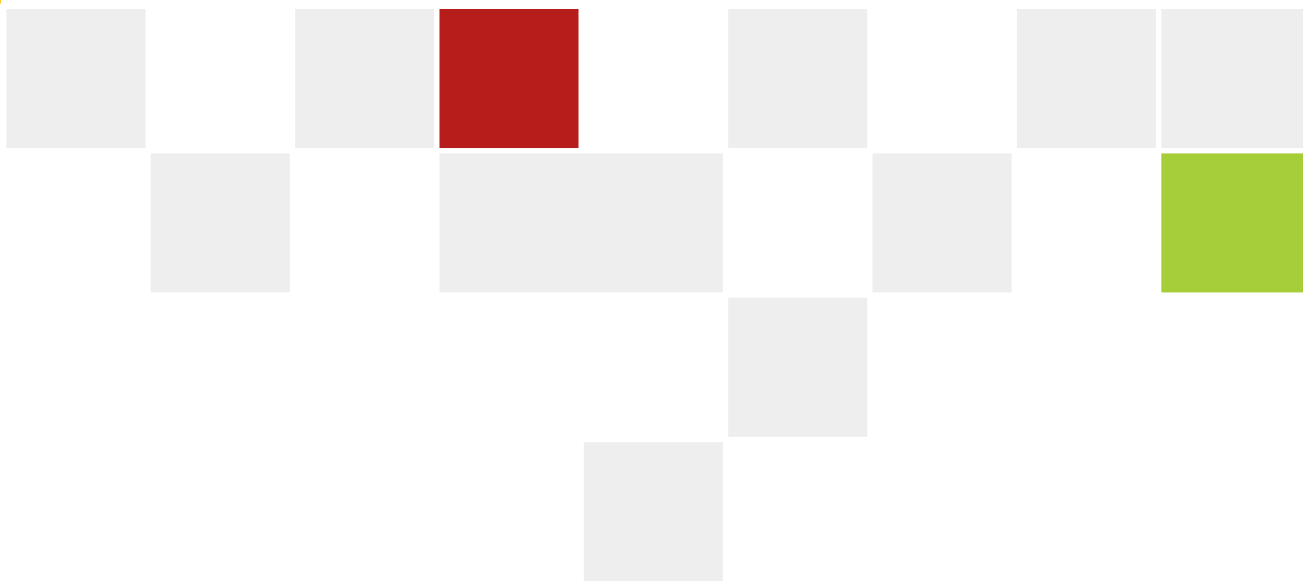


Elmbridge Borough Council

Local Market Appraisal



Boyer

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List of abbreviations

AMPS - Asset Management and Property Services

CPMS – Commercial Property Market Study

CVA - Company Voluntary Agreement

EBC – Elmbridge Borough Council

EM3 – Enterprise M3

EVDAP - Economic Development Vision and Action Plan

FEA - Functional Economic Area

GDHI - Gross Disposable Household Income

GVA – Gross Value Added

HCA – Homes and Communities Agency

HGV – heavy good vehicle

HSPG - Heathrow Strategic Planning Group

LEP – Local Enterprise Partnership

LMA – Local Market Appraisal

NPPF – National Planning Policy Framework

NVQ – National Vocational Qualification

ONS - Office for National Statistics

SEL – Strategic Employment Land

SEP – Strategic Economic Plan

SME – Small and medium enterprise

Sqft – square feet

Sqm – square meters

SWOT – strengths, weaknesses, opportunities and threats

TMT - Technology Media and Telecoms

TTWA – Travel to work area

1. Introduction

- 1.1 Boyer have been instructed by Elmbridge Borough Council (EBC) to undertake a Local Market Appraisal (LMA) in accordance with a detailed brief, a copy of which can be found in Appendix One. The key aim of this LMA is to enable the council to ensure that employment generating uses and development in the borough is making the most efficient use of land, providing enough employment space to meet the requirements of anticipated future business needs and, where appropriate and necessary, safeguarding existing key employment sites.
- 1.2 As part of this work, we have considered and reviewed a number of existing documents prepared for, by and on behalf of the council that provide the technical evidence base for the emerging new Local Plan on existing and future employment needs. To supplement and validate this evidence base we have undertaken our own primary and secondary research. Our research has taken into account national, regional and specific local employment trends, and has involved engagement with council officers, local commercial agents as well as other business and relevant stakeholders to gain and up to date the understanding of employment and business needs within the borough.
- 1.3 Having reviewed the evidence base studies and undertaken our own investigations and research this report provides a series of recommendations on existing and future employment strategy, needs and policy for traditional 'B' class employment and other commercial / town centre type uses.

The impact of Covid 19 on the preparation of this document

- 1.4 As this document was prepared between March and May 2020, it is acknowledged that this was during the Covid 19 epidemic. As the impact of this (such as the closure of large parts of economy) are not, and will not for some time, become fully clear, this document has been prepared based upon data and information obtained prior to the disease impacting the UK economy.
- 1.5 This has been done for a number of reasons, the first being the Government wants councils to continue with their local plan preparation, and not delay them due to the virus, as there has been no statement setting out that there should be a delay.

- 1.6 The second is that if any council were to want to wait for the impacts on the economy to become clear, then this would possibly delay the production of (at least) economy-focused parts of their evidence by approximately a year (as a minimum), with the subsequent knock-on effects on the delivery of the Local Plan. This is because they would have to wait for the effects of lock down to end (as the process for this had only just begun at the time this document was being finalised. Whilst there was a slight lifting of restrictions this was caveated with the potential for the process to be reversed if there was an increase in the rate of infections) and then wait for suitable data from that period and its aftermath to become available. This issue is particularly pertinent for Elmbridge, as their adopted Core Strategy dates from 2011 and is therefore considered out of date by national policy (set out in the NPPF) as it is more than five years old.
- 1.7 Another reason is that as local plans are prepared looking over a 15 or 20 year timeframe, they should be developed to take account of changing market conditions, and be suitably flexible to accommodate this and the changing economic circumstances this brings. Whilst unprecedented, the impacts of Covid 19 represent a downturn in the market that local plans should be flexible enough to be responsive to.
- 1.8 Lastly, at the time of completing the assessment, Elmbridge Borough Council had indicated that they want to keep to their planned timetable for the preparation of their local plan as set out in their [Local Development Scheme](#) (2019), and this document was required to be prepared in advance of the autumn 2020.

2. Employment Uses

What does this Appraisal cover?

2.1 This is not a conventional employment land review that traditionally appraises employment land and needs. This report focuses and considers the three main 'employment' use classes in the planning system (Use Classes) (B1, B2 and B8)) which encompass the following types of businesses:

- B1 (businesses), which is further subdivided into three more specific 'sub-classes':
 - B1(a): Offices (other than those that fall within use class A2).
 - B1(b): Research and development of products and processes.
 - B1(c): Light industry appropriate in a residential area.
- B2 (General Industrial) - use for industrial process (excluding incineration purposes, chemical treatment or landfill or hazardous waste).
- B8 (Storage and Distribution) - this class includes open-air storage.

2.2 This LMA in addition to considering B uses also reviews a wider variety of commercial property types more generally and this includes use classes that are normally considered to fall into the broad 'main town centre uses'. These are explained in more detail below.

2.3 'Main town centre' uses are defined in the Glossary of the National Planning Policy Framework (NPPF) (2019) as:

'Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities)'.

2.4 This 'main town centre uses' definition more formally would include the following land uses as set out in the Use Classes Order (2015) and its subsequent amendments as:

- A1 (Shops) - shops, retail warehouses, hairdressers, undertakers, travel agents, post offices, pet shops, sandwich bars, showrooms, dry cleaners etc.

- A2 (Professional and Financial Services) - financial services such as banks and building societies, professional services (other than health and medical services) including estate and employment agencies. It does not include betting offices or payday loan shops.
- A3 (Restaurants and Cafes) - for the sale of food and drink for consumption on the premises - restaurants, snack bars and cafes.
- A4 (Drinking Establishments) - public houses, wine bars or other drinking establishments (but not nightclubs).
- A5 (Hot Food Takeaways) - for the sale of hot food for consumption off the premises.
- C1 (Hotels) - hotels, boarding and guesthouses (where no significant element of care is provided). (This has not been considered as most of the hotels in the district are outside of the designed centres. However, the council may want to consider an update to the Surrey Hotel Future's study (2015) to obtain more up to date information on the potential future need for this use type).
- D1 (Non-residential Institutions) - clinics, health centres, crèches, day nurseries, day centres, schools, art galleries (other than for sale or hire), museums, libraries, halls, places of worship, church halls, law courts. Non-residential education and training centres. (This was not considered as the uses either are provided primarily by the state (e.g. health and educational centres, libraries etc.) or by not for profit organisations, e.g. religious bodies).
- D2 (Assembly and Leisure) - cinemas, music and concert halls, bingo halls (but not night clubs), swimming baths, skating rinks, gymnasiums or areas for indoor or outdoor sports and recreations (except for motor sports, or where firearms are used).
- Sui Generis - casinos and amusement arcades, betting offices and payday loan shops. (Only betting offices and payday loan shops have been considered due to there being no known casinos / amusement arcades located in Elmbridge).

2.5 Within the 'town centre uses' categories our LMA analysis has focused upon the A use classes and commercial leisure type uses. We have not specifically considered C1, D1 or Sui Generis elements.

2.6 The LMA is taking a wider approach to employment generating commercial uses to reflect the fact that the uses listed above all generate employment and we are conscious of the fact that over 80% of the UK's economic output is generated by the services sector¹.

¹ <https://commonslibrary.parliament.uk/research-briefings/sn02786/>

2.7 In addition, and reflective of the contribution that non-B class employment makes, the council commissioned a Commercial Property Market Study (CPMS) in 2014, with a subsequent update in 2017². This included a detailed assessment of the existing composition of employment in Elmbridge, as well as making projections about potential future changes and need in employment accommodation over the period of 2015-2035. This study will be looked at in more detail in the following section as part of a literature and evidence review of Elmbridge and wider geographies.

² See the Economy subsection on this page: <https://www.elmbridge.gov.uk/planning/planning-policy/evidence-to-inform-the-new-local-plan/>

3. Existing evidence

Introduction

- 3.1 In this chapter we provide a brief review of existing evidence base documents relating to employment and commercial uses which have been prepared by and for EBC. We also review other evidential documents that relate to wider regional / sub-regional and local enterprise areas.
- 3.2 Key findings and conclusions drawn out of the various documents reviewed are provided in this section and full summaries are provided at Appendix Two.

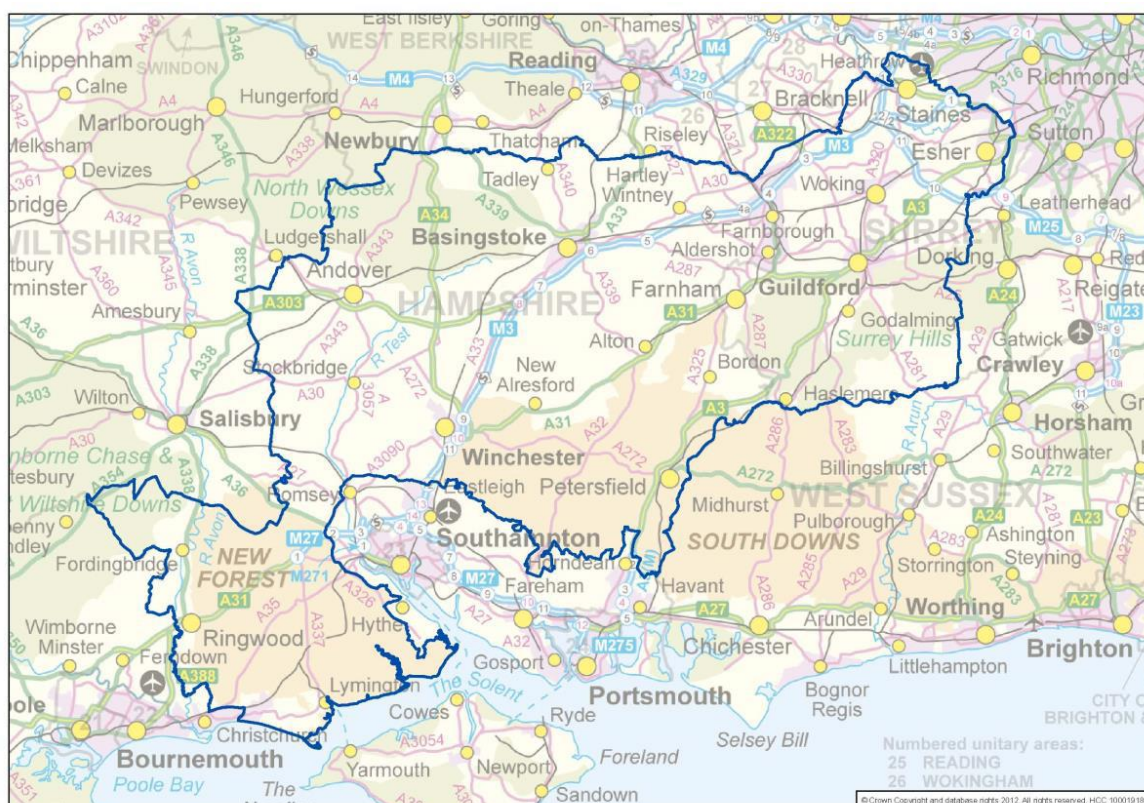
Existing evidence

- 3.3 There is a large body of collected information that relates to the existing provision and anticipated future needs for employment and commercial uses.
- 3.4 Boyer have reviewed and summarised multiple documents that focus on either Elmbridge, Surrey or wider (e.g. regional or national) geographies. These have been set out below with their key conclusions highlighted. This forms the first part of establishing the baseline position in the borough.

Elmbridge Baseline Review and Functional Economic Area (2016)

- 3.5 Key findings from this document (prepared by EBC) relevant to the LMA are:
 - Elmbridge is part of the Enterprise M3 Local Enterprise Partnership (LEP) area as shown in the map below.
 - Elmbridge has excellent transport links with access to the M3 and M25, easy access to both Heathrow and Gatwick airports and rail connections to the capital.
 - Based on 2016 NOMIS data, within Elmbridge there were 57,800 jobs, this had increased by 3,700 (just under 7%) from 2009. Job growth was significantly higher than the South East (4.9%) and Surrey average growth rates (4.25%).
 - Job growth over a longer period (1997-2013) increased by 12.4% resulting in additional 7,400 jobs, although this growth was slightly lower than the national and regional rates over the same period.
 - The main strength of the Elmbridge economy is in the professional services sector, which accounted for over 15% of all of the jobs in the borough.
 - The borough does not have a significant manufacturing presence compared to the South East in general.

- Elmbridge’s business base is predominantly small and medium sized enterprises, with around 85% of employment in companies with less than 250 staff and 92% of all companies in the borough employing under 10 people.
- Travel to work patterns in Elmbridge are split north-south between the ‘Slough and Heathrow’ and ‘Guildford and Aldershot’ Travel To Work Areas (TTWAs). This was a change from the 2007 position where the whole of Elmbridge fell within the London TTWA³.
- 2011 Census commuting patterns showed that Elmbridge had a self-containment (e.g. living and working in the borough) rate of 48%.



3.6 These key points confirm that Elmbridge has good accessibility; professional services are the main economic sector for residents; and a commuter shift away from London toward employment around Slough / Heathrow and Guildford / Aldershot confirming the M3 / M25 importance. In terms of businesses, the borough is predominately small and medium enterprise (SME) focused.

³ This will have been the result of change in the pattern of where a significant number of people in the southern half of the borough work.

Elmbridge Commercial Property Market Study Update (2017)

- 3.7 This document (prepared by GL Hearn) is an important part of the council's employment evidence base. It covers a number of areas including:
- Commercial property market review;
 - Consultation with local businesses and stakeholders;
 - Updated employment forecasting;
 - Future employment land requirements; and
 - Conclusions on the local property market demand / supply balance.
- 3.8 The key findings from this document that are relevant to the LMA are:
- Weybridge continues to be the principal office location with a number of blue-chip companies and a good supply of both new buildings coming to the market and good quality secondary space.
 - Beyond Weybridge, the availability of office space is limited, especially as relatively new schemes such as the Aissela Building in Esher are fully let.
 - Competition is increasing locally, with a number of schemes being developed in adjacent Runnymede.
 - Permitted development rights are adversely affecting the borough and leading to a potential undersupply of second-hand space that is particularly useful for smaller businesses.
 - Industrial property supply is focused at the Brooklands and Molesey Industrial Estates.
 - Brooklands Industrial Estate provides modern, large warehouse accommodation benefiting from good accessibility for HGVs to the strategic road network.
 - Other industrial areas in the borough (Molesey and Hersham) serve local markets and are constrained by their accessibility and quality of stock.
 - Overall, the borough is not a prime market for industrial property however latent demand is considered to exist.
 - Based on their 2016 forecast of an additional 6,600 jobs, the long-term increase in jobs is lower than the 2014 forecast of 9,700 extra jobs to 2030. The key broad sectors are wholesale and retail, and professional and other private services.
 - The quantum of employment floorspace that will be required in Elmbridge over the period of 2015-35 is considered to range from 41,500sqm to 79,000sqm.

- GL Hearn conclude a 'Local Scenario' provides the most reasonable estimate of future floorspace need for Elmbridge. This equates to a need for around 58,000sqm. In land terms, this is anticipated to be around 16ha over the period 2015-35. The majority of this is for offices, while around 7ha is required for warehouse / distribution uses.
- In addition, a further level of replacement demand should be considered to provide for replacement office space that has been lost due to permitted development changes.
- They forecast net loss of around 2ha of industrial land and an additional net loss of around 1ha of Sui Generis uses.

Elmbridge Economic Strategy 2019-2023

3.9 The Elmbridge Economic Strategy (prepared by the council) seeks to encourage growth across a wide range of sectors and use classes and supports the continued growth in employment floorspace as set out by the CPMS update 2017 (summarised above).

3.10 Key relevant points to the LMA include:

- In the borough between 2010–2015 there was an increase in the number of businesses by 1,340 (19.3%) and jobs by 5,500 (10%).
- Elmbridge has the most competitive economy and highest skilled residents in the local M3 LEP.
- Elmbridge has an internationally facing business base driven primarily by the Brooklands Business Park with 139 internationally owned companies in the borough that support an estimated 14,500 jobs totalling 24% of jobs across the area.

3.11 The Economic Strategy clearly identifies based upon business survey responses the strengths and challenges it faces. The strengths include:

- The quality of life in the borough provides for highly skilled employees.
- The area is attractive to businesses for inward investment and those seeking to relocate out of London, given the local workforce and transport network connections.
- Strong performance in the knowledge / technology sectors.
- Potential for the distribution sector given the location.
- Positive outlook on business growth potential from local businesses.
- An additional Heathrow runway would benefit business.

3.12 The challenges were considered to be:

- Lack of stock available in town centre locations, due mainly to the impact of permitted development rights.
- Lack of car parking.
- General lack of development sites for offices.
- Congestion both at a local and wider level – notably the M25 / M3 / A3.
- Existing employment areas are largely at capacity.
- An undersupply of both office and industrial space.
- Property prices are a disincentive and barrier to attracting young professionals.
- Concerns over Brexit.

3.13 The strengths and challenges are distilled into a vision, priority actions and targets. Those most relevant to the LMA are:

- To facilitate the economic conditions to create, retain and attract knowledge-based businesses. (vision)
- To improve connectivity and networks between our employment hubs, stations, towns and businesses. (vision)
- To target investment at the needs of the Elmbridge economy. (vision)
- Developing the borough's strategic employment sites and commercial property offer to ensure businesses can start, grow and succeed. (priority action)
- Supporting appropriate community hubs to deliver quality amenities in town and village centres. (priority action)
- Enhancing and adapting town and village centres to build on success and ensure future sustainability. (priority action)
- 370 additional knowledge-based employees each year. (target)
- 1,200 additional businesses by 2024. (target)
- 20 new foreign direct investments by 2024. (target)
- 16,000sqm of new A-grade office space by 2026. (target)
- 11,500sqm of refurbished commercial floorspace by 2026. (target)
- 150 additional hotel bedrooms by 2026. (target)

3.14 Fulfilling these visions, priority actions and meeting targets will require co-ordinated planning policy and site allocation actions and we consider how these can be addressed later in the LMA.

Economic Development Strategy for Surrey - Report on Local Industrial Strategy Evidence Base for Surrey (2019)

3.15 This document (prepared by Ove Arup and Partners) considers the combined Local Enterprise Partnership areas that cover the whole of Surrey. This document has a more strategic area focus and whilst useful contextual background has limited information which directly informs the Elmbridge LMA. We have already reviewed economic evidence relating to the Enterprise M3 LEP that Elmbridge falls within.

3.16 Our summary of the document is provided in Appendix Two and relevant information is set out below.

- Surrey is covered by two Local Enterprise Partnerships (LEPs) which are The Coast to Capital LEP and Enterprise M3 LEP.
- There is a large level of net outward migration, particularly amongst those aged 25-34 years. Young professionals and young families make up this age cohort, containing a high proportion of skilled individuals.
- EM3 contains a greater proportion of high-skilled jobs than the national average (12% and 7% of employment is within Professional, Scientific and Technical activities and Information & Communications, compared to 9% and 4% nationally).
- In terms of productivity, EM3 ranked fifth highest out of all LEPs in terms of GVA per person at £31,952.



Surrey Economic Development Strategy – Economic Baseline Assessment (2020)

3.17 This is a baseline report (prepared by Ove Arup and Partners) providing economic and socio-economic indicators and trends for Surrey and has been prepared to inform the economic development strategy and identify economic priorities and actions. Key Surrey-wide information includes a strengths, weaknesses, opportunities and threats (SWOT) analysis that is set out below.

3.18 Whilst focused upon Surrey as a whole, there is specific comparative information for the individual boroughs and districts. We have drawn out information relative to the preparation of the Elmbridge LMA that are summarised below.

- Elmbridge is noted as having a lower than average level of economic activity. This is a consequence of the population structure of the borough, which relative to others has a smaller ‘working age’ segment of the population (those aged 16-64)⁴.
- Elmbridge has the highest level of active businesses per 10,000 people in Surrey at 746 (2018). As the population of the borough is 134,000, the total number of active businesses is therefore 10,190.
- This high level of active businesses per capita is reflective of the high proportion of businesses in the borough classed as ‘micro businesses’ (e.g. those employing nine people or fewer), which account for 92.5% of the total.
- The report identifies the larger employers in the borough and this is reproduced below.

Rank	Company name	Employment Range	Industry
1	Tivoli Group Limited	1,500-1,599	Professional garden maintenance
2	Chelsea Football Club Limited	1,200-1,299	Sport and leisure
3	Central Surrey Health Limited	600-699	Health
4	Schindler Limited	600-699	Access and transit management systems
5	Tesco Stores Ltd	500-599	Retail
6	Sony Europe BV	400-499	ICT and Digital Media
7	Air Products PLC	400 to 499	Industrial gases
8	ACS International Schools Ltd	400 to 499	Education
9	Proctor & Gamble UK	400 to 499	Professional and business services
10	The Network Field Marketing and Promotions	400 to 499	Professional and business services

⁴ Part of this will be accounted for by a proportion of the population that do not want or need to work (according to NOMIS data).

- In terms of job density (the number of jobs per 100 population) Elmbridge is 0.85 that is lower than Surrey (0.9) and the South East region (0.87). However, this is more a reflection of the relatively high population level for the borough as opposed to a lack of employment opportunities.
- Elmbridge has a high pay and gross disposable household income levels; this statistic also highlights the disparity between resident and workplace wages which coupled with high property prices has implications for home ownership affordability.
- Elmbridge is a sought-after location for businesses, and office rents were some of the highest in Surrey and second only to Runnymede.
- For industrial premises, space in Elmbridge is comparatively expensive relative to Surrey and the South East indicating high demand and / or short supply in the borough.
- Retail property rental levels in Elmbridge are in line with the regional average but lower than the Surrey average. This is not unexpected as the borough's retail centres tend to be smaller with a local focus compared to higher order towns in Surrey.
- Looking at commercial property rental trends for the last 10 years, rental prices have been increasing broadly in line with the regional trend except for industrial, which has had notably higher growth.
- The rental growth does suggest a strong market for employment floorspace of all types in the borough.

3.19 Overall, the key points to take away are that Elmbridge is a prosperous location that is well connected to London and has equivalent or stronger demand for all types of employment floorspace compared to both the county and South East region.

A Strategic Economic Plan for the Enterprise M3 Area 2018 – 2030 (Enterprise M3 SEP)

3.20 This document (which has been prepared by the Enterprise M3 LEP) has a strong focus on increasing annualised growth over the period to 2030, and sees transportation improvements as one of the key areas to assist with this. This includes alleviating more localised congestion, as well as larger infrastructure projects such as Heathrow expansion. It also sets out that there is a need to improve skills and make it easier for companies to recruit the right people, as this is currently an area of difficulty. The focus of these improvements is in high skilled industries, as this would yield the greatest levels of improvements in growth.

3.21 Of relevance to the Elmbridge LMA, is the highlighting of digital and data-driven technologies as one of the key areas to focus on for growth. This includes SMEs, which account for a large number of businesses in the area as well as highlighting the large number of technology company HQs in the area, such as Sony.

3.22 Five priorities for growth are set out:

1. High Value Sectors for a Globally Facing Economy
2. Enterprise and Innovation for Scaling Up High Productivity SMEs
3. Skills for a High Value, High Growth Economy
4. Connectivity for a 21st Century Advanced Digital and Low Carbon Economy
5. Dynamic Communities and Sustainable Growth Corridors

3.23 For Elmbridge specifically, the document notes:

‘look for further opportunities to support the digital and creative centres that are in close proximity to London such as Runnymede, Elmbridge and Spelthorne as well as those located in our rural areas’.

Heathrow Strategic Planning Group – Economic Development Vision and Action Plan (EVDAP) (2020)

3.24 This action plan (developed by Ove Arup and Partners and the Heathrow Strategic Planning Group) provides a vision for the area, which covers three LEPs, two county and six local councils as well as two London boroughs. It sets out a series of recommendations as to what can be done to prepare for and take advantage of the expansion of Heathrow with a third runway. The vision is:

‘By 2050 the HSPG sub-region will be one of the most advanced economies in Europe, having used Heathrow airport expansion as a major catalyst to positively transform the business environment, mitigate climate change, enhance regional connections and improve quality of life’.

3.25 The recommendations are split broadly into short, medium and longer-term actions. These have been summarised below.

Short-term:

- 3.26 The council (as could any LPA in the Strategic Planning Group) could consider the further utilisation of Article 4 Directions to protect employment locations to cover all the areas of Strategic Employment Land the council wants to retain (e.g. those recommended for retention in the Strategic Employment Land Review evidence base document). This is identified in the document as a 'quick win' and would be extended beyond the B1 to C3 permitted development right to also assist in the management and retention of B8 floorspace as well.
- 3.27 As a diametric alternative to Article 4 Directions, the council could also consider the use of Local Development Orders and other tools to provide greater flexibility between use classes, targeted at specific buildings or locations; which could allow related (yet different) sectors to co-locate and collaborate.
- 3.28 In emerging local plans, planning policy should ensure that key employment sites have access to quality green spaces and active travel options.

Medium-term:

- 3.29 It is suggested that councils consider how affordable workspaces might be considered as part of the local plan process, and if possible, secured through planning mechanisms, such as s106 agreements. Alongside this, councils should develop and implement place-making masterplans and public realm strategies for growing town centres and other priority areas.

Longer term:

- 3.30 Following airport expansion, where Heathrow Airport Limited has not managed to accommodate additional commercial floorspace within the airport boundary, particularly for logistics uses, Heathrow Spatial Planning Group authorities should consider the extent to which they wish to accommodate this residual growth and where possible update their local plans accordingly.

Heathrow Strategic Planning Group - Joint Strategic Planning Framework (2020)

- 3.31 This report (developed by the Heathrow Strategic Planning Group (HSPG)) looks across a wide area, and Elmbridge appears to be one of the more peripheral authorities in terms of having key towns and employment locations that relate to Heathrow.
- 3.32 Elmbridge has 7 (not specified) sites that are suitable for further employment development and intensification for B1 and C1 uses are identified as suitable.

- 3.33 The preliminary analysis indicates that sufficient land for B1, B2, B8 and C1 Use Class uses cannot be identified within the sub-region without affecting the Green Belt and other environmental designations for Heathrow Airport expansion related requirements.
- 3.34 There are limited references to Elmbridge towns forming part of a wider network connected to Heathrow. For example, Esher and Weybridge are identified as locations to have a strategic link to the wider Strategic Active Travel Network that sets out the main routes / methods of transportation (as well as the main elements of the green and blue networks) across the Heathrow area.
- 3.35 Molesey is identified as being an existing employment cluster for manufacturing, which will be related to the designated Strategic Employment Land at Molesey Industrial Estate, and Weybridge for higher education, which will be linked to the presence of Brooklands College.
- 3.36 Weybridge is also identified as one of the locations where access between rail, bus and town centres needs improvement, as the station is approximately a mile from the centre of the town, as well as being 1.5 miles from The Heights Business Park, the key employment locations.
- 3.37 Overall, this document does acknowledge a number of the towns in Elmbridge as being linked and part of the network of locations that are connected with Heathrow, and that there is a need for further employment land provision across the strategic area. However, Elmbridge and its towns are comparatively peripheral compared to numerous other locations that are more closely linked (as well as being physically closer) to Heathrow.

4. Market Trends

- 4.1 In this section, we seek to identify the main market trends by employment sector that will have an impact upon future needs for floorspace across the B use class and other commercial uses from occupier, landlord and developer / investor viewpoints.
- 4.2 The trends identified are drawn from a combination of sources including commercial property agents, economic performance data and on the ground observations. Predicting the future is very challenging and as mentioned in the introduction to this document, this appraisal has been prepared / undertaken not taking account of the impact of Covid 19.
- 4.3 Before going into the different sectors of employment uses, it should be noted that in the council's 2017 CPMS update, it was concluded that past trends in take-up are likely to have been slowed by limited supply however there are significant competing demands for land and development, which affects this. This, when coupled with a potential lack of 'grow on' space for business in Elmbridge may result in some out migration. Overall, there is now limited space available in the borough itself and little pipeline of new development.

B use classes

B1 – Offices

- 4.4 Office occupier markets are anticipated to continue to perform well across the UK despite ongoing uncertainties around Brexit (particularly in the potential detail of any future trade deal with the EU), which has the potential to be further delayed by the impacts of Covid-19 upon the economy and negotiations between the UK government and the EU.
- 4.5 A wide range of sectors including professional services and the public sector will drive demand for office space. At a regional level, the sectors driving demand for space are predominately pharmaceuticals, media, computer and information services, and professional services.
- 4.6 Office occupier markets have outperformed market expectations in recent years and demand was primarily focused on new, high-quality space. The consensus view is that this trend will continue through 2020 and beyond, particularly as corporate occupiers use real estate as part of their recruitment and retention strategy in a tight labour market. Office-based employment, which has grown rapidly, is forecast to continue to expand although at a more moderate rate.

- 4.7 Against rising demand for office space (of grade A quality), supply of new space is expected to tighten from already low levels. With Brexit-related uncertainty, there has been a relative pause on speculative office development and a reluctance of businesses to commit to construction pre-lets which has acted to reduce the immediate supply pipeline. Therefore, the existing imbalance between supply and demand of new space will persist for a period of time to come. Rents in central London and other key UK cities have increased during 2019 at a significant rate and the South East, which has long been recognised as the second-most prosperous region in the UK after London, is expected to see rental growth in offices driven in large part by supply / demand forces.
- 4.8 Set against strong demand, developed space has quickly been absorbed in the South East, with agents Knight Frank reporting that (at the end of 2019) vacancy rates in all markets (M25, M3, and M4) were around 20% below their respective ten-year averages and 76% of this space was new or grade A. This statistic in itself highlighting the scale of grade B space being repurposed for alternative use.
- 4.9 Against a strong occupational demand for quality office space, there is a clear trend also on user experience and agility. As part of this shift and in response, the co-working phenomenon has come to the fore. Start-ups, micro businesses and SME's are increasingly looking for flexible space that can grow with the business and is adaptable to responding to changing working practices and 'virtual office' technology. The growth of the latter may however curb the need for additional physical space and is something that may need to be carefully monitored and managed on a flexible, on-going basis.
- 4.10 Flexible office operators have become a major feature of the South East offices market. According to research by Knight Frank, operator take-up accounted for 16% of the South East total in 2018, more than four times the long-term average for the business group. Occupiers, from start-ups to large corporates, have embraced the growing phenomenon. Co-working space and the flexibility in leasing (subscription / pay as you use) that it provides is very attractive to start-ups, micro and small businesses and for these sectors co-location with other facilities such as retail and leisure coupled with good accessibility are main considerations.

- 4.11 This shift towards flexible working goes beyond simply outsourcing to a third-party provider. As working practices change, so the role of the workplace evolves in order to meet future needs. Flexibility is foremost; meaning the presence of a third-party flexible office provider (as a tenant integrated in a multi-let building) is acting as an attribute and therefore an additional tool for landlords to attract new tenants. There is some potential for this in the borough, and this will be explored in more detail in later sections.
- 4.12 However, not all landlords are ready to relinquish this level of control in their buildings. While occupiers have been quick to embrace the changing work environment and the concept of co-working, landlord investors have typically been more averse to the concept. The perceived danger is that when an economic downturn appears, demand will reduce, and weaker covenants are quickly exposed. That could leave providers of flexible offices with large amounts of unlet space, which they might need to close or renegotiate to reduce costs. Larger property firms consequently would be indirectly exposed.
- 4.13 In summary, national and South East trends for offices show a demand for high quality space that is provided either as large space for corporates or as smaller flexible multi-let space for smaller businesses.

B2-B8 Industrial and Warehousing

- 4.14 There is anticipated to be static or reduced demand for more traditional industrial and manufacturing property in the UK as this sector has been particularly impacted upon by the prolonged Brexit uncertainties. There is however, the potential that UK manufacturing will experience a bounce once negotiations are completed and there is certainty around trading and tariffs.
- 4.15 The main driver of space requirements in this sector is in warehousing and logistics. Nationally, demand for logistics remains strong and rents will continue to grow as supply responds but at a slower rate (with demand outstripping supply).

- 4.16 Demand for logistics space into the future should be robust and will be driven primarily by the need to fulfil delivery for online retailers supporting the sustained growth of online retail sales. UK ecommerce drivers are particularly strong, and it is anticipated that one in every five pounds of retail expenditure will be from online orders in 2020 and this will continue to grow as acceptance of this format is embedded in UK culture and we maintain our position as Europe's most mature online market. This trend is likely to be reinforced by the current changes to retailing by Covid-19. Consumption has been radically disrupted especially in non-food and the restaurant and leisure sectors. Spending on food in supermarkets, but also in convenience and local (general and specialist) food stores was increased in part through panic buying but also through cooking meals at home rather than eating out. There has been a shift to online shopping, both in multiple retailers but also for online specialist producers and local collectives. Non-retail sales platforms such as Amazon have had significant sales volume increases.
- 4.17 However, it will become even more important to understand the needs of those occupiers and the drivers of ecommerce growth. Whereas speculative development has been the primary source of new warehousing and distribution space to date, increasingly it is expected that the driver will be 'last mile' fulfilment within smaller micro-distribution hubs and intensification of existing facilities with multi-level developments and increased use of robotics within buildings (which would reduce job densities).
- 4.18 Last mile fulfilment could take many and varied forms, with potential for existing retail warehousing units to be repurposed or it could be an element within new town centre mixed-use developments. These micro distribution hubs would be in urban and suburban locations.
- 4.19 In summary, national trends indicate that there will be limited (if any) growth in manufacturing based sectors and continuing demand for warehousing / distribution space will be driven primarily from the logistics sector and a battle to drive last-mile logistics requirements. Competition for the paucity of suitable sites will lead to more multi-level logistics as well as the reuse of other urban assets.
- 4.20 Locally, these trends will manifest in the form of a continuation of the previous trend be little to no demand for additional industrial space, However, this low demand should not be taken as an indicator that the industrial locations and space that already exists should be lost or redeveloped to other uses.

4.21 In terms of warehousing / logistics developments, there could be a change resulting from an increase in town centre / suburban micro collection / delivery sites. These may take advantage of falling rents / increased vacancies in traditional retailing locations to establish themselves in what would previously be considered an unsuitable / unviable location. Larger units are most likely to be needed / able to be provided in the Brooklands Industrial Estate and other locations with good access to the strategic road network.

Town centre and other commercial uses

4.22 As set out in the 2016 Elmbridge Retail Assessment, the 'traditional' high street continues to face a number of challenges stemming from the impacts of the recent economic downturn, the tightening of retail spending in recent years, and continued significant changes in consumer shopping behaviour. The growth in online shopping, including multi-channel retailing, acts as tough competition for the high street, but also presents an opportunity for the high street to capitalise, by maximising the opportunities arising from services like 'click & collect', and retailers moving towards a seamless transition between store-based and virtual shopping experiences.

4.23 Although the above conclusion was written in 2016, much of it remains applicable in 2020. There will be continued structural change in UK retail through 2020 and beyond and occupier sentiment will remain very cautious. Affordability, sustainability and flexibility remain key themes for retailers. Profitability remains the key performance metric.

4.24 Retail performance will be strongest in London and the surrounding key urban locations, which for Elmbridge this means Kingston-upon-Thames and Guildford. This polarisation of major regional (e.g. central London) and sub-regional retail centres (Kingston and Guildford) being ahead of other smaller centres (e.g. Walton-on-Thames, Weybridge, Cobham etc.) and will see prime retail centres likely to outperform other smaller locations.

4.25 The repurposing of retail floorspace will be a key trend over the coming years and this is most likely to manifest itself in converting excess retail space to create mixed-use destination schemes and more residential within town centres.

- 4.26 UK retail will continue to weather a perfect storm that is bringing about fundamental changes to the sector through a combination of structural, cyclical and temporary factors. For landlords and investors, the combined impact has seen rental values reduced and capital values of schemes consequently fall substantially. Negative returns are expected to continue in all but the strongest locations for a considerable period. Increasingly rather than the traditional expectation that rental negotiations would result in increased values these type of negotiations will become irrelevant and rental levels will be reflective of specific store profitability, alternative demand, and ultimately an occupier's desire to retain a particular store.
- 4.27 Commentators identify that non-prime retail is suffering from an oversupply of space and high streets and shopping centres will be the hardest hit in terms of rental and capital values and potential for vacancy. Particularly where some multiple occupiers are under pressure to rationalise their portfolios to save cost in their struggle to avoid Company Voluntary Agreements (CVAs).
- 4.28 As a result, it is expected that excess retail space will be redeveloped and repositioned for alternative uses, increasing the number and quality of mixed-use schemes across the UK. Shopping centre and high street developers will be more inventive in using excess and under-utilised space, focussing on greater innovation and faster decision-making to enact change. It is strongly anticipated that mixed-use spaces will create consumer destinations that enhance the general shopping experience.
- 4.29 Across retail sectors the future is mixed, and the primary influence will be how easy or otherwise it is to shop online compared to physically for the goods being sold. For example, consumer demand for convenience will insulate the food and grocery sector from growth in ecommerce. The health and beauty sector should continue to benefit from the wellness trend and a focus upon experiential interactions. Therefore, reflecting this lifestyle, sports fashion, cosmetics, and health and beauty sectors all likely to hold up well in trading terms and remain solid. Food and value / mixed retail are also expected to remain resilient.
- 4.30 Those more exposed to direct online substitution such as electrical and personal finance will continue to see contraction in physical store space as these sectors have grown fastest online.
- 4.31 As a consequence, the pool of 'in the market' national multiple operators are reducing and their requirements are becoming more tightly focused around profitability metrics rather than geographic coverage.

- 4.32 Leisure and fitness operators continue to be very active both nationally (mainstream / budget / cinema), as well as in London (boutique, studio-based and mainstream). Leisure and fitness brands will benefit from additional opportunities from the breakup or reconfiguration of traditional A1 retail buildings and surplus department stores.
- 4.33 The food and beverage sector had been performing well with rapid expansion. However, there has been a spate of recent outlet closures and parts of the casual and family dining sector are now struggling because of reducing discretionary spend by consumers and saturation within the segment. The sector does however have some encouraging signs elsewhere with evidence of micro-pubs, craft brewers and artisanal independent hot food 'pop-up' businesses taking over empty shops.
- 4.34 A further town centre trend which could be expected to trickle down from larger city locations is investment in and development of build to rent residential schemes and compact living (co-living and micro-living) within accessible town centres either as standalone developments or as part of mixed-use redevelopments.
- 4.35 In summary, the future prospects for the town centre market is somewhat mixed. Whilst food retailing and other experiential offerings are expected to continue at existing levels or with slight growth, other sectors are likely to reduce their physical presence on the high street. As a result, the expectation that retail will be the backbone of town centre offering will need to be reconsidered. The future is more likely to be a series of complimentary mixed uses, which will include retail but could equally be leisure, health and wellness, community space, employment and residential. Managing the change is likely to require temporary and flexible meantime / pop-up uses.

5. Elmbridge office, industrial and warehousing employment approach

Introduction

5.1 In this section, we consider the council's existing B class evidence base regarding forecasts of employment space and land need and supply. This is combined with information collected on local market demand to provide advice to the council upon the validity and robustness of the evidence base and therefore the approach that it should be taking in regard to planning for office, industrial and warehouse land uses.

Elmbridge Council's Evidence Base

5.2 The two main evidence base documents are:

- Elmbridge Commercial Property Market Study Update 2017 (GL Hearn); and
- Elmbridge Strategic Employment Land Review 2019 (EBC)

5.3 We reviewed the Commercial Property Market Study Update in the previous section. This update reviewed a range of employment need scenarios for the borough that gave a spread of floorspace need figures ranging from 41,000sqm up to 79,000sqm and recommends that the council should adopt a local labour demand based target which indicates a requirement within the borough for an additional 58,000sqm of employment floorspace over the period 2015 to 2035.

5.4 Based upon an appropriate plot density including car parking, landscaping etc., this equates to a need for around 16ha of employment land over the period 2015-35. It is advised that circa 9ha should be for office and around 7ha is required for warehouse / distribution.

5.5 We have reviewed the forecasts and consider that the methodology used for the calculations are reasonable and robust. However, we are aware that more recent employment forecast data (Experian) is available and in our experience these later forecasts by Experian have been less optimistic in terms economic outlook and this in turn has a downward impact on job growth forecasts.

- 5.6 Whilst it is not within the scope of our instruction in preparing this LMA to update the employment floorspace need calculations we have reviewed these and would advise the council that the 2017 work is still valid and presents a justified and sound target in the short-term. However, we expect that in light of lowered economic growth expectations reported by Experian in more up to date economic projections (as well as the aforementioned impacts of Covid-19 in 2020), the 2017 targets for Elmbridge probably represent an over-calculation of the borough's employment need in the medium to longer term.
- 5.7 This need for a recalculation must be balanced against the ability to obtain suitable data. Due to the current uncertainty at the time of the production of this Appraisal, particularly around the severity of any economic impacts and recovery period it would be premature to set a date or timeframe as to when this should take place, and is something that the council will need to determine to enable a reliable recalculation to be undertaken.

Elmbridge Strategic Employment Land Review 2019

- 5.8 This review assesses the existing designated (as per the council's 2011 Core Strategy Proposals map) Strategic Employment Land (SEL) sites across the borough, as well as numerous other locations that are not currently designated. It seeks to determine what, if any sites, building or land should either be retained or designed as SEL, and therefore be protected from developments that are not for traditional 'B class' employment uses.
- 5.9 It scores 31 sites (after having removed those that had already been granted planning permission) against a series of criteria including site size, its clustering effect, opportunities for redevelopment, sustainability and physical quality. Those that scored at least 60% (e.g. 32 points from a possible 53) had the potential to be designated as SEL; however, most were not recommended for designation due to being too small.
- 5.10 Six sites were recommended to be designated as SEL, five of which are already SEL sites, with the last one (Abbey House, Weybridge) being adjacent to an existing SEL and is recommended to be included within that SEL by an extension to its boundary. These existing SELs are:
- The Heights, Weybridge
 - Hersham Place Technology Park, Hersham
 - Brooklands Industrial Estate, Weybridge
 - Hersham Trading Estate, Walton-on-Thames
 - Molesey Industrial Estate, West Molesey

5.11 Boyer have reviewed all of the existing SEL sites that have not been granted planning permission that would change the entire existing area to another use that does not fall into one of the B use classes (Table 1 in the SEL Review). This therefore encompassed:

- The Heights, Weybridge
- Hersham Place Technology Park, Hersham
- Brooklands Industrial Estate, Weybridge
- Hersham Trading Estate, Walton-on-Thames
- Molesey Industrial Estate, West Molesey
- Glaxo Smith Kline, Weybridge
- Kingston House Estate, Thames Ditton
- The Pavilion, Thames Ditton

5.12 This review involved undertaking site visits to all eight locations and checking the methodology and scoring undertaken in 2019 by EBC. The conclusions from this is that the approach to assessing which locations should be designated or retained as SEL within the borough is deemed as sound, and these locations (as set out in paragraph 5.9 above) should be taken forward as part of the emerging New Local Plan.

5.13 There are a few recommendations for changes to this document, the first of which is to update the list of sites that have planning permissions (if relevant) and the second to undertake a detailed reassessment of the exact boundaries of each SEL. This is due to mapping changes and improvements since the boundaries were last drawn (at least 2010), which may mean minor amendments are needed to more accurately reflect the curtilages and boundaries of the properties in each location.

5.14 The final recommendation is to potentially consider the impact / effect of allowing a more flexible approach to employment uses on SEL sites to take account of changing future uses of employment accommodation. This could be taken account of as part of a revised policy in the Local Plan but could also include modifying the methodology for assessing sites to potentially account for the presence of/ potential ability to accommodate flexible workspace(s) in future.

Local Market Demand

5.15 We have obtained published market data from Costar (dated March 2020) for the office, industrial and warehousing markets in Elmbridge.

- 5.16 For offices, the Costar data shows that there are over 50 separate units available for lease, ranging in size from 280sqft (37sqm) to 68,875sqft (6,400sqm). This shows that there are vacancies in a wide variety of quality, unit types and sizes encompassing small parts / floors of town centre offices through to entire buildings in more prestigious locations such as The Heights, Weybridge.
- 5.17 The above variety is also reflected in the range of rents being asked for these units, which varies from £13/sqft (£139.93/sqm) to £37.50/sqft (£403.65/sqm) (where data is available) and again reflects leases being available in a wide variety of different unit types across all parts of the borough.
- 5.18 Based upon the published Costar data there are vacancies across the range of office stock in Elmbridge, suggesting that there may be some over-supply in the borough. Indeed, when looking at the Costar trend data (as opposed to reviewing the lease availability listings) the vacancy rate is 5.7%. Whilst there would always be some vacancy to allow for churn in the market and refurbishment and upgrading works, the vacancy level combined with annual rental growth which is relatively low at just 1.7%, suggests that current demand for office space is not notably strong.
- 5.19 When coupled with the projection that a vacancy rate across all types of office space would only increase by 1-2% by 2023 it suggests that there is neither an egregious over-supply, but nor is there a pressing demand for additional floorspace. Therefore, an argument could be made for the preservation of the status quo as opposed to a need for a radical shift in direction in relation to office space provision in Elmbridge.
- 5.20 For industrial and warehousing, the data shows that lease availability is very low. Costar only had five separate units / premises available, totalling 7,506sqft (700sqm) in March 2020, with rents between £9.84 (£105.92/sqm) and £26.02/sqft (£280.08/sqm). These observations are backed by the Costar trend information that shows vacancy rates are very low at 2.8%, and subsequent rental growth being relatively high at 3.8% over the last year. The future trends also predict little to no increase in vacancy rates up to 2023, which shows that industrial land in the borough is very much in demand.
- 5.21 Therefore, the above would suggest that those areas should be protected from redevelopment due to their high level of utilisation, and the potential difficulty in finding alternative locations if existing ones are lost.
- 5.22 Whilst the Costar data helpfully shows recent market activity, we have supplemented this with informal discussions with commercial agents active within the Elmbridge property market to get a picture of future demand across the sectors and an agent's perspective on what local issues and trends will be. The findings from this informal engagement are set out below.

Commercial Agents Feedback on Elmbridge Office and Industrial Market

- 5.23 Telephone discussions were held with Cattaneo Commercial, Churchod & Co, Hurst Warne, and Stiles Harold Williams.
- 5.24 Weybridge is regarded by all agents contacted as the strongest location in the borough in terms of demand and rental levels. There is stock available in the town centre (generally grade B) and on the business parks (predominately grade A).
- 5.25 Whilst the market is relatively strong, incentives are required to get space let, but generally there is demand and deals are being done. It was noted that there has been a shift toward smaller self-contained and serviced office space lettings which package grade A space within larger modern buildings into smaller parts which are attractive to smaller companies. This was seen in part as a response to less activity by larger companies seeking headquarter office space. Agents did highlight transport and accessibility issues at Brooklands / The Heights and this had in some instances led to initial interest being reversed.
- 5.26 Beyond Weybridge, the office market in the borough is regarded as a mix of town centre premises (grade B space above ground floor shops); older stock office buildings around the edge of town centres; and a some 'modern' stand-alone office buildings. The town centres specifically mentioned were Cobham, Walton-on-Thames and Esher. In general, these office options were regarded as being more affordable and attractive to smaller locally based businesses and it was highlighted that due to the impact of office to residential conversions there was some pressure on this stock that was helping to push up rents and lessen incentives required to secure deals. Some commented that the demand was at a level where there was a need for additional stock of smaller self-contained office suites and this was starting to come forward in the form of flexible tenure space.
- 5.27 Warehousing and Industrial property is focused within the borough predominately at West Molesey, Hersham and Brooklands. Agents advised that the strongest location is Brooklands due to its connectivity and better environment and this is reflected in the caliber of businesses operating from there. Demand for premises is strong with lettings being secured quickly and there is underlying demand particularly from distribution / logistics operators.

5.28 West Molesey and Hersham are regarded as more mixed locations with large and small business that have more localised market reach. There are issues at both with vehicular circulation that is exacerbated with limited off-street car parking that leads to on-street congestion and parking issues. Regardless of these issues, we were advised that both locations have strong demand from predominately locally based businesses and premises that come to the market are quickly let.

The council's current supply

5.29 Having reviewed the council's commercial monitoring records (dated up to 14 March 2020) there is the following amount of net office / industrial / storage and warehousing development in the borough.

5.30 Unimplemented planning permissions:

- B1: -40,025sqm (of which 24,215sqm if from office to residential conversions via permitted development rights changes)
- B2: 3,968sqm
- B8: 85sqm

5.31 Developments under construction:

- B1: -8,935sqm (of which 6,314sqm if from office to residential conversions via permitted development rights changes)
- B2: -6,462sqm
- B8: 0sqm

5.32 Previous completions (for the period 2011-2020):

B1: 11,476sqm (of which 10,336sqm if from office to residential conversions via permitted development rights changes)

B2: -3,901sqm

B8: 114sqm

5.33 Tables setting out the borough's development pipeline and previous completions are set out in Appendix Three.

- 5.34 Comparing the overall trend in supply for demand versus what has been completed in the various employment uses over the period from 2011 to 2020, it appears that the pipeline of permissions has broadly been meeting the needs for office space over this period. However, there is the potential for large losses in the future if even a proportion of what has been given consent is implemented. There had been an increase in the overall floorspace developed that will have met the needs of a growing economy over this period, post-recession.
- 5.35 However, there has been a loss of smaller, lower quality units to residential property via the B1 to C3 permitted development right (introduced in 2013). This may have distorted the market as a large amount of the new floorspace that has come forward over this period has been in larger, higher grade, HQ-style accommodation (e.g. at Velocity in Brooklands), and thus there may still be a need for smaller start-up accommodation going forward.
- 5.36 For industrial uses, the loss of nearly 4,000sqm may be of some concern, particularly based upon the low vacancy and apparent on-going demand in the borough's designated industrial areas. It appears to show that the council may need to take a more protectionist stance towards these uses / locations in future to safeguard this sector of the economy, particularly as it would be difficult to find alternative locations to provide new industrial accommodation. The low level of available accommodation supports this stance, as the vast majority of property is clearly needed by the local economy.
- 5.37 The relatively small net growth in B8 floorspace may perhaps come as a surprise given the on-going and increasing demand for online-retailing and home delivery services over this period, with this trend only getting faster. Therefore, the council may need to make a more concerted effort to identify or permit opportunities to help meet the expected future demand for additional storage / warehousing, particularly at the key location of Brooklands Industrial Estate, with its good links to the strategic highway network. In a similar way to industrial floorspace, the lack of available property demonstrates that this type of accommodation / land needs to be protected going forward.
- 5.38 Based on the above, and having looked into the detail of the B1, B2 and B8 permissions, it is clear that the council's pipeline is not currently delivering enough of the right kind of floorspace to meet the future projected needs of the borough. Therefore, on this basis the council will need to seek to deliver a greater number of permissions that will enable an increased level of supply for small and incubator office space to meet future demands. This will partially help to alleviate the recent loss in small office space that has been converted to residential property through the B1 to C3 permitted development rights since 2013.

- 5.39 Whilst there may not be a major need for additional industrial land or floorspace, based on the monitoring figures, the low level of vacancy for this property type suggests that there is a need to at least protect the existing stock.
- 5.40 Alongside this, with the continued growth of online shopping and therefore home delivery services, there will need to be an intensification of the provision for warehouse and distribution facilities, particularly when taking account of the borough's position in close physical and functional proximity to the M25, Heathrow, Gatwick and southwest and central London. This may come forward on a larger variety of sites (and sizes) compared to previously delivered large-scale warehousing units (e.g. those at Brooklands Industrial Estate), and involve smaller last-mile collection / delivery locations within / at the edge of traditional shopping locations / town centres.
- 5.41 To conclude, having reviewed employment floorspace completed in Elmbridge since 2011 and compared this with the need for circa 58,000sqm of additional floorspace over a 20-year period as forecast by the GL Hearn; it is clear that the council is not currently on target to meet this need. This is due to the large amount of floorspace that has the potential to be lost through both 'in progress' and unimplemented permissions. However, in light of anticipated changing circumstances this is likely to be an overestimation of actual need.

Start-up workspace in Elmbridge

- 5.42 There is evidence that there is an increasing level of demand for smaller, start up space in the borough. Below are a series of examples of smaller units that are often outside of the designated SEL and town, district and local centres, showing that potentially these do not need to be as strictly controlled or directed as has been the case under more traditional approaches to employment accommodation.
- [Hersham Place Technology Park, Hersham](#) – This is within one of the designated (and proposed to be retained) SEL locations and is one of the more long-standing providers of start-up accommodation. This site also has the benefits of enabling a comparatively large clustering effect of small businesses, as one of the entrance signs attests to the large number and variety of different businesses it accommodates.
 - [Nammu, Grapes House, 79A High Street, Esher](#) – This location is a good example of a small office space located in a designated retail centre that has made use of a Listed Building and enables the provision of a highly distinctive workspace with real character in a highly sustainable location.

- [Unit 46, The Heart, Walton-on-Thames](#) – this (currently) retail (A1) unit was given permission at the end of 2019 to change to a café on the ground floor and a co-working office space on the floor above (with subsequent conditions in progress). This is a good example of the council taking a more relaxed, mixed non-A1 retail approach to a unit in a designated primary frontage, particularly as this is located in an area of The Heart that has (comparatively) struggled compared to other areas of the development itself and Walton-on-Thames town centre as a whole.
- [Nicholson House, 41 Thames Street, Weybridge](#) – This is a good example of an out-of-centre site that still has good access to it, being mere meters from its boundary. Whilst not within a designated centre, this would be considered to be functionally within the ‘centre’ of Weybridge and is a good example of how flexibility around the edges of designated areas can help with the provision of modern workspaces.
- [The Long Barn, Cobham](#) – this site is located well outside any of the designated settlement areas in the Green Belt, but demonstrates that potentially unorthodox locations can provide high quality modern office space for start-up businesses.

5.43 As can be seen from the above there are a number of existing (or soon to exist) examples of small, start-up workspaces that are provided in a variety of locations across Elmbridge. Demonstrating that there is demand for this type of property, but also that it does not need to always be directed towards existing designated areas. On this basis, the council may want to consider a comparatively flexible policy approach to the provision / location of new, small-scale office developments, particularly in light of the significant losses in small office floorspace since the introduction of permitted development rights in 2013 that enabled their conversion to residential use.

5.44 Alongside the above identified properties, there is also an increasing trend for sub-letting space and parts of buildings in the office market in response to various shifts in working styles. This includes increased homeworking (enabling the primary occupier to free up floorspace for other businesses) as well as a growing market for smaller office space as much of the traditional smaller town centre accommodation has been converted to residential use.

5.45 The prime (and possibly the longest standing) example of this in the borough is Hersham Place Technology Park, which is primarily occupied by Air Products, but whom let of a significant quantum of space to smaller and start-up businesses. However, there is growing evidence of other players emerging into this market segment, with some examples of advertised serviced office space set out below⁵:

- [Abbey House, Weybridge](#);
- [Image Court, Hersham](#);
- [Terrace Road, Walton-on-Thames](#);
- [Queens Road, Weybridge](#);
- [Central Avenue, West Molesey](#);
- [Cobham High Street](#); and
- [Esher Groves, 13-17 Church Street, Esher](#)

⁵ Information collected on 28/04/2020 from various websites.

6. Elmbridge town centre employment uses approach

Introduction

- 6.1 In this section, we consider the council's existing retail and town centre uses evidence base, particularly in respect of the anticipated need for additional floorspace over the forthcoming plan period. Given the evolving position in relation to retailing in particular we have also collected information on local market demand to provide advice to the council on the validity and robustness of the evidence base and therefore the approach that it should be taking in regard to planning for retail and other town centre uses.

The impact of the Covid 19 pandemic / epidemic

- 6.2 As this document was prepared between March and July 2020, it is acknowledged that this was during the Covid 19 epidemic. As the impact of this (such as the closure of large parts of economy) are not, and will not for some time, become fully clear, this document has been prepared upon the basis of data and information obtained prior to the virus impacting the UK economy.
- 6.3 This has been done for a number of reasons, the first being the Government wants councils to continue with their local plan preparation, and not delay them due to the virus.
- 6.4 The second is that if any council were to wait for the impacts on the economy to become clear, then this would possibly delay the production of (at least) economy-focused parts of their evidence by approximately a year (as a minimum), with the subsequent knock-on effects on the delivery of their local plan. This is because they would have to wait for the effects of lockdown and other restrictions to end (as the process for this had only just begun at the time this document was being written, with the potential for the process to be reversed if there was an increase in infections) and then wait for suitable data from that period and its aftermath to become available. This issue is particularly pertinent for Elmbridge, as their adopted Core Strategy dates from 2011 and is therefore considered out of date by national policy (set out in the NPPF) as it is more than five years old.
- 6.5 Another reason is that as local plans are prepared looking over a 15- or 20-year timeframe, they should be developed to take account of changing market conditions, and be suitably flexible to accommodate this and the changing economic circumstances this brings. Whilst unprecedented, the impacts of Covid 19 represent a downturn in the market that local plans should be able to react to.

6.6 Notwithstanding these points above, the trends in retailing and town centre uses e.g., a move away from traditional retailing focus and a shift towards more multi-purpose, mixed-use and community-focused developments, alongside for the re/introduction of a greater amount of residential accommodation, could be expected to be accelerated by the impact of Covid-19. Consumption has been radically disrupted especially in non-food and the restaurant and leisure sectors. Spending on food in supermarkets, but also in convenience and local (general and specialist) food stores was increased and there has been a shift to online shopping, both in multiple retailers but also for online specialist producers and local collectives. Non-retail sales platforms such as Amazon have had significant sales volume increases.

The council's evidence base

6.7 The council's retail and town centre uses evidence base comprises the Elmbridge Retail Assessment (2016) prepared by Bilfinger GVA.

6.8 The 2016 Retail Assessment provides a conventional floorspace need assessment that is supported by commentary and analysis of:

- Planning policy and sub-regional context;
- A review of the designated town, district and local centres (as per the 2011 Core Strategy proposals map) in the borough which provides vitality and viability health checks;
- Analysis of borough resident's shopping and commercial leisure activity and the locations where this is undertaken, with details of convenience (food) and comparison shopping (non-food) as well as commercial leisure activities including the use of restaurants and cafés, hairdressers, beauty salons, banks, building societies and estate agents, and non-retail uses such as cinemas and arts centres;
- Analysis of population and consumer spending of residents within the borough; and
- A series of goods based estimates of the need for additional retail floorspace and other commercial leisure facilities to meet the future needs of the borough up to 2035.

6.9 The conclusions and recommendations of the retail need assessment were that up to 2035; having taken account of planned commitments, the following new floorspace would be required:

- Comparison goods shopping floorspace - between 14,100 and 19,700sqm net.
- Convenience goods shopping floorspace - between 1,000 and 1,900sqm net

- 6.10 Although the 2016 Assessment reviewed commercial leisure usage and expenditure growth, it did not make any specific recommendations concerning planning for additional floorspace to meet needs for commercial leisure uses. It is noted that commercial leisure plays an important role in the vitality and viability of Elmbridge's main centres and significant spending growth particularly in the restaurant and café sector will support additional outlets.
- 6.11 Whilst it is beyond the scope of our instruction to provide updated retail need calculations for the borough, we have reviewed the base assumptions, and data inputs to assess the robustness and validity of the need calculations now, four years since the work was undertaken. In 2016 when the assessment was undertaken, this was done using data from 2015 that was reflective of a more buoyant time for retailing and town centres as it was in a post 2008/09 recession recovery / 'bounce back' phase. In comparison, the current struggles of high street retail are well documented, and the ever-increasing dominance of internet shopping is dragging down traditional retailing.
- 6.12 We consider that the retail expenditure growth predicted for the borough in the evidence base document is higher than would be calculated now, as growth predictions for consumer spending particularly on comparison goods are lower now than they were in 2016. In addition, the proportion of consumer spending diverted away from physical retail floorspace by online sales and e-tailing is higher now than was accounted for by the 'special forms of trading' deduction that was made in the retail need forecasts.
- 6.13 The combined effect of these two changes is, we estimate, around a 20-30% reduction in the identified theoretical need for comparison goods shopping floorspace. For convenience goods, the change is less marked and we anticipate a reduction of around 5 to 10% would be appropriate.
- 6.14 It should also be recognised that retail need calculations are highly theoretical and one of the main components of the calculation is the setting of benchmark or baseline trading densities to identify under and overtrading compared to a notional normal or acceptable trading level.
- 6.15 Overtrading in retail need calculations is often regarded as something that should be addressed by adding additional floorspace to relieve overtrading. However, the reality, particularly for comparison shopping, is that this theoretical overtrading is existing floorspace achieving stronger margins / profitability which is something that retailers would welcome provided their stores are not overcrowded and they do not have issues keeping enough stock to meet customer demand.

- 6.16 In convenience / food retailing, overtrading can be an issue that manifests in overcrowded shops, car park capacity issues, stock shortages and the like. This is something that should be addressed through providing additional floorspace or through the expansion of click and collect / home delivery services as these options would help alleviate car-parking capacity issues.
- 6.17 The 2016 Assessment does consider overtrading and Elmbridge's town centres were shown to be achieving healthy comparison goods sales densities but qualitatively there was no mention of overtrading issues within comparison goods stores. The council could therefore decide as an alternative approach to allow these healthy levels of trade to continue in their town centres rather than add additional comparison goods shopping floorspace, which would reduce trading densities and retailers margins.
- 6.18 However, the level of trading suggested in main convenience stores in the borough is high relative to benchmark levels and will give rise to customer inconvenience and this may need to be addressed through additional stores, particularly where a qualitative and quantitative need is shown to exist. Alternatively, this overtrading could be met through the provision of enhanced click and collect / home delivery services to take pressure off the in-store environment.
- 6.19 Turning to the vitality and viability of existing centres, the 2016 Assessment sets out a series of qualitative recommendations for each of the designated centres (with no major concerns about any of them highlighted) as well as out of centre development.
- 6.20 Boyer have visited each of the borough's designated centres and consider that the observations made in terms of the hierarchy, function and role of the centres are still valid, with the exception to this being Hersham district centre.
- 6.21 Our view on Hersham is based on a number of factors including the change in land uses since the boundary was last designated in 2011, (primarily along Queens Road and Primrose Road) where a number of office buildings have been redeveloped into flats. This means that large elements in the current west / north-western boundary of the centre do not contain any significant concentration of town centre uses (this area is primarily residential or a village green) and therefore the part that actually contains active uses is far smaller and located in the eastern portion of the current designation.
- 6.22 When looking at the areas that remain in active use in Hersham, the centre now appears to have the characteristics and size of other local centres in the borough, such as Thames Ditton and Claygate.

- 6.23 In Hersham there is one primary retail anchor (Waitrose) / focal point in its shopping centre, with a number of complementary businesses adjacent to it and in the surrounding streets.
- 6.24 Alongside this, when comparing the area of Hersham centre that contains active town centre uses to the other district centres in the borough (e.g. Weybridge, East Molesey, Esher and Cobham), it is clear that is far smaller in both physical size and number of units / businesses present. These larger district centres also tend to serve a wider area, such as Cobham district centre being the retailing / service focal point for Oxshott, Stoke D'Abernon and Downside as well as serving Cobham itself. It is unlikely that Hersham district centre is drawing many shoppers from other areas of the borough (e.g. Walton-on-Thames, Weybridge or Esher) and thus Hersham's role and function is more akin to that of the other local centres in Elmbridge.
- 6.25 In addition to making changes to the boundary of the centre as its position in the retail hierarchy within Elmbridge, it should also be noted that it is suggested that the existing primary and secondary retail frontages are removed. This is for two main reasons, the first being that due to changes in national policy in the NPPF, there is no longer an onus on there being delineated frontages within settlement centres. The second reason is that as it is proposed for Hersham to become a local centre as opposed to remaining a district centre, and previously local centres have not had specified primary and secondary frontages within them. Therefore, the removal of these frontages would be in keeping with the proposed designation of the centre.
- 6.26 Based upon the above research and observations, it is therefore suggested that consideration is given to re-designating Hersham as a local centre as opposed to the current district centre designation and the centre boundary is redrawn. The proposed amendments to the boundary are shown in Appendix Five.

Local Market Demand

- 6.27 We have obtained published market data from Costar for the retail and other town centre markets in Elmbridge that shows recent new letting and investment activity.
- 6.28 For retail, there were over 35 separate units listed as vacant in March 2020, at various locations across the borough. The smallest ranged from 112sqft (10.4sqm) to 8,000sqft (740sqm) with the vast majority being under 3,000sqft (circa 275sqm). This shows that the vast majority of available leases were for smaller retail premises, frequently in high street locations. This would align with the wider trends seen over the last few years that highlight a struggling / declining traditional high street.

6.29 There does seem to be some conflict between the lease listings and the Costar trend data, which states that vacancies are only at 1.4%, with a 12-month increase in rents of 3.6%. However, the forward projections suggest a steady increase in retail vacancy over time to 2023, as would be expected if current trends continue.

6.30 When looking at EBC's data collected (which relates specifically on the designated centres), the average vacancy rate in those areas for 2020 was 6.3%. This seems to perhaps be more realistic of the actual vacancy rate, as although Elmbridge is generally a wealthy area that has been largely 'recession proof' in previous years, it is not fully immune to the changing nature of retail spend.

Commercial Agents Feedback on Elmbridge's town centre market

6.31 Whilst the Costar data helpfully shows recent market activity, we have supplemented this with informal discussions with commercial agents active within the Elmbridge property market to get a picture of future demand across the sectors and an agent's perspective on what local issues and trends will be. The findings from this informal engagement are set out below.

6.32 Feedback from commercial agents active in the borough gives a consensus view that the market for high street retail lettings is challenging. National multiple retailers are generally scaling back their store networks rather than actively seeking new premises. From the independent retailing sector there is some demand although this is generally for smaller premises to limit property costs (rent and rates) and lease terms are short. There is however interest from certain sectors and food and beverage operators (both national and independent) were identified as having some interest in taking space, however this was very much on restricted terms and conditional upon the appropriate A3 / A4 / A5 consents being secured.

6.33 Across the borough's town centres, agents were consistent in identifying Cobham, Weybridge and Walton-on-Thames as having the strongest levels of demand although it was hard to get deals 'over the line' and tenants were able to negotiate on rent / rent free periods and fit-out costs. Esher was identified as a centre which now has limited retail function and its focus had become food and beverage and retail services.

Retail and Leisure Property Requirements

- 6.34 Some national multiple retail and leisure operators publish requirement lists, which detail the size, type and locational characteristics of properties they are looking for. The list will sometimes identify specific towns of interest or will be more general to a county or region. Often rather than the retailer themselves providing their requirement list, they will appoint commercial property agents to market their requirements and identify premises that are suited to their requirements.
- 6.35 We have undertaken a requirement search to establish specific and more general occupier requirements of national multiple traders for the borough's main centres. This is not an exhaustive search but does give a broad indication of the operators currently in the market. There will be other occupiers with unpublished requirements that would take a premises-by-premises approach and if a suitable opportunity arises, would be interested in locating within the borough. Copies of a selection of requirements are provided at Appendix Four.
- 6.36 With regard to larger space users, the main interest for premises and development sites within the borough is from the food discounters Lidl and Aldi. Both retailers have broadly similar operational requirements seeking prominent locations with easy access and strong pedestrian or traffic flows. They will consider freehold, leasehold or long leasehold opportunities on units between 14,000 and 26,500sqft (circa 1,300 to 2,500sqm) ideally with adjacent and dedicated car parking although both will also look at premises without car parking on smaller sized units in strong town centre locations. For developments, they are looking for 1.5 acres (0.6ha) plus sites for standalone stores or up to 4 acres (1.6ha) where there is a mixed-use development opportunity. Lidl's requirements specifically identify Esher, Molesey, Cobham, Walton-on-Thames and Thames Ditton while Aldi's requirements include Cobham, Weybridge and Thames Ditton.
- 6.37 Other food grocery store requirements are less specific, but we are aware that Co-Op, Sainsbury's and to a lesser level Tesco have requirements for smaller sized convenience stores, primarily focused upon local centres and locations with good levels of passing-by car trade.

- 6.38 Requirements from non-food comparison goods retailers are more mixed and rather than definitive specific locations, the higher quality retailers in particular will consider socio-demographic and consumer spending characteristics when assessing potential store locations. In this respect, it is not surprising for example, that Cobham has some high-end retail provision (e.g. Jo Jo Maman Bebe, Space NK Apothecary, Jigsaw, Sotheby's etc.). It is considered that there is potential for other similar profile retailers to be attracted to this location because of the characteristics of the area and equally because retailers like adjacency with other similar calibre and complimentary brands.
- 6.39 Comparison good retailers we have identified with active requirements for representation within Elmbridge centres include Pets at Home, Superdrug, Savers, Jigsaw, Loaf (furniture), TK Maxx, Sense (Charity), British Heart Foundation (Charity), Card Factory and Cards Direct. Generally, these are town centre-based requirements although Pets at Home and TK Maxx would consider retail warehouse type premises.
- 6.40 Leisure operators with active specific and general requirements include gym brand Jett Fitness, food and beverage companies Jamaican Blue (Coffee and Casual Dining), Greggs (take away), KFC, McDonalds, Dominos and Prime Steak Grill (restaurant).
- 6.41 Overall, whilst there are some specific requirements from national chains, the size and status of the borough's centres means that they will often be overlooked for higher order major and sub-regional centres such as Guildford and Kingston-upon-Thames. Additionally, rather than expanding store networks, the majority of national brands are more focused upon rationalising their existing store portfolios and are cautious about adding additional stores.

The council's current supply

- 6.42 Having reviewed the council's commercial monitoring records (dated up to 14 March 2020) there is the following net amount of retail and commercial leisure development either coming forward within the borough or has been completed previously (covering the period 2011-2020).
- 6.43 Net changes in floorspace in unimplemented planning permissions:
- A1: 1,416sqm
 - A2: -1,478sqm
 - A3: -401sqm
 - A4: -722sqm
 - A5: 366sqm

- D2: 6,859sqm
- Sui Generis: -1,960sqm

6.44 Net changes in floorspace in commenced developments:

- A1: 1,214sqm
- A2:314sqm
- A3: 177sqm
- A4: -220sqm
- A5: 0sqm
- D2: 692sqm
- Sui Generis: 2,283sqm

6.45 Net changes in floorspace of completed developments (for the period 2011-2020):

- A1: 5,888sqm
- A2: 748sqm
- A3: 3,841sqm
- A4: 989sqm
- A5: 686sqm
- D2: 1,014sqm
- Sui Generis: 4,570sqm

6.46 Full tables showing this (and information in relation to commercial uses) data in full are set out in Appendix Three.

6.47 Looking at the above figures and comparing the net completions to the projected future trends, it appears that there may have been a level of completions previously that now results in an over-provision against what is, or may well be needed in future. As there has been nearly 6,000sqm of A1 floorspace completed (though it should be noted that much of this is in the form of convenience grocery retail of which there is evidence of there being some need for further competition in this sector) it is likely that this level of provision could not continue in future.

- 6.48 Within this overall excess of supply, however, the lesser increases in all the non-A1 uses may be beneficial to the retail sector in the borough as it is predicted that retail centres will need to provide a wider offer to draw in people to make multi-purpose trips and therefore increase the amount of time and money they spend.
- 6.49 Overall, it could be concluded that there may well have been an over-supply of A1 retail floorspace over 2011-2020, but the increased diversification of offer through the provision of more floorspace in other uses may assist in maintaining a vital and vibrant retail environment in future. This is something that will need to be monitored closely by the council on an on-going basis, and potentially a flexible approach will need to be taken depending on the specific context and circumstance(s) in which any given future proposals emerge.

Summary / conclusions

- 6.50 As noted at the start of this section, the work undertaken (and therefore the subsequent conclusions drawn from it) was undertaken during the peak of the Covid 19 pandemic lockdown, but utilised data from the period before it began.
- 6.51 This was done for a number of reasons including not delaying the preparation of the new Local Plan as the current Core Strategy is already over five years old, taking account of pre-crisis market activity and demand as the plan looks over a 15-year period and the Government's desire for all councils to have an up to date plan in place by 2023.
- 6.52 This means that the conclusions of this document do not reflect the impacts of the Covid 19 pandemic, and thus there may be a need (in the medium term) for this to be reviewed, but will help guide the council's policy formation on the local plan so that it can progress.
- 6.53 To conclude, the council's 2016 Retail Assessment would most likely need to be updated, due to the evidence it is based upon dating from 2015. Since then the prevailing conditions for traditional retailing on the high street have significantly worsened, and thus an update to this document would most likely reflect a reduced requirement for (particularly) comparison retail.
- 6.54 Based on Boyer's observations of each of the centres and compared to the data available on the land uses in each, the only recommended change to the hierarchy of centres would be to re-designate Hersham as local centre instead of a district centre. This is based on its size, number and mix of units, as well as the catchment area it serves which are more comparable to the other local centres in the borough than the district centres of Esher, East Molesey, Cobham and Weybridge.

- 6.55 When looking at the Costar data for the borough, there are over 35 leases available on retail premises (of various sizes) as of March 2020. When combined with the expected increase in vacancy levels to 2023, this suggests that there may be too much retail stock in the borough already, and thus it is unlikely that there will be a need for any significant additional floorspace in future.
- 6.56 This, when combined with the data from the council's own records (including the annual retail centre surveys and commercial monitoring) shows that there has been a significant delivery of all of the retail and commercial leisure uses over the period 2011-2020. Whilst the additional A1 provision may be in excess of what is / is no longer needed, the increase in floorspace of a greater variety of uses may well assist in ensuring that centres have multiple draws and this may help maintain their vitality and viability.
- 6.57 Based on the above including existing vacancies, the increased quantum of floorspace delivered in the borough, and the changing nature (and any proposed losses of) floorspace from the commercial use classes the town centres will need to be closely monitored by the council. Because of this, a flexible and context specific approach may need to be taken to individual proposals and cases. Any policy in the new Local Plan may therefore need to be more flexible (particularly in comparison to a potentially more protective one for the SEL locations) to enable centres to adapt to change and meet the shifting demands of an evolving 21st century retail landscape.

7. Potential opportunities and barriers

Introduction

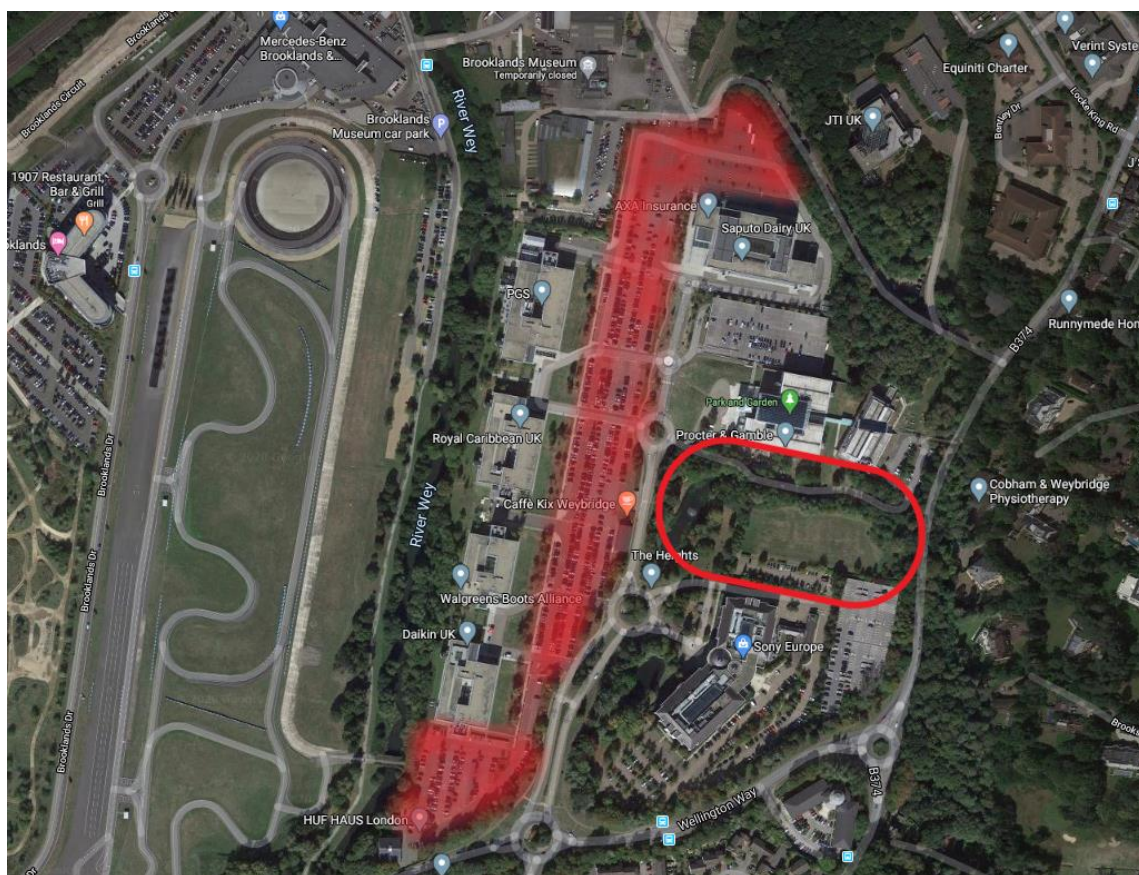
- 7.1 Having reviewed the existing evidence and examined the potential approaches appropriate to the council in the context of gathered evidence and local market conditions, in this section we set out the potential opportunities to meet employment and commercial growth.
- 7.2 Our overarching view is that in Elmbridge the main opportunities lie primarily in intensification and change of use-based interventions at and within existing employment areas and town centres in the borough. This is due to the constrained nature and geography of the area; the main areas of employment and retail tend to be surrounded by the Green Belt or the built form goes straight to residential, with no 'transitional areas' in between that could be utilised for further development.

B-use opportunities

- 7.3 In terms of opportunities for further B class employment uses, the main areas which provide potential for additional employment floorspace are within the SEL areas that are proposed to be retained.

B1 Office – large scale Grade A

- 7.4 An example of an intensification would be the large quantum of surface car parking present at The Heights SEL.
- 7.5 This surface level car parking is an inefficient use of land that could be reduced in footprint by replacing with decked car parking which would yield surplus land for additional Grade A office space either in the form of HQ style buildings or multi-tenanted serviced office facilities.
- 7.6 There is at least 3 hectares of land in use as surface level car parking and reformatting this would provide some scope for additional office space. Utilising one third, for office development could if developed as three storey office buildings yield 30,000sqm (gross) floorspace.
- 7.7 At The Heights, we also noted an area of undeveloped land lying between Proctor and Gamble and Sony, which we have estimated would have a developable area of circa 1.5ha. Allowing for car parking, access / circulation and landscaping at a site coverage of 0.3ha there would be scope to develop circa 15,000sqm (gross) again assuming three-storey development.
- 7.8 The annotated aerial map below shows the potential areas for intensification.



7.9 Another SEL location that has the potential to be intensified is the surface car parking and single storey building located at Hersham Place Technology Park. The main building on the site is at least three storeys so there is precedent to increase the height of the single storey building. The area of land covered by this is 2.2ha.

7.10 Based on the same plot ratio approach as that taken for The Heights above, this could potentially yield 6,600sqm floorspace. However, when assessing the potential job density, this time it would be more appropriate to use the Technology Media and Telecoms (TMT) density of 11sqm per job (from the HCA guidance) as this more closely aligns with the type of accommodation at this location. This would therefore have a potential yield of 600 additional jobs at this location.

7.11 The target from the existing evidence base is 11.9ha (equivalent to 35,650sqm gross), based on using the 'Local Scenario'. However, there are notable levels of vacancy in good quality office buildings, particularly the recently developed Dakota Building in the Brooklands Industrial Estate, as well as a number of properties along Locke King Road in The Heights SEL, so the actual need may not be as high if existing premises were re-occupied.

B1 office - smaller scale

- 7.12 The borough has lost a considerable amount of smaller (lower grade but affordable) office space through permitted development conversion to residential uses. Given the disparity between rental values for lower quality office space and residential values, this is unsurprising. However, it has as a result constrained office supply for smaller businesses and some pent-up demand.
- 7.13 We identify later in this section in regard to town centre type uses that there is scope within existing centres to create new office floorspace either through change of use or mixed-use redevelopment of secondary and tertiary retail frontage / space. This could be facilitated through for example a supportive / permissive policy for office development within sustainable (town centre) locations and recognition of the contribution that small incubator / co-working space makes to the vitality and viability of town centres and how 'meanwhile' uses albeit temporary can address some micro-business location needs.

B2 -research and development

- 7.14 We do not consider there are any specific needs for additional B2 and the forecasts prepared for the council suggest a contraction in this sector. However, the key locations within the borough (Brooklands, Hersham and Molesey Industrial SELs) all have low vacancy rates and are intensively used. This does suggest that supply is constrained and a healthy level of local demand for space can be expected to continue for now.

B8 – Warehousing / Distribution / Logistics

- 7.15 The council's evidence suggests that the borough will require an additional 7ha of B8 land up to 2035. Trends point to a growing need for logistics space and our market engagement has confirmed there is occupier and logistic/distributor demand.
- 7.16 Having regard to physical constraints and based upon our review of the existing primarily B2 / B8 focused SELs - Brooklands, Hersham and Molesey Industrial Estates - we consider that the best and most appropriate location to plan to meet the future projected need would be in Brooklands Industrial Estate due to its close links to the strategic road network.
- 7.17 Unlike Hersham and Molesey, the Brooklands Estate also has a number of larger plots that could accommodate additional floorspace through intensification or redevelopment. Additionally, we consider that Brooklands Industrial Estate is part of a wider cluster that adjoins similar industrial premises in neighbouring Runnymede Borough.

7.18 Both Molesey and Hersham Industrial Estates are intensively used and there is very limited scope for any additional development.

7.19 Away from intensification of floorspace, another area where potential improvements could be made is in the rejuvenation or improvement of existing stock. This is particularly applicable to areas such as Molesey Industrial Estate and the Hersham Industrial Estate. As these areas are comparably full in terms of plots, or lack notable open spaces within them, the best way to provide additional or improved accommodation would be through redevelopment. It can be argued that this has already happened in some cases, such as at the Dakota building in the Brooklands Industrial Estate.

7.20 As there is evidence of this already taking place in both of these locations, it suggests that the council is already supportive of this approach, and this is something that could be integrated into a policy that may replace the current Core Strategy Policy CS23. This is because in its current form the policy is not as explicitly supportive of redevelopment to provide additional / improved floorspace as it could potentially be as it currently focuses on the protection of existing areas / sites. The priority for these areas should be to protect and where possible enhance and improve their environment and accessibility within and around them.

Retail and town centre opportunities

7.21 As part of visiting the council's designated centres, Boyer sought to identify locations that have the potential to enable significant developments, as well as areas that could be improved to enhance the attractiveness and offer of the centres.

7.22 These town centre opportunities were limited in number and include the following locations / properties:

- Former Carpetright store, Bridge Street, Walton-on-Thames;
- Homebase, New Zealand Avenue, Walton-on-Thames;
- 15 Between Streets, Cobham; and
- Bridge House, 41-45 High Street, Weybridge

7.23 Whilst a number of improvements could be made to various centres (set out below), only the first two of the above listed sites have not already obtained planning permission (having reviewed the council's commercial monitoring records), or have proposals being developed to regenerate them. The suggested improvements are as follows:

- Traffic calming measures – to improve air quality and make centres more attractive to pedestrians;

- Improved pedestrian connectivity to make centres easier to navigate. Specific examples include Esher High Street, New Zealand Avenue in Walton-on-Thames and Hepworth Way / Church Street, Walton-on-Thames;
- Environmental improvements to reduce street clutter and make streets easier to navigate; and
- Incentives / improved electronic vehicle parking facilities or a greater number of charging points would help improve air quality.

7.24 Due to the physically constrained nature of the designated centres, the best way to ensure their health and future vitality would be to focus on improving the appearance and accessibility of them, as well as ensuring that there is a good mix of uses to drive footfall. This could for example include small scale B1 e.g. co-working and community uses which add to vibrancy.

7.25 Alternatively, as there is an ever-increasing shift to centres being mixed use, to encourage multi-purpose trips and for people to spend longer there, the council may wish to review its policy approach via the use of primary and secondary retail frontages, to ensure the designations are fit for purpose.

7.26 This is because there is no longer an emphasis on this in national policy with no reference to them in the 2019 NPPF. This does not preclude their identification, but does raise questions as to whether this is a designation that is still capable of having a positive planning impact in a changing retail and town centre market. This is in light of the need to take a flexible approach to the mix of uses present, and could stymie the provision of additional employment accommodation.

7.27 If these frontage designations were no longer used, then this presents an opportunity for a more market-driven approach that has the potential to increase competition for prime locations and reduce vacancies through a less rigid approach in formal council policy as to what uses go where in any given centre.

7.28 This is particularly applicable to potential mixed-use developments that may enable the provision of additional town or edge of centre start-up office accommodation which would not only assist in meeting a potential aim to restore lost office floorspace in town centres due to permitted development rights, but will also complement the suggested employment floorspace needs going forward.

7.29 Another potential route to ensuring the viability and vitality of town centres would be to increase the population living within / adjacent to these areas through additional residential development. This would increase footfall within / to these locations from those living there, as well as additional visitor / social visits from friends and relatives. In addition, due to living in close proximity to shops and services, this should ensure an increased amount of trade for town centre businesses and services.

Council owned and other public sector property opportunities

7.30 As well as looking at extant planning permissions, we have also undertaken a review of EBC's capacity to make use of its own property to enable the provision of additional employment floorspace, where appropriate. As part of this, we have consulted the council's Asset Management and Property Services (AMPS) department and sought their views on the potential of the council's property portfolio.

7.31 The council's Asset Management Plan (2019-2024) sets out the council's approach to its own portfolio, including the investment and operational elements of this.

7.32 The overall conclusion that can be drawn from it is that the council's first preference would be for any property that is to be disposed of would be for affordable residential units as this is stated at multiple points throughout the Plan.

7.33 The only properties that are noted as being surplus and vacant are as follows:

- Molesey (former) Sewage Works - a 6.5ha site that comprises open land with part (3.25ha) identified within the current Local Plan for housing. There is serious land contamination (including methane), and detailed reports need to be prepared by specialist engineers. Overall the cost of redeveloping this site is deemed to be prohibitive and the problems complex. As a result, the matter is on hold.
- Pleasant Place Bungalow – a vacant residential property and horticultural land. The property has restrictions and covenants which hinder the ability to release and whilst it has been deemed surplus to council requirements we are still looking at various options for the site.

- 7.34 Other council owned land will, following consideration of the service delivery needs of the council, make best use of council assets, maximise resources and will be informed through the Local Plan development process. A study into the potential of council land was undertaken in 2018, as part of the Land Availability Assessment, which can be found under the 'Housing' section on Elmbridge's [Evidence Base webpage](#).
- 7.35 Aside from the above, the only other location that has the potential to provide an increase or improved (in qualitative terms) amount of employment space that is owned by the Council is Sandown Industrial Estate Esher. This has the potential to provide either a solely employment-focused location or could become a mixed-use site that also includes an element of residential accommodation as part of a potential redevelopment towards more office / light industrial / research and development focused area with ancillary residential provision.
- 7.36 Another issue raised as part of discussions with the council's AMPS team is that if any space were to become available in its operational portfolio, (e.g. the Civic Centre), the council is now moving towards seeking to provide more community-focused space, (e.g. accommodating nurseries, gyms etc.) as opposed to pursuing a purely commercial approach. This may have implications for the potential redevelopment of Sandown Industrial Estate highlighted above.
- 7.37 Looking at what the council sets out as recent successes in terms of the redevelopments in its portfolio, these have focused (as is the stated intention) upon the provision of affordable housing. The only notable exception to this has been the planning permission granted for Weybridge hall for a mixed-use of five residential units and D1 (cinema) use on the ground floor. It is notable that the council has a positive record of accomplishment in developing multi-use use locations within its asset portfolio, such as the multiple occupiers at the Civic Centre in Esher as well as the widely and frequently used community hubs / halls across the borough.
- 7.38 In addition, to the Elmbridge plan for their own assets, we have reviewed Surrey County Council's Asset and Place Strategy 2019-2030. This sets out that the county council are seeking property rationalisation, consolidation and investment in assets. The main overall outcome the county council is aiming for is a reduction in operational estate (excluding schools) from 300 to 100 assets.

- 7.39 This document, does not however, go through said assets in any detail, and thus any opportunities arising from this programme are likely to come forward over the next few years, and will most likely involve a series or continuous rounds of contact between the boroughs and districts in Surrey. Therefore, any opportunities that may arise from the county estate are hard to gauge at this time and may have to be dealt with on a case-by-case basis, unless a formalised framework is agreed.
- 7.40 During the site visits undertaken by Boyer, main notable public sector assets that represent a potential opportunity for coordinated mixed-use redevelopment is the Weybridge Library (and associated car park to its rear) and Weybridge Hospital sites which are located on opposite sides of the High Street in the town centre. There is scope for a coordinated review of public sector assets in this location to explore what options there may be to make use of them in future.
- 7.41 Aside from the above-mentioned sites, there may be other opportunities that arise on a more ad-hoc basis. For example, the public healthcare assets in the borough are relatively small and well utilised, and thus we would not expect them to represent a significant opportunity in future. In these instances, (in the same way as with the county council), a constructive and case-by-case approach is most likely to be the way to capitalise upon any property that may become surplus to requirements.

Heathrow

- 7.42 There may be some scope for Elmbridge to accommodate some of the potential additional growth from Heathrow and its expansion, but it is not seen as a key location. Any additional growth is likely to be difficult to accommodate due to the highly constrained nature of the borough and the context in which its main employment locations are sited.
- 7.43 This includes there being little to no space to expand these key employment areas, as they are generally immediately surrounded by either Green Belt or existing residential areas. Therefore, any growth would most likely have to come forward through the intensification of existing employment areas.
- 7.44 Another issue that would need to be addressed to enable Elmbridge to take advantage of any economic growth arising from Heathrow expansion would be the disconnect between the location of key transport hubs such as train stations and town centres and other designated employment areas.
- 7.45 In summary, we consider that Elmbridge is somewhat remote from Heathrow and there are locations closer to the airport and with more direct transport links that have greater potential to accommodate airport related employment needs.

Barriers

- 7.46 The main barrier for all types of employment generating floorspace in the borough is very high land values and housing need, which push most available sites towards residential development as opposed to those that may provide jobs. This, as already highlighted, is due to the highly constrained nature of the borough, which is 57% Green Belt.
- 7.47 Another barrier to bringing about effective land use change (though it is indicative of a heathy and well-managed property portfolio), is a lack of council-owned sites through which redevelopment can be driven or directed. This leaves the council reliant upon multiple private landowners coming forward with their own proposals for sites and reduces the ability of the council to directly intervene in the process.
- 7.48 A point of key concern for some locations is the highway network, often combined with a lack of public transport options serving key employment locations.
- 7.49 For example, many of the railway stations in the borough are set away from the designated centres, and many of the SELs. This means that many locations in the borough are highly reliant upon car-based commuting to the point this becomes a detriment to the attractiveness as a place of work. A prime example of this would be The Heights, Weybridge, where due the provision of a large quantity of car parking coupled with a distant train station and limited bus services; significant daily peak time congestion is a problem. Taking steps to improve this situation may improve the attractiveness of locations and therefore increase their viability for new / redevelopment to provide additional / revitalised employment accommodation.
- 7.50 The lack of large sites in single ownership is also detrimental to the provision of significant amounts of new employment generating developments. As highlighted previously, the only major sites left in the borough that have retail potential are the former Carpetright and Homebase store is Walton-on-Thames.
- 7.51 The vast majority of employment sites in the borough are small, as demonstrated by the records (where data is available) in the council's commercial monitoring information. This shows that the average site size in the borough is 1.2 ha. However, it should be noted that this average is distorted by a low number of larger sites around 6ha and over. If these larger sites are excluded from the average calculation, the mean employment site size is 0.33ha, demonstrating that the majority of sites in the borough are very small.

7.52 As an aside, out of a total of 380 sites where there was data provided about the site size, only 19 were between 2 and 6ha, and just 12 were between 1 and 2ha. That means that out of 380 sites with site size records available, 339 (89%) were less than 1ha in size.

8. Recommendations

Employment recommendations

- 8.1 Based on the evidence base review; assessment of up to date trends; Boyer's own primary data collection and on-site observations, the following recommendations are made in relation to the council's SEL sites and more generally in relation to the approach the council may wish to take towards employment uses when developing policy in the emerging Local Plan:
- 8.2 The approach and conclusions drawn from the results of the assessments undertaken as part of the SEL review are considered sound.
- 8.3 Whilst the projections, previous completions and trend information may point towards a reduced need for industrial floorspace in the borough over the Plan period, information showing that the price/sqft as well as on-site observations of Molesey Industrial Estate and Hersham Industrial Estate show that there is very low vacancy in these areas. This suggests that there may still be local latent demand for this type of accommodation, and therefore the council may want to take a more cautious approach to any proposals that seek a net loss in the floorspace of industrial uses. They could therefore seek to retain the protective elements of current Core Strategy Policy CS23 that presumes against the loss of employment floorspace in designated areas.
- 8.4 Although the GL Hearn report and other trend data may point towards a continuing need for additional B1 (office) floorspace across the borough, there may need to be some caution as to what form this comes forward in. There was a notable level of vacancy in a number of larger office units at the northern section of The Heights SEL areas (in the buildings around Locke King Road), so there may not be such a need for this larger style of office space. However, it may be viable in a very modern and prestigious format e.g. like that developed at the Velocity building in the Brooklands Industrial Estate SEL. Therefore, it may be that although there is continuing demand for B1 office use in the borough, the recent success of smaller start-up offices indicate that there is a need for smaller units to replace those lost to permitted development rights changes of use to residential, which has taken place since 2013.
- 8.5 The ongoing and increasing demand for online shopping (as indicated by the trend data) shows that there is likely to be a continued requirement for B8 warehousing and distribution units. There is likely to be split between smaller units being located in / at the edge of town centres (possibly occupying formerly retail units) and larger premises, which are most likely to be needed in the Brooklands Industrial Estate and those locations with good access to the strategic road network.

- 8.6 In terms of locations where additional future employment floorspace can come forward, potential within Elmbridge is very limited due to its nature and existing geography. This is because most of its employment locations are either directly surrounded by existing Green Belt or residential development, with very little in the way of 'transition areas' which they could expand into. Alongside this, the very high residential property prices and housing need would mean that in most areas where there is potential for either type of development, it is most likely that residential would be the format that would come forward. On that basis, the most likely viable approach would be to protect and intensify existing employment locations.
- 8.7 We consider the large areas of surface car parking at The Heights, presents opportunities for redevelopment through decked car parking and redevelopment of 'spare' land yielded. For B8, the focus must be on redevelopment proposals on other industrial sites in the borough to provide modern accommodation. There should also be support for smaller office developments, though these may come forward on an ad-hoc and opportunistic rather than planned basis in a number of town centre and sustainable locations across the borough. This could be enabled through a more relaxed approach to the mix of units permitted / supported in the borough's designated centres.

Retail / Town Centre Use Recommendations

- 8.8 Based on the evidence base review, assessment of up to date trends and Boyer's own primary data collection and on-site observations, the following recommendations are made in relation to the borough's town, district and local centres. These apply to all centres unless specific ones / sites / locations are mentioned. Others relate more generally to the approach the council may wish to take towards town centre development when producing policy in the emerging Local Plan:
- 8.9 The council may want to have the 2016 retail study formally refreshed as the current version has become dated (particularly the background trends that formed part of the projected need for comparison and convenience goods), as this information dates from 2015. This would result in a different set of projected floorspace needs for both comparison and convenience goods.
- 8.10 Although there may no longer be the level of need for additional comparison floorspace as set out in the 2016 Retail study and this theoretical need could be absorbed by more intensive use of existing floorspace; up to date trend information and evidence of overtrading in existing food stores suggests that there may still be a need for some additional convenience floorspace. The relatively recent opening of the Lidl in Hersham demonstrates this.

- 8.11 There currently appears to be a gap in the market with scope for some additional discount food retailers to introduce competition and choice as a single higher-order outlet dominates many of the borough's centres. This provision of a wider range of grocery retail options may help balance out the fact that many stores in the borough were over-trading as set out in the 2016 study.
- 8.12 The council may have to take a more relaxed approach to retaining retail uses in its designated frontages and centres, therefore responding to the 2019 NPPF that no longer contains any references to primary and secondary frontages, which has the potential to allow a more flexible approach to the mix of uses in centres. This omission does not, however preclude the use of these designations, but the council may wish to consider if their use is still a viable policy approach, particularly with the ongoing shift towards more mixed-use centres that need multiple attractions to draw in footfall, combined with the continued decline in the traditional high street.
- 8.13 If it does want to continue with this frontages approach then a detailed study of the existing uses in each frontage should be undertaken to review what is primary and secondary, and if any amendments to them need to be made. This should be done in conjunction with a review of the boundaries of each of the centres, to ensure a joined-up and coherent approach to the review, which will also need to take account of improvements / updates to OS base mapping.
- 8.14 In terms of specific locations that may be developable in the borough's existing centres, these are relatively limited, but include, the former Carpetright store and existing Homebase in Walton-on-Thames. There were notable vacancies at Bridge House, 41-45 High Street, Weybridge, as well as 15 Between Streets Cobham, but these either have planning permission for redevelopment, or have signs indicating that proposals for their redevelopment are in progress.
- 8.15 Other actions the council could take to ensure the continued vitality and viability of designated centres is to encourage the provision of additional small business space in and around them to ensure that there is additional daytime footfall. This would also improve the supply of this type of accommodation that appears to be in need in the borough, leading to an integrated approach to the wider definition of employment uses as set out at the start of this report.

8.16 In addition to the above, the provision of additional residential properties within and around centres can also increase footfall and the local market for existing businesses in highly sustainable locations that already have higher densities than other areas in the borough. This may mean that further development in these locations is less likely to be out of character, and a good way to help the council meet both its housing need and the desire to ensure the vitality and viability of its centres.

Heathrow

8.17 There may be some scope for Elmbridge to accommodate some of the potential additional growth from Heathrow and its expansion, but it is not seen as a key location. Any additional growth is likely to be difficult to accommodate due to the highly constrained nature of the borough and the context in which its main employment locations are sited.

8.18 This includes there being little to no space to expand these key employment areas, as they are generally immediately surrounded by either Green Belt or existing residential areas. Therefore, any growth would most likely have to come forward through the intensification of existing employment areas.

8.19

APPENDIX ONE – ELMBRIDGE BOROUGH COUNCIL LOCAL MARKET APPRAISAL BRIEFING SPECIFICATION



Elmbridge
Borough Council
... bridging the communities ...

Elmbridge Borough Council

Local Market Appraisal

Briefing Specification

Specification for a Local Market Appraisal

Overview

Elmbridge Borough Council (the Council) requires a Local Market Appraisal to inform the preparation of the new Local Plan, selection of sites for future allocations and its future growth development strategy.

The need for new homes in the borough is significant and land supply is limited. The Council is responding to this challenge and this Local Market Appraisal will support the Council's approach to ensuring the optimisation of land and the consideration of its future options for growth. The constrained land supply means there is potential for conflicting demand from different uses. The Local Plan evidence base shows there is still a need to protect and enhance employment land but competing demands will need to be balanced. The introduction and greater utilisation of mixed-use schemes along with a creative approach to the use of existing sites and buildings will enable the different needs for employment and housing to be met.

The Council has already published a number of evidence base studies on employment and retail however further work is required, to ensure the employment, commercial and retail evidence base is robust and up-to-date with the requirements of the National Planning Policy Framework (NPPF) and Planning Practice Guidance.

The borough is located close to London with good access to national and international transport links. It is situated within the upper area of the Enterprise M3 Local Enterprise Partnership (LEP) and has a thriving local economy. The Elmbridge Economy is characterised by high value knowledge firms with approximately 30% of firms classified as knowledge businesses, the highest level across Surrey¹. It is home to a range of businesses including large companies such as Amazon, Samsung, Cargill, Air Products and JTI. In recent years, the borough has seen above national job and business growth as well as a high level of startups, along with a growing cluster of digital, computing and information services.

There are currently 13 designated Strategic Employment Locations in the borough. These along with other non-designated employment sites were reviewed in the Strategic Employment Land Review 2019². It concluded that 5 sites should retain their designated status. These 5 strategic employment sites are: The Heights, Brooklands Industrial Estate, Hersham Place Technology Park, Hersham Trading Estate and the Molesey Industrial Estate. They provide a mixture of Grade A offices, distribution and flexible modern industrial units helping to maintain a healthy balance of sectors and businesses across Elmbridge.

The Local Plan must proactively promote sustainable economic growth and ensure there is enough employment land that responds to business needs. We know that work space requirements depend on the nature and size of the business and that business demand is changing. We need to understand what these changing business demands are because it is important that our workspace offer responds to these changes to prevent valued businesses and jobs leaving the borough. The Local Plan will need to address any barriers to investment and be flexible enough to allow for new working practices like live-work accommodation.

¹ [Economic Strategy Elmbridge 2019-2023](#)

² [Strategic Employment Land Review 2019](#)

The borough's network of town and local centres all contribute towards the local economy. We know that the role of town centres is changing and the diversification of uses within town centres is needed to support their long-term vitality and viability. Retail uses will remain a key element of the high street but will no longer be the most dominant sector. The Local Plan will need to support their changing role and be flexible to respond to changes in market demand. Given their proximity to transport links and services, our town centres are well placed to offer sustainable locations for employment and new homes.

The Local Market Appraisal will enable the Council to ensure it is making the most efficient use of land, providing enough employment land to meet the requirements of future business needs and safeguarding key employment sites. This will enable the borough to build on its strengths, counter any weaknesses and address the challenges of the future. It will help support the priorities in the Elmbridge Economic Strategy and inform the formulation of the economic vision and planning policies in the new Local Plan and any future related strategies.

This specification outlines the objectives and aims of the Local Market Appraisal, the tasks involved, the level and scope of information required, along with the project meetings and timetable for completing this work in the following sections.

Set out in Table 1 below are the contract details for the Local Market Appraisal.

Table 1

Item	Contract Details	
Contract Title	Local Market Appraisal	
Client Address	Elmbridge Borough Council Esher Civic Centre High Street Surrey KT10 9SD	
Authorised contact	Rachael Thorold Local Plan Manager	Joseph Kelly Planning Policy Officer
Period of Contract	11 weeks	
Possible extension period	41 weeks + 1 year + 1 year (up to 4 years)	
Tender Queries	All queries relating to the content of this contract should be made via Intend	

Background on the Local Plan

The Core Strategy was adopted in 2011 prior to the introduction of the NPPF. Since then Elmbridge's need for housing has grown significantly and 623 homes per year are needed as per the standard methodology. The Council is currently assessing its land availability and supply and evaluating different options for its future growth development strategy in the new Local Plan.

The Council carried out a Regulation 18 Strategic Options Consultation at the end of 2016. In response to this consultation, the Council carried out more evidence base work. A Local Plan Options (Regulation 18) Consultation was held over the summer of 2019 which consulted on five possible options for selecting housing sites. A further Regulation 18

consultation is planned for early 2020 on the vision, objectives and the direction of development management policies. The responses to these consultations, together with other evidence base studies including this Local Market Appraisal and the Sustainability Appraisal will all inform the Council's future growth development strategy for the Local Plan and site selection.

In line with the timetable set out in the [Local Development Scheme](#), the Council is preparing a Draft Local Plan (Regulation 19) to be published 2020 and to submit a Draft Local Plan for examination.

Specification Requirements

The Local Market Appraisal will be required to meet the following objectives:

Baseline:

- Provide a commercial based perspective on the current market demands for different employment sectors in the borough, along with an evaluation on whether the supply of employment land in the borough is meeting market demands and if there are any weaknesses such as gaps in supply.
- Identify local business trends in the borough such as start-ups, co-working spaces and clustering of specific sectors, including the identification of possible future business trends over the next 15 years and what the implications of these trends are on employment land supply.
- Recognise and address the specific locational requirements of different business sectors. This includes making provision for clusters, networks of knowledge and data-driven, creative or high technology industries, and for storage and distribution operations at different scales and accessible locations.

Future trends:

- Identify names of high street businesses outside of town centres; this may include smaller shops and restaurants.
- Identify changes in market demand for town centre and local retail centre floorspace arising from the shifts in shopping behaviour and the impact of these changes.
- Identify the scale and type of development likely to be needed in town centres over the next ten years, which will meet the anticipated needs for retail, leisure, office and other main town centre users over this period.

Delivery:

- Highlighting any key sites and locations in the borough for different sectors and providing conclusions on the current suitability of locations, for meeting existing and future demand whilst taking into account the potential for improvements through new investment.
- Identify any potential barriers to growth and investment to Town Centres such as viability, inadequate infrastructure such as car parking, services or housing and poor environment.

Wider influences and opportunities:

- Highlight any opportunities for improving workspace supply such as provision in council-owned property or for private sector and public sector collaboration to provide workspace needed.
- Provide the evidence that can be used to formulate planning policies that can create the conditions for businesses to invest, expand and adapt. This will be achieved by taking into account both local business needs, wider opportunities for development and identifying any gaps in provision.
- Provide evidence to support capacity and growth for Heathrow and other priorities highlighted in the Elmbridge Economic Strategy and the emerging Local Industrial Strategy.

The Consultancy will be expected to demonstrate an up to date and extensive market knowledge, property expertise, knowledge of key transactions, take-up and availability in the employment and retail market. They will be required to demonstrate successful application of a scoring system based on a list of appropriate criteria, which can be used to assess the quality of existing floor space in industrial and office accommodation and retail and identify potential redevelopment opportunities.

Data and modelling

Mapping data should be sourced from existing sources such as the Council's Geographical Information System (GIS). A list of key organisations to liaise with and data to be sourced for each project should be discussed and agreed within the Council prior to commencement. In addition, any further requirements such as data and formats should be set out prior to commencement.

All data should be analysed to assess whether any adjustments or additional modelling is required. If adjustments or additional data is required, the consultant must notify the Council in writing with a clear explanation and costings. Further work must not be undertaken unless instructed to do so by the Council and will be agreed at an additional cost.

Project meetings and timetable

The Consultant is invited to comment on the feasibility of the outline timetable provided below, and to provide a project plan to achieve these overall timescales. The studies will be subject to regular progress reporting throughout their duration in addition to scheduled meetings.

The final details of the specification, structure of the reports together with work programmes (particularly later stages of work) will be agreed following discussions at the Inception meeting.

The Council reserves the right to withdraw from using the services of the consultant if it is not satisfied with the standard or quality of the work or agreed timescales are not met.

Project Milestone	Date
Deadline for submission of proposals	3 February 2020 (midday)
Confirmation of successful consultant	7 February 2020
Contract start date	10 February 2020

Inception meeting	18 February 2020
Progress Meeting 1	TBC
KEY MILESTONE 1: Initial report to Council	
Progress meeting 2	TBC
Initial Report to Council	27 March 2020
Consultation with other organisations	TBC
KEY MILESTONE 2: Draft report to Council	
Draft report to Council	17 April 2020
Consultation with other organisations	TBC
KEY MILESTONE 3: Final Report	
Final report to council	27 April 2020

Outputs

All content must be clearly presented and structured. In addition, it is expected that it should be written in an understandable format for all audiences and must be user friendly, not overly lengthy, technical or contain unnecessary repetition. Maps, tables flow diagrams etc should be used wherever possible to simplify information and illustrate key points.

The completed report should be presented as a bound hard copy publication, including maps, illustrations and tables as appropriate 3 hard copies will be required. The entire content of the completed studies must be made available in digital formats, as agreed with the Council. All map-based data must be provided in a format compatible with BDS and Shapefile formats. All data used in this project and raw evidence gathered will be expected to be made available to the Council in user friendly and easy to understand digital formats, as agreed with the Council.

The final report will be published as part of the evidence base to support the emerging Local Plan policies and allocations. In this regard, care should be taken to ensure that the study does not compromise commercial sensitivity and/or confidentiality.

To meet the Public Sector Bodies (website and mobile applications) (No.2) Accessibility Regulations 2018, the final document will need to be compliant with the International WCAG 2.1 AA Accessibility Standards.

Costs and payments

The fee for this project will be a fixed fee price based on daily rates and inclusive of all travel and subsistence. All prices are to be exclusive of VAT. The consultants will not be entitled to free car parking at the Council Offices or in Council owned car parks across the borough. Fees to be paid under this contract will not include any costs incurred by the consultants in preparing their quote. The Consultant must agree that all documents and materials produced as a result of their engagement under the contract are the property of the Council and that copyright in all documents and materials so produced vests in the Council. Payment will be based on monthly invoices reflecting the number of days spent on the project and progress to date.

The Council reserves the right to withdraw from using the services of the consultant if it is not satisfied with the standard or quality of the work. The Council and the successful consultant will agree key milestones for the project at the inception meeting. Payments will be made after each key milestone is completed to the satisfaction of officers based on the following payments structure:

- Milestone 1 – 25%

- Milestone 2 – 25%
- Milestone 3 – 50%

Any bids should also indicate the day rate for the preparation for and attendance at any examination in public in support of the evidence prepared.

Submission Information

The following information should be provided as part of the quotation submission:

- A brief statement of the approach and methodology of how the identified work will be undertaken
- Confirmation that the proposed timetable can be met
- A breakdown of project costs as set out above in the specification requirements
- Names and details of individuals who will be actively involved in the project
- Details of how the project will be managed
- Copies of the relevant insurance schedules

The successful consultant will be expected to sign a Memorandum of Agreement based on this Specification, the Council's Conditions of Contract, Legal Declaration, Insurance document and submission document(s), and Confidentiality Agreement

Future Work (potential)

The Council may also expect consultants to support and attend any Examination in Public (EIP) in support of the evidence. In addition, the Councils expects support to responding to representations and the Inspectors questions etc. This work would be awarded under the existing contract and based on a daily attendance fee. The Council will need this information to be provided as part of the response to this specification.

Critical success factors

1. A suitably qualified and experienced consultant shall undertake this work.
2. The inception meeting shall take place w/c 17 February 2020 and a draft methodology shall be provided.
3. The Consultant shall proactively communicate with the Council to highlight issues and risks as identified.
4. Progress updates shall take place at fortnightly intervals.
5. The written format of the document should abide by the Accessibility Regulations and be written in recognisable style and fonts.
6. The consultant shall provide the initial report in pdf and word (to include track changes) format within 1 month of the commencement of the contract. This will be reviewed and consulted upon before being returned to amend for the draft report as agreed by the Council.

7. The consultant shall provide the draft report in pdf format on 17 April, three weeks after the provision of the initial report. This will be reviewed and consulted upon before being returned to amend for the final report as agreed by the Council.
8. The final report shall be presented electronically and should be presented as a bound hard copy publication that includes maps. This shall be supported by tables in appendices as appropriate (three hard copies are required).
9. The entire content of the completed work is submitted to the Council in a digital format.
10. The assessment work shall commence on time and be concluded and signed off (by the Council) on 8 May 2020 or subsequent date agreed by the Council.
11. The information and data gathered shall be owned by the Council and made available to the Council in an appropriate format upon request at no cost.
12. In the future, the Council may also expect consultants to support and attend any Examination in Public (EIP) in support of the evidence. In addition, the Councils may require support in responding to representations and the Inspectors questions etc.

Contact and project management

The Council's main contact for this Local Market Appraisal is Joseph Kelly, Planning Policy Officer. The project manager is Rachael Thorold, Local Plan Manager.

Key Performance Indicators

The Tenderer shall be obliged to meet all Service Level Agreements (SLA). To confirm the SLA has been achieved a Key Performance Indicator (KPI) has been allocated to each SLA - see Table 4 below.

The KPI's shall be monitored as appropriate, where the KPI's fail to meet the minimum threshold the following staggered actions shall be instigated:

- In the first instance of issue(s) arising, the Council will email the consultant stating what the issue is, what needs to be done to rectify it, and the timeframe(s) in which this should take place.
- A face-to-face meeting with the consultant is held to address the issue(s).
- The issue(s) are escalated to the next level of management if they are not resolved, or, a performance failure notice is issued detailing actions required to be taken prior to an agreed date.
- Financial penalty.
- Termination of the contract.

I/We confirm that the undersigned are authorised to commit the Bidder to the contractual obligations contained in the Contract.

Table 4 - KPI Matrix		
<i>Each KPI will monitored as is appropriate. Where the supplier fails to achieve a minimum threshold the above stated actions will be instigated.</i>		
Service Level Agreement	KPI	How is it measured
The inception meeting must take place and a draft methodology provided.	100% achieved	The SLA is fully met by the agreed date.
The initial report must be submitted by 27 March 2020.	100% achieved	The initial report is received by 27 March 2020
The draft report must be submitted by 17 April 2020.	100% achieved	The initial report is received by 17 April 2020
The final report must be produced by 27 April 2020. The final report should be presented electronically including a bound hard copy publication that includes maps, photographs and aerial photographs. This must be supported by tables in appendices as appropriate (three hard copies are required).	100% achieved	The hard and electronic copy is received by 27 April 2020
The output must comprise accurate mapped locations, including the approximate size, individual species information, supported by photographs and aerial images.	100% achieved	To be confirmed upon the submission of the final report and other associated work.
The assessment work must commence on time and be concluded and signed off (by the Council) by 8 May 2020 or as agreed by the Council.	100% achieved	At the commence of the contract and at the end of the contract.
The information and data gathered will be owned by the Council and must be made available to the Council in an appropriate format at no additional cost.	100% achieved	The information is received by the Council in its ownership or may be disposed of as instructed by the Council.

Confirmed By:

Signature(s) _____

Name(s) _____

Position _____

Date _____

for and on behalf of

Appendix 1

- Elmbridge Economic Strategy 2019-2023
- Strategic Employment Land Review 2019
- Elmbridge Commercial Property Report 2017
- Elmbridge Retail Assessment 2016 - Main Report
- Elmbridge Retail Assessment 2016 - Plans and Appendices
- Elmbridge Retail Assessment 2016 - Household Survey Results
- Baseline and Functional Economic Area 2016
- Commercial Property Market Study 2014

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APPENDIX TWO – BASELINE STUDIES – ADDITIONAL INFORMATION

Elmbridge Baseline Review and Functional Economic Area (2016)



1. The Elmbridge Baseline Review and Functional Economic Area (FEA) (prepared by the council) sets out that Elmbridge is part of the Enterprise M3 Local Enterprise Partnership (LEP) area as shown in the map below. The Surrey authorities of Spelthorne, Runnymede, Woking, Guildford and Mole Valley and the London boroughs of Kingston-upon-Thames and Richmond-upon-Thames directly surround it. The area has excellent transport links with access to the M3 and M25, easy access to both Heathrow and Gatwick airports and rail connections to the capital.
2. It then goes on to discuss the 2014 Strategic Economic Plan for the LEP areas; however, this has been superseded by the 2018 version (see below).

3. The FEA noted that (based on 2016 NOMIS data) that within Elmbridge there were 57,800 jobs, with this figure having increased by 3,700 (just under 7%) from 2009. This growth was significantly higher than the South East (4.9%) and Surrey average growth rates (4.25%) and indicated the relative strength of the job market in Elmbridge following the banking crisis in 2008 and subsequent recession. This made it the fifth (out of 13) largest jobs market out of the Surrey and London boroughs.
4. The FEA also examined this growth rate over a longer period (1997-2013) where it increased by 12.4% resulting in additional 7,400 jobs. Over this longer period the rate of job growth has been slightly lower than the national (12.8%) and regional levels of growth (13.5%).
5. The main strength of the Elmbridge economy is in the professional services sector. This comprises a range of activities such as legal, architectural and engineering services, which accounted for over 15% of all of the jobs in the borough. Whilst this figure is high, when looking at locational quotient figures (which quantifies how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation), the most prominent sectors are professional services as well as wholesale and transportation.
6. The borough does not have a significant manufacturing presence compared to the South East in general but more surprising is that financial and business services are much less prominent than might be expected from a borough such as Elmbridge. The location quotient shows the borough as having a much lower proportion compared to the EM3 LEP area or Surrey.
7. In terms of business demography, the Elmbridge business base is predominantly small and medium sized enterprises, with around 85% of employment in companies with less than 250 staff and 92% of all companies in the borough employing under 10 people. Alongside this, 17.1% of the workforce between 16 and 64 are self-employed, significantly above local and regional averages.
8. Another element of the FEA is the Labour market, including Travel to Work Areas (TTWAs). In August 2015, The Office for National Statistics (ONS) released TTWAs across the UK based on 2011 Census data. The assessment defines a TTWA as being an area where at least 75% of an area's resident workforce work in the area and at least 75% of the people who work in the area also live in the area. The area must have a working population of at least 3,500. For areas with a working population in excess of 25,000, self-containment rates as low as 66.7% are accepted.

9. Elmbridge is split north-south between the Slough and Heathrow and Guildford and Aldershot TTWAs, which is a change from the 2007 TTWA where the whole of Elmbridge fell within the London TTWA. Alongside the TTWA data, the FEA also look at 2011 Census commuting patterns, which showed that Elmbridge had a self-containment (e.g. living and working in the borough) rate of 48%. The net commuting level showed that there was a net outflow of 13,714 people, which is unsurprising given the high level (37%) of out commuting into London for work.
10. The latter parts of this document cover the Housing Market Area and an overview of the Commercial Property Market. The latter document is reviewed below, but the former is not because the focus of this assessment is on employment as opposed residential development.

Elmbridge Commercial Property Market Study Update (2017)

11. This document provides an update to the original 2014 study that was also produced by GL Hearn. It covers a number of areas including:
 - Commercial property market review
 - Consultation with local businesses and stakeholders
 - Updated employment forecasting
 - Future employment land requirements
 - Conclusions on the local property market demand / supply balance
12. The document highlights that Weybridge continues to be the principal office location with a number of blue-chip companies and a good supply of both new buildings coming to the market and good quality secondary space. Beyond Weybridge, the availability of office space is limited, especially as relatively new schemes such as the Aissela Building in Esher are fully let.
13. It notes that competition is increasing locally, with a number of schemes being developed in adjacent Runnymede, such as Aviator and The Bourne Business Parks, as well as 92,900sqm (1m sqft) of pre-let space at Longcross. Alongside this, permitted development rights are adversely affecting the borough and leading to a potential undersupply of second hand space that is particularly useful for smaller businesses, as large amounts of this have been converted to residential property.

14. In terms of industrial property, supply is focused at the Brooklands and Molesey Industrial Estates. Brooklands Industrial Estate provides modern, large warehouse accommodation benefiting from good accessibility for HGVs to the strategic road network. Other industrial areas in the borough (e.g. Molesey and Hersham) serve local markets and are constrained to a greater or lesser extent by their accessibility and quality of stock. Overall, the borough is not a prime market for industrial property however latent demand is considered to exist.
15. According to the 2016 forecast, the long-term increase in jobs is lower than the 2014 forecast – 6,600 jobs (compared to 9,700 previously) to 2030. The key broad sectors are Wholesale and Retail, and Professional and other private services.
16. This report has also extended the jobs growth forecast to 2035. The Experian Baseline shows a total jobs growth of 10,100 jobs over the 20-year period 2015-35 – an annual average growth rate of 0.7%.
17. Various forecasts are used to estimate the quantum of employment floorspace that will be required in Elmbridge over the period of 2015-35. These result in figures ranging from 41,500sqm to 79,000sqm.
18. GL Hearn conclude that the ‘Local Scenario’ provides the most reasonable estimate of future floorspace need for Elmbridge, showing a need for around 58,000sqm, which falls roughly in the middle of the two completions trend scenarios. In addition to this figure, a further level of replacement demand should be considered to provide for replacement office space that has been lost due to permitted development changes to residential property.
19. They also estimate the land required to support this growth in floorspace by using plot ratios which account for site requirements such as car parking and landscaping. This results in a need for around 16ha of employment land over the period 2015-35. The majority of this is for offices, while around 7ha is required for warehouse / distribution uses. Conversely, there is a forecast net loss of around 2ha of industrial land and an additional net loss of around 1ha of Sui Generis uses.

Elmbridge Economic Strategy 2019-2023

20. The aim of this council-produced document is to enable a new wave of knowledge-based sector growth with targeted investments that will create a sustainable high performing economy to support existing and new businesses to achieve their full potential.

21. The Strategy sets out that there has been (between 2010–2015) an increase in the number of businesses by 1,340 (19.3%) and 5,500 jobs (10%). It also highlights a series of other key statistics about the borough:

- £3.6bn GVA
- The most competitive economy in the Enterprise M3 LEP, and the 16th most competitive in the UK.
- 59% of residents are skilled to at least NVQ Level 4+, the highest level in the LEP area (compared to 38.6% nationally).
- 60,500 jobs (compared to 135,400 population) and 8,275 businesses
- The above equates to 8% of LEP residents, 7.5% of the jobs and 9.9% of the businesses

22. Elmbridge has an internationally facing business base. Driven by the Brooklands Business Park there are 139 internationally owned companies (with 36 firms on the Department of International Trade Ministerial One List) identified by the Invest in Surrey team in the borough that support an estimated 14,500 jobs totalling 24% of jobs across the area.

23. The document also highlighted a number of strengths and challenges for the area as set out by the council's latest Business Survey:

24. Strengths:

- The quality of life in the borough provides for highly skilled employees.
- The area is attractive to businesses for inward investment and those seeking to relocate out of London, given the local workforce and transport network connections.
- Strong performance in the knowledge / technology sectors.
- Potential for the distribution sector given the location.
- Positive outlook on business growth potential from local businesses.
- Additional Heathrow runway would benefit business.

25. Challenges:

- Lack of stock available in town centre locations, due mainly to the impact of permitted development rights.
- Lack of car parking.
- General lack of development sites for offices.
- Congestion both at a local and wider level – notably the M25 / M3 / A3.
- Existing employment areas are largely at capacity.
- An undersupply of both office and industrial space.

- Housing prices a disincentive and barrier to attracting young professionals.
- Concerns over Brexit.

26. Following on from this the council sets out its vision for the borough, which is:

- To facilitate the economic conditions to create, retain and attract knowledge-based businesses.
- To attract and retain people that are more skilled by maintaining a good quality of life, thriving centres, housing which is affordable and quality amenities.
- To improve connectivity and networks between our employment hubs, stations, towns and businesses.
- To target investment at the needs of the Elmbridge economy.

27. To help meet this vision the council sets out a number of priorities / actions including:

- Developing the borough's strategic employment sites and commercial property offer to ensure businesses can start, grow and succeed.
- Supporting appropriate community hubs to deliver quality amenities in town and village centres.
- Enhancing and adapting town and village centres to build on success and ensure future sustainability.
- Working to deliver new community infrastructure and amenities to support current and future demographics.
- Balancing economic development and sustainability to maintain respect and protection for the environment and town and village centres.

28. Following on from this a series of targets are defined:

- 370 additional knowledge-based employees each year.
- 1,200 additional businesses by 2024.
- 20 new foreign direct investments by 2024.
- 400 apprenticeship starts each year.
- 16,000sqm of new A-grade office space by 2026.
- 11,500sqm of refurbished commercial floorspace by 2026.
- 150 additional hotel bedrooms by 2026.
- Accelerate future delivery of housing and housing which is affordable over the Local Plan period by 2035.

29. Based on these targets, this strategy seeks to encourage growth across a wide range of sectors and use classes, and supports the continued growth in employment floorspace as set out by the CPMS update 2017.

Economic Development Strategy for Surrey - Report on Local Industrial Strategy Evidence Base for Surrey (2019)

30. This document (prepared by Ove Arup and Partners) looks at the two and mainly deals with Surrey-wide figures. A summary of the Enterprise M3 area of Surrey is as follows:

- The Surrey areas contributed 55% of GVA in 2017 and 56% of jobs in 2018 in the EM3 LEP area, but only accounts for 51.6% of the population (as of 2018).
- Surrey has a relatively high proportion of young people in comparison to the rest of the EM3 region – they are clustered in the north-eastern areas closest to London.
- There is a large level of net outward migration, particularly amongst those aged 25-34 years. Young professionals and young families make up this age cohort, containing a high proportion of skilled individuals.
- Housing affordability is an issue in Surrey, particularly in Guildford and areas located at the north-eastern boundary, with prices 14 times that of net annual incomes.
- EM3 is a £50.1bn economy by GVA. EM3's GVA grew by 12.9% from 2012-17 which is higher than Coast 2 Capital's growth of 8.9%, Solent's 5.9%, Thames Valley Berkshire's 6.3% and Buckinghamshire Thames Valley's 10%.
- In terms of productivity, EM3 ranked fifth highest out of all LEPs in terms of GVA per person at £31,952.
- The most highly productive areas with a GVA per job of over £50,000 tend to be clustered in the authorities closest to London, e.g. Spelthorne, Elmbridge and Runnymede.
- The total value of EM3's service exports was £11.5bn, the highest among LEPs.
- The number of Foreign Direct Investment (FDI) projects in EM3 more than doubled from 2013/14 –2018/19.
- Elmbridge accounts for £5.4bn (10.6%) of the GVA in the EM3 LEP area, which also had the highest level of growth at 8.7% in 2017.
- In 2018, Elmbridge had 61,000 jobs, (7.9%) of the total in Surrey, but had experienced a slight (and recent) contraction in that total.

- EM3 contains a greater proportion of high-skilled jobs than the national average (12% and 7% of employment is within Professional, Scientific and Technical activities and Information & Communications, compared to 9% and 4% nationally).
- Transport: congestion affects the strategic road network (M3, M25 and A3) which link EM3's major urban centres to London, the South East and serve as international gateways.
- Congestion is concentrated to the northeast of EM3 in the Elmbridge, Woking and Guildford area.

31. This document shows that (primarily Surrey) but also Elmbridge is an economically productive area with the ability to spur future growth and a strong 'starting position' from which to do this. It also sits within a wider region that is economically competitive so it needs to maintain its advantages and continue to develop in the areas in which it is strong.

Surrey Economic Development Strategy – Economic Baseline Assessment (2020)

32. This report (prepared by Ove Arup and Partners) presents the latest baseline economic and socio-economic indicators and trends for Surrey. Its purpose is to inform the economic development strategy for the county to 2050 by helping to identify economic priorities and actions.
33. It sets out a SWOT analysis (replicated below). When compared with the strengths and challenges set out in the EBC Economic Strategy it is clear that many of these also affect other areas of Surrey, and not just Elmbridge.

SWOT ANALYSIS OF SURREY



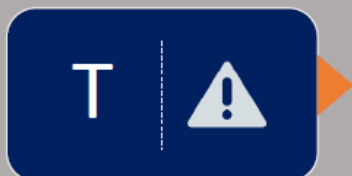
- Significant economic GVA contribution (over £40bn)
- High productivity
- High proportion of knowledge-based businesses
- High economic activity and low unemployment
- Highly skilled workforce
- Low deprivation
- High standard of living



- Negative employment growth (over last 5 years)
- Lower rate of business births
- Low growth in active businesses
- Skills shortages and hard-to-fill vacancies
- GVA per head declining relative to national level
- Productivity in East Surrey declining rapidly
- Low housing affordability
- Contraction of working age population



- Infrastructure investment to take advantage of connectivity / strategic location advantage
- Improving the business environment and innovation
- Enhancing digital connectivity and digital economy
- Investment in skills (preparing the workforce of the future, with business)
- Place Ambition and Strategic Opportunity Areas
- Natural capital approach and investment opportunities
- Transition to low carbon economy








- Ageing population
- Attracting and retaining young people
- Housing affordability and future of housing
- Attractiveness as business
- Car dependency and congestion
- Future of town centres
- Dependency on in/out-commuting
- Climate change

34. Although this document is primarily focused upon Surrey as a whole, it does draw out specific points of information about the individual boroughs where there are disparities from the County, regional or national levels.

35. Elmbridge is noted as having a lower than average level of economic activity (defined as the percentage of the population, both employed and unemployed, that constitutes the manpower supply of the labour market, regardless of their current labour status) at 79.2%. This is somewhat lower than the Surrey (83.8%) and South East (81.6%) rates, with the Elmbridge level only being marginally above the England rate of 79.1% in 2019. Alongside this lower rate, the change in the economic activity rate since 2010 is also significantly lower than the Surrey, South East and England rates with an increase of just 1.8%, compared to 4.7%, 2.3% and 2.6% respectively.
36. What explains this lower economic activity rate is Elmbridge's lower than average (for Surrey, the South East and England) rate of people in the 'working age' segment of the population (e.g. those aged 16-64), at just 59.4% compared to 61.4%, 61.5% and 62.6% respectively. This aligns with the average population age in Elmbridge (42.7 years) which is above the Surrey (42.0), South East (41.6) and England averages (39.9 years).
37. Elmbridge has a high level of active businesses per 10,000 population (in 2018) with 746, the highest in Surrey. The total number of active businesses in the borough is recorded as 10,190. Part of the reason for this will be the high proportion of businesses in the borough classed as 'micro businesses' (e.g. those employing nine people or fewer), which account for 92.5% of the total. Of the 10,190, 9,426 would therefore be 'micro businesses'.
38. Looking at some of the larger employers in the borough, the top ten of these include the following:

Rank		Company name	Employment Range	Industry
1		Tivoli Group Limited	1,500-1,599	Professional gardening services
2		Chelsea Football Club Limited	1,200-1,299	Sport and leisure
3		Central Surrey Heath Limited	600-699	Health
4		Schindler Limited	600-699	Access and transit management systems
5		Tesco Stores Ltd	500-599	Retail

6		Sony Europe BV	400-499	ICT and Digital Media
7		Air Products PLC	400 to 499	Industrial gases
8		ACS International Schools Ltd	400 to 499	Education
9		Proctor & Gamble UK	400 to 499	Professional and business services
10		The Network Field Marketing and Promotions	400 to 499	Professional and business services

39. The large number of companies however is somewhat at odds with the jobs density for the area. Surrey has a higher jobs density than both England and the South East, with a job density of 0.9, meaning there are 90 jobs for every 100 residents of working age. In England and the South East region, the jobs density is 0.87, and Elmbridge it is 0.85.
40. This is more likely a reflection of the relatively high population level for the borough (estimated to be 136,600 as of 2018 or 1,440 people / km²) as opposed to a lack of employment opportunities in Elmbridge. In future however, this population density can be expected to increase as in 2018 it was projected that by 2041 it will be 149,700, an increase of 9.6%, or an annualised rate of 0.4%.
41. Another area highlighted is the high level of pay in Elmbridge with a disparity between resident and workplace wages of £144.20 per week according to the ONS, Annual Survey of Hours and Earnings (ASHE), 2019. Elmbridge records the highest resident-based wages in Surrey, at £815.80 per week, meaning the average workplace based wages are £671.60 per week. This aligns with the relatively high level of Gross Disposable Household Income (GDHI) which for England and the South East in 2017 was £19,988 and £22,568 respectively, both of which are far lower than the £29,624 in Elmbridge
42. This high level of pay corresponds with a relatively high GVA per person in Elmbridge, which (as of 2015) was £33,510, far high than the level for England (£27,949) and the South East (£28,988) in 2017. Growth in GVA is expected (over the period 2020-2039) to increase by above the Surrey average of 45.5% in the borough.

43. These high levels of pay and GVA reflect the very high house prices in the borough, and the significant increases that have been seen over the previous decade. Between 2009 and 2018 house prices increased by an average of 41.2% across England and 58.6% across the South East. In Surrey, the average increase was 65.4%. Every district within Surrey recorded a larger increase in house prices than the national average, with the rate in Elmbridge being 56.2%, an annual growth rate of 5.1%.
44. Whilst the growth in house prices was the lowest rate in Surrey, what also needs to be taken into account is the far higher than average house price in Elmbridge. In Surrey, the median price was £435,000, considerably higher than the regional and national averages of £322,000 and £240,000 respectively. Again, every district within Surrey recorded a median house price in excess of the national average. The highest median house price was recorded in Elmbridge, at £570,000.
45. These very high house prices mean that Elmbridge is relatively unaffordable (where the median house price is 13.5 times the median salary of £42,311) compared to in Surrey (13.2), the South East (10.4) and England (8.0) overall.
46. Whilst travelling to work is predominantly done by car in Elmbridge, compared to the other Surrey authorities, it is the joint least (with Epsom and Ewell) car-intensive district, where the proportion of commuting by car or van is lower than the averages for the South East and England. Elmbridge and Epsom and Ewell record the highest proportion of residents commuting to work by train, both at 21.8%.
47. Looking in more detail at the market for commercial property, it is clear that Elmbridge is a sought after location for businesses, as office rents were some of the highest in Surrey at £29.04/sqft, second only to Runnymede at £29.17 in Q4 2019. This compares to £25.28 in Surrey and £20.83 across the South East region.
48. For retail property, the rate per square foot in Elmbridge was far more in line with the regional average at £28.52/sqft (compared to £28.41/sqft for the South East region), which is much lower than the Surrey average of £34.14. This shows that perhaps there is sufficient retail floorspace in the borough or the retail market in the area is not as competitive as other areas in Surrey. This would make sense as many of the borough's retail centres tend to be small and more lower-order / locally focused, compared to some of the larger and more prestigious locations in the county, such as Guildford.

49. For industrial premises, Elmbridge is comparatively expensive at £13.10/sqft, which is notably higher than the Surrey (12.32/sqft) and South East average (£9.19/sqft), suggesting that this type of floorspace is in high demand and / or short supply in the borough. This correlates with the observations made by Boyer during our site visits to the main industrial locations in Elmbridge, where a very high level of occupancy (and virtually no noticeable vacancy) was observed.
50. This high level of demand for industrial floorspace is also reiterated when looking at the change in the price of floorspace across each of the employment use types over the previous ten years to Q4 2019. For office (33%) and retail (20%), these matched the increases in the Surrey-wide rates, but industrial floorspace in Elmbridge increased by 55% compared to a countywide increase of 46%. All of these figures were slightly above or broadly in line with the regional increase (split 25%, 16% and 47% for office, retail and industrial respectively) over the same period, with industrial floorspace being only type that has increased notably higher than the others have.
51. This suggests that there is strong market for employment floorspace of all types in the borough, and somewhat surprisingly for industrial floorspace in the borough, which in terms of its main sectors of employment is more associated with financial and professional services.
52. Overall, this document sets out a clear baseline for Surrey and the boroughs within it in comparison to regional averages. The key points to take away from it are that Elmbridge is a prosperous location with high pay, house prices and GVA, and it is well connected to London and has equivalent or stronger demand for all types of employment floorspace compared to both the County and South East region.

A Strategic Economic Plan for the Enterprise M3 Area 2018 – 2030 (Enterprise M3 SEP)

53. Whilst the vast majority of this document (prepared by the Enterprise M3 LEP is focusing on the LEP area as opposed to the constituent local authorities, Brooklands College is highlighted as one of the key locations of higher education in the LEP.
54. In a similar vein to many of the other documents reviewed the need for a greater amount of market and affordable housing to help attract younger professional employees is seen as a key factor to ensure that the area is able to main its competitiveness.

55. One of the main aims of the SEP is to increase average annual growth over the 12-year period from its current rate of 2.9% to 4% p.a. on average. This increase in growth would add £39bn of GVA to the UK economy.
56. Closing the productivity gap, particularly on ICT (compared to the Thames Valley Berkshire LEP), is an important challenge for the Enterprise M3 economy going forward.
57. Businesses often cite skills as a significant factor in raising productivity. Part of this issue is the difficulty in filling skilled roles / positions. According to a survey, 12% of Enterprise M3 businesses reported having at least one vacancy that was hard to fill in 2015. This represents a 4% increase from the previous survey (2013). It is also the joint-highest amongst all 38 LEPs and clearly above the English average (8%).
58. The SEP highlights a general need to improve connectivity in and across the area, but also focuses on the need to improve access to Heathrow, particularly as it is currently due to be expanded. The plan is supportive of the proposed expansion of Heathrow but pushes hard for the essential infrastructure that is needed to ensure the benefits spread out across the area. Improved connectivity is therefore needed through new western and southern rail accesses to Heathrow, the latter of which is highlighted as having the potential to assist with connectivity to Elmbridge.
59. The report states that the benefits of this investment will be clear in economic terms. It will ensure corporate retention; make the Enterprise M3 area a global centre of science / technology and related industries as well as being a great place to locate new business as skills are available, accessible and connected.
60. The impact of congestion is driven principally by corridor demand and this is borne out in analysis carried out as part of the Transport for the South East Economic Connectivity Review which is summarised in this document. This identified the financial impact of delay on key corridors in the area as well as the potential impact of transport intervention targeted at congestion relief on commuters. It highlighted that the M25 had a delay impact of £114,000/km and £433,000/km on commuter delay impacts. Similarly, the impact of delays on the A3 / Portsmouth Direct Line was £85,000 and £215,000/km respectively.
61. The Plan highlights digital and data-driven technologies as one of the key areas to focus on for growth. This includes SMEs, which account for a large number of businesses in the area (and Elmbridge) as well as highlighting the large number of technology company HQs in the area, including Sony.
62. It goes on to set out five particular priorities for growth, which include:

1. High Value Sectors for a Globally Facing Economy
2. Enterprise and Innovation for Scaling Up High Productivity SMEs
3. Skills for a High Value, High Growth Economy
4. Connectivity for a 21st Century Advanced Digital and Low Carbon Economy
5. Dynamic Communities and Sustainable Growth Corridors

63. One of the key elements to note (for Elmbridge) is that part of the second priority is that the plans aim to 'look for further opportunities to support the digital and creative centres that are in close proximity to London such as Runnymede, Elmbridge and Spelthorne as well as those located in our rural areas'.

64. To summarise this document, it has a strong focus on increasing annualised growth over the plan period, and sees transportation improvements as one of the key areas to assist with this. This includes alleviating more localised congestion, as well as larger infrastructure projects such as Heathrow expansion. It also sets out that there is a need to improve skills and make it easier for companies to recruit the right people, as this is an area of difficulty currently. The focus of these improvements is in high skilled industries, as this would yield the greatest levels of improvements in growth.

Heathrow Strategic Planning Group - Joint Strategic Planning Framework (2020)

65. This report (developed by the Heathrow Strategic Planning Group (HSPG)) looks across a wide area, and Elmbridge appears to be one of the more peripheral authorities in terms of having key towns and employment locations that relate to Heathrow, compared to other areas covered by HSPG. This is evidenced by the towns in Elmbridge all coming under the 'other' category (as opposed to being 'Priority' town centres).

66. Having said that, Elmbridge has 7 (not specified) sites that are suitable for further employment development and intensification (as set out in Table 3.2 on p.70), in this case B1 and C1 uses are identified as suitable, but not B2 or B8. This is because Weybridge, Walton-on-Thames and East & West Molesey fall within the Employment Land Forecasting Study 5 mile 'Core Assessment Area' as set out in Figure 1.2.

67. The preliminary analysis indicates that sufficient land for B1, B2, B8 and C1 Use Class uses cannot be identified within the sub-region without impacting on the Green Belt and other environmental designations for longer term background economic development and Heathrow Airport expansion related requirements. This however does not make specific recommendations in relation to certain areas.

68. There are some limited references to Elmbridge towns in this document, where they form part of a wider network connected to Heathrow. For example, in figure 4.3 Esher and Weybridge are identified as locations to have a strategic link to the wider Strategic Active Travel Network that sets out the main routes / methods of transportation (as well as the main elements of the green and blue networks) across the Heathrow area.
69. In Figure 3.1 Molesey is identified as being an existing employment cluster for manufacturing, which will be related to the designated Strategic Employment Land at Molesey Industrial Estate, and Weybridge for higher education, which will be linked to the presence of Brooklands College.
70. Weybridge is also identified as one of the locations where access between rail, bus and town centres needs improvement, as the station is approximately a mile from the centre of the town, as well as being 1.5 miles from The Heights Business Park, the key employment locations. This disconnect is one of the major causes of congestion in the area as the vast majority of employees drive to these locations as opposed to taking the train or bus.
71. Overall, this document does acknowledge a number of the towns in Elmbridge as being linked and part of the network of locations that are connected with Heathrow, and that there is a need for further employment land provision across the strategic area. However, Elmbridge and its towns are comparatively peripheral compared to numerous other locations that are more closely linked (as well as being physically closer) to Heathrow.
72. Therefore, although there may be some scope for Elmbridge to accommodate some of the potential additional growth from Heathrow and its expansion, it is not seen as a key location. Having said that, any additional growth is likely to be difficult to accommodate due to the highly constrained nature of the borough and the context in which its main employment locations are sited.
73. This includes there being little to no space to expand these key employment areas, as they are generally immediately surrounded by either Green Belt or existing residential areas. Therefore, any growth would most likely have to come forward through the intensification of existing employment areas.
74. Another issue that would need to be addressed to enable Elmbridge to take advantage of any economic growth arising from Heathrow expansion would be the disconnect between the location of key transport hubs such as train stations and town centres and other designated employment areas.

APPENDIX THREE – ELMBRIDGE COMMERCIAL MONITORING DATA

Net change in floorspace (sqm) in unimplemented planning permissions by use class

A1	A2	A3	A4	A5	B1	B2	B8	C1	D1	D2	Sui Generis
1,416	-1,478	-400	-721	366	-40,025	3,968	85	232	5,535	6,859	-1,959

Net change in floorspace (sqm) in under construction planning permissions by use class

A1	A2	A3	A4	A5	B1	B2	B8	C1	D1	D2	Sui Generis
1,314	314	177	-220	0	-8,935	-6,462	0	5,665	2,253	692	2,283

Net change in floorspace (sqm) in completed planning permissions by use class (from 2011 onwards)

A1	A2	A3	A4	A5	B1	B2	B8	C1	D1	D2	Sui Generis
5,888	748	3,840	979	686	11,476	-3,901	114	1,816	11,846	1,014	4,570

APPENDIX FOUR - RETAIL AND LEISURE PROPERTY REQUIREMENTS EXAMPLES

savers

HEALTH HOME BEAUTY

SHOPS
FIT FOR

2020

STORE REQUIREMENTS ACROSS THE UK



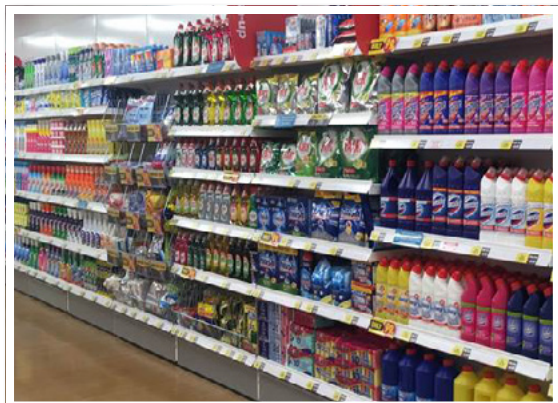
LOCATION REQUIREMENTS

- PRIME / GOOD SECONDARY
- HIGH STREET
- SHOPPING CENTRE
- SUBURBAN PARADES



PROPERTY REQUIREMENTS

- SALES
1,500 - 3,000 SQ FT
- ANCILLARY
500 SQ FT



Recently opened

MEADOWS SHOPPING CENTRE | PORTADOWN
CROSSGATES SHOPPING CENTRE | LEEDS
YATE SHOPPING CENTRE | BRISTOL
BROADWAY | WEST EALING



SEARCHING FOR STORES SERVING LOCAL COMMUNITIES

490+
EXISTING
UK STORES

50
NEW STORES
REQUIRED
IN 2020

VOTED
No. 1
WHICH?
2018 SURVEY

AAA
COVENANT

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NEW Stores Required

All locations considered

City centres

High street

Shopping centres

Town centres

1200 - 4000 sqft

Other sizes considered on
their own merit

FREEHOLD

CLASS A1 USE

ENGLAND & WALES

**Mason
Partners**

North - **Lee Quinn**

MOBILE: **07788 188731**

leequinn@masonpartners.com

Midlands/South & Wales -

Mathew Green

MOBILE: **07774 725095**

mathewgreen@masonpartners.com

SOUTH WALES

**AVISON
YOUNG**

02920 248923

Daniel Davies

MOBILE: **07920 822663**

daniel.davies@avisonyoung.com



Superdrug ☆

SHOPS FIT FOR
2020



LOCATION REQUIREMENTS



HIGH FOOTFALL



PRIME LOCATIONS

HIGH STREET

HIGH STREET



RETAIL PARK



SHOPPING CENTRE

PROPERTY REQUIREMENTS

SALES (SQ FT)

2,000 – 5,500

STORAGE (SQ FT)

500-1,000

RECENTLY OPENED

THE FORT | BIRMINGHAM

ST HELIER | JERSEY

KINGSGATE | EAST KILBRIDE

BROUGHTON | CHESTER

SOUTHBANK | LONDON



Superdrug ☆

800+
UK STORES

30
NEW STORES
PER ANNUM

AAA
COVENANT

No. 1
IN THE MARKET
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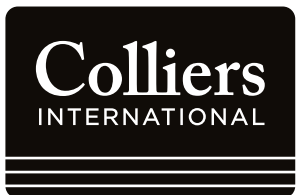
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Jessica.Short@colliers.com

We pack more into our property deals



Get in touch

We're looking for freehold or leasehold sites of up to 10,000 sq ft gross and existing businesses with a net sales area of over 1,500 sq ft. We're competitive, quick to respond and happy to retain introducing agents.

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Head of Acquisitions & New Store Development
07525 620 502

rob.bignold@co-operative.coop

Andrew Coles
Senior Acquisitions Manager
07702 505 319

andrew.coles@co-operative.coop

Des Malone
Senior Acquisitions Manager
07872 801 188

des.malone@co-operative.coop

Group acquisitions

We're interested in talking to business owners who are thinking about the future. Whether it's an informal conversation to discuss options, or you're seriously considering a sale, please get in touch.

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Head of Group Acquisitions
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Alistair Smith
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North

1 Aberdeen, Aberdeenshire, Angus, Argyll and Bute, Clackmannanshire, Dundee, Eilean Siar, Fife, Highlands, Isle of Man, Moray, Northern Ireland, Orkney, Perth and Kinross, Shetland

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2 Cumbria, Dumfries and Galloway, East Ayrshire, East Dumbartonshire, East Renfrewshire, Glasgow City, Inverclyde, North Ayrshire, North Lanarkshire, Renfrewshire, South Ayrshire, Stirling, West Dumbartonshire

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3 County Durham, East Lothian, Edinburgh City, Falkirk, Midlothian, Northumberland, Scottish Borders, South Lanarkshire, Tyne and Wear, West Lothian

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9 Cambridgeshire, Leicestershire, Northamptonshire, Staffordshire, Suffolk, Warwickshire, West Midlands

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12 Berkshire, Dorset, Hampshire, Isle of Wight, Wiltshire
Samantha Moore
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13 East Sussex, Kent, Surrey (outside M25), West Sussex
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London

14 **North and East London**
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West London
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South London
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craig.smith@co-operative.coop

Central London
Camden, City of London, Hackney, Islington, Southwark, Tower Hamlets, Westminster
Rob Tindale
07738 982 407
robert.tindale@co-operative.coop





WE ARE ACQUIRING

High Street & Non Standard



All Locations Considered



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GREGGS REQUIREMENTS

All locations considered:

HIGH STREET
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 TRANSPORT INTERCHANGES
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 UNIVERSITIES
 KIOSKS
 BUSINESS PARKS
 RETAIL PARKS
 INDUSTRIAL ESTATES
 ROADSIDE
 PETROL FILLING STATIONS
 PUBLIC HOUSES



- USE CLASS : A1
- 800 TO 1,500 sq ft (other sizes considered on their own merit)
- Leasehold or Freehold
- Excellent PLC Covenant

Ian Thurlbeck — @retail
 T: 0191 2804236 M: 07515 831417
 E: iant@atretail.co.uk

Dan Turner — @retail
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www.atretail.co.uk

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MENU



J I G S A W

Jigsaw

Jigsaw

MENU



IDEAL GROUND FLOOR AREA

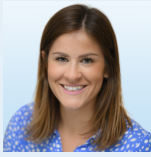
- 800 - 1000 sqft sales

CURRENT LOCATIONS

- Greater London
- Barnes
- Bellevue Road
- Blackheath
- Bow Lane
- Chiswick
- Covent Garden - Floral Street
- Dulwich
- Ealing
- Hampstead
- Islington
- Kensington
- King's Cross
- King's Road
- Kingston
- Muswell Hill
- Northcote Road, Clapham
- Parsons Green
- Putney
- Richmond
- Spitalfields
- St Christopher's Place
- St James's
- Teddington
- The Strand
- Westbourne Grove
- Westfield London
- Wimbledon
- South East
- Amersham
- Bluewater
- Brighton
- Canterbury
- Chichester
- Cobham
- Farnham
- Guildford
- Horsham
- Lewes



- Marlow
- Milton Keynes
- Newbury
- Oxford
- Reigate
- Rushden Lakes
- St Albans
- Tunbridge Wells
- Walton-On-Thames
- Winchester
- Windsor
- Witne
- East Anglia
- Bury St Edmunds
- Cambridge
- East Midlands
- Nottingham
- North West
- Chester
- Manchester
- Shrewsbury
- Northern Ireland
- Belfast
- Scotland
- Aberdeen
- Edinburgh
- Glasgow
- South West
- Bath
- Bristol
- Cheltenham
- Cribbs Causeway
- Exeter
- Marlborough
- Salisbury
- Swindon (Outlet)
- Tetbury
- West Midlands
- Birmingham
- Leamington Spa
- Stratford Upon Avon
- Yorks & Humber
- Harrogate
- Ilkley
- Leeds
- York



Jessica Short

Senior Surveyor

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Mark Phillipson

Director

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[VIEW EXPERT >](#)

Checkout our store requirements.

Talk to us about your land and development opportunities today.

Competitive fees paid for new site introductions.



Help us find great quality locations for our new stores.



What we'd like from you...

We're looking for great quality locations for our new stores, to help us continue our phenomenal growth.

National

Prominent locations with **easy access** and **strong pedestrian or traffic flow**

Freehold, leasehold or long leasehold opportunities

Unit sizes flexible on design and scale **between 14,000 and 26,500 sq ft**

1.5 acres plus for standalone stores or **up to 4 acres** for mixed-use schemes



London

Approx. **0.8 acres plus** for standalone stores or **up to 4 acres** for mixed-use schemes



With or without car parking and in close proximity to **key public transport links**

Our regional contacts and the areas we are currently looking at are listed throughout.



Stand alone



Fit out



Retail parks

What you can expect from us...

A competitive fee structure for new site introductions

Response within



1.5%

for freeholds

(acting as agent for a previously unknown site)



Our regions at a glance

Page

- 1 Scotland
- 2 North East England | Cumbria
- 3 Yorkshire | Humberside
- 4 Greater Manchester | East Lancs | Calderdale | High Peak
- 5 North Wales | Lancashire | Merseyside | Cheshire West
- 6 Nottinghamshire | Derbyshire | Shropshire | Staffordshire | Cheshire East
- 7 South-Mid Wales
- 8 Central England
- 9 East England
- 10 Bristol | Gloucestershire | Wiltshire | North & East Somerset | Mendips
- 11 London North West
- 12 London North East
- 13 London South
- 14 South and West Somerset | Devon | Cornwall
- 15 Central South England
- 16 Kent | East Sussex | East Surrey

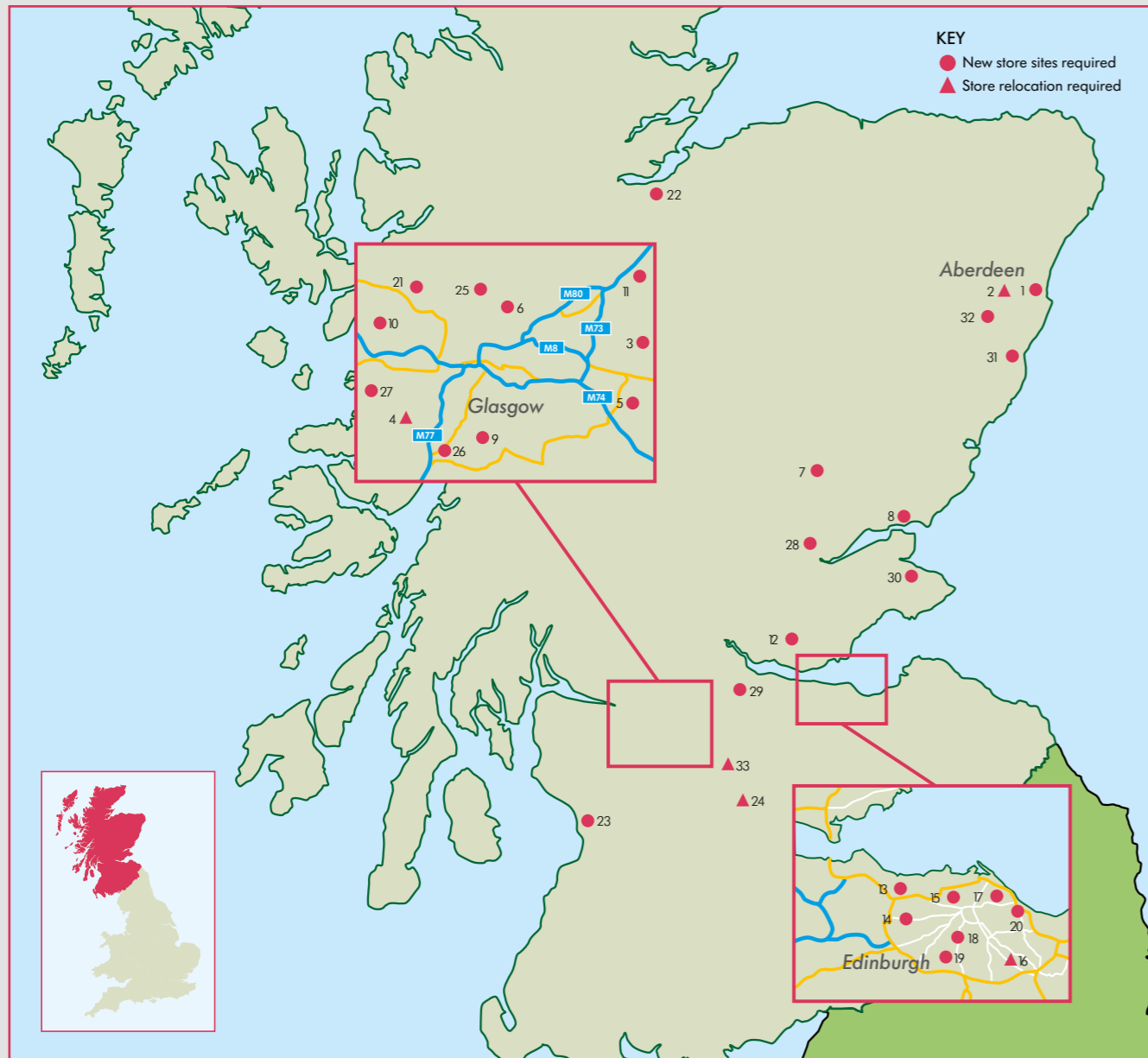
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 Olu Johnson: olu.johnson@lidl.co.uk
 Alice Stennett: alice.stennett@lidl.co.uk
corporate.acquisitions@lidl.co.uk
 020 8971 8835

Use the page key to find your regional contact.



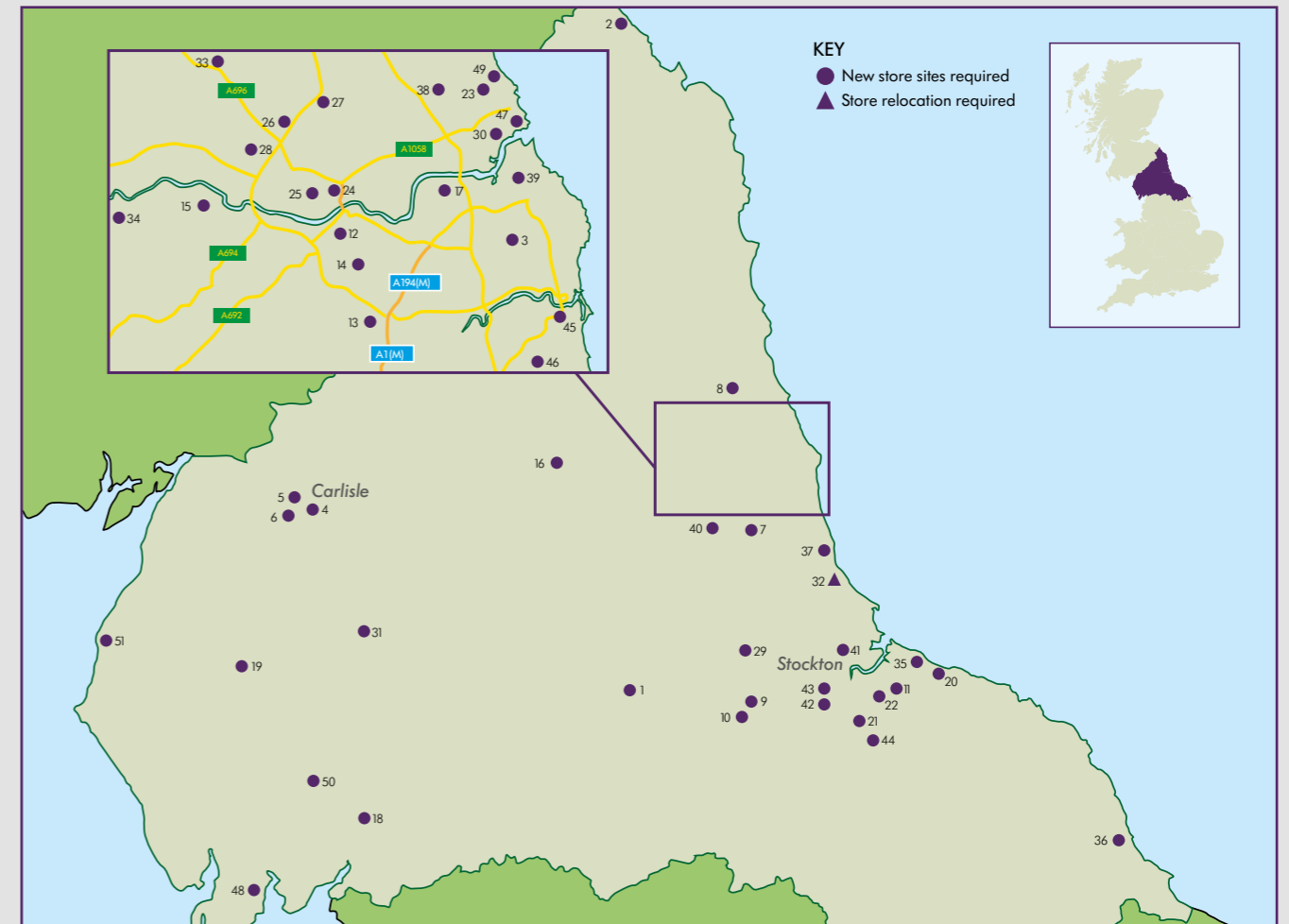
Our site requirements in Scotland

- | | | | |
|------------------------------|--|----------------------------------|---------------------|
| 1. Aberdeen - Garthdee | 11. Cumbernauld | 18. Edinburgh - Morningside | 27. Paisley - South |
| 2. Aberdeen - Mastrick (rel) | 12. Dunfermline | 19. Edinburgh - Oxfangs/Ormiston | 28. Perth - North |
| 3. Airdrie | 13. Edinburgh - Barnton/Davidson Mains | 20. Edinburgh - Portobello | 29. Polmont |
| 4. Barrhead (rel) | 14. Edinburgh - Corstorphine/Murrayfield | 21. Glasgow - Drumchapel | 30. St Andrews |
| 5. Bellshill | 15. Edinburgh - Craighleith/Stockbridge | 22. Inverness - South | 31. Stonehaven |
| 6. Bishopbriggs | 16. Edinburgh - Gilmerton (rel) | 23. Irvine | 32. Westhill |
| 7. Blairgowrie | 17. Edinburgh - Meadowbank | 24. Lanark (rel) | 33. Wishaw (rel) |
| 8. Broughty Ferry | | 25. Milngavie | (rel) = relocation |
| 9. Clarkston | | 26. Newton Mearns | |
| 10. Clydebank | | | |



Our site requirements in North East England | Cumbria

- | | | | |
|--------------------------|----------------------------------|------------------------------------|-----------------------------------|
| 1. Barnard Castle | 17. Jarrow | 31. Penrith | 45. Sunderland - City Centre West |
| 2. Berwick | 18. Kendal | 32. Peterlee (rel) | 46. Sunderland - Doxford Park |
| 3. Boldon | 19. Keswick | 33. Ponteland | 47. Tynemouth |
| 4. Carlisle - East | 20. Marske/Saltburn | 34. Prudhoe | 48. Ulverston |
| 5. Carlisle - North | 21. Middlesbrough - South West | 35. Redcar | 49. Whitley Bay |
| 6. Carlisle - West | 22. Middlesbrough - Marton | 36. Scarborough - North | 50. Windermere |
| 7. Chester-le-Street | 23. Monkseaton | 37. Seaham | 51. Workington |
| 8. Cramlington | 24. Newcastle - City Centre East | 38. Shiremoor | (rel) = relocation |
| 9. Darlington - North | 25. Newcastle - City Centre West | 39. South Shields - Harton/Marsden | |
| 10. Darlington - West | 26. Newcastle - Kingston Park | 40. Stanley | |
| 11. Eston | 27. Newcastle - North West | 41. Stockton - Billingham | |
| 12. Gateshead - Bensham | 28. Newcastle - West | 42. Stockton - Ingleby Barwick | |
| 13. Gateshead - Birtley | 29. Newton Aycliffe | 43. Stockton - Yarm | |
| 14. Gateshead - Low Fell | 30. North Shields | 44. Stokesley | |
| 15. Gateshead - Ryton | | | |
| 16. Hexham | | | |



Get in touch.

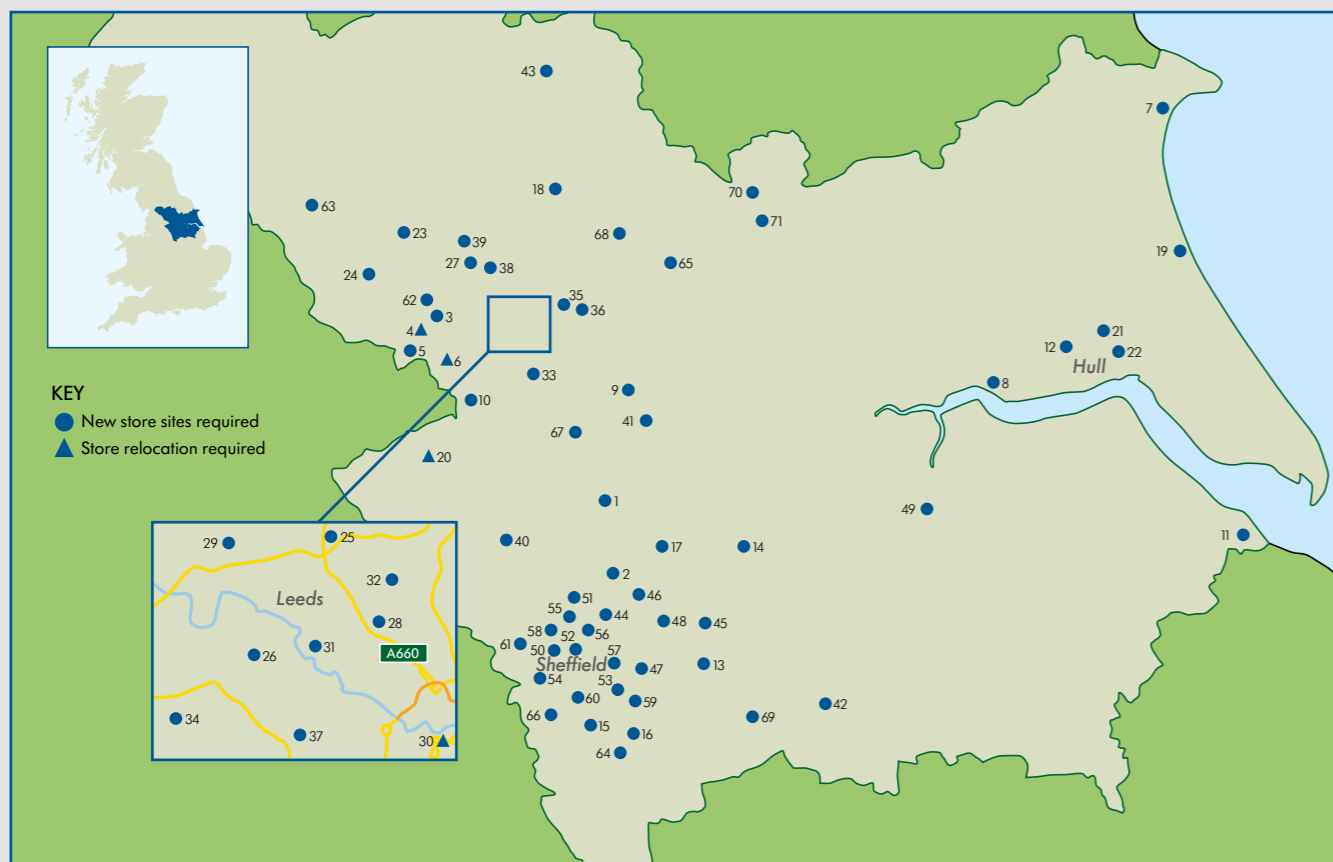
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Our site requirements in Yorkshire | Humberside

- | | | | |
|--------------------------------|----------------------------------|------------------------------------|-------------------------------------|
| 1. Barnsley - Cudworth | 20. Huddersfield - Central (rel) | 38. Leeds - Yeadon | 56. Sheffield - Grimesthorpe |
| 2. Barnsley - Hoyland | 21. Hull - Kingswood | 39. Otley | 57. Sheffield - Handsworth |
| 3. Bradford - Frizinghall | 22. Hull - Sutton | 40. Penistone | 58. Sheffield - Hillsborough |
| 4. Bradford - Girlington (rel) | 23. Ilkley | 41. Pontefract | 59. Sheffield - Holbrook/Mosborough |
| 5. Bradford - Queensbury | 24. Keighley | 42. Retford | 60. Sheffield - Norton |
| 6. Bradford - South (rel) | 25. Leeds - Adel | 43. Ripon | 61. Sheffield - Stannington |
| 7. Bridlington | 26. Leeds - Bramley | 44. Rotherham - Kimberworth | 62. Shipley |
| 8. Brough | 27. Leeds - Guiseley | 45. Rotherham - Maltby | 63. Skipton |
| 9. Castleford | 28. Leeds - Headingley | 46. Rotherham - Rawmarsh | 64. Staveley |
| 10. Cleckheaton | 29. Leeds - Horsforth | 47. Rotherham - Swallownest | 65. Tadcaster |
| 11. Cleethorpes | 30. Leeds - Hunslet (rel) | 48. Rotherham - Wickersley/Bramley | 66. Totley |
| 12. Cottingham | 31. Leeds - Kirkstall | 49. Scunthorpe - West | 67. Wakefield |
| 13. Dinnington | 32. Leeds - Meanwood | 50. Sheffield - Broomhill | 68. Wetherby |
| 14. Doncaster - Central | 33. Leeds - Morley | 51. Sheffield - Chapeltown | 69. Worksop |
| 15. Dronfield | 34. Leeds - Pudsey | 52. Sheffield - City Centre | 70. York - Clifton |
| 16. Eckington | 35. Leeds - Roundhay | 53. Sheffield - Crystal Peaks | 71. York - Fulford |
| 17. Goldthorpe/Thurnscoe | 36. Leeds - Seacroft | 54. Sheffield - Eccleshall | |
| 18. Harrogate - Central | 37. Leeds - Wortley | 55. Sheffield - Ecclesfield | (rel) = relocation |
| 19. Hornsea | | | |

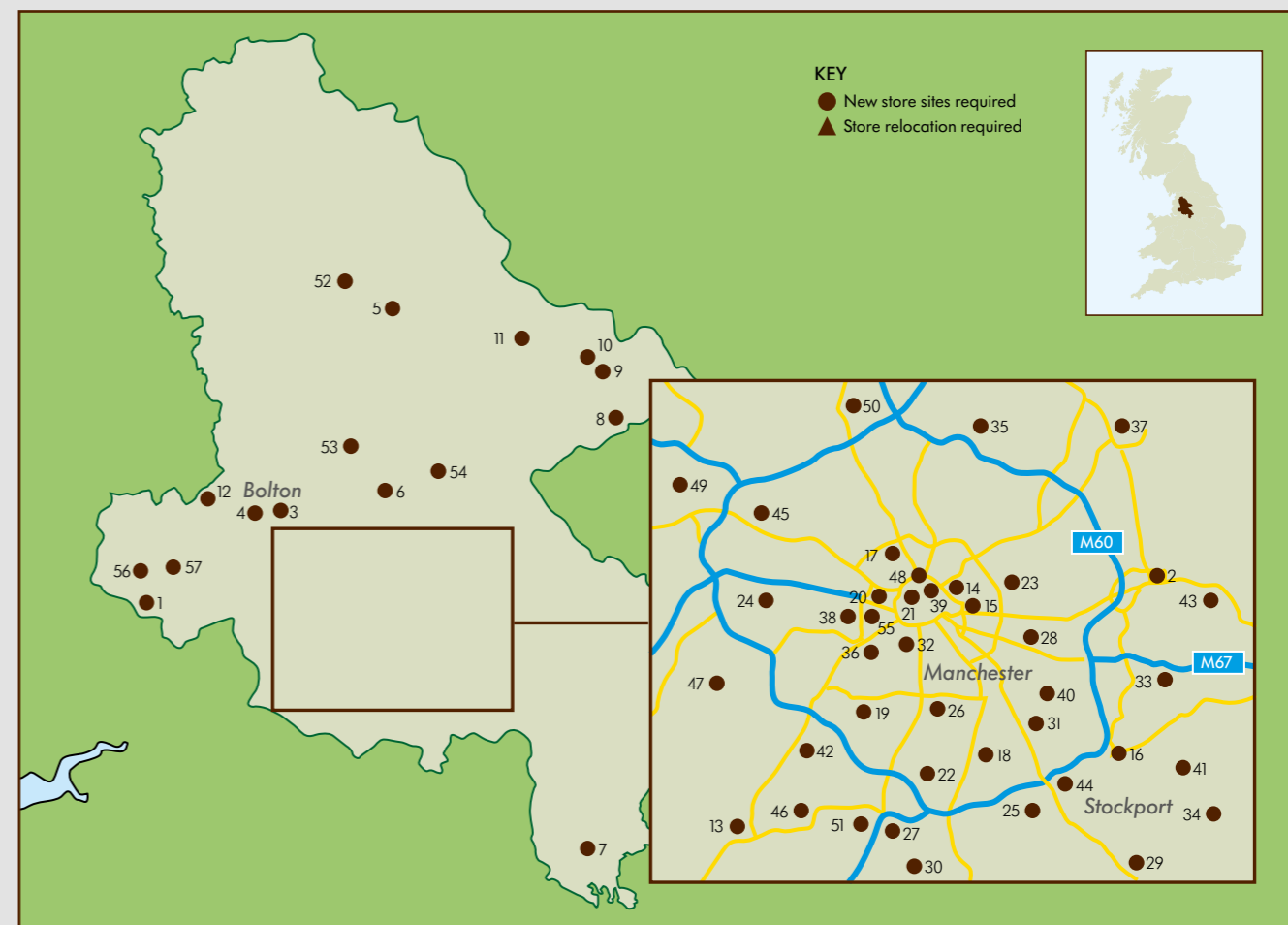


Get in touch.

Doncaster Property Office, Lidl GB Ltd, iPort Unit 4, Ontario Drive, Doncaster, DN11 0BF
 Name: Graham Burr Tel: 01226 337991 E-mail: graham.burr@lidl.co.uk

Our site requirements in Greater Manchester | East Lancs | Calderdale | High Peak

- | | | | |
|------------------------------|--------------------------------------|-----------------------------------|----------------------------------|
| 1. Ashton In Makerfield | 18. Manchester - Burnage | 32. Manchester - Hulme | 47. Manchester - Urmston/Flixton |
| 2. Ashton-under-Lyne - North | 19. Manchester - Chorlton | 33. Manchester - Hyde | 48. Manchester - Victoria |
| 3. Bolton - East | 20. Manchester - City West | 34. Manchester - Marple | 49. Manchester - Walkden |
| 4. Bolton - West | 21. Manchester - Deansgate | 35. Manchester - Middleton | 50. Manchester - Whitefield |
| 5. Burnley - West | 22. Manchester - Didsbury/Withington | 36. Manchester - Old Trafford | 51. Manchester - Wythenshawe |
| 6. Bury - East | 23. Manchester - Eastlands | 37. Manchester - Oldham East | 52. Padiham |
| 7. Buxton | 24. Manchester - Eccles | 38. Manchester - Ordsall | 53. Ramsbottom |
| 8. Eiland | 25. Manchester - Edgeley | 39. Manchester - Piccadilly | 54. Rochdale - South |
| 9. Halifax - South | 26. Manchester - Fallowfield | 40. Manchester - Reddish | 55. Salford - Quays |
| 10. Halifax - West | 27. Manchester - Gatley | 41. Manchester - Romiley | 56. Wigan - Goose Green |
| 11. Hebden Bridge | 28. Manchester - Gorton | 42. Manchester - Sale | 57. Wigan - Hindley |
| 12. Horwich | 29. Manchester - Hazel Grove | 43. Manchester - Stalybridge | |
| 13. Manchester - Altrincham | 30. Manchester - Heald Green | 44. Manchester - Stockport Centre | (rel) = relocation |
| 14. Manchester - Ancoats | 31. Manchester - Heaton Chapel | 45. Manchester - Swinton | |
| 15. Manchester - Ardwick | | 46. Manchester - Timperley | |
| 16. Manchester - Bredbury | | | |
| 17. Manchester - Broughton | | | |

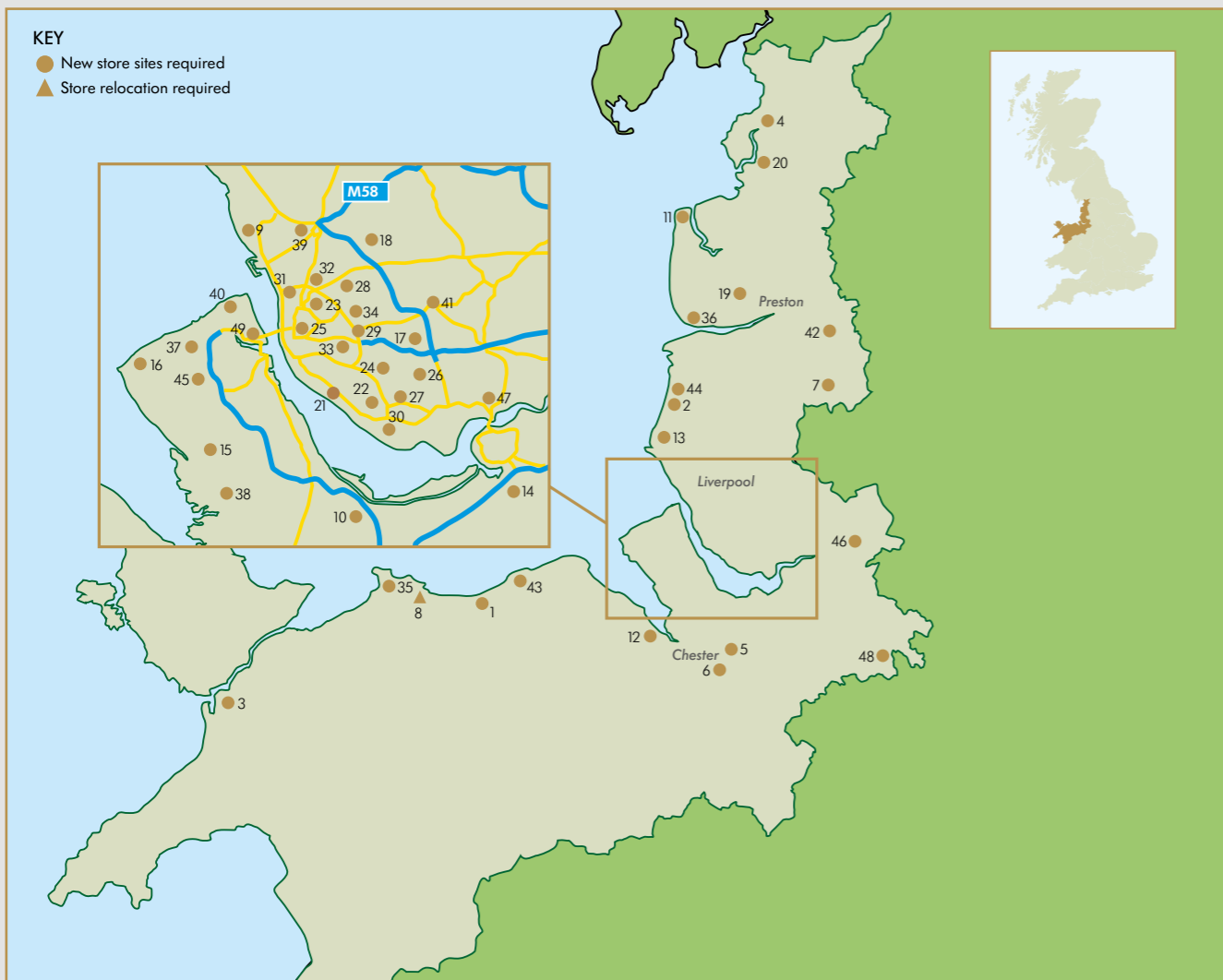


Get in touch.

Manchester Property Office, Lidl GB Ltd, Eastgate Way, Manor Park, Runcorn, WA7 1NT
 Name: Nick Harvey Tel: 01928 532891 E-mail: nick.harvey@lidl.co.uk

Our site requirements in North Wales | Lancashire | Merseyside | Cheshire West

- | | | | |
|----------------------|--------------------------------------|------------------------------|------------------------|
| 1. Abergele | 15. Heswall | 28. Liverpool - Norris Green | 42. Preston - South |
| 2. Birkdale/Ainsdale | 16. Hoylake/West Kirkby | 29. Liverpool - Old Swan | 43. Rhyl |
| 3. Caernarfon | 17. Huyton | 30. Liverpool - Speke | 44. Southport - North |
| 4. Carnforth | 18. Kirkby | 31. Liverpool - Vauxhall | 45. Upton |
| 5. Chester - North | 19. Kirkham | 32. Liverpool - Walton | 46. Warrington - North |
| 6. Chester - South | 20. Lancaster - South | 33. Liverpool - Wavertree | 47. Widnes |
| 7. Chorley - South | 21. Liverpool - Aigburth/
Garston | 34. Liverpool - West Derby | 48. Winsford |
| 8. Colwyn Bay (rel) | 22. Liverpool - Allerton | 35. Llandudno | 49. Wirral - Seacombe |
| 9. Crosby | 23. Liverpool - Anfield | 36. Lytham St. Annes | (rel) = relocation |
| 10. Ellesmere Port | 24. Liverpool - Childwall | 37. Moreton | |
| 11. Fleetwood | 25. Liverpool - City Centre | 38. Neston | |
| 12. Flint | 26. Liverpool - Gateacre/
Woolton | 39. Netherton | |
| 13. Formby | 27. Liverpool - Hunts Cross | 40. New Brighton | |
| 14. Frodsham/Helsby | | 41. Prescot/Rainhill | |

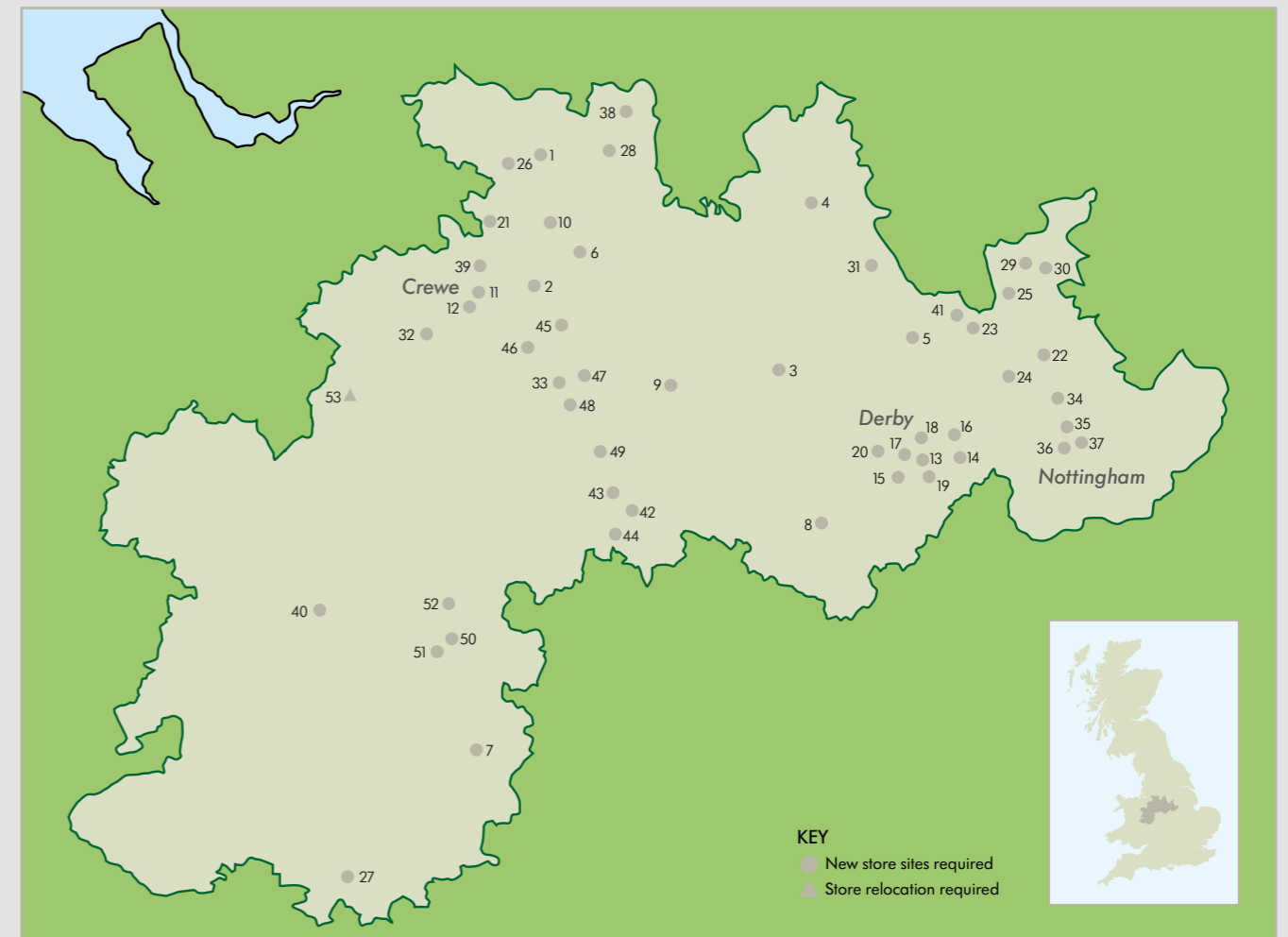


Get in touch.

Runcorn Property Office, Lidl GB Ltd, Eastgate Way, Manor Way, Runcorn, WA7 1NT
Name: Stuart Jardine Tel: 01928 532891 E-mail: stuart.jardine@lidl.co.uk

Our site requirements in Nottinghamshire | Derbyshire | Shropshire | Staffordshire | Cheshire East

- | | | | |
|--------------------------------------|---------------------------------------|------------------------------------|------------------------------------|
| 1. Alderley Edge | 15. Derby - Hilton | 29. Mansfield - North West | 43. Stafford - North |
| 2. Alsager | 16. Derby - Ilkeston | 30. Mansfield - South | 44. Stafford - South |
| 3. Ashbourne | 17. Derby - Mickleover/
Littleover | 31. Matlock | 45. Stoke on Trent - Burslem |
| 4. Bakewell | 18. Derby - North | 32. Nantwich | 46. Stoke on Trent -
Chesterton |
| 5. Belper | 19. Derby - Sinfyn | 33. Newcastle under Lyme
- West | 47. Stoke on Trent - Fenton |
| 6. Biddulph | 20. Derby - West | 34. Nottingham - Basford | 48. Stoke on Trent - Trentham |
| 7. Bridgnorth | 21. Holmes Chapel | 35. Nottingham - Central | 49. Stone |
| 8. Burton upon Trent -
South East | 22. Hucknall | 36. Nottingham - East | 50. Telford - Central |
| 9. Cheadle, Staffordshire | 23. Ironville/Selston | 37. Nottingham - Edwalton | 51. Telford - Dawley |
| 10. Congleton | 24. Kimberley | 38. Poynton | 52. Telford - Donnington |
| 11. Crewe - North | 25. Kirkby-in-Ashfield | 39. Sandbach | 53. Whitchurch (rel) |
| 12. Crewe - South | 26. Knutsford | 40. Shrewsbury - West | (rel) = relocation |
| 13. Derby - Alvaston | 27. Ludlow | 41. Somercotes | |
| 14. Derby - Burrowash/
Spandon | 28. Macclesfield - North | 42. Stafford - East | |

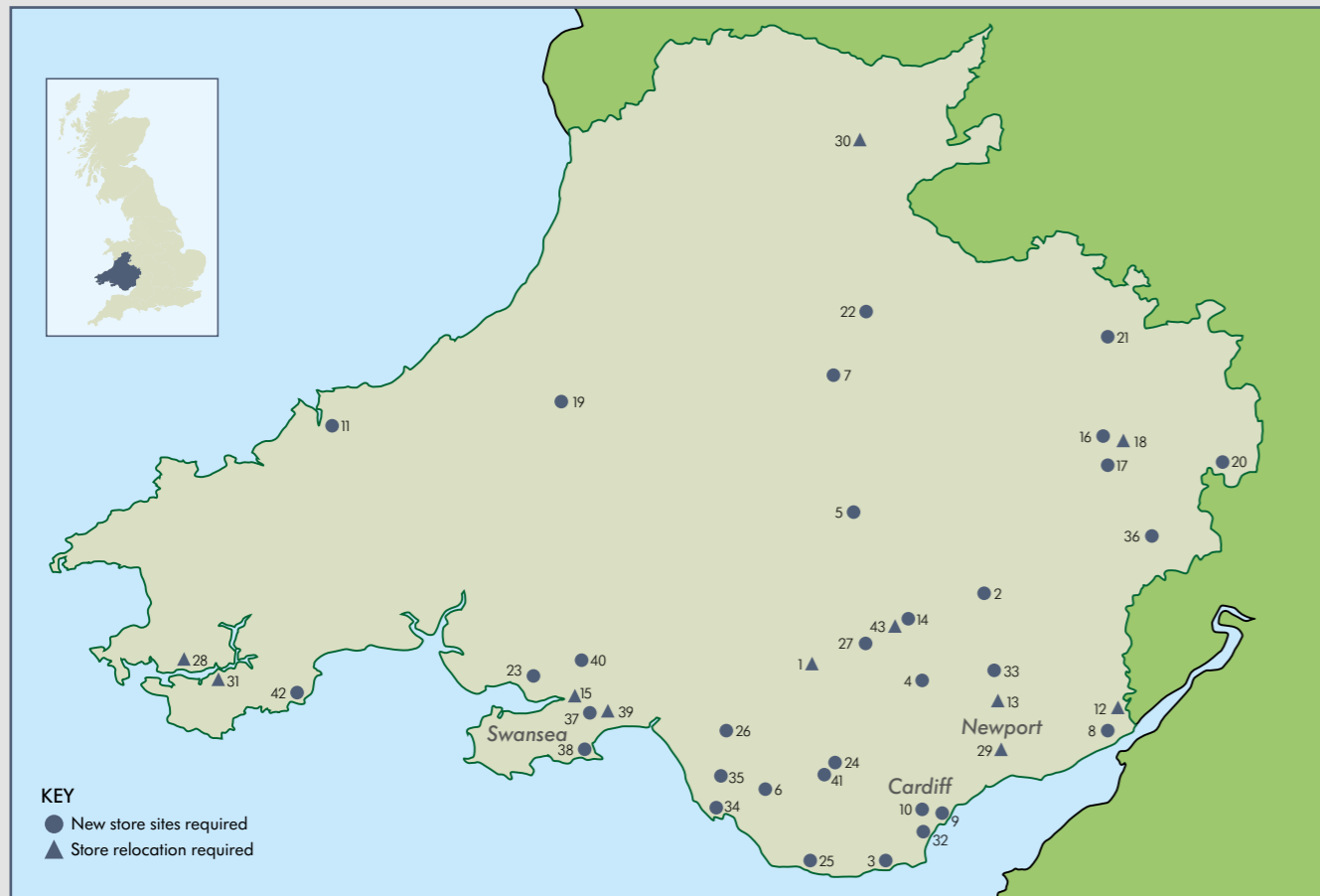


Get in touch.

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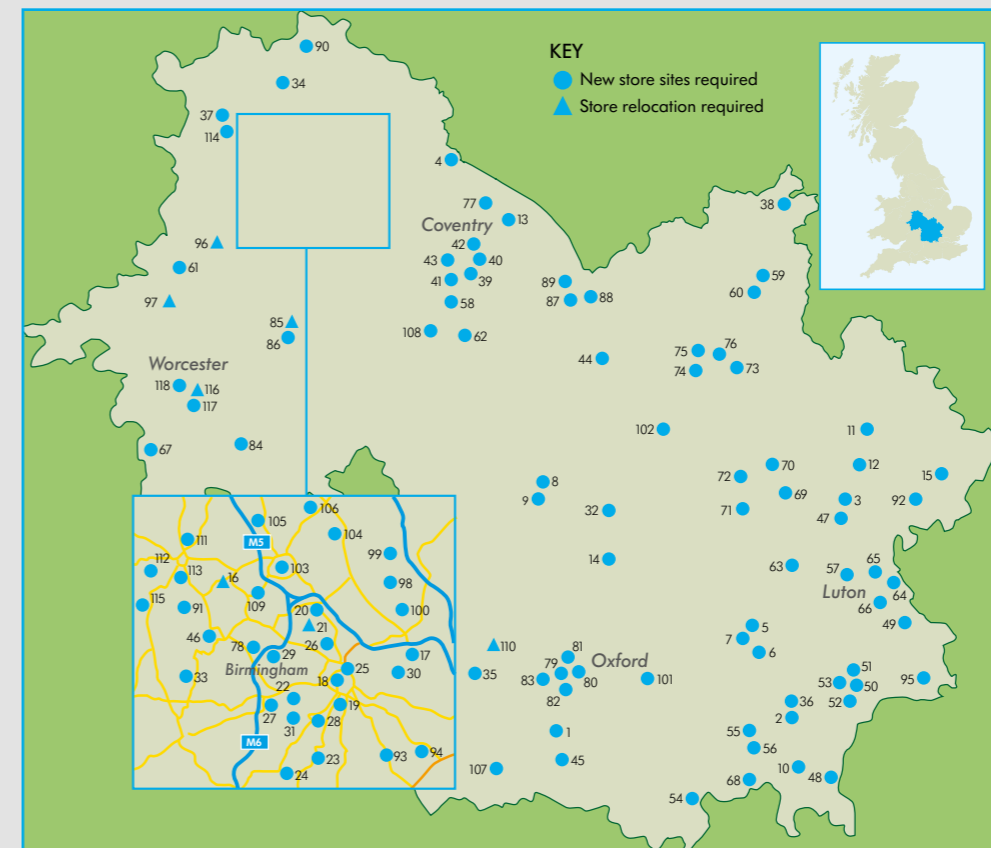
Our site requirements in South-Mid Wales

- | | | |
|---------------------------|----------------------------------|------------------------------|
| 1. Aberdare (rel) | 17. Hereford - South | 33. Pontypool |
| 2. Abergavenny | 18. Hereford - Town Centre (rel) | 34. Porthcawl |
| 3. Barry | 19. Lampeter | 35. Pyle |
| 4. Blackwood | 20. Ledbury | 36. Ross on Wye |
| 5. Brecon | 21. Leominster | 37. Swansea - Fforestfach |
| 6. Bridgend | 22. Llandrindod Wells | 38. Swansea - Killay/Mumbles |
| 7. Builth Wells | 23. Llanelli | 39. Swansea - Penlan (rel) |
| 8. Caldicot | 24. Llantrisant/Church Village | 40. Swansea - Pontarddulais |
| 9. Cardiff Bay | 25. Llantwit Major/Cowbridge | 41. Talbot Green |
| 10. Cardiff - City Centre | 26. Maesteg | 42. Tenby |
| 11. Cardigan | 27. Merthyr Tydfil | 43. Tredegar (rel) |
| 12. Chepstow (rel) | 28. Milford Haven (rel) | |
| 13. Cwmbran (rel) | 29. Newport (rel) | (rel) = relocation |
| 14. Ebbw Vale | 30. Newtown (rel) | |
| 15. Gorseinon (rel) | 31. Pembroke Dock (rel) | |
| 16. Hereford - North/West | 32. Penarth | |



Our site requirements in Central England

- | | | | |
|----------------------------------|--|-------------------------------------|--|
| 1. Abingdon | 24. Birmingham - Longbridge/Northfield | 48. Gerrards Cross | 72. Milton Keynes - West |
| 2. Amersham | 25. Birmingham - Olton | 49. Harpenden | 73. Northampton - Abington |
| 3. Amphill | 26. Birmingham - Perry Barr | 50. Hemel Hempstead - East Hunsbury | 74. Northampton - East Hunsbury |
| 4. Atherstone | 27. Birmingham - Quinton | 51. Hemel Hempstead - North | 75. Northampton - Kingsthorpe |
| 5. Aylesbury - North | 28. Birmingham - Selly Oak/Edgbaston | 52. Hemel Hempstead - South | 76. Northampton - Spinney Hill |
| 6. Aylesbury - South | 29. Birmingham - Smethwick | 53. Hemel Hempstead - West | 77. Nuneaton |
| 7. Aylesbury - West | 30. Birmingham - Stechford | 54. Henley-on-Thames | 78. Oldbury |
| 8. Banbury - North | 31. Birmingham - Weoley Castle | 55. High Wycombe - North | 79. Oxford - Central |
| 9. Banbury - South | 32. Brackley | 56. High Wycombe - South | 80. Oxford - East |
| 10. Beaconsfield | 33. Brierley Hill | 57. Houghton Regis | 81. Oxford - North |
| 11. Bedford - North | 34. Cannock | 58. Kenilworth | 82. Oxford - South |
| 12. Bedford - South | 35. Carterton | 59. Kettering - North | 83. Oxford - West |
| 13. Bedworth | 36. Chesham | 60. Kettering - South | 84. Pershore |
| 14. Bicester | 37. Codsall | 61. Kidderminster | 85. Redditch (rel) |
| 15. Biggleswade | 38. Corby | 62. Leamington | 86. Redditch - South |
| 16. Bilston (rel) | 39. Coventry - Canley | 63. Leighton Buzzard | 87. Rugby - East |
| 17. Birmingham - Castle Bromwich | 40. Coventry - City Centre | 64. Luton - East | 88. Rugby - Hillmorton |
| 18. Birmingham - Central | 41. Coventry - Earlsdon | 65. Luton - North | 89. Rugby - North |
| 19. Birmingham - Edgbaston | 42. Coventry - Radford | 66. Luton - South | 90. Rugeley |
| 20. Birmingham - Great Barr | 43. Coventry - Walsgrave | 67. Malvern | 91. Sedgley |
| 21. Birmingham - Hamstead (rel) | 44. Daventry | 68. Marlow | 92. Shefford |
| 22. Birmingham - Harborne | 45. Didcot | 69. Milton Keynes - East | 93. Shirley |
| 23. Birmingham - Kings Norton | 46. Dudley | 70. Milton Keynes - Newport Pagnell | 94. Solihull |
| | 47. Flitwick | 71. Milton Keynes - South | 95. St Albans |
| | | | 96. Stourbridge (rel) |
| | | | 97. Stourport (rel) |
| | | | 98. Sutton Coldfield - Central |
| | | | 99. Sutton Coldfield - Mere Green |
| | | | 100. Sutton Coldfield - Walmley/Minworth |
| | | | 101. Thame |
| | | | 102. Towcester |
| | | | 103. Walsall |
| | | | 104. Walsall - Aldridge |
| | | | 105. Walsall - Bloxwich |
| | | | 106. Walsall - Walsall Wood |
| | | | 107. Wantage |
| | | | 108. Warwick |
| | | | 109. Wednesbury |
| | | | 110. Witney (rel) |
| | | | 111. Wolverhampton - North |
| | | | 112. Wolverhampton - Penn/Tettenhall |
| | | | 113. Wolverhampton - South |
| | | | 114. Wolverhampton - Wednesfield |
| | | | 115. Wombourne |
| | | | 116. Worcester - Ronswood (rel) |
| | | | 117. Worcester South |
| | | | 118. Worcester West |



Get in touch.

Bridgend Property Office, Lidl GB Ltd, Waterton Industrial Estate, Off Cowbridge Road, Bridgend, CF31 3PH
 Name: Paul Hebblethwaite Tel: 01656 678291 E-mail: paul.hebblethwaite@lidl.co.uk

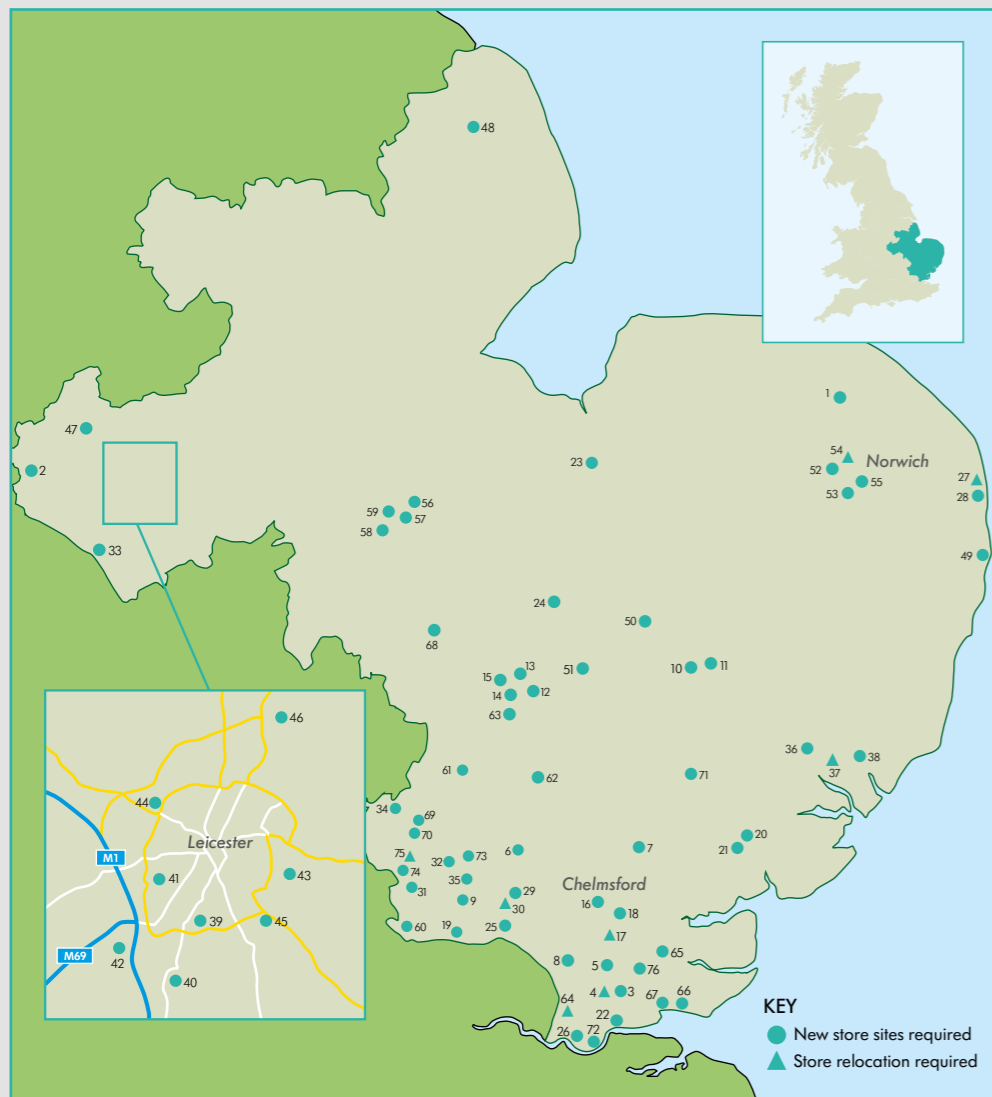
Get in touch.

Wednesbury Property Office, Lidl GB Ltd, Axletree Way, Wednesbury, WS10 9QS
 Name: Jeremy Lee Tel: 0121 5027088 E-mail: jeremy.lee@lidl.co.uk

Our site requirements in East England

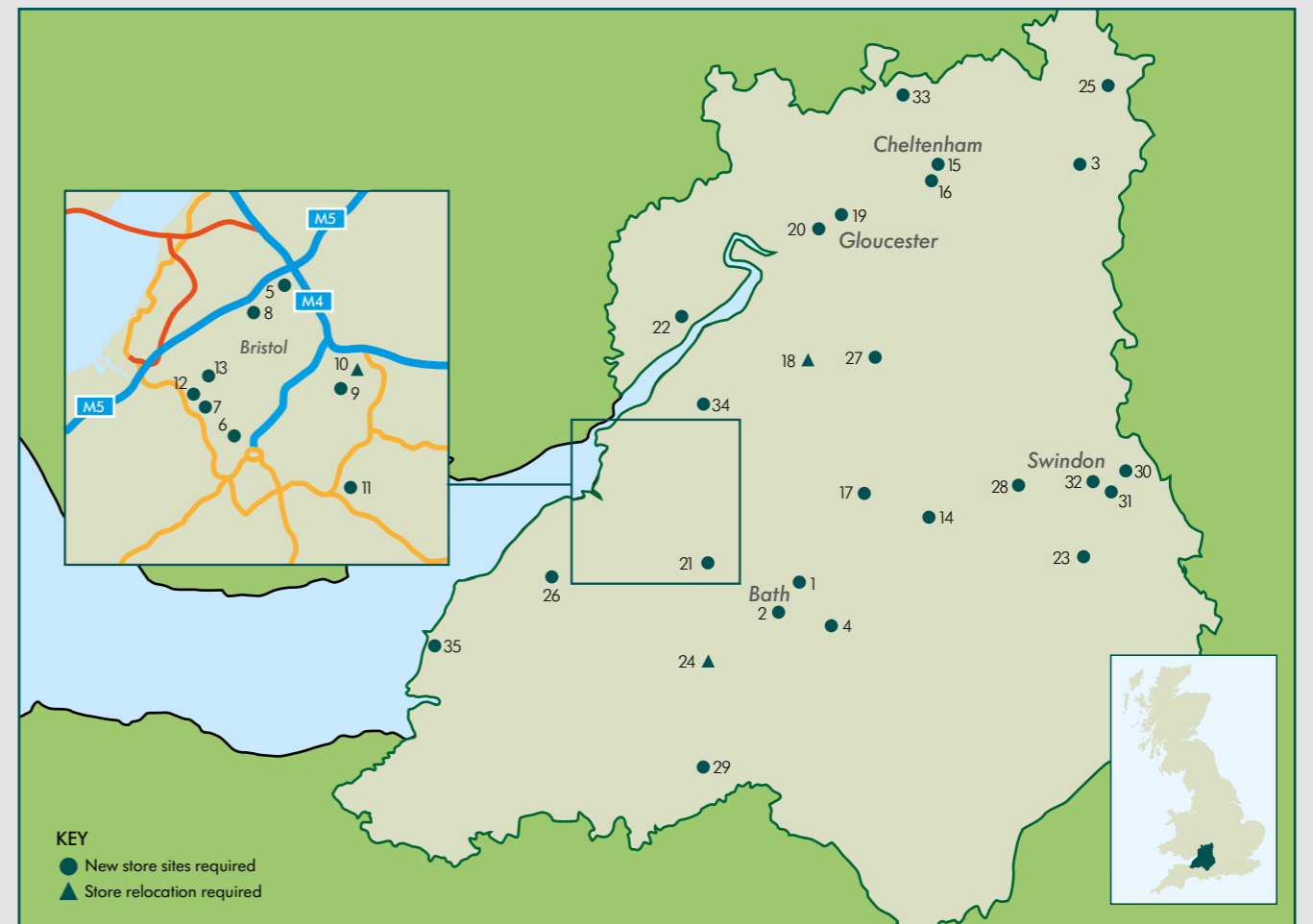
- | | | | |
|-----------------------------|---------------------------------|-------------------------------------|--------------------------------|
| 1. Alysham | 15. Cambridge - West | 28. Great Yarmouth - South | 41. Leicester - Braunston |
| 2. Ashby de la Zouch | 16. Chelmsford - Broomfield | 29. Harlow - North | 42. Leicester - Enderby |
| 3. Basildon | 17. Chelmsford - South (rel) | 30. Harlow - South (rel) | 43. Leicester - Evington |
| 4. Basildon - Laindon (rel) | 18. Chelmsford - Springfield | 31. Hatfield | 44. Leicester - Glenfield |
| 5. Billericay | 19. Cheshunt | 32. Hertford | 45. Leicester - Oadby |
| 6. Bishops Stortford | 20. Colchester - North | 33. Hinckley - North | 46. Leicester - Syston |
| 7. Braintree | 21. Colchester - West | 34. Hitchin | 47. Loughborough - West |
| 8. Brentwood | 22. Corringham/Stanford-le-Hope | 35. Hoddesdon | 48. Louth |
| 9. Broxbourne | 23. Downham Market | 36. Ipswich - Northwest | 49. Lowestoft - South |
| 10. Bury St Edmunds | 24. Ely | 37. Ipswich - Southeast (rel) | 50. Mildenhall |
| 11. Bury St Edmunds - East | 25. Epping | 38. Ipswich - Woodbridge/Martlesham | 51. Newmarket |
| 12. Cambridge - East | 26. Grays | 39. Leicester - Aylestone | 52. Norwich - Costessey |
| 13. Cambridge - North | 27. Great Yarmouth (rel) | 40. Leicester - Blaby | 53. Norwich - Lakenham |
| 14. Cambridge - South | | | 54. Norwich - Mile Cross (rel) |

- | |
|---|
| 55. Norwich - Thorpe Hamlet |
| 56. Peterborough - East |
| 57. Peterborough - Embankment |
| 58. Peterborough - South |
| 59. Peterborough - West |
| 60. Potters Bar |
| 61. Royston |
| 62. Saffron Walden |
| 63. Sawston |
| 64. South Ockendon (rel) |
| 65. South Woodham Ferrers |
| 66. Southend - Central |
| 67. Southend - Leigh-on-Sea |
| 68. St Ives |
| 69. Stevenage - North |
| 70. Stevenage - South |
| 71. Sudbury |
| 72. Tilbury |
| 73. Ware |
| 74. Welwyn Garden City - Central |
| 75. Welwyn Garden City - Panshanger (rel) |
| 76. Wickford |
- (rel) = relocation



Our site requirements in Bristol | Gloucestershire | Wiltshire | North & East Somerset | Mendips

- | | | | |
|------------------------------------|--------------------------------|---------------------------|---------------------------------|
| 1. Bath - East | 11. Bristol - Longwell Green | 22. Lydney | 34. Thornbury |
| 2. Bath - South | 12. Bristol - Stoke Bishop | 23. Marlborough | 35. Weston-Super-Mare - Central |
| 3. Bourton-on-the-Water | 13. Bristol - Westbury on Trym | 24. Midsomer Norton (rel) | |
| 4. Bradford on Avon | 14. Calne | 25. Moreton-in-Marsh | (rel) = relocation |
| 5. Bristol - Bradley Stoke | 15. Cheltenham - South | 26. Nailsea | |
| 6. Bristol - City Centre | 16. Cheltenham - South West | 27. Nailsworth | |
| 7. Bristol - Clifton | 17. Chippenham - South | 28. Royal Wootton Bassett | |
| 8. Bristol - Cribbs Causeway | 18. Dursley (rel) | 29. Shepton Mallet | |
| 9. Bristol - Downend/Staple Hill | 19. Gloucester - East | 30. Swindon - East | |
| 10. Bristol - Emersons Green (rel) | 20. Gloucester - South | 31. Swindon - South | |
| | 21. Keynsham | 32. Swindon - West | |
| | | 33. Tewkesbury | |



Get in touch.

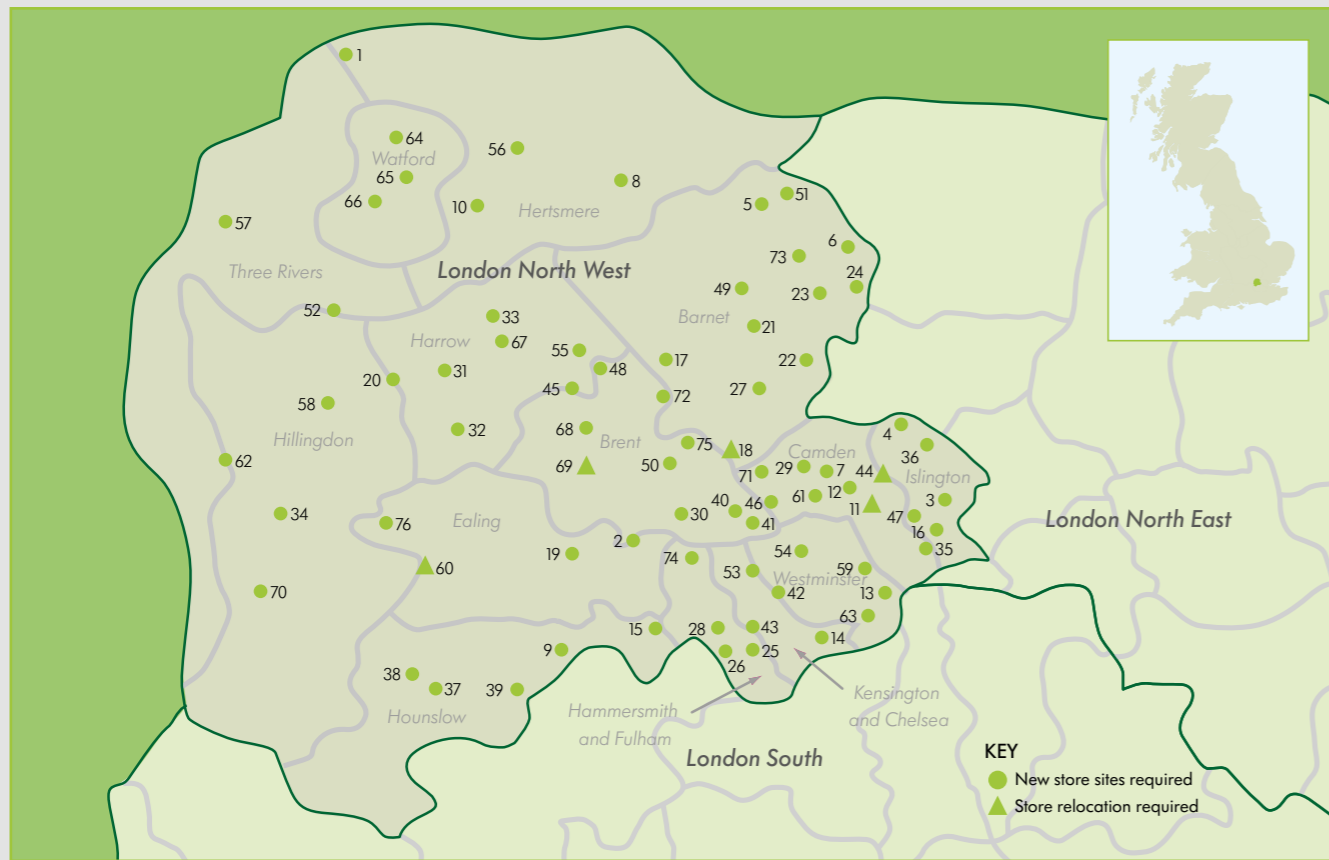
Lutterworth Property Office, Lidl GB Ltd, Wellington Parkway, Magna Park, Lutterworth, LE17 4XW
 Name: Andrew Hodgkinson Tel: 01455 555120 E-mail: andrew.hodgkinson@lidl.co.uk

Get in touch.

Avonmouth Property Office, Lidl GB Ltd, Central Park, Palmer Avenue, Severn Beach, BS35 4DF
 Name: Glen Stidever Tel: 01174 280391 E-mail: glen.stidever@lidl.co.uk

Our site requirements in London North West

- | | | | |
|----------------------------------|-----------------------------------|--------------------------------|---------------------------|
| 1. Abbots Langley | 20. Eastcote | 39. Isleworth | 58. Ruislip |
| 2. Acton - North/Park Royal | 21. Finchley | 40. Kensal Rise | 59. Soho/Mayfair |
| 3. Angel/Islington | 22. Finchley - East | 41. Kensal Town | 60. Southall (rel) |
| 4. Archway | 23. Finchley - North | 42. Kensington | 61. Swiss Cottage |
| 5. Barnet | 24. Friern Barnet | 43. Kensington - West | 62. Uxbridge - North |
| 6. Barnet - East | 25. Fulham | 44. Kentish Town (rel) | 63. Victoria/Westminster |
| 7. Belsize Park | 26. Fulham - West | 45. Kenton | 64. Watford - Garston |
| 8. Borehamwood | 27. Golders Green/ Temple Fortune | 46. Kilburn | 65. Watford - North |
| 9. Brentford | 28. Hammersmith | 47. Kings Cross | 66. Watford - West |
| 10. Bushey | 29. Hampstead | 48. Kingsbury | 67. Wealdstone |
| 11. Camden (rel) | 30. Harlesden/Stonebridge | 49. Mill Hill | 68. Wembley - North |
| 12. Chalk Farm | 31. Harrow - North | 50. Neasden | 69. Wembley Stadium (rel) |
| 13. Charing Cross/ Covent Garden | 32. Harrow - South | 51. New Barnet | 70. West Drayton |
| 14. Chelsea/South Kensington | 33. Harrow Weald | 52. Northwood | 71. West Hampstead |
| 15. Chiswick | 34. Hillingdon | 53. Notting Hill | 72. West Hendon |
| 16. Clerkenwell | 35. Holborn | 54. Paddington/Bayswater | 73. Whetstone |
| 17. Colindale | 36. Holloway/Highbury | 55. Queensbury | 74. White City |
| 18. Cricklewood (rel) | 37. Hounslow - Town Centre | 56. Radlett | 75. Willesden |
| 19. Ealing Broadway | 38. Hounslow - West | 57. Rickmansworth/ Chorleywood | 76. Yeading |
- (rel) = relocation

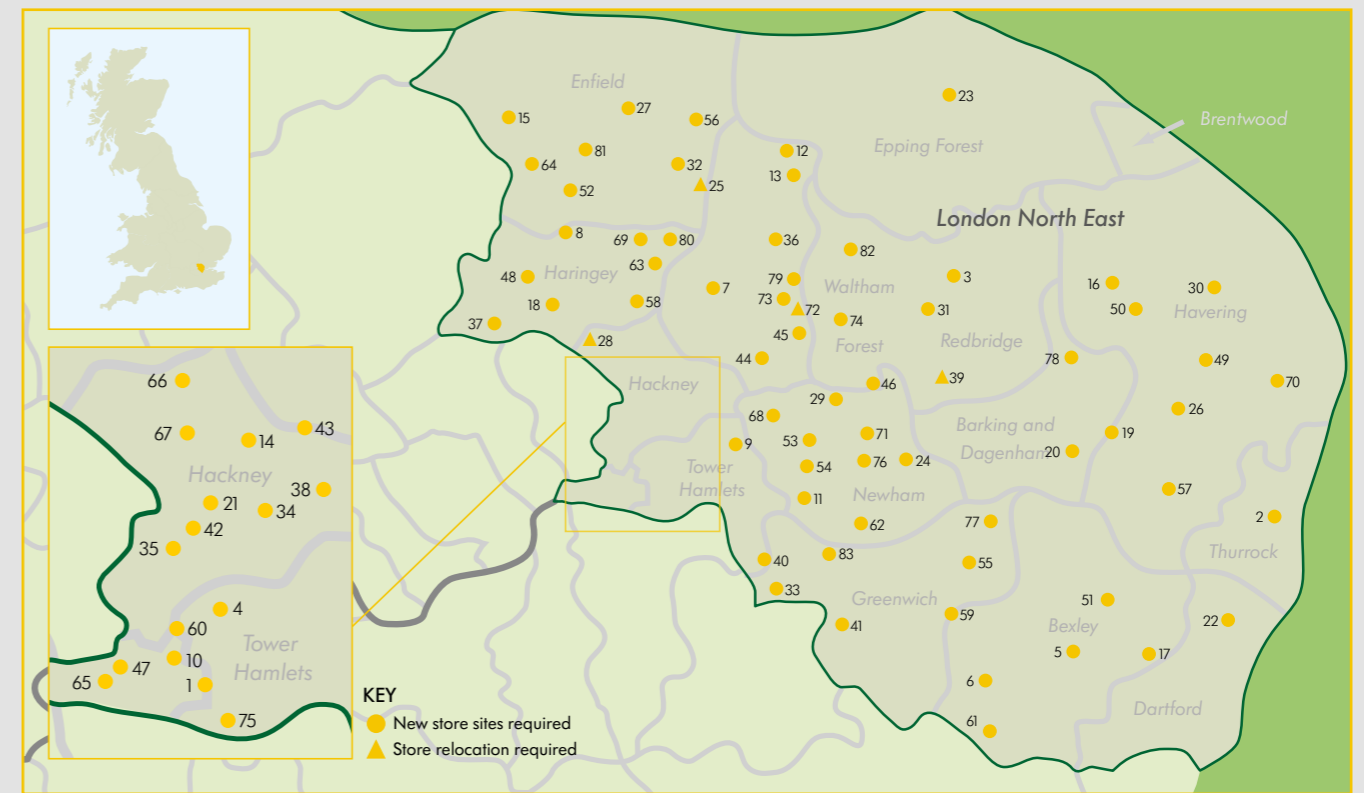


Get in touch.

London North West Property Office, Lidl GB Ltd, 1st Floor, 4-14 Blackbird Hill, Wembley, NW9 8SD
 Name: Mike Devine Tel: 0208 9058766 E-mail: mike.devine@lidl.co.uk

Our site requirements in London North East

- | | | | |
|-----------------------|--------------------------|--------------------------|-------------------------------|
| 1. Aldgate | 23. Debden | 45. Leytonstone | 67. Stoke Newington |
| 2. Aveley/Purfleet | 24. East Ham - South | 46. Manor Park | 68. Stratford |
| 3. Barkingside | 25. Edmonton Green (rel) | 47. Moorgate/Barbican | 69. Tottenham |
| 4. Bethnal Green | 26. Elm Park | 48. Muswell Hill | 70. Upminster |
| 5. Bexley | 27. Enfield | 49. North Hornchurch | 71. Upton Park |
| 6. Blackfen | 28. Finsbury Park (rel) | 50. North Romford | 72. Walthamstow (rel) |
| 7. Blackhorse Road | 29. Forest Gate | 51. Northumberland Heath | 73. Walthamstow - Wood Street |
| 8. Bounds Green | 30. Gallows Corner | 52. Palmers Green | 74. Wanstead |
| 9. Bow | 31. Gants Hill | 53. Plaistow | 75. Wapping |
| 10. Broadgate | 32. Great Cambridge Road | 54. Plaistow - South | 76. West Ham |
| 11. Canning Town | 33. Greenwich | 55. Plumstead | 77. West Thamesmead |
| 12. Chingford - North | 34. Hackney - Central | 56. Ponders End | 78. Whalebone Lane - South |
| 13. Chingford - South | 35. Haggerston | 57. Rainham | 79. Whipps Cross |
| 14. Clapton | 36. Highams Park | 58. Seven Sisters | 80. White Hart Lane |
| 15. Cockfosters | 37. Highgate | 59. Shooters Hill | 81. Winchmore Hill |
| 16. Collier Row | 38. Homerton | 60. Shoreditch | 82. Woodford |
| 17. Crayford | 39. Ilford (rel) | 61. Sidcup | 83. Woolwich Road |
| 18. Crouch End | 40. Isle of Dogs | 62. Silvertown | |
| 19. Dagenham - East | 41. Kidbrooke | 63. South Tottenham | (rel) = relocation |
| 20. Dagenham - South | 42. Kingsland | 64. Southgate | |
| 21. Dalston | 43. Lea Bridge | 65. St. Paul's | |
| 22. Dartford - North | 44. Leyton | 66. Stamford Hill | |

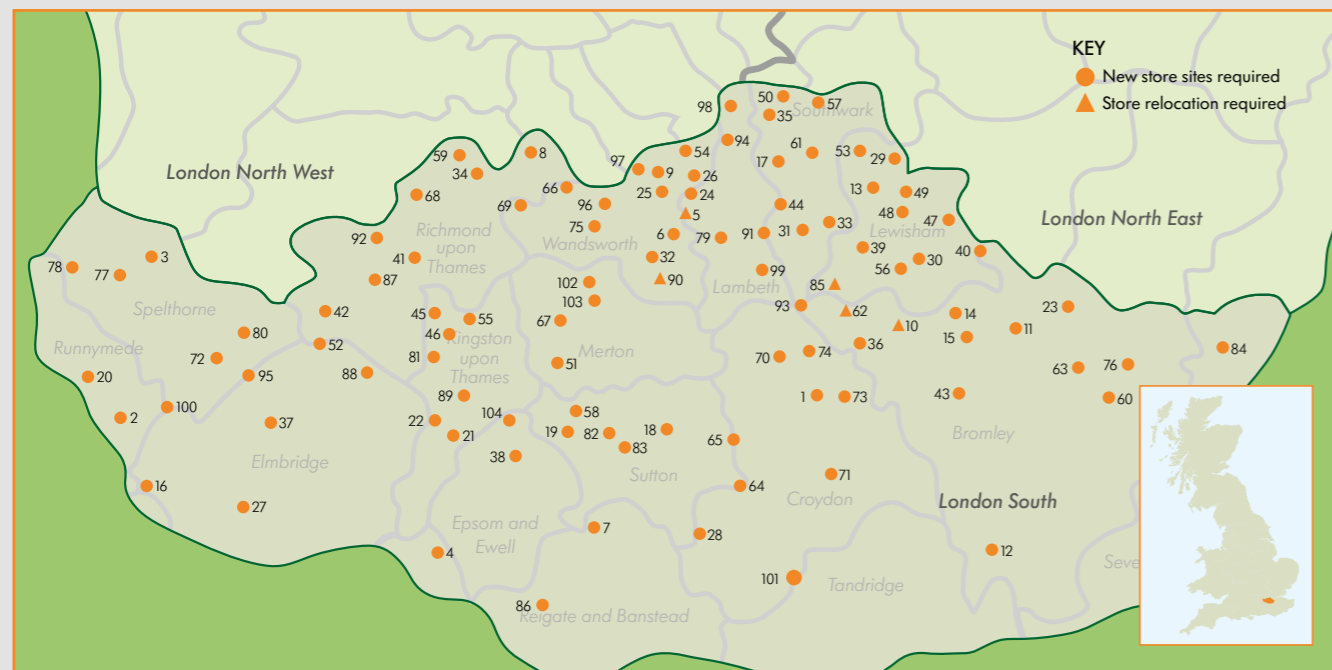


Get in touch.

London North East Property Office, Lidl GB Ltd, 1st Floor, 807-829 Longbridge Road, Dagenham, RM8 2DB
 Name: Oliver Barrett Tel: 0208 5487580 E-mail: oliver.barrett@lidl.co.uk

Our site requirements in London South

- | | | | |
|---------------------------|----------------------------|----------------------------|----------------------------|
| 1. Addiscombe | 28. Coulsdon | 55. Norbiton | 82. Sutton |
| 2. Addlestone | 29. Deptford - High Street | 56. North Bellingham | 83. Sutton - Town Centre |
| 3. Ashford | 30. Downham | 57. North Bermondsey | 84. Swanley |
| 4. Ashted | 31. Dulwich | 58. North Cheam | 85. Sydenham (rel) |
| 5. Balham (rel) | 32. Earlsfield | 59. North Sheen/Kew | 86. Tadworth |
| 6. Balham/Clapham - South | 33. East Dulwich | 60. Orpington | 87. Teddington |
| 7. Banstead | 34. East Sheen/Mortlake | 61. Peckham - Rye Lane | 88. Thames Ditton |
| 8. Barnes | 35. Elephant & Castle | 62. Penge (rel) | 89. Tolworth |
| 9. Battersea | 36. Elmers End | 63. Petts Wood | 90. Tooting Broadway (rel) |
| 10. Beckenham (rel) | 37. Esher | 64. Purley | 91. Tulse Hill |
| 11. Bickley | 38. Ewell | 65. Purley Way | 92. Twickenham |
| 12. Biggin Hill | 39. Forest Hill | 66. Putney | 93. Upper Norwood |
| 13. Brockley | 40. Grove Park | 67. Raynes Park | 94. Vauxhall |
| 14. Bromley - North | 41. Ham/Kingston - North | 68. Richmond - Town Centre | 95. Walton-on-Thames |
| 15. Bromley - South | 42. Hampton/Hampton Hill | 69. Roehampton | 96. Wandsworth |
| 16. Byfleet | 43. Hayes | 70. Selhurst | 97. Wandsworth - York Road |
| 17. Camberwell | 44. Herne Hill | 71. Selsdon | 98. Waterloo |
| 18. Carshalton | 45. Kingston - Town Centre | 72. Shepperton | 99. West Norwood |
| 19. Cheam | 46. Kingston - East | 73. Shirley | 100. Weybridge |
| 20. Chertsey | 47. Lee | 74. South Norwood | 101. Whyteleafe/Kenley |
| 21. Chessington - East | 48. Lewisham - High Street | 75. Southfields | 102. Wimbledon |
| 22. Chessington - North | 49. Lewisham - North | 76. St Mary Cray | 103. Wimbledon Chase |
| 23. Chislehurst | 50. London Bridge/Borough | 77. Staines - East | 104. Worcester Park |
| 24. Clapham Common | 51. Lower Morden | 78. Staines - West | |
| 25. Clapham - North | 52. Molesey | 79. Streatham Hill | (rel) = relocation |
| 26. Clapham - Old Town | 53. New Cross | 80. Sunbury | |
| 27. Cobham | 54. Nine Elms | 81. Surbiton | |

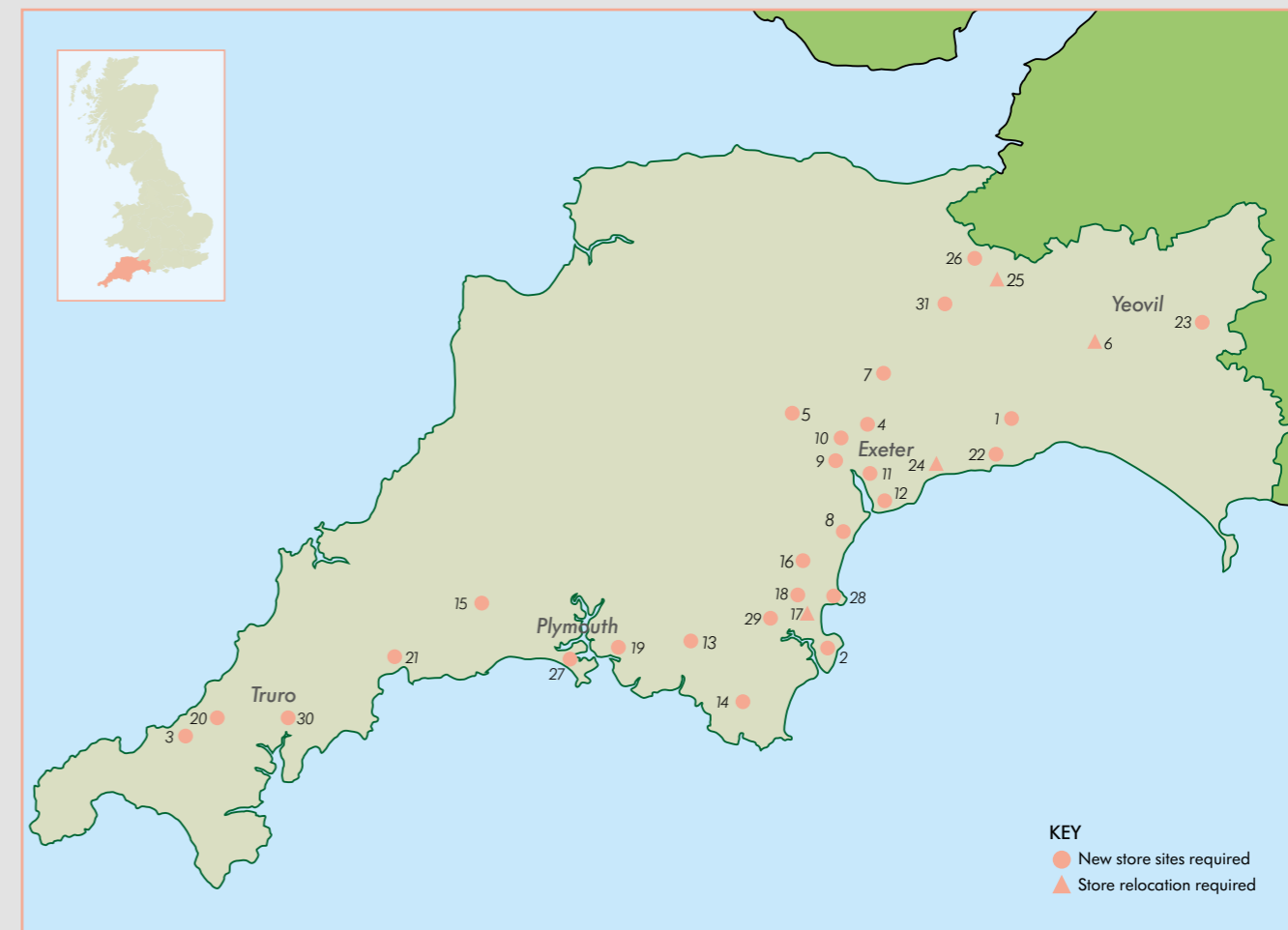


Get in touch.

London South Property Office, Lidl GB Ltd, 1st Floor, 33 Aberconway Road, Morden, SM4 5LN
 Name: Henry Neel Tel: 0208 5432692 E-mail: henry.neel@lidl.co.uk

Our site requirements in South and West Somerset | Devon | Cornwall

- | | | |
|-------------------------|---------------------------------|---------------------|
| 1. Axminster | 14. Kingsbridge | 27. Torpoint |
| 2. Brixham | 15. Liskeard | 28. Torquay - South |
| 3. Camborne | 16. Newton Abbot | 29. Totnes |
| 4. Cranbrook | 17. Paignton - Central (rel) | 30. Truro |
| 5. Crediton | 18. Paignton - North | 31. Wellington |
| 6. Crewkerne (rel) | 19. Plymouth - Mutley/Greenbank | (rel) = relocation |
| 7. Cullompton | 20. Redruth | |
| 8. Dawlish | 21. St Austell - West | |
| 9. Exeter - Central | 22. Seaton | |
| 10. Exeter - North | 23. Sherborne | |
| 11. Exeter - South East | 24. Sidmouth (rel) | |
| 12. Exmouth - Central | 25. Taunton - East (rel) | |
| 13. Ivybridge | 26. Taunton - North | |

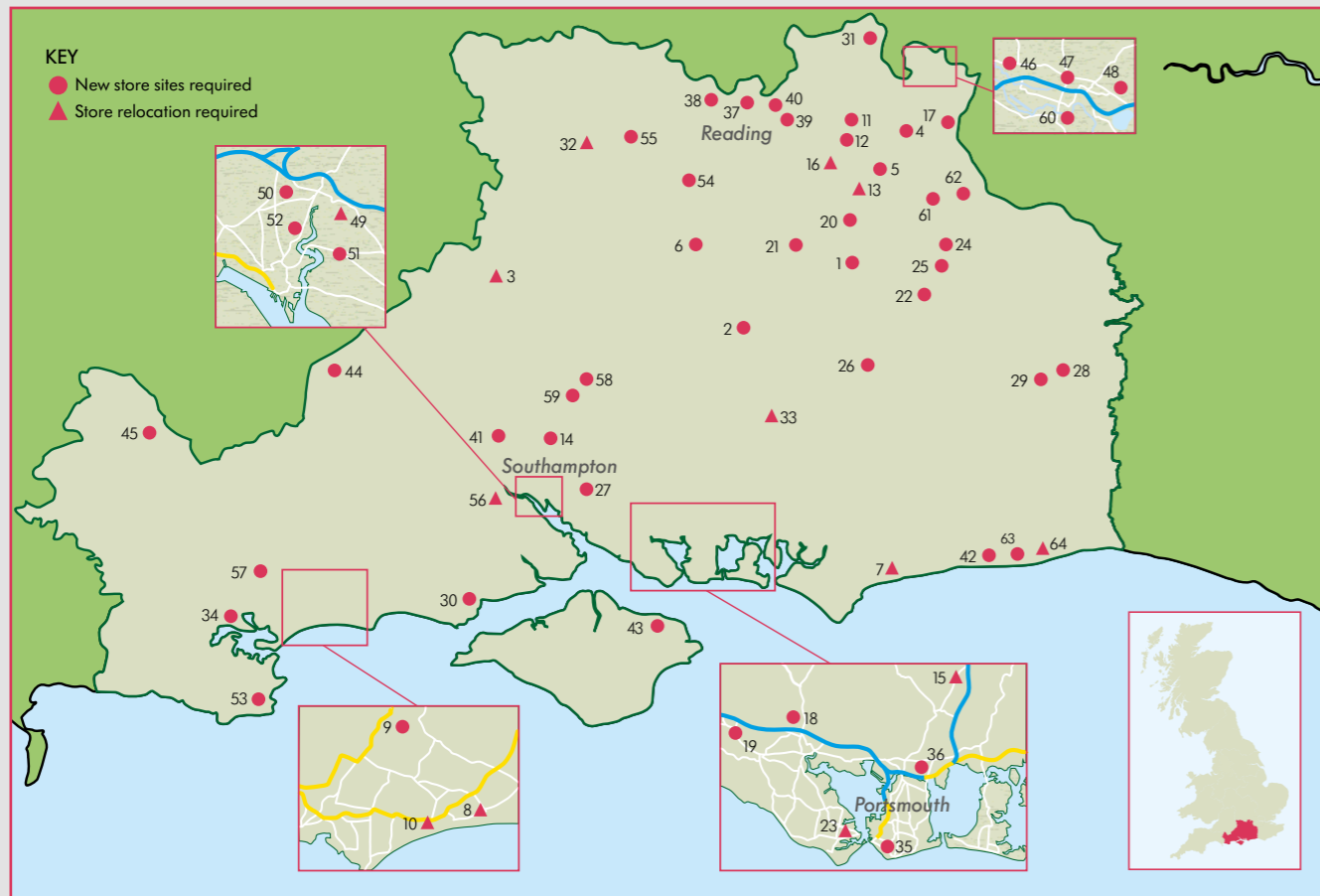


Get in touch.

Exeter Property Office, Lidl GB Ltd, Chillpark Brake, Clyst Honiton, EX5 2FU
 Name: Matthias Daly Tel: 01392 449714 E-mail: matthias.daly@lidl.co.uk

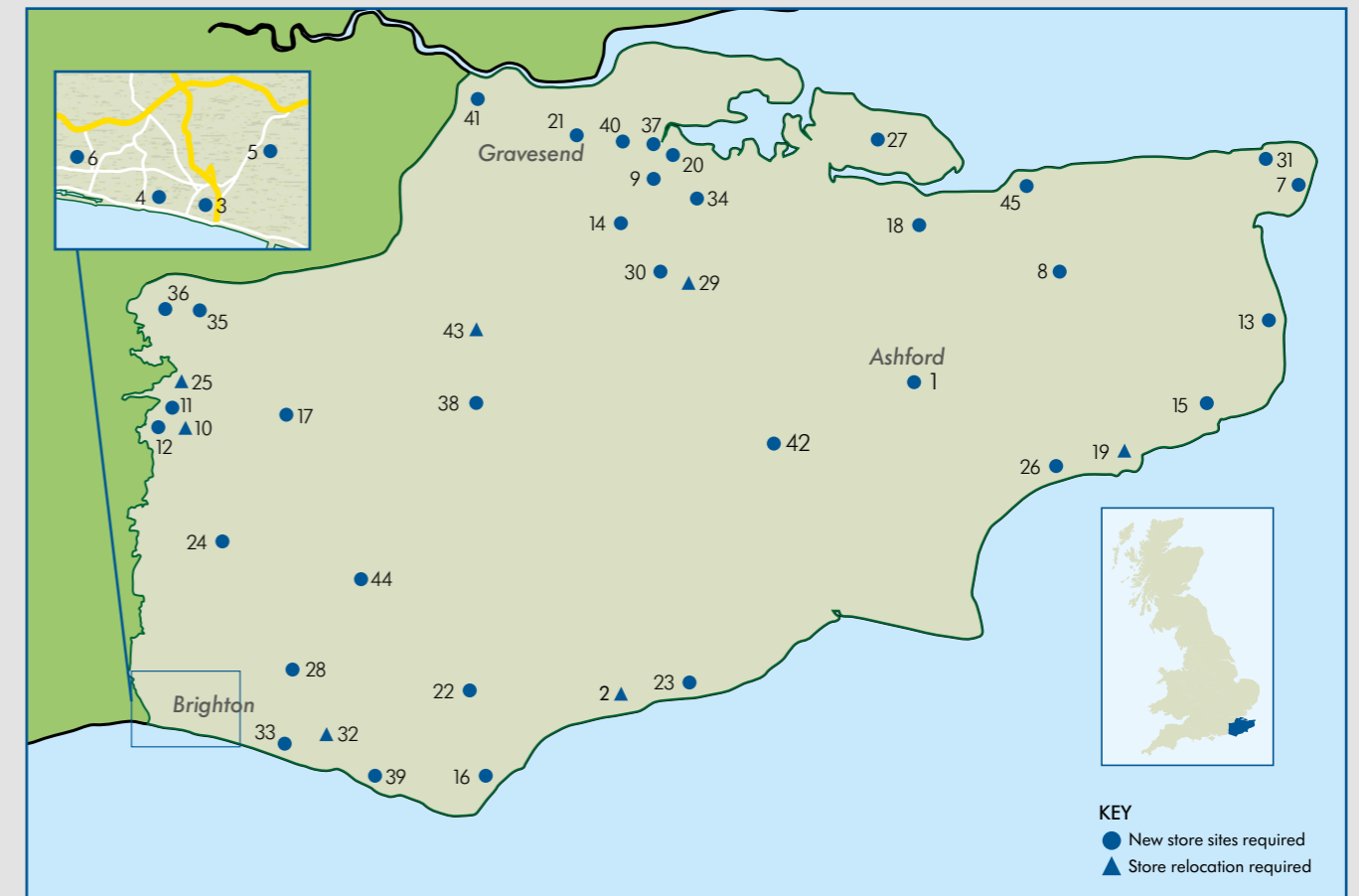
Our site requirements in Central South England

- | | | | |
|-------------------------------------|-------------------------------|----------------------------------|---|
| 1. Aldershot | 18. Fareham - North | 36. Portsmouth - Farlington | 54. Tadley |
| 2. Alton | 19. Fareham - Segensworth | 37. Reading - Caversham | 55. Thatcham |
| 3. Andover (rel) | 20. Farnborough | 38. Reading - Tilehurst | 56. Totton (rel) |
| 4. Ascot/Sunningdale | 21. Fleet | 39. Reading - Winnersh | 57. Wimborne |
| 5. Bagshot | 22. Godalming | 40. Reading - Woodley | 58. Winchester - Town Centre/Easton Lane |
| 6. Basingstoke - Central | 23. Gosport - Forton (rel) | 41. Romsey | 59. Winchester - West/Badgers Farm |
| 7. Bognor Regis (rel) | 24. Guildford - North | 42. Rustington | 60. Windsor |
| 8. Bournemouth - Boscombe (rel) | 25. Guildford - South | 43. Ryde (IOW) | 61. Woking - Goldsworth Park/Knaphill |
| 9. Bournemouth - Kinson/Moordown | 26. Haslemere | 44. Salisbury - North West | 62. Woking - Sheerwater/West Byfleet |
| 10. Bournemouth - Town Centre (rel) | 27. Hedge End | 45. Shaftesbury | 63. Worthing - Goring-By-Sea |
| 11. Bracknell - North | 28. Horsham - North | 46. Slough - Bath Road/West | 64. Worthing - Town Centre/North Street (rel) |
| 12. Bracknell - South | 29. Horsham - West | 47. Slough - Central | |
| 13. Camberley (rel) | 30. Lymington | 48. Slough - Langley/East | |
| 14. Chandlers Ford | 31. Maidenhead | 49. Southampton - Townhill (rel) | |
| 15. Cowplain (rel) | 32. Newbury (rel) | 50. Southampton - Bassett | |
| 16. Crowthorne (rel) | 33. Petersfield (rel) | 51. Southampton - Bitterne | |
| 17. Egham/Virginia Water | 34. Poole - Centre/Parkstone | 52. Southampton - Portswood | (rel) = relocation |
| | 35. Portsmouth - Central/West | 53. Swanage/Wareham | |



Our site requirements in Kent | East Sussex | East Surrey

- | | | |
|---------------------------|-------------------------------|---------------------------|
| 1. Ashford - South | 17. East Grinstead | 33. Peacehaven |
| 2. Bexhill (rel) | 18. Faversham | 34. Rainham |
| 3. Brighton - Central | 19. Folkestone (rel) | 35. Redhill |
| 4. Brighton - Hove | 20. Gillingham | 36. Reigate |
| 5. Brighton - Moulescombe | 21. Gravesend - South | 37. Rochester |
| 6. Brighton - Portslade | 22. Hailsham | 38. Royal Tunbridge Wells |
| 7. Broadstairs | 23. Hastings | 39. Seaford |
| 8. Canterbury - West | 24. Haywards Heath | 40. Strood |
| 9. Chatham | 25. Horley (rel) | 41. Swanscombe/Northfleet |
| 10. Crawley - East (rel) | 26. Hythe (Kent) | 42. Tenterden |
| 11. Crawley - North | 27. Isle of Sheppey | 43. Tonbridge (rel) |
| 12. Crawley - West | 28. Lewes | 44. Uckfield |
| 13. Deal | 29. Maidstone - Central (rel) | 45. Whitstable |
| 14. Ditton/Aylesford | 30. Maidstone - East | |
| 15. Dover - Central | 31. Margate | (rel) = relocation |
| 16. Eastbourne | 32. Newhaven (rel) | |



Get in touch.

Southampton Property Office, Lidl GB Ltd, Foxes Park, Brownhill Way, Nursling, Southampton, SO16 0YP
 Name: James Mitchell Tel: 0238 0742581 E-mail: james.mitchell@lidl.co.uk

Get in touch.

Northfleet Property Office, Lidl GB Ltd, Crete Hall Road, Gravesend, DA11 9BU
 Name: Paula Horton Tel: 01474 543988 E-mail: paula.horton@lidl.co.uk

Competitive rates for
new development
opportunities
throughout the UK...



Winner of 'Open Table' Top 100 Best UK Restaurants

Seeking additional sites to add to existing restaurants in the home counties.

SEARCH CRITERIA

- Destination sites required
- 3,500—6,500 sq ft approximately
- Retail units, pubs, period offices, warehouses and car showrooms with potential for change of use
- Split level space considered
- Preference for outside space & car parking
- Freehold or leasehold

Contact

Will Primrose

07879 417824

will.primrose@rapleys.com

RAPLEYS

0370 777 6292
www.rapleys.com

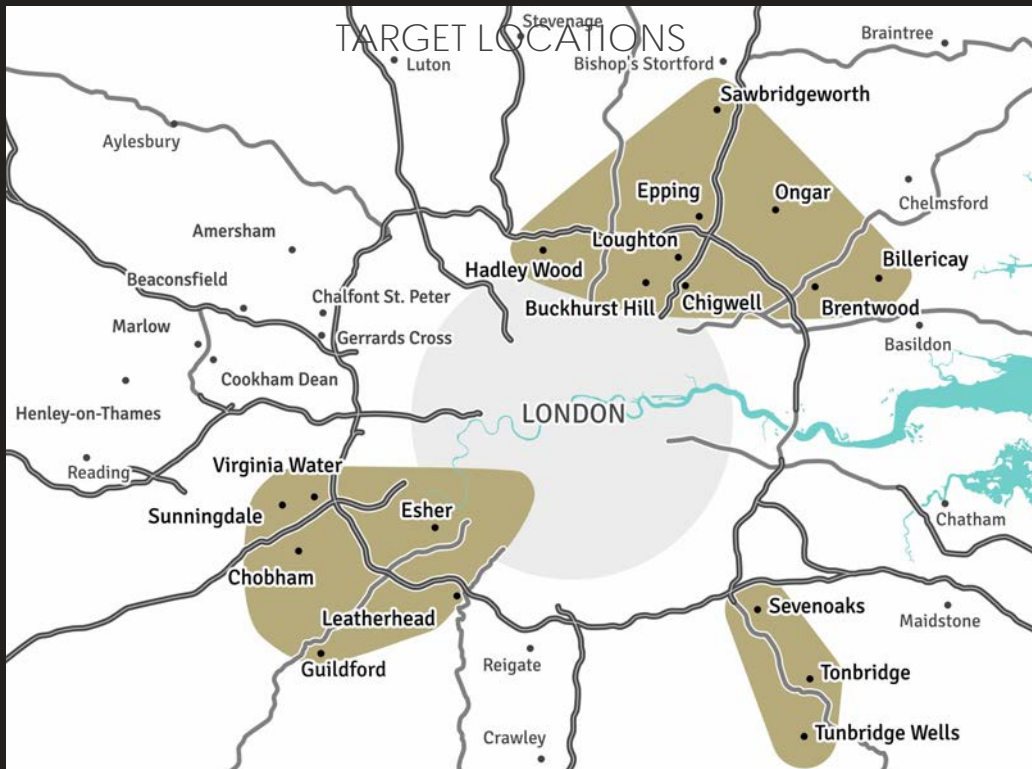
Prime Steak & Grill 2020 Requirements



WHO ARE WE

Prime Steak & Grill is a premium restaurant operator specialising in offering a dining experience with the finest ingredients including British beef sourced exclusively from award winning butchers, appointed by Her Majesty The Queen.

For further information, please refer to www.primesteakandgrill.com



pets
at home

pets at home

the groom room

Welcome

- Pet grooming
- Pet health centre
- Microchipping service
- Pet insurance



the groom room





- Our happy, healthy groomers offer:
- Full dog groom
- Cat grooming
- Microchipping
- Bath and brush
- Puppy sitting
- Nail clipping



RETAIL REQUIREMENT INSIDE M25

Pets at Home is the UK's largest pet supplies retailer, with more than 420 stores.

REQUIREMENTS:

-  Flexible format
-  min 3,000 sq ft inside M25
-  On site parking preferred
-  High visibility / prominence

PRIORITY LOCATIONS:

- | | |
|---------------------------|-----------------------|
| Amersham | Kensington |
| Barnet / Potters Bar | Leyton |
| Beckenham | Mile End |
| Brixton | New Addington |
| Bromley | Putney / Barnes |
| Chigwell / South Woodford | Rickmansworth |
| Chiswick | Staines |
| Cobham | Stoke Newington |
| Coulsdon | Sutton |
| Crouch End | Teddington |
| Ealing / Acton | Tottenham |
| East Dulwich | Twickenham |
| Esher | Warlingham / Caterham |
| Fulham | Welling |
| Hammersmith | West Hampstead |
| Harrow | |
| Islington | |

This list is not exhaustive.

smithprice
RETAIL & LEISURE

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seanvarilone@smithprice.co.uk

Jim Moloney
020 7409 2100
07917 839433
jimmoloney@smithprice.co.uk

(/cart)



Our sustained growth means we are continually expanding our property portfolio to help achieve our ever-growing goals for 2022. We have ambitious acquisition and development plans beyond that and are looking to acquire sites that meet the following property criteria for our standard store format.

Site Requirements

We prefer to purchase freehold, town centre or edge of centre sites suitable for property development in towns with a population of 15,000 or more. We are willing to explore all opportunities including developer led schemes and existing or new retail units. Our yield profile is increasingly adding value to developments.



Site Size

Minimum 1.5 acre site to accommodate a 18-20 ft² unit and 100+ dedicated parking spaces. Note - for London a minimum of 8K ft²



Main Road

Prominent main road frontage with good visibility and access



Retail Parks

Retail Parks



Town Centre

Either central or edge of centre location



Tenure

Freehold or leasehold



Footfall

Approximately 15,000 catchment area



Locality

Minimum of 1.5km from an existing store OR a potential site for a relocation from an existing store



Contact

If you meet these requirements please get in touch

Your Fees

Typical agent fees are 1.5% of the purchase price (freehold) or 10% of the annual rent (leasehold) finder's fee*

Fees regarding the acquisition of portfolio purchases can be discussed and agreed from the outset.

*Acting as our agent on previously unknown sites.

Download our Corporate Acquisitions Guide

[DOWNLOAD >](#)



(<https://cdn.aldi-digital.co.uk/T9MRTiLSP1SoKs8LQKdAI3vIXqw.pdf>)

Find your region



(about-aldi/property/required-towns/scotland)



(about-aldi/property/required-towns/north-east-england-north-yorkshire-and-cumbria)



(about-aldi/property/required-towns/east-west-and-south-yorkshire)



(about-aldi/property/required-towns/north-england)



(about-aldi/property/required-towns/west-midlands)



(about-aldi/property/required-towns/east-midlands)



(/about-aldi/property/required-towns/merseyside-cheshire-and-north-wales)



(/about-aldi/property/required-towns/east-anglia)



(/about-aldi/property/required-towns/south-wales-and-south-west)



(/about-aldi/property/required-towns/south-central-home-counties-and-west-london)



(/about-aldi/property/required-towns/london)



(/about-aldi/property/required-towns/south-east)



(/about-aldi/property/required-towns/ireland)



(/about-aldi/property/sites-for-sale)

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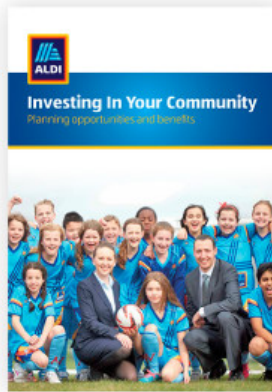
Download our guides

If you would like to find out more about Aldi, our property requirements, where we are looking for sites or how our stores benefit their local communities please download one of our guides.



Corporate Acquisitions

(<https://cdn.aldi-digital.co.uk/T9MRTiLSP1SoKs8LQKdAI3vIXqw.pdf>)



Investing in your Community

([https://cdn.aldi-digital.co.uk/CCP0bQM0\\$da9LqNTOQ\\$@95zqdSU.pdf](https://cdn.aldi-digital.co.uk/CCP0bQM0$da9LqNTOQ$@95zqdSU.pdf))



We require sites in these locations

(/about-aldi/property/required-towns)

(/cart)



We have an ambitious property investment and development programme across the South East and we need your help to find new commercial sites.

Required locations in South East:

Required locations in South East:

Required locations in East Sussex	<input data-bbox="1444 813 1476 857" type="button" value="+"/>
Required locations in Kent	<input data-bbox="1444 882 1476 927" type="button" value="+"/>
Required locations in Surrey	<input data-bbox="1444 952 1476 996" type="button" value="-"/>
<ul style="list-style-type: none">• Aldershot• Caterham• Cobham• Dorking• Farnham• Godalming• Guildford• Haslemere• Horley• Leatherhead• Oxted• Petersfield• Redhill• Reigate• Staines• Thames Ditton• Weybridge• Woking	<input data-bbox="1428 1742 1476 1776" type="button" value="Close"/>
Required locations in West Sussex	<input data-bbox="1444 1800 1476 1845" type="button" value="+"/>

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To discuss potential opportunities in South East contact:

T: **01795 601 900**

E: **property.she@aldi.co.uk**

Your Fees

Typical agent fees are 1.5% of the purchase price (freehold) or 10% of the annual rent (leasehold) finder's fee*

Fees regarding the acquisition of portfolio purchases can be discussed and agreed from the outset.

*Acting as our agent on previously unknown sites.

[PREVIOUS PAGE \(/ABOUT-ALDI/PROPERTY/REQUIRED-TOWNS\)](/about-aldi/property/required-towns)

Download our guides

If you would like to find out more about Aldi, our property requirements, where we are looking for sites or how our stores benefit their local communities please download one of our guides.



Corporate Acquisitions

([https://cdn.aldi-digital.co.uk/T9MRTiLSP1\\$oSks8LQKdAI3vIXqw.pdf](https://cdn.aldi-digital.co.uk/T9MRTiLSP1$oSks8LQKdAI3vIXqw.pdf))



Investing in your Community

([https://cdn.aldi-digital.co.uk/CCP0bQM0\\$da9LqNTOQ\\$@95zqdSU.pdf](https://cdn.aldi-digital.co.uk/CCP0bQM0$da9LqNTOQ$@95zqdSU.pdf))



We require sites in these locations

(</about-aldi/property/required-towns>)

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MENU



Sainsbury's Local

Sainsbury's Local



MENU



**New convenience stores in
West London Suburbs; Kent; Surrey;
Sussex; Hampshire; North Yorkshire,
West Yorkshire, South Yorkshire,
Lincolnshire, Leicestershire,
Nottinghamshire, Derbyshire,
Northamptonshire, Suffolk,
Cambridgeshire and Norfolk.**

Sites for new convenience stores conforming to the following GIA 3,000 – 4,500 sqft (at least 2,000 sqft on ground floor) Freehold or Leasehold Opportunities Prominent sites with good frontage and visibility on main arterial roads Busy urban High Streets Small neighbourhood parades Close to transport links Development sites (involvement is welcome as early as possible) Mixed use schemes, petrol filling stations, pub conversions, car sales sites, office conversions

RECENT OPENINGS

- Aldershot
- Bisley
- Cobham
- Leeds
- Nottingham
- Sheffield
- York

LOCATIONS REQUIRED

- UK

COMMENTS

For opportunities in North Yorkshire, West Yorkshire, South Yorkshire, Lincolnshire, Leicestershire, Nottinghamshire, Derbyshire, Northamptonshire, Suffolk, Cambridgeshire and Norfolk. Please contact Tom Cullen / Helen Cahill. For opportunities in North West London & South East please contact Steve Burnaby / Robin Williams.

MENU



Tom Cullen

Director

T +44 113 200 1853

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tom.cullen@colliers.com

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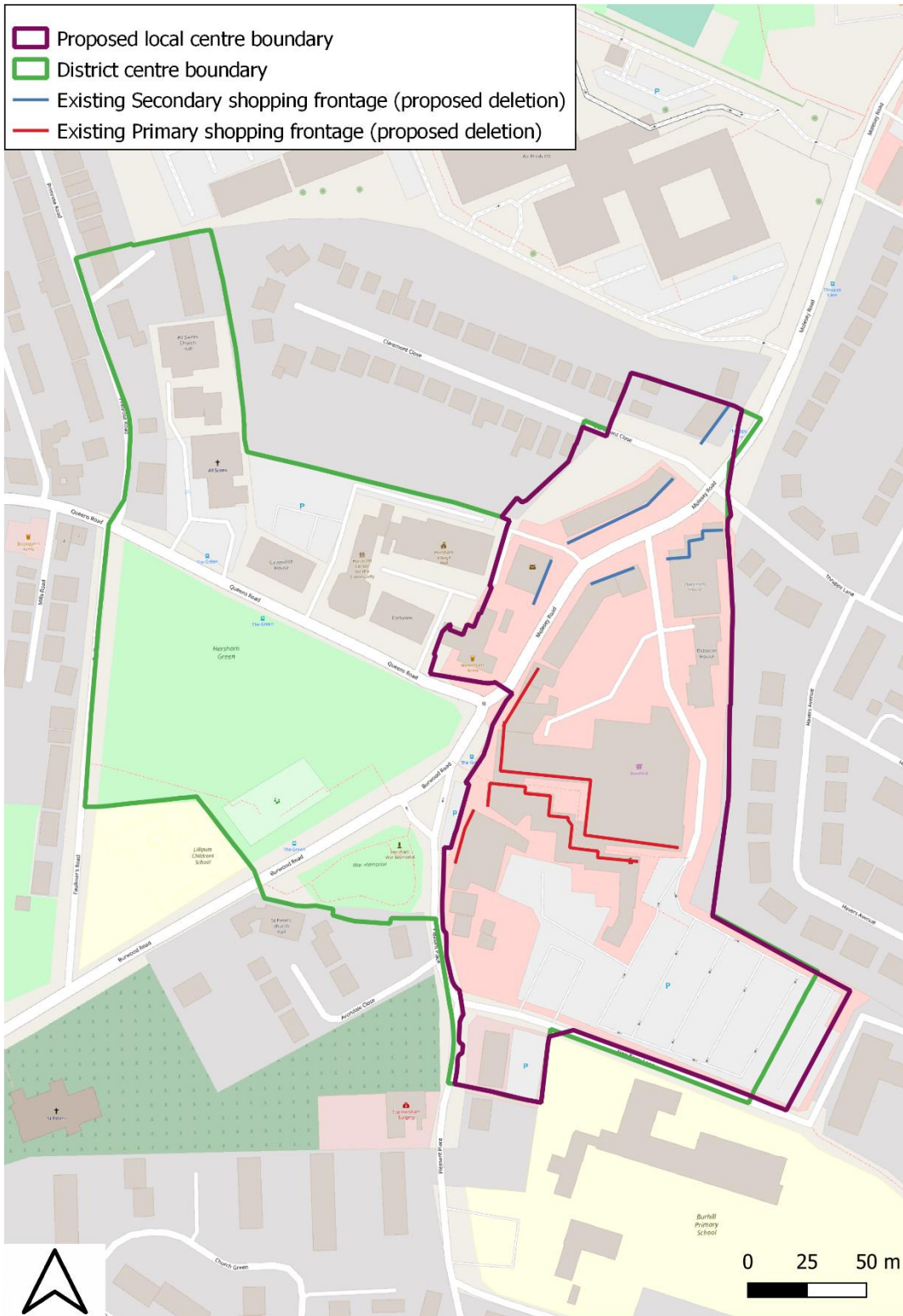
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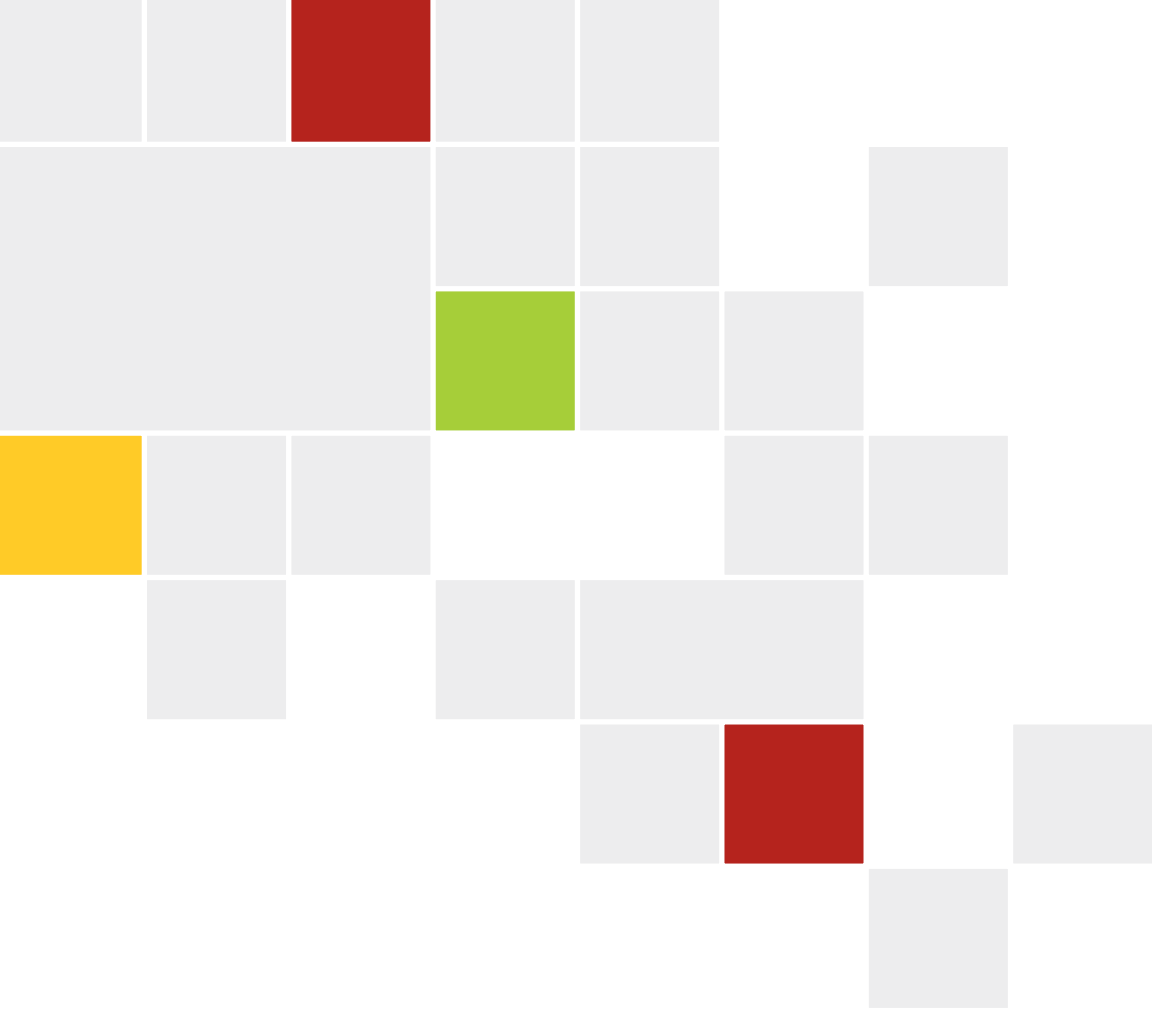
APPENDIX FIVE – PROPOSED CHANGES TO THE BOUNDARY OF HERSHAM CENTRE

The existing and proposed boundaries of Hersham centre



The existing and proposed boundaries of Hershams centre





Boyer

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london@boyerplanning.co.uk | boyerplanning.co.uk