment interest in supermarkets and continue to be an attractive investment. The nature and structure of the deal, as well as, the covenant strength will impact the viability of the foodstore. Securing pre-lets with all the key occupiers is vital to enable delivery of the scheme and is likely to be a fundamental requirement of a funder.

Suitability on the Subject Site

There is currently a Tesco and Co-op on site and an element of food store space should be reincorporated on site. Foodstores help to create footfall and enable the scheme to attract other retailers. The foodstore will also be of benefit to local residents and should therefore be maintained. Without the inclusion of a foodstore, unless there was an alternative anchor, the scheme would struggle to attract retailers and would be unviable.

3.2.3 HOTEL

Baseline Analysis

The supply and pipeline of hotels in Oxford has been tabled in Appendix 2. As the data shows there is a limited supply of budget rooms for a market the size of Oxford. As examples, Premier Inn and Travelodge both have requirements for Oxford.

Given the subject site location to the west of the city, it is likely a budget operator would be the most interested in the opportunity. The redevelopment of this site is unlikely to attract a boutique or luxury hotel given the location outside of Oxford and the surrounding uses such as a main road and retail parks.

A hotel would benefit from exposure to the main road and from access to car parking. This is likely to be more attractive to budget operators than a 4/5 star hotel group. The most deliverable hotel on this scheme would therefore be a budget type hotel operator, due to the demand from hotel operators for this location.

Land Use Viability

The viability of the hotel will be dependent on the type of operator secured, a large national brand with a strong covenant will be considerably more valuable compared to an independent operator. A small operator would make the hotel element unviable due to its weak covenant and would attract limited investment interest.

A larger operator, with good covenant strength such as Premier Inn, would potentially enable delivery of a hotel on site. The hotel will not make a considerable financial contribution to the redevelopment but will improve the footfall on site, attracting other occupiers. The inclusion of a hotel also contributes to achieving a mixed use scheme.

Suitability on the Subject Site

A hotel use on site will help drive other components of the scheme through increased footfall, making it a suitable use on the subject site. Given the location of the site, the redevelopment is unlikely to be able to attract a boutique or luxury offer and is more likely to attract a budget operation given the demand from these occupiers.

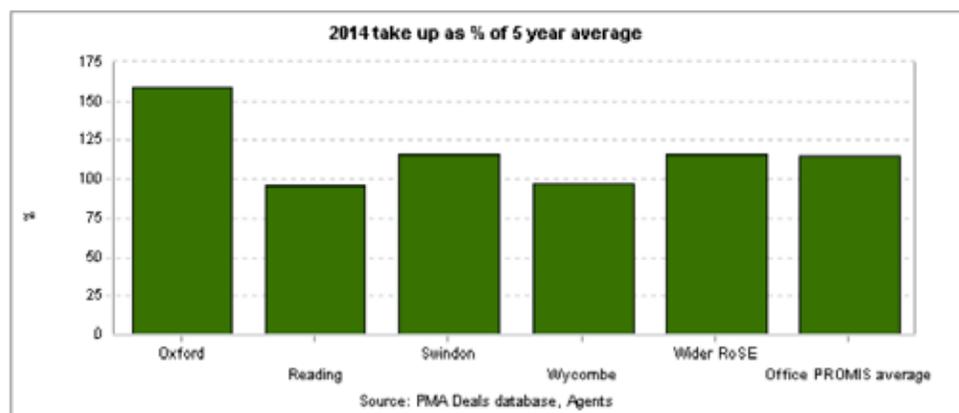
Premier Inn and Travelodge have both have a requirement for the outskirts of Oxford with good transport links. This site is likely to be of interest to both operators and will provide a return that will enable other components of the redevelopment.

3.2 ANALYSIS OF LAND USES

3.2.4 OFFICES

Baseline Analysis

The public sector accounts for a large proportion of employment in Oxford and is therefore a major office occupier. Other large office occupiers are biotech and research based businesses, publishing and law firms.



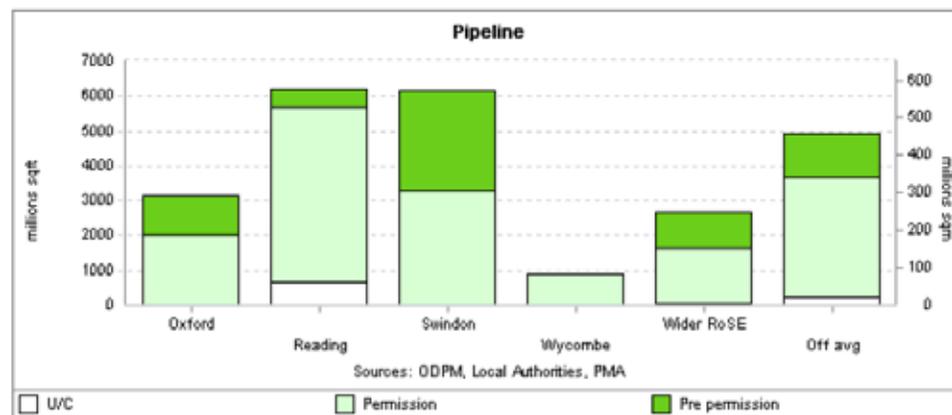
The Oxford office market saw a rise in demand in 2014 with take up far surpassing 2013 levels. The most recent short term take up trends (6 months to end Q1 2015) suggests that demand in Oxford totalled 174,000 sq ft, an increase of 50% from the previous 6 months.

The graph above shows Oxford take up in comparison to similar office locations, including Reading and Swindon. Oxford’s office take up is significantly above those markets and the average for the UK.

The most significant rental, in relation to the subject site was the Midland House, West Way to Darby’s Solicitors of 16,400 sq ft on a 17 years lease.

EGI has estimated the availability of offices in Oxford, including under construction and due to complete within the next 6 months, to have fallen by -8% to a total of 304,000 sq ft over the year Q4 2014.

Oxford has an estimated office stock of 6.1 million sq ft for 2014. This does include business and science parks, such as the Abingdon Business Park, Abingdon Science Park, Milton Park and Oxford Spire Business Park.



The graph above shows the limited pipeline of office development in Oxford compared to Reading, Swindon and the office average. Office development in Oxford is focused around the Northern Gateway of the city driven by the University. Botley is a less favourable office location in comparison.

Scenario 2 and 3 both have a component of office space of 800 sq metres which feels appropriate for the location.

Botley is a local office centre but the accommodation is generally secondary and somewhat aged space. New office provision is likely to be below breakeven.

Land Use Viability

Botley is not a prime office location and is unlikely to demand a strong rental. The cost to construct an office scheme now will not be recouped by the rental figures achievable. The land use value will as a result be break even at best. The inclusion of any office provision will not be a financial decision, rather, the desire to provide a mixed use scheme. Other uses delivered in the development will need to provide a return substantive enough to cover the cost of any office provision.

3.2 ANALYSIS OF LAND USES

Suitability on the Subject Site

The delivery of office space on the site will provide limited value to the scheme and the suitability of the land use will be based on the development of a mixed use scheme rather than suitability from a financial prospective.

3.2.5 LEISURE

Baseline Analysis

The leisure market has been growing for the last few years and has attracted considerable investment of late. With the increase in online shopping and declining number of visitors to physical retail stores, there has been an increase in awareness of creating a destination. This often is achieved through a component of leisure, be it a cinema or A3 (restaurants and cafes).

According to Goad Centre Reports, the average proportion of floorspace dedicated to leisure uses (namely A3-A5) within centres across the UK has increased from 9.52% in 2008 to 11.63% in 2013; whilst the average proportion of such units has increased from 14.82% to 16.34% over the same period.

The health and fitness market is also an increasingly important retail centre use, helping to generate footfall for other uses. The no-contract, budget operators (such as Pure Gym, The Gym Group and easyGym) are performing particularly well. However, the economic downturn and the squeeze on disposable incomes has affected the established multiple operators; most notably Fitness First, which has been forced to close a number of health and fitness clubs as a result of falling revenues.

There is considerable interest from restaurants for units within schemes located close to another leisure offer, such as a cinema. There is a large pool of operators who are likely to be interested in the redevelopment of West Way. The inclusion of restaurants into schemes is an increasingly profitable component of many schemes.

There are two leisure parks in Oxford, The Ozone Leisure Park and the former Oxford Castle site on New Road. The Ozone Leisure Park is situated to the south of Oxford city centre next to

Oxford United Football Club stadium, benefitting from the proximity of the A34. A Bowlplex, Vue Multiplex, Holiday Inn and Gala Bingo, along with several A3 operators.

The former Oxford Castle site on New Road is a 106,000 sq ft leisure development, completed in 2005. The scheme is anchored by a Malmaison Hotel, whilst restaurants include La Tasca, Slug & Lettuce, Pizza Express and Prezzo.

The two cinemas currently in operation in the City are both Odeon's and a Curzon Cinema is going into the Westgate extension. A component of leisure is vital to the subject scheme and should include a cinema and A3 units (restaurants and cafes) to maximise and extend dwell time. The cinema will act as an anchor and would help secure tenants for the retail units. Without the leisure component the viability of the scheme would be significantly impacted.

Land Use Viability

The viability of the leisure elements of the scheme varies. The cinema is breakeven in this location, whereas the restaurants are viable components. The cinema is however required to attract the restaurants and retail units and without it they would not be attracted to the site. Cinemas create a significant amount of footfall, help to extend dwell time and overall hours of opening.

Gyms are also good footfall drivers, but again are often delivered at breakeven rather than a viable use in its own right. There are likely to be a number of gym operators interested in the opportunity.

Suitability on the Subject Site

Leisure is increasingly important in retail led schemes to try to combat the negative effects of internet shopping, together with out of town retail parks. Leisure provides footfall which improves retail trading, as such, many retailers will not look at new sites without a leisure component. An element of leisure, namely a cinema, is therefore vital for the delivery of a scheme as it acts as an anchor to attract restaurants and retailers, without a cinema the scheme is likely to be undeliverable as a developer will struggle to secure other uses within the development. The restaurants are a significant element in their own right. The gym is also an important component for increasing footfall in the scheme and is a suitable use in the scheme.

3.2 ANALYSIS OF LAND USES

3.2.6 RESIDENTIAL

Baseline Analysis

Oxford Market

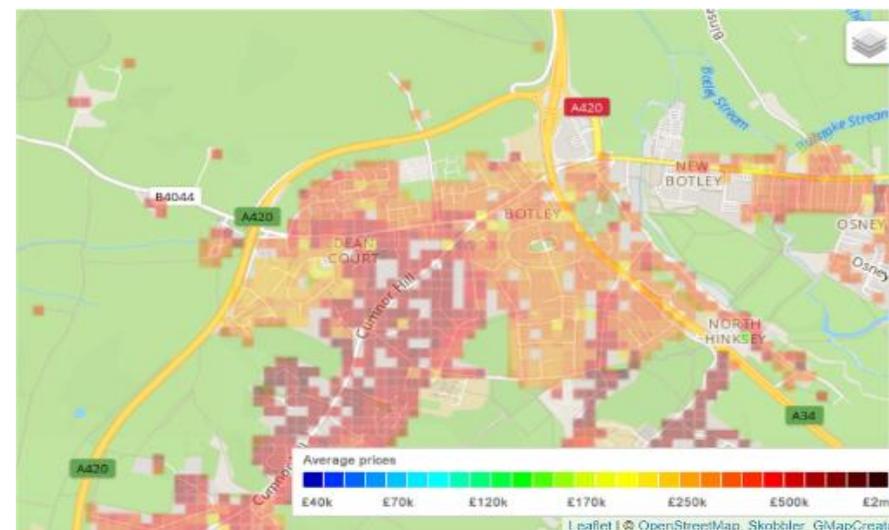
In 2014, prime property prices in Oxford rose by 6.1% and between October and December the same year, average house prices rose by 1.8%. One of the key reasons for this is homebuyers relocating from outside of the city with 52% of property purchases in Oxford in 2014 coming from outside the city.

Botley Market

	OX2	OX	National
1 Bedroom	£304,900	£211,600	£181,400
2 Bedrooms	£411,700	£271,300	£197,600
3 Bedrooms	£490,800	£320,100	£224,400
4 Bedrooms	£832,100	£506,900	£398,900

Source: Mouseprices

The residential market in Botley seems relatively strong. This can be seen by the higher values for all size properties in the OX2 postcode than the wider OX and national values. A majority of the residential properties in the area are whole houses or bungalows with only 13% of units being flats or apartments. The wider Oxford market also looks to be on the up as many purchases in and around the city are being made up by out of city buyers.



The heatmap indicates that values specific to Botley are predominantly £200,000- £250,000 with a few values pushing £500,000 to the West South-West.

In regards to household types, 86% are whole houses or bungalows, with only 13% being made up by flats and apartments. Out of these whole houses and bungalows, 43% are detached, 35% are semi-detached with 22% terraced. Out of the flats a vast majority are made up from a purpose built blocks with 13% and 5% being made up of a converted or shared house, or part of a commercial building respectively.

Occupation Statistics

Within the Vale, out of the inhabitants, 12.8% work as Managers, Directors and Senior Officials, 23.3% work in professional occupations, 14.2% work in Associate professional and technical occupations, 10.9% work in administrative and secretarial occupations, 11% in skilled trade occupations, 8% in caring, leisure and other service occupations, 6.2% in sales and customer service, 5.3% in process plant and machine operative with 8.5% in elementary occupations.

3.2 ANALYSIS OF LAND USES

Age Structure

AGE	VALE OF WHITE HORSE	OXFORDSHIRE	ENGLAND
Age 0 to 4	6.1%	6.3%	6.3%
Age 5 to 9	5.5%	5.5%	5.6%
Age 10 to 14	6.1%	5.7%	5.8%
Age 15 to 17	3.9%	3.6%	3.7%
Age 18 to 24	7.1%	10.2%	9.4%
Age 25 to 29	5.8%	7.2%	6.9%
Age 30 to 44	20%	20.7%	20.6%
Age 45 to 59	20.9%	19.2%	19.4%
Age 60 to 64	6.6%	5.8%	6%
Age 65 to 74	9.4%	8.3%	8.6%
Age 75 to 84	6.1%	5.3%	5.5%
Age 85 +	2.5%	2.3%	2.3%
Mean Age	40.8	38.9	39.3
Median Age	41	38	39

Source: ONS

Source: ONS

On average, the Vale (in which Botley lies), has an older population than the wider Oxford and the national average. 45.5% of residents in the Vale are aged 45 and over, but the demographic profile is younger the closer you get to Oxford.

New Build Residential in Botley

A development of 7, 2/1 bedroom flats located on Eynsham Rd, Botley is currently under construction and are due for completion in September 2015. The asking price for the 1 bed units are £220,000, with a £275,000-£300,000 asking price for the 2 bed units.

There is a small development of 5, 2 bedroom apartments with asking prices of circa £375,000 located on Cumnor Hill, Botley.

Using the recent decisions made on planning applications in the Vale, the most recent applications have been for developments of 2-4 storey buildings each containing 7, 2/1 bed apartments along with relevant access and parking for the units. These decisions are dated between February and July 2015.

We would envisage the most appropriate form of residential development would comprise of 2 and 1 bedroom flats. We would expect very little demand for studio flats in this location.

Land Use Viability

The strong sales rates in Botley means the residential components of the scheme are financially viable and there is likely to be demand for units on the scheme. The residential component is one of the most viable components of the scheme and will need to be provided in order to deliver the elements of the scheme that are not as viable such as the hotel, cinema and any community facilities.

Suitability on the Subject Site

The provision of residential is a suitable use on site and there is likely to be significant demand for the units. The inclusion of residential units on site will help create a local community and increase footfall in the scheme.

3.2.7 STUDENT ACCOMMODATION

Baseline Analysis

The student accommodation market has been strengthening over recent years, particularly those leased to Universities on a long term basis.

In terms of the yield, this is totally dependent on the structure of the investment. "Direct let" product (where the owner of the scheme lets beds on yearly contracts direct to students) is of little interest to the annuity type funds due to the lack of security of income. On the other hand, low yields are being achieved on long term annuity style leases (25 years plus) that are direct to the University, with index linked guaranteed uplifts.

3.2 ANALYSIS OF LAND USES

Postgraduate and Family Accommodation

Postgraduate only accommodation is available at many universities across the country, however, these blocks of accommodation are limited in space and availability. This lack of availability means that many universities advise that postgraduates apply for undergraduate/ postgraduate mixed accommodation, where they try and group the postgraduates. Oxford Brookes University hosts the Clive Booth Postgraduate Centre, which is a block of accommodation located near the Headington Campus which is dedicated to postgraduates and mature students. It includes 2-6 bed ensuite apartments with a total of 364 rooms. Despite this, demand is high and the block is full for the 2015/16 academic year. We would therefore envisage demand for postgraduate accommodation in Botley, which could create a viable scenario for development.

Student accommodation for families is very limited in Oxford. If you are a single parent student or intend on living with a partner or children, you are advised to make your own accommodation arrangements in advance of your studies. This theme runs with many universities throughout the UK. Universities such as Manchester and Bristol offer very little in the way of family accommodation and like most universities, will offer advice on finding suitable accommodation close to their respective grounds. Leeds University, as an example, offers 150 'family properties' specific to students who wish to live with a partner, and or, children. However, this is not one block of accommodation, these sites are spread across the city. Demand for these types of properties in Leeds can be seen to be high, as there is currently a waiting list to get one of the properties.

Land Use Viability

Student accommodation is one of the most viable uses on site and enables the wider development. The introduction of student accommodation, if pre-leased, reduces the risk for a developer and creates an attractive investment. The ability to lease a large component of the site, i.e. the student accommodation is highly attractive to an investor as it decreases potential risk. The student accommodation in particular should be of scale as it is fundamental to the viability. This will help improve the viability of the scheme and without these elements there is unlikely to be investment in the scheme.

If a student accommodation operator is secured at an early stage it removes the risk for the developer and therefore increases the potential of deliverability. The residential units have a higher degree of risk due to the timing of selling the units. A developer would therefore try to reduce risk and increase deliverability by providing student accommodation.

We would envisage significant demand for the student accommodation from both students looking for a cheaper scenario in comparison to the city centre and in turn from student accommodation operators. We would recommend any scheme proposed on site should include an element of student accommodation to ensure viability and therefore deliverability.

Suitability on the Subject Site

If the scheme includes student accommodation, it is likely to be a key attractor to the site and improve the viability of the development scenario. The inclusion of student accommodation will help improve footfall and the creation of a resident community, if delivered alongside residential units.

3.2.8 COMMUNITY FACILITIES

Baseline Analysis

Within Botley, there is one library currently open to the public. This is Botley Library, currently located at Elms Court. There are a couple of community centres located in the surrounding area. West Oxford Community Centre is located on Botley Road and is run by a small local charity which provides a range of recreational, welfare and educational opportunities to the local community. Dean Court Community Centre is run by a similar, non-profit organisation and is situated at Pinnocks Way. This centre is there to host events for the community as well as provide a meeting point and a place for activities for the local community. There are a scattering of nurseries in Botley and the surrounding area. The closest of which being Elms Road Children's Centre which is located on Elms Road, adjacent to Botley Primary School. Most of these nurseries are non-profit and provide day childcare for families.

3.2 ANALYSIS OF LAND USES

Land Use Viability

Community facilities, including libraries, are a cost to a development and do not provide any financial value, but they obviously provide a significant ‘indirect’ benefit through the creation of additional footfall. In order to deliver community facilities, there needs to be enough commercial value generated from other parts of a development to bear the cost of providing these facilities.

The ability to provide community uses on site will be determined by the profit the site delivers, as such the rest of the redevelopment will need to maximise commercial value in order to warrant the cost of providing these.

Suitability on the Subject Site

The community facilities would not create any financial benefit to the scheme but would help in the creation of a community and provide a facility for local residents. There will need to be sufficient profit generated in other elements of the scheme to ensure the deliverability of these elements.

3.2.9 SUMMARY OF USES AND VIABILITY

We have colour coded the different components of the site to show which uses are viable, which break even and what components are unviable in isolation, all on the basis this schemes location. In order to deliver a scheme, the mix of uses will need to include those uses that are viable.

The most viable uses are the foodstore, student accommodation, national retailers, residential and restaurants. These components will help deliver those uses that are not as viable or are pure costs. These uses include the hotel, gym, cinema, offices, independent retailers (if retained) and community facilities.

Pure Cost	Unviable in Isolation	Breakeven	Viable
Community Uses	Independent Retail	Hotel	Foodstore
	Offices	Cinema*	Student Accommodation
		Gym	National Retailers
			Residential
			Restaurants

3.3 DEVELOPMENT SCENARIO ANALYSIS

The assumptions detailed below are provided on the basis that the scheme brought forward is commercially sound, including an efficient design that has been market tested and demonstrated to be in demand. We have assessed the scenarios as an overview, not taking into consideration specific designs, i.e. investigating the impact on rentals of retail unit sizes. Our commentary of viability and deliverability essentially relates not to these indicative figures but the concept to attract occupiers and hence developers and investor commitment.

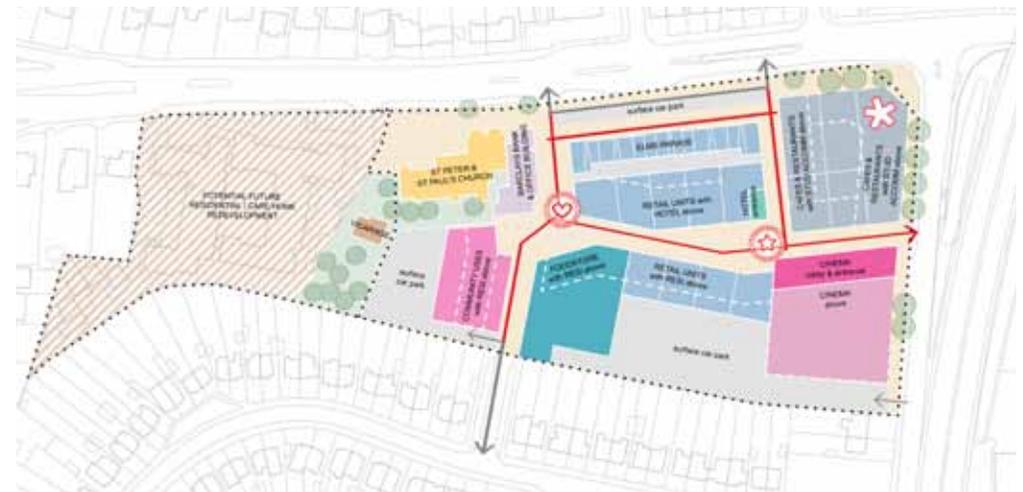
The land value produced for each redevelopment scenario will need to be reviewed in conjunction with the existing use value as only those scenarios which have a residual development value above EUV would be viable.

Early consultation workshops had identified four development scenarios, however feedback on Scenario 1 (minimal redevelopment of the site) was that it was not considered to be desirable.

As instructed, we have therefore only appraised Scenarios 2, 3 and 4.

3.3.1 SCENARIO TWO - MEDIUM MIXED USE

Scenario two is a medium density, mixed use development. The uses on site include retail, foodstore, cinema, residential, student accommodation, hotel, offices, community uses and surface car park. In this scenario Elms Parade is retained, along with the Barclays building adjacent to St Peter and St Paul's church.



Deliverability

We are of the opinion scenario 2 is likely to be the most deliverable given the mix of uses, including the more viable residential and student accommodation. We would envisage significant demand for the student accommodation. We would recommend any scheme proposed on site should include an element of student accommodation to ensure viability and therefore deliverability.

If a student accommodation operator is secured at an early stage it removes the risk for the developer and therefore increases the potential of deliverability. The residential units have a higher degree of risk due to the timing of selling the units. A developer would therefore try to reduce risk and increase deliverability by providing student accommodation.

3.3 DEVELOPMENT SCENARIO ANALYSIS

The retail form south of Elms Parade is larger in nature than currently on site, which is more suited towards modern retailing requirements. This is required to enable the development to be financially viable and therefore deliverable. There is potential to increase the density of Scenario 2, which would improve the viability and deliverability of the scheme.

Impact on Retained Users

Scenario 2 retains a component of the existing retail at Elms Parade which will ensure the continuation of the independent retailers. The overall retail offer of West Way Shopping Centre is improved to provide modern retailing space suited to national retailers. The size and form of the new retail is likely to reduce the impact of the redevelopment on Elms Parade as the retailer offer will be different.

Ability to attract Investment

The ability of the scheme to attract development investment will be dependent on the ability to lease the retail and restaurant units, hotel and student accommodation. It is likely the developer will want to pre-lease some of the elements of the scheme prior to commencing the development and obtaining finance. The ability to lease a large component of the site, i.e. the student accommodation is highly attractive to an investor as it decreases potential risk.

Ability to attract Occupiers

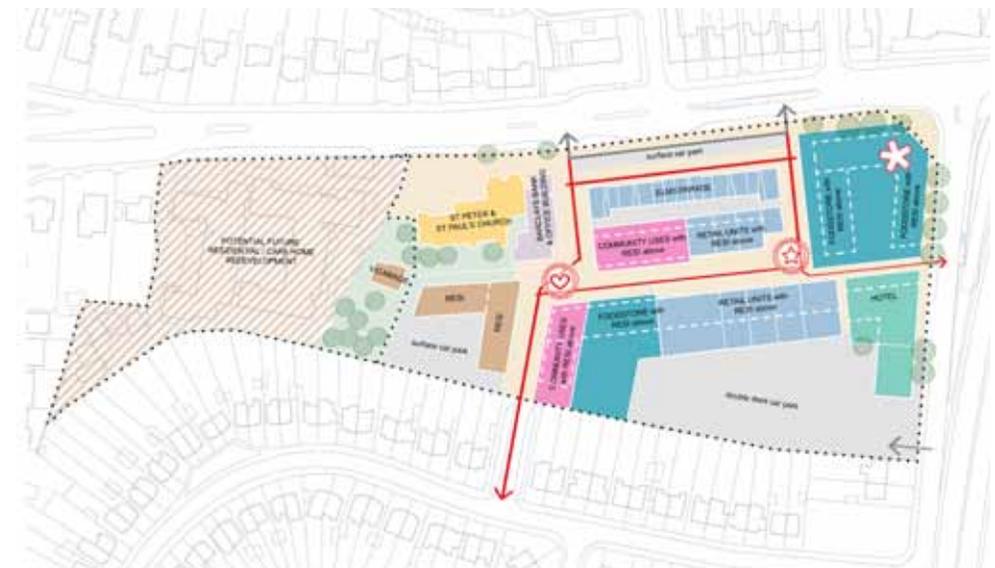
The retail units are of an appropriate size to attract multiple retailers to the scheme. The restaurant/A3, while in close proximity to the cinema, might prefer to be surrounding the cinema entrance. Elms Parade will continue to be operated by independent retailers and is unlikely to attract any national brands in its current form.

There has been shown to be demand from budget hotels for Oxford and they have previously shown interest in the site. The hotel operators might prefer main road exposure and more convenient access to the car park.

3.3.2 SCENARIO THREE - RESIDENTIAL LED

Scenario 3 is a residential led development, providing upgraded town centre uses and foodstore in the north eastern part of the site. The scheme continues Botley's role as a Local Centre, while introducing some larger units. Given the limited retail space and smaller units we would envisage lower rental figures for the retail components in comparison to the other 2 scenarios.

The scheme has the least mix of uses and does not include student accommodation, which is a key driver to viability. This scenario also does not include a cinema which will significantly impact the ability to lease the retail components of the scheme as the cinema would act as a key footfall driving to the scheme. This will also impact the schemes ability to attract restaurants to the site. The inclusion of leisure to the scheme would help create a more vibrant destination.



3.3 DEVELOPMENT SCENARIO ANALYSIS

Deliverability

Scenario 3 consists of 2 foodstores, which could impact the deliverability of the scheme if occupiers are not secured. The supermarket operators have seen a significant downturn and move away from large format stores.

The compromised nature of the retail units, due to their size, configuration close to non-retail uses and the lack of leisure facilities, the retail will demand lower rental figures compared to Scenario 2 and 4. This could impact the deliverability of the scheme.

Impact on retained Users

The scheme will impact the retained users as there will be an introduction of new retail to the scheme. The smaller units are more likely to be occupied by retailers that could compete with the existing independent retailers.

Ability to attract Investment

There are more viability concerns with this scheme given the compromised retail design. It is therefore likely to attract less investment opportunities in comparison to the other two schemes. There is likely to be of concern from investors regarding the ability to lease some of the components of the site, such as the 2 foodstores.

There are concerns regarding the ability to provide enough car parking on site, particularly for the residential components. The residential units on site however are separated from the other components of the site, which will be more attractive to end purchasers.

Ability to attract Occupiers

The retail 'strip' is negatively affected by the inclusion of community uses, by reducing the quantum of retail. While community uses can increase footfall, retailers benefit from a high quantum of retailers around them. The retail units are also smaller on the northern side of the retail strip which are likely to be difficult to lease.

Scenario 2 comprises of two foodstores, one to the north east and one south west. There might be issues leasing two foodstores, particularly as the north eastern supermarket does not have any surface car parking. The inclusion of two foodstores might also impact the rental.

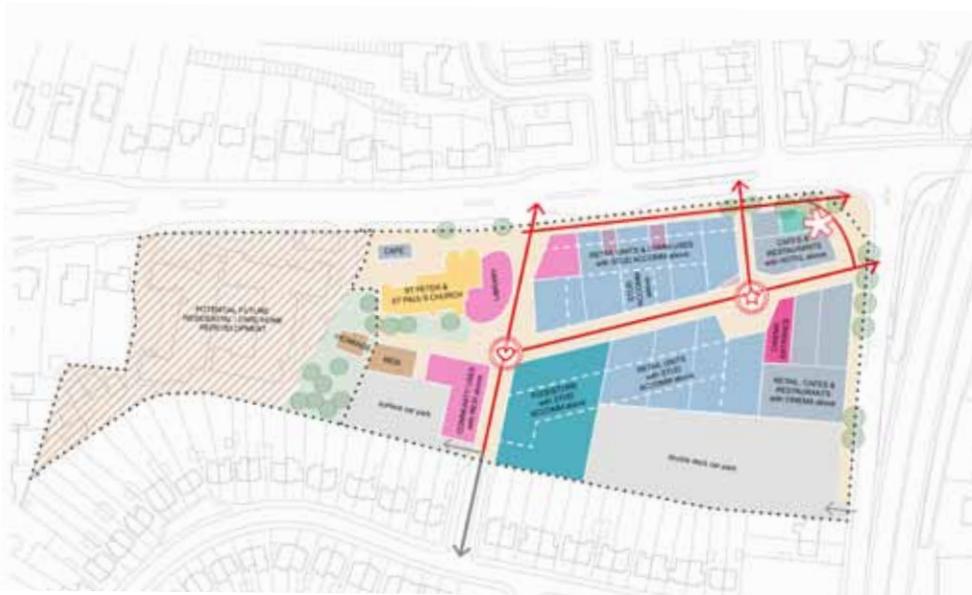
The hotel benefits from exposure to the main road and benefits from access to the car parking. This is likely to be more attractive to occupiers compared to Scenario 2.

Scenario 3 does not include a cinema, which would impact the ability to attract any restaurants to the scheme. The limited amount of leisure components on site, coupled with the community uses breaking up the retail will have a significant impact on the ability to attract retailers.

3.3 DEVELOPMENT SCENARIO ANALYSIS

3.3.3 SCENARIO FOUR – HIGHER LEVEL INTERVENTION

Scenario four has the highest density and involves the higher level intervention as it shows the Elm Parade site also redeveloped. The mixed use scheme includes the highest density of retail, foodstore and cinema. There is a mix of surface car parking and decked car parking. There are considerable community uses on the scheme, including the demolition of Barclays for the library. This amount of intervention is likely to have high compensation costs, which have not been factored into our appraisal.



The scheme includes student accommodation, which is likely to be a key attractor to the site and improves the viability of the development scenario. There is also a component of residential to the west of the site, separated from the retail components. This position is likely to be attractive to developers due to the attractiveness to end purchasers.

The retail offer of Scenario 4 might be harder to lease, due to the size and depth of units, the northern units are outward facing and broken up by community/residential uses. The ability to lease these units will affect the deliverability of this development scenario.

The demolition of the Barclays bank for the provision of the library will have a substantial cost, while not providing any financial value. The compensation for the removal of Barclays could be considerable. This component of the scheme is not deliverable and we would encourage the library to be provided elsewhere on the scheme that can be funded by the introduction of additional value. The demolition and removal of Barclays would only be viable if there was a financial benefit to do so.

Impact on retained Users

There are very little current occupiers retained in scenario 4 as the scheme completely removes all existing retailers. This could have an impact on the viability of the scheme if there is considerable compensation payable.

Ability to attract Occupiers

The retail components of Scenario 4 are likely to have lower demand given the depth of the units and the northern units having no frontage into the scheme. This is likely to impact the viability of this scenario. The 'breaking up' of the retail uses on the West Way, with residential access points and community uses will reduce the footfall, further impacting the rent achievable and demand for these units.

The restaurants for the scheme surround the cinema entrance which will be attractive to these occupiers, particularly given the easy access to the decked car park. The foodstore is located to the rear of the scheme, but should still benefit from some sight line from West Way. The footsore is a suitable size for the current requirement of food store operators.

The hotel benefits from corner exposure but is some distance from the car parking. The café and restaurants below will make the overall offer attractive.

3.4 PHASING

Any scheme proposed for the site is unlikely to be phased given that it would be difficult to break up the retail. The only part of the site that might be a later phase would be the community/residential area to the west. This could not be delivered first as there is no return from the community centre and the developer would need some of the income generated to fund the next phase.



3.5 SUMMARY

From a high level perspective, demand still exists from the key occupier markets including foodstores and cinemas although the foodstore operators are scaling back the size of stores they are currently looking to take, making a move away from the extra-large store format. The student accommodation market has been strengthening and performing well over the last few years. This market is however very specific to the town or city the scheme is located in and the nature of demand from the universities and private student accommodation operators. Private student accommodation operators are likely to be the most interested in taking new space in Botley due to the West Way site being located close to Oxford Brookes' Harcourt Hill campus.

The Baseline Analysis has shown demand for the following uses on site:

- Budget operated hotel
- Retail – larger format for multiple retailers
- Cinema with restaurants alongside
- Residential – 2-1 bedroom units
- Student Accommodation

The hotel will not add significant value to viability of the scheme but will add to the mix of uses and will help increase the footfall. Likewise, the cinema does not contribute significantly to the financial viability of the scheme but the provision enables the developer to secure other occupiers, such as retailers and restaurants. These are important when creating a development with longevity.

The student accommodation and residential components of the scheme are the most viable uses on site and enable the wider development. The introduction of student accommodation, if pre-leased, reduces the risk for a developer and creates an attractive investment.

Most Appropriate form of Development

The development scenarios created by BDP have been analysed and financially appraised. As a result, the best form of development will present itself in the form of Scenario 2, which includes larger retail units, while retaining the local centre character of Elms Parade. The position of the foodstore is appropriate as it draws people through the scheme, the surface car parking is also in the correct position to secure a foodstore operator.

The scheme should include a high density of residential and student accommodation, to a similar level of Scenario 4. The student accommodation in particular should be of scale as it is fundamental to the viability. This will help improve the viability of the scheme and without these elements there is unlikely to be investment into the scheme.

Due to the foodstore and the student accommodation making up the majority of the income the demand for these uses is critical along with the nature and structure of the deal that is agreed with the leaseholder as well as the covenant strength. Securing pre-lets with all the key occupiers is vital to enable delivery of the scheme and is likely to be a fundamental requirement of a funder.

The most viable scenario is to maintain the Barclays building if there is no other use apart from community uses, unless it can be established that demolition costs and compensation costs are lower than assumed.

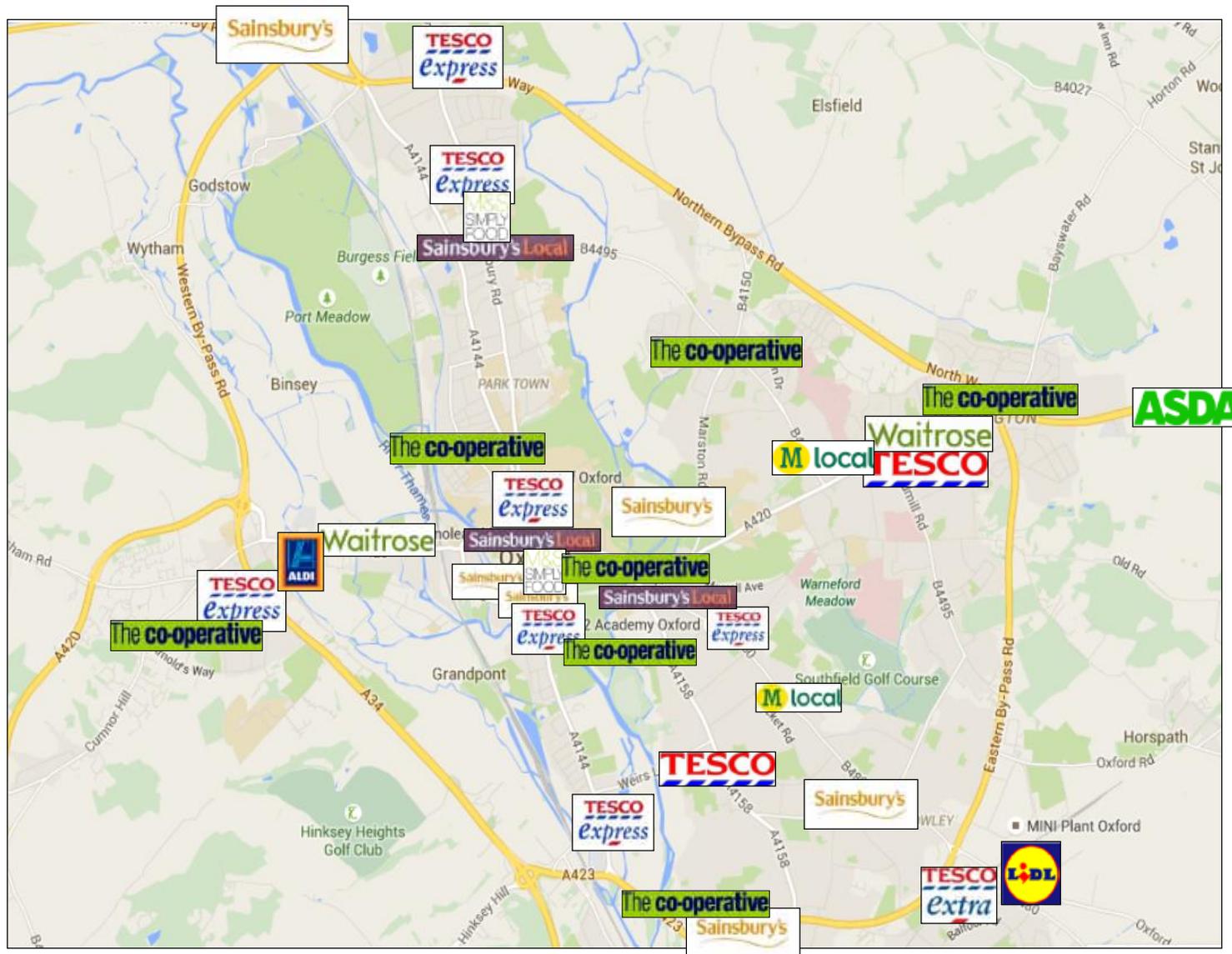
Importance of Anchors

The cinema and foodstore are essential anchors that are required to attract other retailers and uses. Without the inclusion of these uses the scheme will struggle to attract the required retailers and restaurants. The restaurant units need to be developed within close proximity to the cinema to ensure maximum value and demand.

APPENDICES



APPENDIX 1 : FOODSTORES IN OXFORD



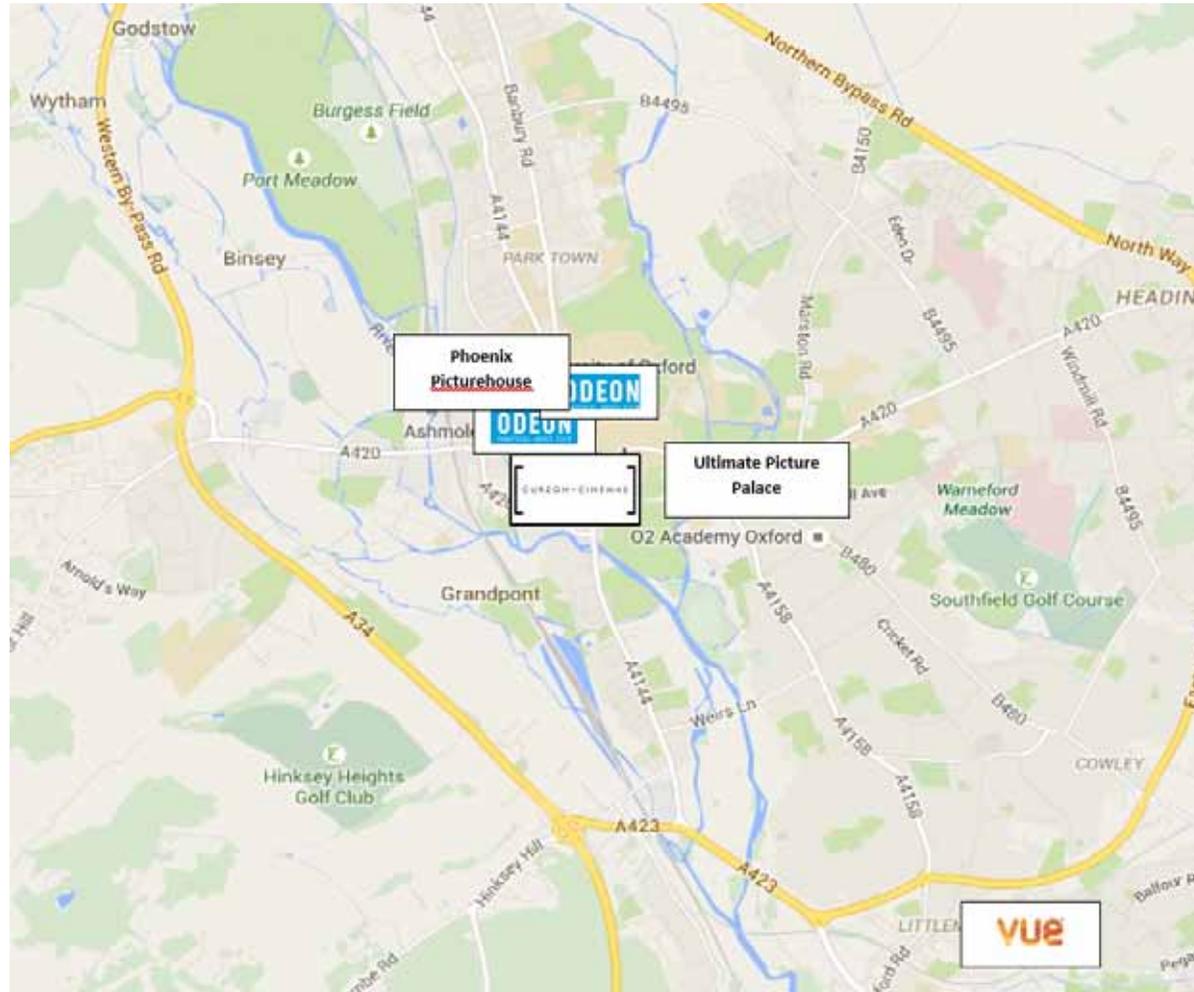
APPENDIX 2 : HOTEL MARKET (AM:PM REPORT)

#	Type	Hotel	Grade	Rooms	Opened/Opening	Brand	Operator
1	Supply	Oxford	4	168	1970	The Hotel Collection	Puma Hotels
2	Supply	Remont	3	25	2006	Independent	Independent
3	Supply	Marlborough House	3	17	1990	Independent	Omshanti Group
5	Supply	Galaxie	4	32		Independent	Gwyn Harries-Jones
7	Supply	Best Western Linton Lodge	3	73		Best Western	Khanna Enterprises
8	Supply	Cotswold Lodge	4	49		Classic British Hotels	Independent
9	Supply	Old Parsonage	4	35	1989	Independent	Mogford Ltd
11	Supply	Macdonald Randolph	5	151	1864	Macdonald Hotels	Macdonald Hotels
12	Supply	Bath Place	2	15	1988	Independent	Fawsitt family
13	Supply	Buttery	2	16		Independent	Independent
14	Supply	Bocardo	3	10	2012	Independent	Omshanti Group
16	Supply	Victoria House	2	14		Independent	Independent
17	Supply	Eurobar	2	13		Independent	Independent
18	Supply	Vanbrugh House	4	22	2012	Independent	Sojourn Hotels
19	Supply	Oxford Backpackers	Hostel	8		Independent	Funky Hostels
20	Supply	Royal Oxford	3	26		Independent	Independent
21	Supply	Central Backpackers	Hostel	7	2005	Independent	Independent
22	Supply	YHA Oxford	Hostel	31	2001	YHA	YHA
25	Supply	Old Bank	4	42	1998	Independent	Mogford Ltd
26	Supply	River	2	20		Independent	Christchurch College
28	Supply	Mercure Oxford Eastgate	3	64	1607	Mercure	Accor HotelServices
29	Supply	Kite Inn	2	5		Independent	Independent
30	Supply	Malmaison Oxford	3	95	2006	Malmaison	Malmaison Hotel du Vin
35	Supply	Old Black Horse	2	10		Independent	Independent
37	Supply	Head of the River	3	12		Fuller's Inns	Fuller's Hotels
39	Supply	Ethos	3	12	2008	Independent	Independent
40	Supply	Sportsview	2	18		Independent	Independent
41	Supply	Oxford Spires Four Pillars - Eastwyke House	4	10	2010	Four Pillars	Four Pillars
42	Supply	Oxford Spires Four Pillars	4	164		Four Pillars	Four Pillars
43	Supply	Victoria	2	20		Independent	Independent
44	Supply	Balkan Lodge	2	13		Independent	Independent
45	Supply	Hawkwell House	3	77	1970	Independent	Obbligato Hotels Ltd
47	Supply	Premier Inn Oxford	Budget	143	1995	Premier Inn	Premier Inn
48	Supply	Tree	2	9		Independent	Omshanti Group
49	Supply	Said Business School	3	63	1996	Independent	Said Business School
50	Supply	Westwood	3	20		Independent	Independent
52	Supply	Holiday Inn Express Oxford Kassam Stadium	Budget	162	2002	Holiday Inn Express	Firoka
54	Supply	Oxford Thames Four Pillars	4	84		Four Pillars	Four Pillars

APPENDIX 2 : HOTEL MARKET (AM:PM REPORT)

#	Type	Hotel	Grade	Rooms	Opened/Opening	Brand	Operator
4	Pipeline	Galaxie (extension)	4	4	Speculative	Independent	Gwyn Harries-Jones
6	Pipeline	Barton Oxford	4	120	Speculative	Independent	Tba
10	Pipeline	Old Parsonage (extension)	4	5	Speculative	Independent	Mogford Ltd
15	Pipeline	George Street	3	43	On Hold	Independent	Omshanti Group
23	Pipeline	North Hinksey Lane	3	30	Speculative	Independent	Dr Sue Zhang
24	Pipeline	Dominvs hotel site	4	120	Speculative	Independent	Dominvs Hospitality
27	Pipeline	Mercure Oxford Eastgate (extension)	3	17	On Hold	Mercure	Accor HotelServices
31	Pipeline	Premier Inn Oxford West Way	Budget	100	Speculative	Premier Inn	Premier Inn
32	Pipeline	St Aldate's	2	10	Speculative	Independent	Zeshan Shah
33	Pipeline	Malmaison Oxford (extension)	3	2	Speculative	Malmaison	Malmaison Hotel du Vin
34	Pipeline	Oxpens	4	150	Speculative	Independent	Tba
36	Pipeline	Travelodge Oxford Cowley Road	Budget	66	On Hold	Travelodge	Travelodge Hotels
38	Pipeline	Travelodge Oxford Abingdon Road	Budget	83	Due 2016	Travelodge	Travelodge Hotels
46	Pipeline	Premier Inn Oxford (extension)	Budget	59	Speculative	Premier Inn	Premier Inn
51	Pipeline	Hampton by Hilton Oxford	Budget	87	Due 2016	Hampton by Hilton	Firoka
53	Pipeline	Oxford Thames Four Pillars (extension)	4	20	Due 2015	Four Pillars	Four Pillars

APPENDIX 3 : CINEMAS IN THE LOCAL AREA



4.1 INTRODUCTION

This Review Note sets out our findings and conclusions regarding transport considerations for the Botley Centre development site. This feasibility review has been undertaken by movement and transport consultants Urban Flow for planning purposes only to assist development scenario preparation for the Botley Centre Supplementary Planning Document (SPD). The findings inform the development movement principles within the SPD.

Our findings draw upon our site observations, a desktop review, discussion with the wider project team and prior technical work (including traffic and parking surveys) undertaken by others – with that work reviewed by us for general applicability. Naturally, any future development proposal would require a thorough re-assessment of all technical matters with appropriate primary data collection in support of a related planning application and preparation of a full Transport Assessment document.

The Review Note is in two main sections, the first providing a summary of site conditions, the second examining the feasibility of proposals for site development as prepared for the SPD. Generally, these findings are presented in summary / note form with the main focus of related technical work having been on collaborative scenario preparation and site capacity movement and parking analysis.



4.2 TRANSPORT CONDITIONS

4.2.1 SITE CONDITIONS

The site is well connected to the local and strategic road network, with the A34 trunk road to the east providing good, if sometimes congested, access between the M4 to the south and the M40 to the north. The B4044 West Way acts as a primary vehicular route offering connections to the wider area including Oxford City Centre.

Although there is no railway station in the Botley area, Oxford Railway Station is located a seven minute bus journey from Botley Centre and is also walkable from the site. Oxford Railway Station provides direct train links to London, Hereford, Worcester, Reading, Bicester, Manchester, Newcastle and Birmingham, and also enables accessible rail connections to all major cities across England, Wales and Scotland. The site also benefits from good bus connections with bus stops located along West Way and Westminster Way. These offer bus access to Abingdon, Carterton, Oxford, Swindon, Wantage and Witney.

Pedestrian routes through the site generally lack natural surveillance and are not well used beyond working hours, leading to personal security concerns and attracting anti-social behaviour.

The population of the Botley Core area places considerable reliance on car use with 35 per cent of households owning one car/van and 55 per cent of households owning two or more cars, which is comparable to car ownership within the Vale (Census, 2011).

The site frontages are vehicle dominated and present a generally unfriendly pedestrian environment with the wide West Way carriageway, large car park, fenced footpaths, pedestrian guardrailing and elevated A34 road in close site proximity though access is circuitous and of variable quality. The West Way junctions are subject to congestion at peak times but generally operate satisfactorily.

Cyclists have the benefit of shared bus lane use eastbound on West Way, though a short length of cycle lane is their only provision westwards. This east-west axis offers access to most of Oxford city centre within 10 minutes cycle ride. The site is also therefore an attractive proposition for sustainable access on foot and cycle from the surrounding residential hinterland.

Roads and Key Junctions

West Way - Pedestrian access from north of West Way is inconvenient and discouraging to visitors – the existing ‘sheep pen’ crossing exacerbates the considerable crossing distance. A higher quality single-stage crossing would be beneficial – along with a further crossing point west of Church Way.

Westminster Way - Westminster Way’s road width is between 5.0 and 5.5m south of Arthray Road, narrow for a 2-way carriageway and largely unsuitable for HGV’s accordingly. This limits its use for access to/from the south in terms of; vehicle flow, vehicle type, real and perceived impact of adjacent properties and pedestrians. North of Arthray Road however, conditions improve significantly in terms of a substantially wider carriageway approaching the signalised West Way junction and a footway being provided on the eastern side as well as the western side.

Arthray Road - Although wider at 6.0m in comparison to Westminster Way, Arthray Road at 6.0m wide is best suited to residential rather than commercial traffic. The occurrence of on-street parking serves to further narrow the effective available width.

A34 Access - Access to this strategic route is circuitous limiting the site’s attractiveness to motorists as a destination for those travelling on the north-south axis.

The east-west access is served more conveniently from West Way, either directly from West Way, and indirectly from Chapel Way and Arthray Road from the West Way traffic signal controlled junction. The access arrangements limit the site’s attractiveness in terms of strategic access by road.

4.2.2 SITE STRENGTHS

Public Transport

- Readily accessible by bus with stops on West Way and Westminster Way
- West Way buses – approx. 4 per hour during the week towards city centre
- Real time bus service information available on West Way stops – plus shelter and seating
- Oxford Rail Station 1.9km away - 7 minutes by bus or 25 minutes walking distance
- Bus lane available between Elms Road and A420
- Inset bus laybys on West Way in both directions

Pedestrians

- Shopping area is pedestrianised
- Signalised crossings of West Way and Westminster Way/West Way junction

Cycling

- Cycle parking available and well used
- Cycle routes on West Way in both directions – shared use of bus lane eastbound (limited cycle lane w/b)

Roads and Key Junctions

- A34 offers connection to strategic road network
- West Way / B4044 offers direct connection to city centre
- West Way's carriageway and junctions offer physical capacity for improvements in pedestrian crossing facilities and vehicle movement

Parking

- Ample surface parking available - 380 spaces
- Parking is free for three hours and well utilised
- No clear evidence of persistent overspill parking



4.2.3 ISSUES

Public Transport

- No shelter for bus passengers on Westminster Way southbound
- No real time bus information on Westminster Way stops
- Insufficient room for waiting passengers on West Way eastbound – block footway

Pedestrians

- “Sheep pen” pedestrian crossing causes walking diversions – pedestrians often cross either side of it - hazardous
- No pedestrian crossing facility on Westminster Way/ West Way junction west arm causes pedestrian diversions (incl schoolchildren)
- Guardrailing increases severance and discourages pedestrian movement
- Pedestrian access via Arthray Road made through car park

Cycling

- Lack of bicycle parking means bikes often secured to railings
- Narrow and discontinuous cycle lane on West Way (westbound)

Roads and Key Junctions

- Wide West Way carriageway means considerable pedestrian crossing distances
- Circuitous vehicular access to / from A34
- Westminster Road, narrow and unsuitable for heavy 2-way flow - buses stop on the carriageway too as there are no inset bus laybys

Parking

- Parking demand is substantial pressurising access and site space usage
- Some parking on double yellow lines causing inconvenience to pedestrians and vehicle flows

Servicing

- Residential area to south means Arthray Road unsuited to servicing movements



4.2.4 SITE CONSTRAINTS

A34

- A34 dual carriageway limits east-west movement
- A34 access is circuitous and limits site's attractiveness for longer distance traffic

West Way

- Carries substantial traffic flows and prone to delays at peak times
- West Way width presents considerable crossing distances for pedestrians
- Limited left-turning capacity from West Way westbound to Westminster Way

Westminster Way

- Narrow south of Arthray Road – limits usability and convenience
- Short length of footway on eastern side – extends to bus stop only

Other

- Residential nature of area to the south of the site – need to carefully manage site access, parking and servicing movements accordingly



Westminster Way



'Sheep Pen' style pedestrian crossing



4.2.5 OPPORTUNITIES

Public Transport

- Inset bus lay-by on Westminster Way northbound
- Bus shelter and seating on Westminster Way southbound
- Real time bus service information on Westminster Way
- Address bus passenger waiting capacity on West Way eastbound
- Provide real time bus service information within site – timetabling information for bus, rail, walking and cycling too

Cycling

- Provide sufficient cycle parking to promote cycle use and growth
- Better integrate cycle movement with vehicular traffic on West Way
- Limit on-site vehicle roads to access-only, i.e. to discourage through-site use and provide for walking and cycling use/links

Pedestrians

- Improve West Way crossing by removing ‘sheep pen’ diversion and guardrailing
- Provide convenient access for pedestrians from southern residential area
- Provide pedestrian crossing of West Way (west arm) at its Westminster Way junction - particularly to benefit primary school movements
- Roads and Key Junctions
- Improve junctions for convenient pedestrian movement
- Possible reallocation of roadspace to help improve streetscape and pedestrian movement
- Provision of additional limited vehicle access on West Way to facilitate Elms Parade access and parking use

Servicing

- Use of Westminster Way north of Arthray Road junction for servicing access – i.e. between West Way signalised junction and Arthray Road junction
- Possible localised widening of Westminster Way (west side) to further facilitate site access movements

Travel Plan

Site-wide Travel Plan to rationalise movement to / from site, encourage travel by sustainable modes and minimise required on-site parking

Parking

- A Car Park Management Plan would be advisable to manage appropriate use of on-site parking and in particular deter possible Park & Ride use

4.3 MOVEMENT IMPACT AND PARKING ASSESSMENT

4.3.1 TRIP GENERATION - PRESENT SITE MOVEMENT ESTIMATIONS

This section summarises the estimation of movement impact generated by the development scenario explored, along with the parking capacity required on-site. As described earlier it draws upon our site observations, a desktop review, discussion with the wider project team and prior technical work (including traffic and parking surveys) undertaken by others – with that work reviewed by us for general applicability. Where that earlier work has been referenced an asterisk (*) appears accordingly (see below).

Naturally, any future development proposal would require a thorough re-assessment of all technical matters with appropriate primary data collection in support of a related planning application and preparation of a full Transport Assessment document.

Along with multi-modal movement, consideration is also given to the appropriate level of parking provision required to support each scenario. For movement and parking, consideration has been given to both scenario viability and the sustainable transport objectives.

Present Site Movements

The development site was surveyed for the previous Transport Assessment* to assess the current movements in and out of the site. That survey has been applied to provide a robust baseline in assessing the impact of the proposed development movements on the transport network.

On the current site there is a total of 3,908 m² of vacant office space, which has been occupied previously. Thus trips for this office space were calculated by interrogating the TRIC database and then added to the surveyed movements to give a total for the entire site when its fully occupied. The resulting estimated total number of two way trips on a weekday in the AM peak is around 870 and 1070 in the PM peak. Meanwhile on a Saturday the total is around 900. This equates to around 600 arrivals and 600 departures in the AM and PM peak respectively. Of the total trips to the site, approximately 60-70% are by vehicle, highlighting the current reliance on private cars to access the site.

Mode	Weekday AM Peak (07:45 – 08:45)			Weekday PM Peak (16:45 – 17:45)			Saturday Peak (12:00 – 13:00)		
	In	Out	2 Way	In	Out	2 Way	In	Out	2 Way
Vehicles	262	191	453	283	341	624	318	330	648
Pedestrians	190	58	248	153	123	276	134	84	218
Cycle	17	16	33	30	21	51	22	15	37
Total	469	265	734	466	485	951	474	429	903

Current vehicle movements accessing/exiting the development site - traffic survey numbers

Mode	Weekday AM Peak (07:45 – 08:45)			Weekday PM Peak (16:45 – 17:45)			Saturday Peak (12:00 – 13:00)		
	In	Out	2 Way	In	Out	2 Way	In	Out	2 Way
Vehicles	352	207	559	292	433	725	318	330	648
Pedestrians	213	61	274	155	137	292	134	84	218
Cycle	22	16	38	30	23	53	22	15	37
Total	587	284	871	477	593	1070	474	429	903

4.3 MOVEMENT IMPACT AND PARKING ASSESSMENT

4.3.2 TRIP GENERATION - FUTURE ESTIMATED MOVEMENTS

Future Estimated Movements

Estimated future trips for all three scenarios were estimated by interrogating the TRICS database. They have been calculated using the previous TA's* TRICS inputs. However, new TRICS outputs were obtained for two types of land uses which were not previously proposed:

1. Residential – privately owned flats
2. Foodstore – one or two small sized foodstores which is different to the previous large scale store that was proposed within the TA.

Scenario 2 has the lowest number of total trips for all three time periods when compared to the other two, with nearly 100 fewer vehicle trips in all three time periods.

In all three scenarios the Saturday peak (12:00-13:00) shows the highest total number of trips, due to the mix of land uses proposed with a high proportion of retail and leisure use in addition to some residential and office space.

In the morning and evening peaks Scenario 4 has the highest predicted flows while Scenario 3 has similar flows for the morning period and more noticeably fewer for the evening.

Mode	Weekday AM Peak (07:45 – 08:45)			Weekday PM Peak (16:45 – 17:45)			Saturday Peak (12:00 – 13:00)		
	In	Out	2 Way	In	Out	2 Way	In	Out	2 Way
Vehicle	131	109	240	220	231	451	272	258	530
Pedestrian	106	156	262	173	135	308	187	190	378
Cycle	5	2	7	4	3	7	2	2	3
Public Transport	13	22	36	38	34	72	45	32	76
OGV	2	2	3	1	1	2	1	1	2
Total	257	291	548	436	404	840	507	482	989

Scenario 2 movements accessing/exiting the development site

Mode	Weekday AM Peak (07:45 – 08:45)			Weekday PM Peak (16:45 – 17:45)			Saturday Peak (12:00 – 13:00)		
	In	Out	2 Way	In	Out	2 Way	In	Out	2 Way
Vehicle	165	163	328	252	247	499	262	277	539
Pedestrian	80	102	182	115	96	211	125	147	272
Cycle	4	4	8	5	4	8	2	2	3
Public Transport	12	21	33	16	14	30	10	12	21
OGV	2	2	4	1	1	2	3	2	5
Total	263	291	554	390	361	751	401	440	840

Scenario 3 movements accessing/exiting the development site

Mode	Weekday AM Peak (07:45 – 08:45)			Weekday PM Peak (16:45 – 17:45)			Saturday Peak (12:00 – 13:00)		
	In	Out	2 Way	In	Out	2 Way	In	Out	2 Way
Vehicle	166	149	315	287	286	573	381	367	748
Pedestrian	148	198	345	207	169	377	245	253	498
Cycle	5	3	8	5	4	9	2	2	4
Public Transport	11	23	34	40	34	74	45	32	78
OGV	3	2	5	1	1	2	1	1	2
Total	332	375	707	540	495	1035	674	655	1329

Scenario 4 movements accessing/exiting the development site

4.3 MOVEMENT IMPACT AND PARKING ASSESSMENT

Net Future Estimated Movements - with Office Use Added

The net future estimated movements are estimated using the current movements including the estimated movements for the vacant office space. They show a predicted drop in the number of vehicle trips (in green type, increases in red) to and from all three scenarios for the site.

The site could see up to 300 fewer vehicle two-way trips in the morning and evening peaks in Scenario 2 and around 200 in Scenarios 3 and 4.

However, there is one exception to this with a slight increase in vehicle trips in Scenario 4 for the Saturday peak. This is due to the increase in leisure and retail facilities on the site, which would anticipate a higher usage at the weekend.

There is an increase in pedestrian flows particularly in Scenarios 2 and 4 due to the large amount of student accommodation.

The predicted drop in vehicles accessing/exiting the site in the weekday peaks is due to the nature of the site changing with less office use and an increase in retail and leisure. Thus the site has the potential to have less impact on the road network in the peak hours as cinema trips are more likely to happen in the afternoon and evening periods.

Mode	Weekday AM Peak (07:45 – 08:45)			Weekday PM Peak (16:45 – 17:45)			Saturday Peak (12:00 – 13:00)		
	In	Out	2 Way	In	Out	2 Way	In	Out	2 Way
Vehicle	-221	-98	-319	-72	-202	-274	-46	-72	-118
Pedestrian	-107	95	-12	18	-2	16	53	106	160
Cycle	-17	-14	-31	-26	-20	-46	-20	-13	-34

Difference between Scenario 2 estimated movements accessing/exiting the development site and current development site trips (including vacant office estimated trips)

Mode	Weekday AM Peak (07:45 – 08:45)			Weekday PM Peak (16:45 – 17:45)			Saturday Peak (12:00 – 13:00)		
	In	Out	2 Way	In	Out	2 Way	In	Out	2 Way
Vehicle	-187	-44	-231	-40	-186	-226	-56	-53	-109
Pedestrian	-133	41	-92	-40	-41	-81	-9	63	54
Cycle	-18	-12	-30	-25	-19	-45	-20	-13	-34

Difference between Scenario 3 estimated movements accessing/exiting the development site and current development site trips (including vacant office estimated trips)

Mode	Weekday AM Peak (07:45 – 08:45)			Weekday PM Peak (16:45 – 17:45)			Saturday Peak (12:00 – 13:00)		
	In	Out	2 Way	In	Out	2 Way	In	Out	2 Way
Vehicle	-186	-58	-244	-5	-147	-152	63	37	100
Pedestrian	-65	137	71	52	32	85	111	169	280
Cycle	-17	-13	-30	-25	-19	-44	-20	-13	-33

Difference between Scenario 2 estimated movements accessing/exiting the development site and current development site trips (including vacant office estimated trips)

4.3 MOVEMENT IMPACT AND PARKING ASSESSMENT

Net Future Estimated Movements - without Office Use Added

These net future estimated movements are calculated using the current movements in and out of the site as per the traffic survey carried out for the previous Transport Assessment.

This shows the estimated number of trips to and from the development site compared to the current conditions allowing the proposed sites to be compared against what is currently happening at the site. This only affects the weekday numbers as it was assumed there would be no office trips at the weekend.

It shows that with the change in land usage across the site the number of trips in the AM and PM peak is still predicted to fall when compared to the amount of trips today.

Scenario 2 shows the highest reduction in vehicles with a fall of over 200 2-way trips in both peak periods.

Scenario 4 shows a negligible increase in trips coming to the site in the PM peak with 4 more than the observed number of trips.

Mode	Weekday AM Peak (07:45 – 08:45)			Weekday PM Peak (16:45 – 17:45)			Saturday Peak (12:00 – 13:00)		
	In	Out	2 Way	In	Out	2 Way	In	Out	2 Way
Vehicle	-131	-82	-213	-63	-110	-173	-46	-72	-118
Pedestrian	-84	98	14	20	12	32	53	106	160
Cycle	-12	-14	-26	-26	-18	-44	-20	-13	-34

Difference between Scenario 2 estimated movements accessing/exiting the development site and current development site trips

Mode	Weekday AM Peak (07:45 – 08:45)			Weekday PM Peak (16:45 – 17:45)			Saturday Peak (12:00 – 13:00)		
	In	Out	2 Way	In	Out	2 Way	In	Out	2 Way
Vehicle	-97	-28	-125	-31	-94	-125	-56	-53	-109
Pedestrian	-110	44	-66	-38	-27	-65	-9	63	54
Cycle	-13	-12	-25	-25	-17	-43	-20	-13	-34

Difference between Scenario 3 estimated movements accessing/exiting the development site and current development site trips

Mode	Weekday AM Peak (07:45 – 08:45)			Weekday PM Peak (16:45 – 17:45)			Saturday Peak (12:00 – 13:00)		
	In	Out	2 Way	In	Out	2 Way	In	Out	2 Way
Vehicle	-96	-42	-138	4	-55	-51	63	37	100
Pedestrian	-42	140	97	54	46	101	111	169	280
Cycle	-12	-13	-25	-25	-17	-42	-20	-13	-33

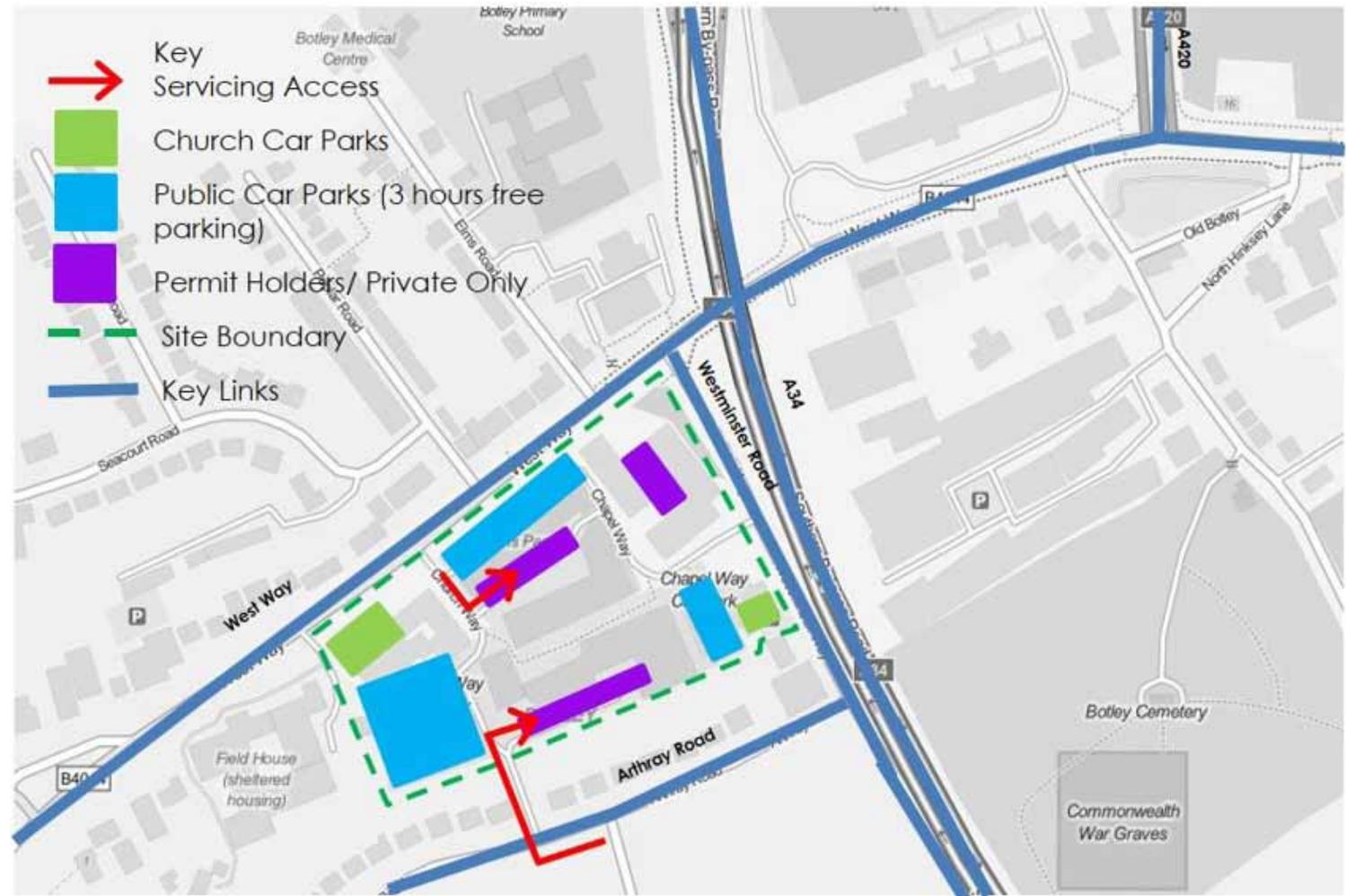
Difference between Scenario 4 estimated movements accessing/exiting the development site and current development site trips

4.3 MOVEMENT IMPACT AND PARKING ASSESSMENT

4.3.3 PARKING : EXISTING SITE PROVISION

Parking standards for new developments are set out in the Vale of Whitehorse Local Plan under policy DC5. This identifies the maximum number of car parking spaces required for each land use. The development site in Botley comes under Type 2 of the accessibility characteristics. It outlines that for residential units 1 space should be assigned to each flat if they are 1 bedroomed units, while a hotel should have 1 space assigned to each bedroom. The other land uses are based on spaces per floor area

It is important to note that this is the maximum number of car park spaces required as the proposals should aim to achieve a balance between promoting sustainable travel to the site by having a limited number of spaces, but not so few that parking overspills onto the surrounding residential streets.



4.3 MOVEMENT IMPACT AND PARKING ASSESSMENT

The earlier Transport Assessment* identifies the following schedule of on-site parking spaces across the SPD boundary:

- Public Car park adjacent to Co-op – 42 spaces
- Car Park adjacent to West Way House – 24 private spaces and 75 public spaces
- Rear service area (from Arthray Road) – 20 spaces including informal parking
- Elms Parade – 36 public spaces
- Rear service area to West Way and Elms Parade – 27 spaces including informal parking
- Elms Court – 93 private spaces
- Community Hall – 6 spaces
- Baptist Church – 14 spaces
- Field House – 19 spaces
- Vale House – c. 21 spaces
- Vicarage – 3 spaces

Although determining established public/private usage, and precise parking space capacity identification can be problematical, we have assumed there to be a minimum of 153 spaces generally available to the public, although we may also assume that some of the amenity uses parking may also be use for general purpose parking.

Local Plan policy DC5

Parking Standards - Maximum Levels

SUPPLEMENTARY PLANNING GUIDANCE

Accessibility Characteristic	Residential	Food Retail**	Non Food Retail**	B1 and A2	B2 - General Industry	B8 Warehousing	D2 Assembly and Leisure**	Cinema & Conference**	Hotel * and Guest House	Hospital	Higher Education	A3 - Restaurant/pubs	Stadia *
Type 1	1 space per dwelling up to 2 bedrooms; 2 or more bedrooms - on merit	Operational Parking Only							on merit	on merit	operational need	operational need	N/A
Type 2	1 bedroom - 1 space; 2/3 bedrooms - 2 spaces; 4 bedrooms or more - on merit	1 space per 14sqm	1 space per 20sqm	1 space per 30sqm	1 space per 50sqm	1 space per 200sqm	1 space per 22sqm	1 space per 5 seats	1 space per 1 bedroom	on merit	1 space per 2 staff 1 space per 15 students	1 space per 5sqm of public space	on merits (guide 1 space per 15 seats)*
Application Threshold (gross floor area)	N/A	1000	1000	500	500	1000	1000	1000	30	N/A	2500	N/A	1500 seats

* Coach parking treated separately

** A sequential test as set out in PPS6 will apply to these land uses

Type 1 - This standard is applicable to the Town Centre Policy Areas of Abingdon and Wantage. These are defined on the Local Plan Proposals Map.

Type 2 - Other areas

4.3 MOVEMENT IMPACT AND PARKING ASSESSMENT

4.3.4 ESTIMATED PARKING PROVISION

	No. of Spaces using Parking Accumulation Method - Weekday	No. of Spaces using Parking Accumulation Method - Saturday	No. of Spaces using the Maximum Parking Standards	Residential Parking Spaces
Scenario 2	242	165	661	37
Scenario 3	354	309	600	213
Scenario 4	236	174	726	23

Estimation of the number of parking spaces spaces required using the parking accumulation method and parking standards outlined in policy DC5 – Linked trips included

Parking estimations have been carried out using two methods:

1. The maximum number of car parking spaces have been calculated using the parking standards outline in policy DC5.
2. Parking accumulation tahroughout the day has been calculated using daily trips rates output from the TRICS database for each land use.

Each method has been calculated using some linked trip assumptions which are:

- 1/3* of people using the restaurants/cafes and cinema are linked leisure trips*
- 41.4%* of food store trips are linked to other retail on the site.

Additionally, it was assumed that 50% of the floor area is open to the general public for the restaurants and cafes. It was also assumed for both methods that each residential unit will be assigned one parking space on the site.

It should be noted that the parking standards are a maximum number of parking spaces for each type of land use and less parking spaces can be provided on the site as long as a justification is given.

	No. of Spaces using Parking Accumulation Method - Weekday	No. of Spaces using Parking Accumulation Method - Saturday	No. of Spaces using the Parking Standards – No Linked Trips	Residential Parking Spaces
Scenario 2	330	210	841	37
Scenario 3	412	352	709	213
Scenario 4	323	226	921	23

Estimation of number of parking spaces required using the parking accumulation method and parking standards outlined in policy DC5 – Linked trips not included

In terms of the parking accumulation calculation it shows that Scenario 2 requires the least amount of parking spaces on site with 242 required during a typical weekday while Scenario 3 requires the most at 354 spaces.

The parking standards identify a significantly larger maximum number of spaces on the site with Scenario 4 at 726 spaces while Scenario 2 is at 661. However, the peak times for the different land uses in terms of parking are different and will allow some sharing across the site. For example the cinema’s peak typical visitation will be in the evenings while the food stores visitor profile may be more spread more evenly throughout the day. Thus more weight should be given to the parking accumulation method as it takes the hourly trip rates into account. This would mean that the site would need to accommodate around 250 spaces for both Scenarios 2 and 4 and around 350 spaces for Scenario 3.

The number of spaces required on a Saturday is lower for all three scenarios than on a Weekday, meaning the number of visitors will be straightforwardly accommodated at the weekend by using the weekday numbers.

Currently all calculations assume 1 space for each residential unit on the site which means Scenario 3 has a high number of residential spaces, 213 across the site. This could be reduced if measures were introduced to maximise the use of sustainable travel methods for the residents on the site thus minimising the number of cars owned.

As stated linked trips have been taken into account as visitors will use the site for more than one of its land uses. This means a reduction of approximately 100 spaces when compared to the number of spaces required if no linked trips were to happen.

4.3 MOVEMENT IMPACT AND PARKING ASSESSMENT

4.3.4 PARKING – ESTIMATED PARKING PROVISION PROFILES

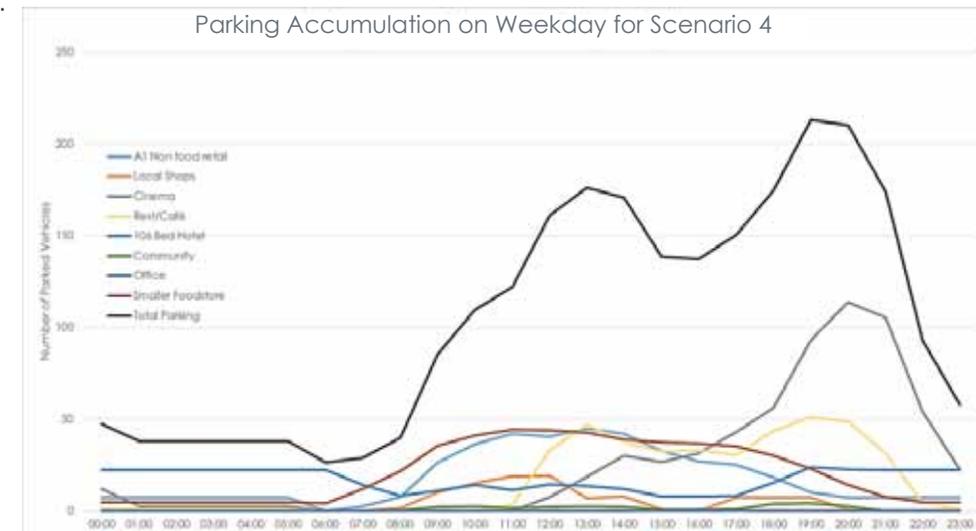
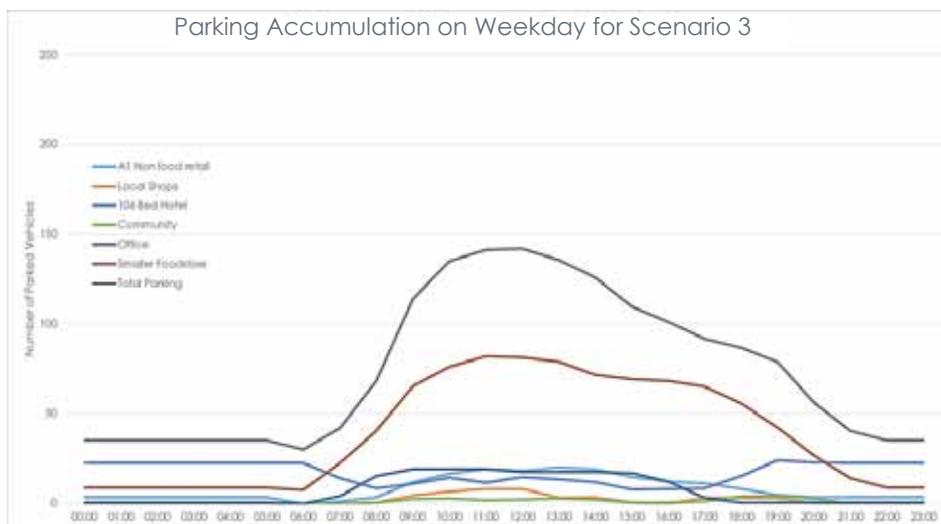
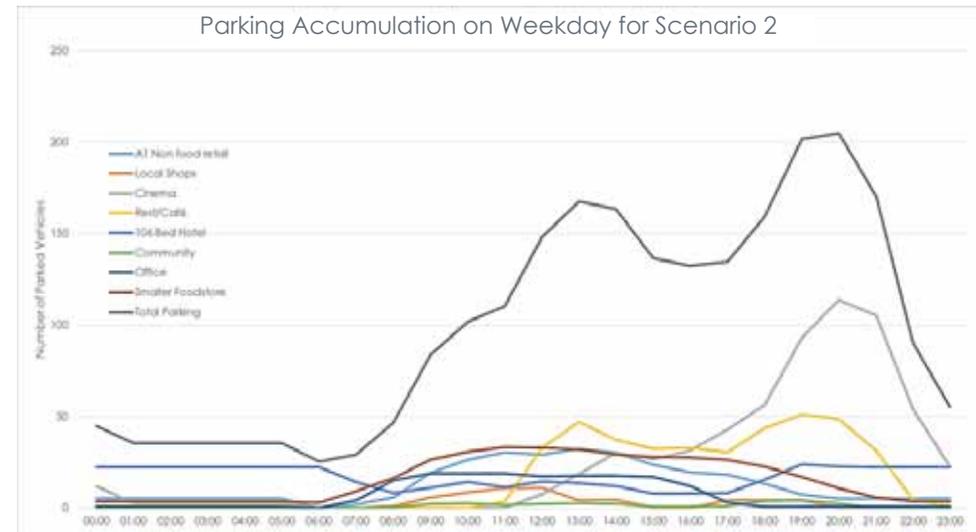
The parking accumulation profiles show the peaks predicted on the site in terms of the number of cars parked over an hour for a typical weekday. Note - these graphs do not include residential parking as it is assumed that these are provided for residents separately.

The peak is highly dependant on the mixture of uses located on the site, with Scenarios 2 and 4 peaking at around 8pm while Scenario 3 peaks in the middle of the day.

The land use that generates the most parked cars in Scenario 3 is the food stores, while in Scenarios 2 and 4 it is more evenly spread through all the land uses during the day with the cinema creating the most amount of parked vehicles in the evening.

Scenario 3 could have some scope to share parking between residential and retail/employment as the amount of parked vehicles drops substantially in the evening peak when you would expect residents to be returning home.

The highest number of parked cars for Scenario 3 comes from the food store, while in Scenarios 2 and 4 the food store is similar to the other land uses due to it being a smaller size in these scenarios. The cinema accounts for the highest proportion of the parked cars in the evening for both Scenarios 2 and 4.



4.3 MOVEMENT IMPACT AND PARKING ASSESSMENT

PARKING – ESTIMATED PARKING PROVISION PROFILES

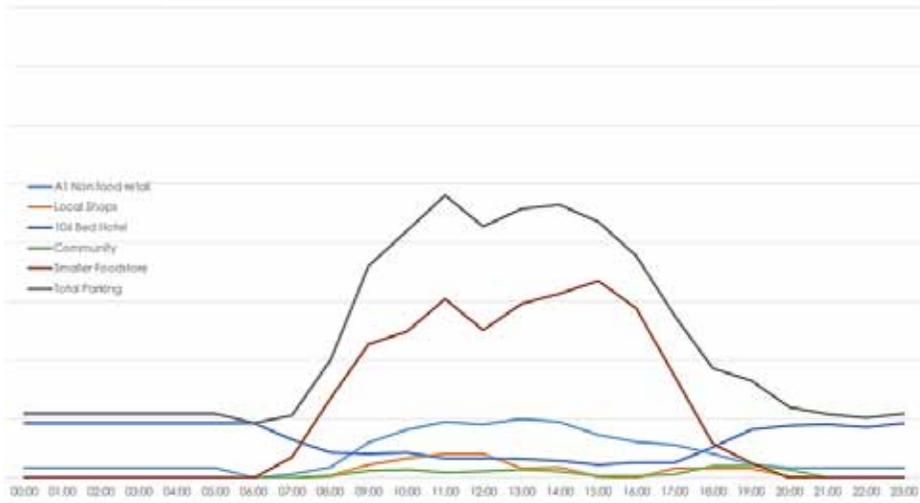
The parking accumulation profiles show the peaks that are predicted on the development site in terms of the number of cars parked over an hour for a typical Saturday. Note - these graphs do not include residential parking as it is assumed that these are provided for residents separately.

The Saturday profiles show similar pattern to the weekday profiles with Scenario 3’s peak being skewed towards the middle of the day by visitors to the food stores.

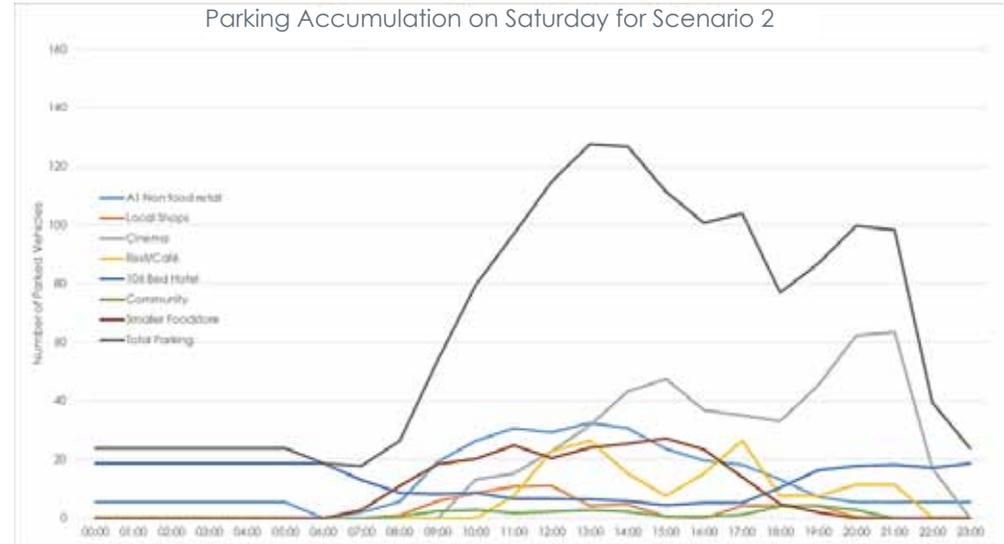
However, Scenarios 2 and 4 show a fairly constant peak across the afternoon, which is due to the mixture of land uses lending itself to trips happening in the afternoon but also people visiting the cinema, hotel and restaurants in the evening.

The highest number of parked vehicles from a particular land use comes from the cinema in Scenarios 2 and 4 while the food store accounts for the most vehicles in Scenario 3.

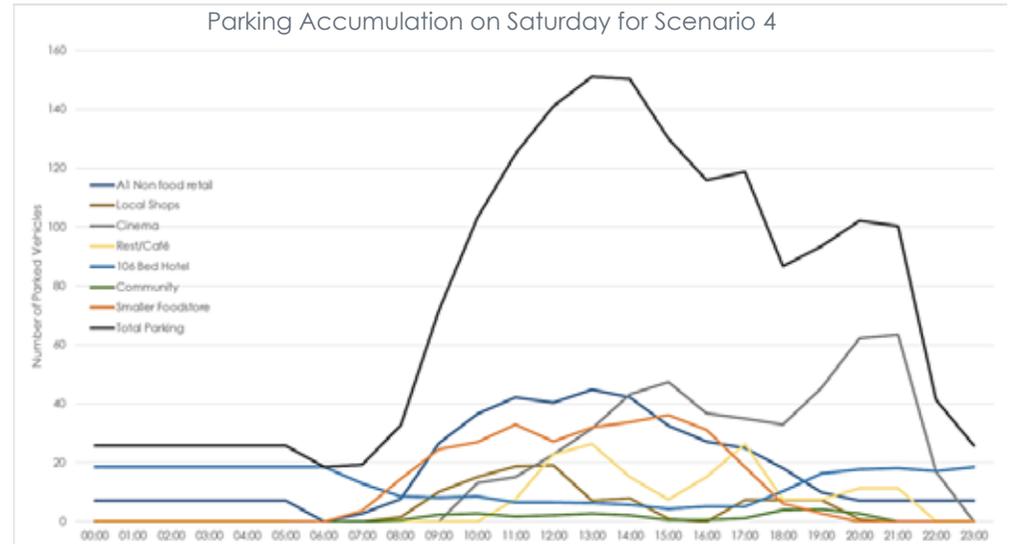
Parking Accumulation on Saturday for Scenario 3



Parking Accumulation on Saturday for Scenario 2



Parking Accumulation on Saturday for Scenario 4



4.3 MOVEMENT IMPACT AND PARKING ASSESSMENT

4.3.5 VISITATION AND PARKING PROVISION SUMMARY

Even though the scenarios increase the number of uses across the site; cinema / hotel / residential / student accommodation, the number of trips during the peak hour is estimated to reduce slightly in comparison to present movements for the reasons identified below. These also affect the resultant parking accumulation and parking requirement for the scenarios – again meaning it is in broad terms, similar to present levels.

Multiple Visitation

- All scenarios allow for trips of multiple purposes, however scenarios 2 and 4 have a mixture of leisure land uses which allows for a higher number of linked trips for leisure purposes
- In Scenario 3 the food store is double the size that is presently on the site, however this is made up of two smaller food stores and there will be some usage of both in a trip

Trip Arrival / Departure / Parking Profiles

- Due to the mixture of land uses across the site the trips occur across the day, with the cinema and cafes/restaurants building steadily through the afternoon/evening rather than in the “normal” peak hours
- The parking accumulation showed that the peak of Scenarios 2 & 4 in terms of parking occurred at 8pm while Scenario 3 occurred in the middle of the day, highlighting the spread of trips across the day rather than in the peak hours
- The favourable blend of land uses presented by Scenarios 2 & 4 mean that demand could be met by 250 spaces on-site, Scenario 3 would require 350 spaces owing primarily to the larger foodstore use

Land Use Blend

- The current site has a high proportion of office use which as a land use is liable to produce more peak hour trips than the mixture of land uses proposed for the site
- The amount of leisure and retail facilities proposed for the site means that a high number of trips will occur on the weekend, which is why Saturday for Scenario 4 shows a small increase in the number of trips when compared to the current situation
- Scenario 3 requires the least amount of parking space throughout the day, when residential spaces are not occupied. However it also has the highest number of residential units proposed. Meanwhile Scenario 4 has a high number of residential units and the highest parking accumulation from the other land uses.

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