

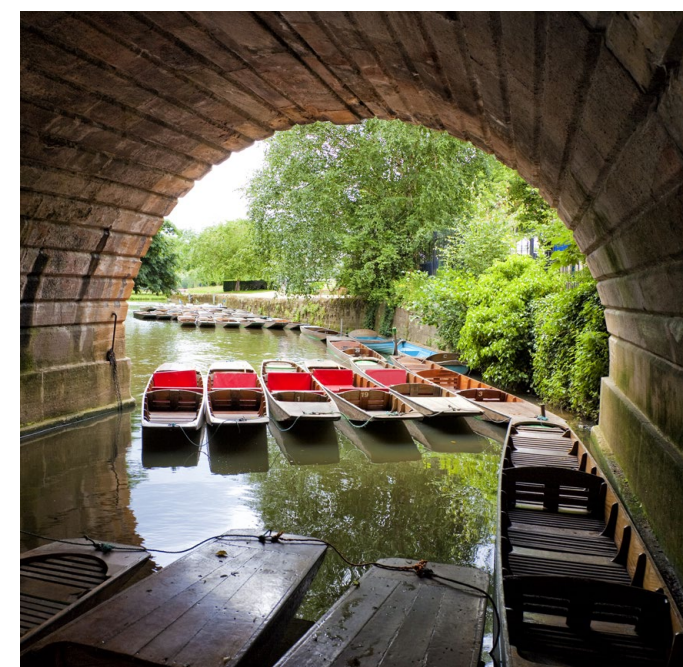


WESTGATE

INSPIRING CHANGE

TOTAL IMPACT REPORT

O X F O R D



MAKING AN IMPACT

We want to help make Oxford one of the greatest cities in the world.

ABOUT THIS REPORT

Oxford is a vibrant city with an independent spirit. We have built Westgate Oxford, a premium retail experience in tune with this modern city. But to really put Westgate on the map, we want to enhance the positive contribution that the centre will bring to the city's economy, environment and its people. We asked local people and businesses about all the ways we have had an impact from construction to opening and beyond. Strengthening our relationships in the community is important to us. We thank the people of Oxford for sharing their views and are now proud to share our findings in this report. This is the first report of two, and our final report will show the total impact of the development, from construction through to opening and operation. To find out more about our methodology, go to page nine of this report.

Oxford is home to big thinkers, so we're thinking big too. By exploring how we shape the city in a holistic way, we can better enhance the prosperity of Oxford, promote a healthy environment and do what is right for the community.

ABOUT THE WESTGATE OXFORD ALLIANCE

We are The Westgate Oxford Alliance, a partnership formed by Landsec and The Crown Estate. Both organisations have a clear track record of delivering exemplary city and town centre regeneration schemes across the country, including centres with heritage sensitivity such as Regent Street, London; One New Change, London; Christs Lane, Cambridge; Princesshay, Exeter; Whitefriars, Canterbury; and Trinity Leeds, Leeds.

Westgate Oxford Alliance is investing heavily in Oxford and has and will continue to work closely with Oxford City Council and Oxfordshire County Council to unlock the regeneration potential of this key city centre site. As leasehold owners of the Westgate Centre, the Westgate Oxford Alliance has signed a Development Agreement with Oxford City Council, who will remain as owners of the freehold to the new development.

SETTING THE SCENE

Westgate Oxford is the latest chapter in the story of a city with a remarkable history.

ABOUT WESTGATE

In a bustling part of the city, the original Westgate Centre was built in the early 1970s on the remains of the ancient Oxford City Walls and a listed building. With over 30,000 m² of shops, a library, 14 flats and some offices, various ideas were put forward for its redevelopment in the 1980s.

We bought the site in 2010 and began discussing its future with the local community straight away. With their feedback, we created a concept fit for Oxford's historic cityscape that would benefit the city.

After four years of discussions, our plans for a £440 million redevelopment were approved and construction began on site in 2015. Westgate Oxford opened its doors on 24th October 2017 with a flagship John Lewis store and 125 shops, restaurants, cafés and leisure facilities. It features 59 high quality apartments and is surrounded by a mix of covered streets, arcades, lanes and squares. It is a world-class destination to shop, work and live.

ABOUT OXFORD

Oxford's depth of character makes it an intriguing city to visit. It is one of the fastest growing and most cosmopolitan cities in the UK. Over 30,000 students and nine million visitors per year mean it is full of energy, and its intellectual edge brings success in industries like publishing, healthcare, bio-tech and car manufacturing.

The people of Oxford are working to tackle environmental and social issues. A strong cycling culture reduces pollution and street congestion, government & community groups are addressing flood risk and government & businesses are working to solve housing, labour and space shortages. It is in this eclectic culture, our story begins.

1970s

WESTGATE BUILT

1980s

VARIOUS PLANNING
APPLICATIONS PUT
FORWARD

2010

BOUGHT BY
WESTGATE OXFORD
ALLIANCE

2014

PLANNING
PERMISSION
GRANTED

2015

CONSTRUCTION
STARTED ON SITE

2017

NEW WESTGATE
OXFORD OPEN

REFLECTING ON THE PAST

We saw that Oxford had something exciting. Potential.

Potential to make a big change and bring vibrancy to the city's colourful mix of academia, culture and industry.

But all good things must come to an end. Our customer's needs evolve quickly and so should their space. The concrete design, lack of green space, over ground car park, pollution and high noise levels left the old Westgate centre unloved. It wasn't doing much for the city either. Since 2009, Oxford's retail ranking fell 9 places to the 42nd spot. However, it wasn't all bad news. People felt the old centre was accessible, with good transport links, and they felt safe when shopping there.

So out with the old and in with the new. The time was right for change.



"Whilst it performed a function, it was acting as a brake on the city centre economy." – Alice, Local Resident

"Nobody missed it when it was demolished – architecturally it was an ugly and crude scheme of its time. Visually it was poor, the internal environment was dated and the fabric was getting extremely tired." – Rachel, Local Resident

"It was definitely a drag on the city. It certainly wasn't realising its potential; Oxford was slipping down the retail rankings." – Amir, Local Resident



CREATION THROUGH CONSTRUCTION

As our vision came to life, we worked hard to ensure construction was as painless as possible.

As a result, local people felt little impact of the redevelopment. A few mentioned inconveniences, such as the temporary loss of parking spaces and bike racks. However most people agreed that issues such as noise, vibration and litter were not a problem. Much of this was down to the considerate approach of our contractor, Laing O'Rourke.

Locals did feel that air quality was bad in central Oxford during construction. Although there were increases in nitrogen dioxide at some monitoring stations, measures such as using material manufactured off site to reduce deliveries helped to mitigate this impact and keep air quality around the site within expected levels.

Some local businesses told us that construction was disruptive to their day-to-day operations. They estimated that their revenue and customer numbers dropped but independent data shows that the number of shoppers visiting Oxford has been gradually declining since 2014. This said, almost half of businesses said there was either no impact or a positive increase on their takings during construction.



50%

OF CONSTRUCTION
MATERIALS SOURCED
WITHIN A 100 MILE RADIUS



102

JOBS CREATED THROUGH
OFF-SITE MANUFACTURING



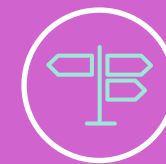
42%

OF TOTAL CONSTRUCTION
VALUE SPENT WITH
LOCAL SUPPLIERS



£738 MILLION

OF GROSS ECONOMIC VALUE
CREATED IN THE ECONOMY



£4.3 MILLION

CONTRIBUTION MADE TO
LOCAL INFRASTRUCTURE
IMPROVEMENTS



1,000

PROSPECTIVE CANDIDATES
ATTENDED OUR COMMUNITY
EMPLOYMENT FAIR



£100K

OF GRANT GIVING, PRO-BONO
WORK, VOLUNTEERING AND
IN-KIND SUPPORT

GENERATING WEALTH

A significant impact of the construction was our £446 million investment into the economy, the total cost of the development. This also had a further indirect impact in our supply chain of £283 million and an additional £195 million through construction and supply chain employees spending their wages.

We focused on Oxfordshire's economic prosperity. During construction, we awarded local contracts, invested in local infrastructure, and invested in local community projects like Aspire Oxford, a social enterprise offering professional facilities management services, and our Homeless To Work Programme. We worked not only to keep jobs but to create jobs, many of which targeted unemployed people from deprived areas of Oxford.

THE FUTURE LOOKS GOOD



We're investing in Oxford for the long run. Now that Westgate Oxford is open, we are determined to make it a success.

The good news is that local people and businesses predict that the new centre will be a positive improvement for the city. They are enthusiastic about its superior design, new green spaces and abundant landscaping.

The benefits Westgate Oxford will bring are impressive. It will raise long-term local employment, increase footfall and increase sales for local businesses. Business rates generated by Westgate Oxford will increase to £5 million annually, the sale of the new flats will result in £1 million in stamp duty and annual council tax returns should be around £100,000.

GOING GREEN

A healthy environment benefits everyone. Westgate Oxford will be more energy efficient than the old centre. We've also reduced supply chain emissions through innovative use of low-carbon construction materials. Through clever waste management, we will recycle more, meaning less refuse vehicles will roll through Oxford.

With more people travelling and more deliveries, comes more congestion. We are counteracting this by supporting Oxford's cycling culture. We'll also make extra efforts to keep crime and noise at or below historic levels.



126

FULL TIME EQUIVALENT
SUPPLY CHAIN
JOBS CREATED



3,500

FULL TIME EQUIVALENT
RETAIL JOBS CREATED



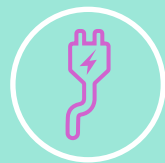
23%

INCREASE IN
FOOTFALL PREDICTED
BY LOCAL BUSINESSES



1,000

CYCLE PARKING
SPACES CREATED



50

ELECTRIC VEHICLE
CHARGING POINTS
CREATED



8%

INCREASE IN REVENUE
PREDICTED BY LOCAL
BUSINESSES



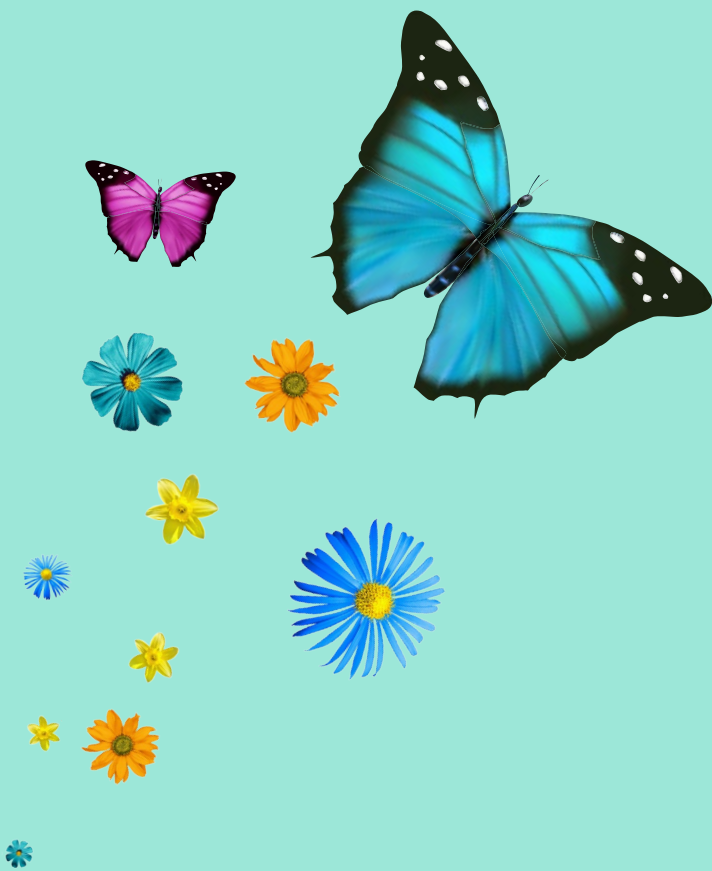
40%

MORE ENERGY
EFFICIENT PER
SQUARE METRE



67

PLANT SPECIES IN THE
ROOFTOP GARDENS



"It will bring a wider range of restaurants and leisure facilities, which are likely to be of a higher order and quality because of the critical mass. The provision of modern retail units is also great, as a lot of the stock is old buildings."
– Iain, Local Business Owner

TIME TO TAKE ACTION

Now that Westgate Oxford is open, we will keep listening to what people tell us about the impact we are having – on the environment, local businesses and the community.

GREEN TRAVEL TO WESTGATE

Before the launch we created a plan for travel to the centre, for staff, visitors and deliveries. The plan was created in partnership with the County and City Councils and bus companies, and will help to reduce emissions and pollution.

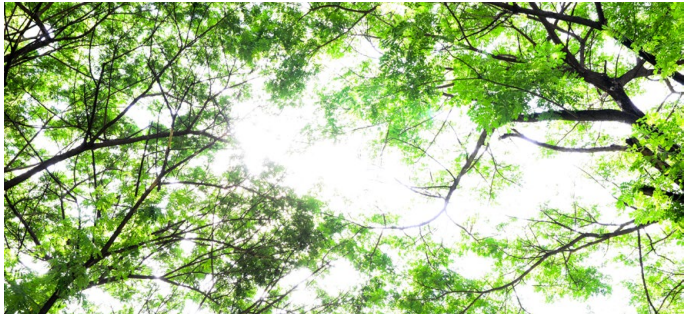
Our new Park and Ride solution means customers can easily travel into Oxford for a full day out, at Westgate and in the rest of the city. The Park and Ride has a single ticket (2 adults and 3 children travel free), with a contactless payment machine for car parking and bus tickets. This will make Park and Ride trips cheaper for families visiting Westgate.

New bus routes have been created, along with eleven new bus stops serving Westgate and the City. We're also offering Westgate staff discounts on bus travel. We're also providing showers to make it easy for staff who choose to cycle in, installing better road signage, better wayfinding to guide people to the right stops and new live transport information boards across Westgate and at each stop.

WE ARE ALL EARS

Now that Westgate Oxford is open, we will keep listening to what people tell us about the impact we are having – on the environment, local businesses and the community. We value inclusivity and want everyone to have their say. That's why we will continue our conversation with the community that uses, surrounds and visits Westgate Oxford. We will also continue to manage these impacts and share our findings and actions publicly. Based on what we have found out so far, we'll ensure that crime and noise complaint rates are monitored, and we'll be collaborating with local businesses to explore ways that they can share the economic benefits from the new centre.

Our final Total Impact Report will be available in 2018. We'll be undertaking more on-street surveys to find out what you think about Westgate Oxford. And we'll be gathering data to show the total impact now everything is up and running.



IMPROVED PERCEPTIONS OF WESTGATE BEFORE & AFTER REDEVELOPMENT

Our on-street and local business surveys show people's perceptions of the new Westgate centre (solid line) are higher than their perceptions of the old Westgate centre (dashed line) across seven impact areas.

SCORE OUT OF 10
(0 = VERY POOR, 10 = EXCELLENT)

ON STREET SURVEY: OLD CENTRE ——— NEW CENTRE
LOCAL BUSINESS SURVEY: OLD CENTRE ——— NEW CENTRE



OUR METHODOLOGY



This report is based on research conducted in 2016 and 2017 on behalf of the Westgate Oxford Alliance by JLL and Envoy Partnership.

Primary Data

Primary data was collected from the Westgate Oxford Alliance, its suppliers and the people of Oxford. We conducted on-street surveys within a 200 metre radius of the centre to engage with local residents, workers, students and tourists. The results of these surveys are shown on the left. We asked people for their views on the old Westgate centre, the impacts from construction of the new centre and their perception of the plans for the new Westgate centre. People were asked to rate their perceptions of Westgate on a scale of 0 to 10 (0=Very Poor, 5=Neither good or bad and 10=Excellent). Finally, we asked people to predict how frequently they might shop at the new centre, for how long and how much they might spend.

Surveys of local businesses were also conducted to identify local spending, business revenue and footfall trends (within a larger radius of up to 300 metres from the centre).

87 people responded to on-street surveys and 37 businesses took part in the business surveys.

Secondary Data

Secondary data was collected on over 170 different impacts of the Westgate centre from sources including the Office of National Statistics, Visit Britain, the NHS, the Police and many more. The most recently available data has been used and data has been used for the smallest geographical area closest to the Westgate centre.

Throughout this report we refer to Full Time Equivalent jobs, which is a unit of measurement equivalent to one person employed on a full time basis. We also refer to Gross Economic Value. This is the amount of economic growth achieved through: the value of construction activity, stimulation in the construction supply chain and benefits from the construction jobs created.

Join the conversation

#WestgateOxford



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