

WOKING BOROUGH COUNCIL



EMPLOYMENT NEEDS ASSESSMENT

NOVEMBER 2005

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Summary

As part of the evidence base for the Local Development Framework (LDF), work has been undertaken to assess the employment needs of the Borough in terms of land supply and land use over the plan period. The work has involved establishing the baseline situation and how this is likely to change over the period to 2016.

In the context of this report employment only refers to business use (office and light industrial), general industry and warehousing (i.e. the B1, B2 and B8 use classes). The key findings are summarised below.

Current Position

At April 2005, around 65% of Woking's employment floorspace was business use, 17% general industry and 18% warehousing. Since the adoption of the Local Plan in 1999 there has been a 5.7% increase in business space, a 3.5% decrease in general industrial floorspace and a 1.2% increase in warehouse space. A survey of employment floorspace undertaken by officers identified that around 23% of employment floorspace is vacant, however, the ODPM's published figure for Woking is only 8%. It has not been possible to identify the reason for this very substantial difference.

The number of jobs in the Borough has increased to just under 43,000 in 2002 from the 1998 figure (an 8% increase). This is primarily through an increase in office based employment and an increase in part time employment. However, there are still fewer jobs in the Borough than the economically active population resulting in net out commuting of just over 5,000.

Forecasts of Jobs and Workers

Employment forecasts done by Experian for SEEDA in 2003 show that there will be an additional 7,200 jobs in the Borough by 2016 (a 20% increase on 2001). Around two-thirds of these jobs will be people working in offices, factories or warehouses. The vast majority of the remainder of these jobs will require retail space. However, it is notable that these figures are continually subject to additional information and changing circumstances which can have an influence on the projections. Recent commentary from Surrey County Council is that these figures are likely to be an overestimate. However SEERA is continuing to use them for regional planning purposes.

Population forecasts by Surrey County Council are that Woking's economically active population will increase by 5.8% over the same period. The impact of these changes would be that there would be 50,600 jobs and an economically active population of 50,455. There is therefore potential for a small amount of net in-commuting by 2016.

Future Requirements for Employment Floorspace

This report addresses the floorspace requirements of the B bulk class uses (office, industrial and warehouse, as defined by the ODPM). The provision of retail floorspace is addressed in the Retail and Commercial leisure Study. The findings of that study broadly conform to the level of retail jobs forecast by Experian.

The current average amount of floorspace for each employee is 22 square metres (across all B use classes). Whilst there have been changes in working patterns over recent years a study commissioned by SEERA has indicated that this has not translated into significant reductions in worker/floorspace ratios.

By using employment forecasts and worker/floorspace ratios a projected amount of future employment floorspace can be determined. It has been found that by 2016 Woking may need to accommodate an additional 43,000m² of office floorspace and an additional 64,000m² of warehousing space. It is forecasted that there will be a loss of jobs requiring industrial floorspace which would mean that there is a potential surplus of 25,000m² of this type of floorspace within the Borough.

Accommodation of Additional Floorspace and Redevelopment for Housing

The ability of the Borough to accommodate this level of additional floorspace has been assessed in two ways. Firstly the potential for intensification of development in existing primary employment areas, and secondly the impact of potential redevelopment of secondary employment sites for housing.

This report assumes that it is possible to intensify the amount of floorspace in primary employment areas by 10%. This is a continuation of a process which has been going on for many years. This would deliver around 24,000m² additional office floorspace in the town centre. It would also deliver 12,500 office and 12,500 warehousing floorspace in other primary employment sites. This, together with the retention of the great majority of other employment sites, and the implementation of current planning consents (including Broadoaks), would fall short of delivering the required amount of office floorspace by around 6,000m². However, it is noted that this report has made no allowances for the reduction in office vacancy rates or the fact that the forecasts are likely to be an over-estimate. These findings are consistent with the assumptions made in the Housing Potential Study about retention of employment land and the promotion of mixed use development in Woking Town Centre.

The Council's research has shown, that this level of development would not be sufficient to meet the projected requirement for additional warehousing floorspace, even given the projected loss of industrial floorspace that may come forward for redevelopment, resulting in a shortfall of around 27,000m². However, as mentioned above, it seems likely that the employment forecasts are an overestimate and that this level of demand for warehousing may not materialise. Again, the Council's survey shows high levels of vacancy for warehousing floorspace (around 35%) and this survey has made no assumptions about to what extent this vacant floorspace may come back in to use or be redeveloped to provide the right kind of space.

Policy LO7 of the Structure Plan, advocates a 20% loss of secondary employment sites to residential use. This would mean a loss of around 3.75ha of land between 2001 and 2016 (around 22,500m² of floorspace). In practice this level of loss has already occurred, particularly with the recent planning permission for redevelopment of Hoe Bridge Works which, for example, involved the loss of 3.2ha of secondary employment land. This results in a significant shortfall on the forecast demand for floorspace and raises the question of whether it would be necessary to intensify the use of some of the secondary employment sites, such as the Lansbury Estate, as suggested by consultants Vail Williams. In deciding whether this additional loss is acceptable two factors should be considered. Firstly the possibility that the employment forecasts are an overestimate, and secondly whether there is scope to reduce the vacancy rate from the current surveyed level of 23%.

It is clear that the employment situation must be closely monitored in the future in order to inform Council policy. The key economic indicators such as the level of employment, the rate of development and the amount of vacancy will be monitored annually as part of the Council's Local Development Framework Annual Monitoring Report.

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Appendix 1 – Use Class Order

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1.0 Introduction

- 1.1 As part of the evidence base for the Local Development Framework (LDF), work has been undertaken to assess the employment needs of the Borough in terms of land supply and land use over the plan period. The research will provide evidence for the justification of policy options available to the Council. The work has involved establishing the baseline situation and how this is likely to change over the period to 2016. The requirement to undertake this work is set out in:
- PPG3 Housing which suggests that local authorities should review all non-housing allocations and consider whether the land would be better used for housing or mixed use developments.
 - Regional Planning Guidance 9 (South East) also suggests that an audit of employment land stock should be undertaken.
 - Policy LO7 of the Surrey Structure Plan 2004 states that planning authorities should undertake an employment land capacity study identifying 'key' and 'secondary' employment sites and should examine the likely future relationship between floorspace, jobs and the workforce.
- 1.2 For the purpose of this study, employment is defined as that which falls under the B use classes as defined by the Use Classes Order 1987, where B1 is offices, research and development, light industrial; B2 is general industrial and B8 is storage and distribution.
- 1.3 A variety of sources have been used in this study and the time periods for some of the information vary. However, in all cases, the most up to date information has been used.

2.0 Policy Context

- 2.1 The policy framework for provision of employment land is provided by National Government, Regional Planning Guidance, Surrey County Council and, currently, the Borough Local Plan. The relevant policy and guidance is summarised below.
- 2.2 National policy set out in PPG4 (Industrial and Commercial Development and Small Firms) is primarily concerned with emphasising the need for development plans to take in to account the locational demands of business and wider environmental objectives. It describes how local authorities can help small firms as well as a concern that consideration should be given to whether proposals for new development may be incompatible with existing industrial and commercial activities.
- 2.3 Policy RE3 of Regional Planning Guidance for the South East (RPG9) states that a long-term holistic approach should be taken to economic development activities and states that development plans should take in to account economic development strategies which will reflect local capacity in terms of labour, land availability, transport infrastructure, and building upon local strengths including skills, local research strengths and strong business clusters. Other key elements of employment land policy in RPG9 include: ensuring business is located in areas well served by public transport; encouraging mixed use development; encouraging energy efficient design; precedence of the re-use of previously developed land over the release of Greenfield land; and encouraging intensification of use of existing sites.
- 2.4 The Regional Economic Strategy aims to improve the region's competitiveness within the European context. It states that there should be a focus on high, value-added, knowledge based growth and a nurturing of critical clusters of companies in key sectors. The prosperity of the South East is also seen to depend on having a range of successful businesses, from the small to the medium sized as well as the global players. This implies the need for both concentrations of employment land and a broad spread of differently sized sites to meet the range of businesses within the region. It advocates the need to reduce travel, for example by concentrating high density development near transport nodes and maximising the use of previously developed, underused and vacant land. The strategy states that Woking is seen as an important free standing town; a key economic driver in the region.
- 2.5 Policy LO7 of the Surrey Structure Plan is concerned with employment land. It states that suitably located land should be safeguarded and that there should be a review and reallocation of surplus or unsuitably located employment land. The expectation is that this will result in the loss of 20% of secondary employment land across the County, which for Woking would equate to approximately 5.6ha.
- 2.6 The key employment objective of the existing Woking Borough Local Plan states: *"The Council will seek to secure a healthy and more diverse local economy, principally through making the best use of existing industrial and commercial land, and will not make provision for significant employment growth"*. Policy EMP7 of the Plan is concerned with the loss of employment land. It states that the loss of B1, B2 and B8 uses will not be permitted unless the existing use causes demonstrable harm to the amenity of the area or if it involves the conversion of offices above shops to residential.

3.0 Methodology

3.1 There have been several stages in undertaking this employment needs assessment. The stages are outlined below.

- The local economic context was established in terms of the level of existing floorspace, the local labour force and the local market from secondary data sources.
- An audit of existing employment floorspace within the Borough was carried out which involved looking at aspects such as vacancy, age of stock and car parking provision.
- Calculations have been made using employment forecasts and floorspace/ worker ratios to estimate the amount of floorspace that will be required by 2016 to accommodate employment growth in the Borough.

3.2 A key element of this assessment has been to commission a local agent (Vail Williams) to brief the Council on factors such as current and likely future demand for different types of floorspace and location of floorspace in the Borough. This full report can be found in Appendix 2 to this report.

4.0 Baseline Information

- 4.1 This section sets out the baseline situation in Woking in terms of employment land, the local labour force and the local market. It shows that, following a period of strong growth, Woking has experienced a down-turn in the economy since 2001, illustrated by high vacancy rates and a decline in the number of jobs within the Borough.

Level of Employment Floorspace

- 4.2 The total amount of employment floorspace in Woking has increased by around 3.2% between 1999 (Local Plan adoption) and April 2005. Since 1999, there has been an increase in office floorspace (5.7%), and a decrease in factory floorspace (around 3.5%). There has also been a small increase in warehouse floorspace of around 1.2%.

	Office		Factory		Warehouse	
	April 1999	April 2005	April 1999	April 2005	April 1999	April 2005
Floorspace (m ²)	392,012	414,636	112,337	108,559	116,064	117,473

Table 1: Employment Floorspace in Woking. Source: WBC Survey

Quality of Existing Stock

- 4.3 The age of buildings can be a good indicator of the quality of existing stock. It also provides an indication of what buildings are more likely to come forward for redevelopment – based on the assumption that older buildings are more likely to be brought forward for redevelopment than newer ones. Information that is available from the ODPM (2000) shows that at the time of study:

- More than 30% of office units in Woking were under 20 years old
- Between 20% and 35% factory units were under 20 years old
- Between 20% and 30% of warehousing units were under 20 years old.

Labour Force

- 4.4 The number of people working in Woking has increased by just over 8% between 1998 and 2002. This compares to a 4% total increase in jobs across Surrey and a 7% increase across the South East over the same period. It is thought that Woking has seen a lower level of growth in businesses compared to the rest of the region, yet still seen a significant increase in the total number of jobs because there have been losses of small firms employing a small number of people, while larger firms have continued employing workers.

	No. Employees
1998	39670
1999	43404
2000	44613
2001	44070
2002	42987

Table 2: No. of Employees in Woking. ABI, 2002.

- 4.5 There has also been a change in the *type* of employment in the Borough over the same period. Most notably there has been a decrease in the numbers of people employed in manufacturing. Increases have been seen in the construction sector, banking, finance and insurance sector as well as in the public admin, education and health sector. Table 3, below shows the type of employment in the Borough by industrial classification, and how it has changed since 1998. It shows that nearly a third of jobs in Woking were in the banking, finance and insurance sector in 2002.

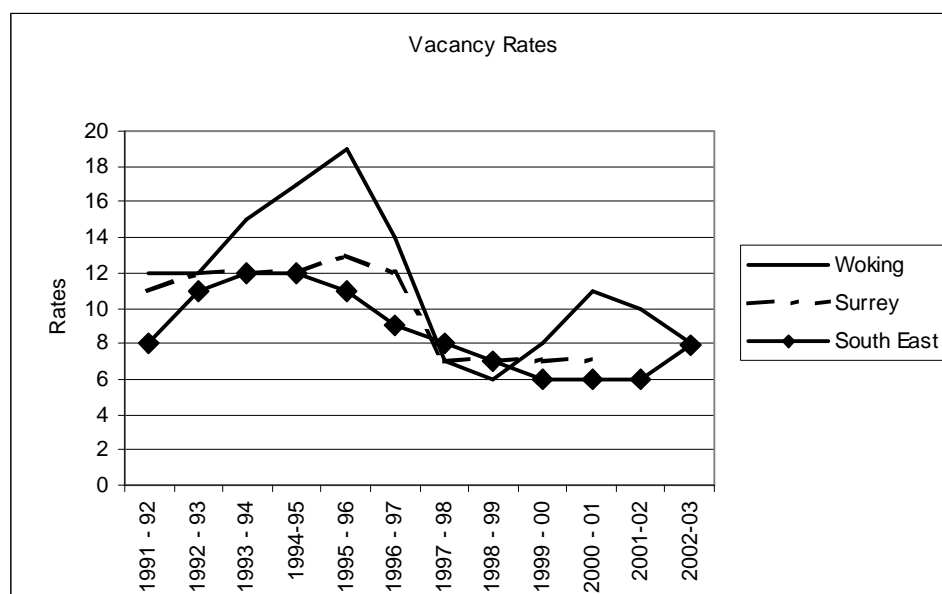
	98	02		98	02
Agriculture & Fishing	1.4	1.2	Transport & Comms	5.2	5.5
Energy & Water	1.1	0.6	Banking, Finance & Insurance	29.3	31.5
Manufacturing	9.9	7.3	Public Admin. Education & Health	16.6	17.3
Construction	4.8	6.2	Other Services	6	5.4
Distribution, Hotels & Restaurants	25.6	24.9			

Table 3: Change in Jobs in Woking 1998-2003 (%), ABI, 2002.

The Market

- 4.6 In 1982, GVA (Gross Value Added, which measures the contribution of each business to the UK economy and it is used in the estimation of GDP) in the Surrey economy totalled £7.8bn. By 2002, this had grown to £16.5bn, equivalent to an annual growth rate of 3.8%. Output has grown steadily above the UK annual trend growth rate of 2.5%.
- 4.7 The commercial property market in Woking has been relatively quiet in recent years reflecting a downturn in the wider economy. The office market has been worst hit with suppressed rents reflecting very limited uptake. Only the perceived demand from freehold owner occupiers has given developers justification to contemplate adding to the Borough's stock of offices such that the overwhelming majority of available space is second hand and much of that quite poor. The industrial market has fared much better with values rising for freehold accommodation and rents remaining strong. Limited opportunities to source suitable land and competition from residential developers are the only real factors preventing speculative development for warehouse and industrial schemes (information from a local agent).
- 4.8 Data from agents Jones Lange LaSalle on office rents has recently been released for 2004. It shows that the average office rent achieved in the South East was £21.79 per sq. ft., a fall from £27.49 across the region since 2001. Woking achieved average rents of £22 per sq. ft. in 2004 – in line with the rest of Surrey and the South East, Woking has seen a fall from £25.5 per sq. ft. in 2003. The demand for extra office space is low, however there is some interest in smaller units of between 200-300m². It is the agents' opinion that the likely trend is that larger units will be sub-divided for occupation by different businesses.

- 4.9 Information on Industrial rents has also been published by Jones Lange LaSalle. Rents in Woking are very close to those achieved across Surrey and the rest of the South East at £9.50 per sq. ft. in 2004. On the basis of information provided by local agents the industrial sector remains static. The market for larger units is poor, whilst there is more interest in smaller units ranging from between 3,000 to 5,000 sq.ft. With low interest rates, there is currently greater interest in buying industrial floorspace than renting.
- 4.10 Graph 1 below shows how vacancy rates for commercial and industrial properties (including retail) have varied over time in Woking, Surrey and in the South East region. The Graph shows Woking as having consistently above average vacancy rates, with the exception of the period 1997-1999. The latest data (2002-03) shows that Woking has a vacancy rate of around 8%, the same as the South East average, indicating that in 2002-03 there was approximately 59,500m² vacant floorspace in the Borough. Woking's average vacancy rate over the last 10 years is 11.5%. Unfortunately, these statistics do not show how the vacancy rates vary across the different types of floorspace. The statistics are derived from the amount of relief given on business rates for empty properties. However, this data only provides the *total* amount of relief given to each LA. This means that the returns will **underestimate** the total value of property vacant, since some of these properties will only be receiving 50% relief.



Graph 1: Vacancy Rates. Source: ODPM

- 4.11 The Council survey of local employment floorspace (2004/5) revealed, however, that around 22.8% of floorspace surveyed was vacant (around 147,000m²); significantly higher than the rate revealed by the ODPM. The difference between the two figures is due to the different way in which the vacancy data has been collected, as explained above.
- 4.12 The council survey showed how vacancy rates vary across the Borough (Table 4).
- 4.13 Because of the significant differences between these two sets of data this study makes no provision for a reduction in the vacancy rates of employment floorspace and the impact of this on future floorspace requirements. It is

considered unlikely that the vacancy rate would fall below 8% (as currently identified by the ODPM data). It is also recognised that (as discussed in para. 5.4) the employment forecasts are likely to be an over estimate and hence the requirement for additional floorspace may not materialise, resulting in less pressure to reduce vacancy rates.

	Total Floorspace (m²)	Vacant Floorspace (m²)	% Vacant
Byfleet Village Centre	14761	3062	20.7
West Byfleet	18380	4194	22.8
Butts Road	2291	0	0
Byfleet Industrial	81551	20086	24.6
Camphill	14185	279	2.0
Forsyth Road	77970	11289	14.5
Goldsworth Park	38445	25455	66.2
Goldsworth Road IE	1549	0	0
Lansbury	10840	1800	16.6
Monument Way West	18111	2297	12.7
Monument Way East	10868	216	2.0
Old Woking	24104	1577	6.5
Poole Road	4122	163	4.0
Robin Hood Works	2381	927	38.9
Woking Business Park	18262	2811	15.4
Woking Town Centre	238491	52874.23	22.2
Rest of Urban Area	17380	12844	73.9
Green Belt	47751	6474	13.6
<i>Totals/ Averages</i>	<i>641442</i>	<i>146348</i>	<i>22.8</i>

Table 4: Vacant Floorspace Across Woking

5.0 Forecasts

- 5.1 This section outlines the key considerations that will need to be taken into account when considering future provision of employment land and floorspace.

Population Projections

- 5.2 Population projections have recently been produced by Surrey County Council. It can be seen in Table 5 below that the population of Woking will increase by around 2.7% over the next 15 years from 89,700 in mid-2001 to 92,382 in 2016. The economically active population is also set to increase by around 5.8% over the same period, from 47,516 in 2001 (mid-year estimate) to around 50,455 in 2016.

	2001	2006	2011	2016
Building Program (estimated)		1,626	1,073	641
Total Population	89,700	92,732	92,260	92,382
Total No. of Dwellings	37,890	39,516	40,589	41,230
Total Households	36,941	38,525	39,572	40,198
Average Household Size	2.41	2.39	2.31	2.28
Economically Active Population	47,516	50,204	50,545	50,455

Table 5: Dwelling Constrained Population Projections. Source: SCC.

- 5.3 Woking's Housing Potential Study (published June 2005) has found that the building programme between 2001 and 2016 may have been underestimated based on housing supply potential. The study has found that there may potential for an additional 779 dwellings to that which was originally identified in the Structure Plan. Many of these dwellings would take the form of town centre flats. If these additional dwellings were to come forward it would imply that the population projections, above, are an under-estimate.

Employment Forecasts

- 5.4 Employment forecasts carried out by Experian on behalf of SEEDA in 2003 show that Woking is expected to gain an additional 7,200 employees between 2001 and 2016. It is estimated that around two thirds of these jobs will require B class floorspace. However, it should be borne in mind when looking at these estimates that they are based on what is termed "unconstrained demand", i.e. the projections do not take account of planning and infrastructure constraints and market imperfections. They are trend based rather than policy based. For these reasons, the forecasts should be interpreted with caution and regarded as representing higher levels of employment than is actually likely.
- 5.5 The 7,200 jobs are expected to be divided as follows:
- 2,800 jobs requiring office floorspace
 - 900 jobs requiring warehousing floorspace
 - A loss of 700 jobs requiring industrial floorspace

- 1,400 jobs requiring retail floorspace
- 3,400 jobs in the health, education and 'other' sectors (likely to be in office accommodation)
- A loss of 100 jobs from the public admin & defence sector.
- A loss of 500 jobs from the agriculture and oil/ gas extraction sectors.

Impact of Changing Working Practices

- 5.6 A recent study jointly commissioned by the South East England Regional Assembly (SEERA) and the South East Economic Development Agency (SEEDA) on the use of business space and changing working practices looked in some detail at changes in floorspace/ worker ratios as a potential explanation for the pattern of rising economic growth and the relatively small amount of floorspace growth which has accompanied this. It found that these ratios have actually changed very little across the region over the last decade due to the number of forces working in the opposite direction, but that any change is primarily due to changing working practices (e.g. flexible working, restructuring and rationalisation and the introduction of new technology and equipment).

Impact of Offshoring

- 5.7 As a follow-up to the SEERA/ SEEDA study mentioned above in paragraph 5.5, a further study was commissioned on "The Impact of Offshoring on the South East Economy". Offshoring is the practice of businesses moving their operations overseas. The Experian report explains that the practice of offshoring has resulted in the loss of around 43,000 jobs in the UK since 2001 and it is agreed that this is a trend which is likely to increase in the coming years. The report states that the key issue relating to the impact of offshoring will be the extent to which displaced workers can find new employment.
- 5.8 Experian suggest that in order to respond to the impact of off-shoring the South East economy will have to 'move up the value chain' and concentrate expertise in specific areas. For Woking, this would mean expanding the knowledge and high-tech economies. With Woking having a high skills base it is considered that Woking is well placed to compete in this arena.
- 5.9 Despite this research, SEERA have said that they are not yet intending to commission any further employment forecasts for the South East. This is primarily because the research was based on three scenarios, one projecting an increase in jobs and two projecting a decrease in the forecasts and the Assembly has not yet formed a view on these. For this reason, this study will use the original forecast as set out in Para. 5.4.

Needs of Employers

- 5.10 In 2000 Surrey County Council undertook a survey of 930 new businesses that had located in the County between 1994 and 1999. The survey found that 53% of these businesses expected to remain in the same premises over the next 5 years and that 21% expected to move to new premises.
- 5.11 In this same survey, businesses were asked to provide details about why they chose to relocate. The key reasons cited were lack of appropriate vacant floorspace when they needed it, the availability of key staff, the need to meet expansion requirements and the cost of premises were all considered to be major factors when decided on where to locate.
- 5.12 The survey also found that 46% of the firms who responded encountered problems of staff recruitment. It is thought that this problem may have increased since the survey took place since unemployment has fallen and there is more competition for skilled staff.
- 5.13 In October 2004, as part of the consultation for the LDF on the Spatial Vision for Woking, a focus group was held with representatives from commerce and related interest groups. Business interests put forward that they felt that the main disadvantages of Woking were: inadequate road links, poor links with Heathrow, the quality of the urban environment and image of Woking, physical barriers to the town centre and insufficient hotel accommodation.
- 5.14 The group also put forward that they felt that employment land should be retained and not transferred to housing in order to retain a balance and to provide jobs for the expanded population. Any development should avoid providing housing for a transient population and instead it should ensure that the population should contribute to the local economy.
- 5.15 There was a clear consensus that there are labour shortages in lower paid, lower skilled jobs in the area. It was felt that this could be exacerbated by further development in Woking and that affordable housing should be provided for these workers.
- 5.16 A similar focus group was held with representatives from the development industry. The developers were of the view that a balance of land uses needs to be maintained and secondary employment sites should not necessarily be transferred to residential use. Although they welcome employment sites being made available for residential development, they recognised that there is also a need to provide a good mix of jobs in the area.

Outstanding Planning Permissions

- 5.17 At April 2005 there was outstanding planning permission (including resolutions to approve) for just less than 17,000m² office floorspace in Woking. Half of this floorspace can be attributed to planning permission for a new County Hall site on Brewery Road.
- 5.18 In terms of factory floorspace, there is currently outstanding planning permission for a net loss of just over 11,000m² (this includes the loss of the James Walker site).

5.19 Analysis of outstanding planning permissions show that there is a potential net loss of just over 17,000m² warehouse floorspace. This is primarily due to the redevelopment of the NFT site in Chobham and the change of use to retail and industrial at Alfonal House, Abbot Close in Byfleet. Despite this net loss, it should be noted that there are some smaller scale increases proposed at Forsyth Road in Sheerwater and in the Goldsworth Park Industrial Estate, for example.

Summary

- The Borough's resident population, as well as its economically active population, is set to increase over the Plan period. The Housing Potential Study has shown that, should housing come through at the anticipated rate, the original estimates may in fact be an under-estimate.
- Employment forecasts show that there will be 7,200 additional jobs in the Borough by 2016. It is noted that this could be an over-estimate due to the way in which the figure is calculated.
- It has been found that the impact of off-shoring and on changing working practices are likely to be insignificant for Woking over the next decade.
- As at April 2005, Council records found that there are outstanding planning permissions for offices and that the rate at which these permissions are coming forward is in line to meet the requirements for 2016. In terms of warehousing, however, the recent losses at the former NFT depot, Guildford Rd and at Abbott Close in Byfleet, for example, have meant that there has actually been a net loss of floorspace. If the projected number of jobs that will require warehousing floorspace are to be accommodated in Woking, policy will need to be tightened in order to ensure that there are no further losses. At April 2005 there was outstanding planning permission for the loss of just over 11,000m² of industrial floorspace. The employment projections suggest that there may be a surplus of 20,000m² of this type of floorspace in Woking, and therefore, it could be considered that there is scope to permit the loss of some more industrial accommodation, in line with policy LO7 of the Structure Plan (see Para. 7.6).

6.0 Floorspace/ Worker Ratios

- 6.1 The floorspace/ worker ratio is defined as the average floorspace per person in a workplace. In forecasting demand and supply for floorspace in a sector/ area, net employment change is used to generate an estimate of expected changes in the demand for floorspace. It should be noted that the main constraint of this approach is that the employment data is based on Standard Industrial Classification (SIC) codes by main product of the workplace. These codes do not therefore distinguish between the different functions which may be undertaken at the workplace which may require different property uses.
- 6.2 As explained in paragraph 5.6, the 2004 SEERA/ SEEDA study on the use of business space and changing working practices looked in some detail at changes in floorspace/ worker ratios. It found that these ratios have changed very little across the region over the last decade despite changing working practices (e.g. flexible working, restructuring and rationalisation and the introduction of new technology and equipment).
- 6.3 The survey has also shown that there are sub-regional variations due to the industrial mix in certain areas. Surrey was found to have the lowest floorspace/worker ratio at 19.6m² per employee (compared to a South East average of 36.2) which is attributable to Surrey containing more high-tech industries and a large amount of office based and retailing employment.
- 6.4 Other factors which were found to have an influence on floorspace/ worker ratios included: size of the firm (the smaller the size of the organisation, the larger the ratio); the age of the building (modern buildings are used more efficiently); and location (the further away from the town centre, the larger the ratio). Floorspace/ worker ratios are therefore complex and assumptions have to be made when calculating future demand of employment floorspace. A sector breakdown was not published as part of the SEERA/ SEEDA report for Surrey.
- 6.5 Because it has been seen that there are such great sub-regional variations, the ratios that will be used for the Woking study will be those produced by Surrey County Council following their survey work carried out in 1999.
- 6.6 Surrey County Council's survey work revealed the following sector breakdown.

	Floorspace/ Worker Ratio 1999 (M ² / person)
Offices	16.4
R&D	67
Light industrial	37.5
Manufacturing	33.1
Storage and Distribution	46.2
Average	40

Table 6: Floorspace/ Worker Ratios across the B Use Classes in Surrey

- 6.7 Using the employment forecasts carried out by Experian for Surrey County Council in 2002 (see Para 5.3) and the average ratios, projections can be made about the amount of floorspace that would be required in 2016 to accommodate the additional workers. Around two-thirds of the 7,200 additional jobs in the Borough by 2016 are likely to be in B use class premises.

7.0 Amount of Floorspace Required by 2016

- 7.1 As explained in section 6 of this report, employment densities have been used in conjunction with the employment forecasts to estimate the amount of additional employment floorspace that will be required to accommodate the increase in jobs. The figures presented here should be interpreted with caution, for the reasons stated in Para. 5.3, regarding the accuracy of the forecasts.
- 7.2 To summarise, in order to calculate employment floorspace requirements the following assumptions have been made:
- That there will be an additional 4,900 jobs requiring office accommodation
 - The ratio that will be used in determining floorspace need for offices will be 16.4m²/ worker
 - There will be an additional 900 jobs requiring warehouse accommodation
 - The ratio that will be used in determining floorspace need for warehouse use will be 46m²/ worker
 - There will be a loss of around 700 jobs requiring industrial floorspace
 - The ratio that will be used in determining the floorspace that could potentially be lost from industrial use will be 46m²/worker.
- 7.3 Table 7, below, shows the total amount of floorspace that will be required in Woking by 2016 compared to the amount of floorspace in the Borough in 2002 (when the forecasts were published) and against the latest floorspace figures for April 2005. It shows that there is an estimated requirement for an additional 43,000m² of office accommodation and scope for a loss of just over 25,000m² of industrial space. A gain of just over 64,000m² of warehousing accommodation is needed.

	Total Floorspace 2001 (m²)	Additional Require- ment by 2016 (m²)	Total Required Floorspace by 2016 (m²)	Percent Increase by 2016 from 2001	Floor space April 2005 (m²)	Planning Permission (m²)	Additional Require- ment between 2005 & 2016 (m²)
Office	408,352	80,360	490,975	20%	414,636	16,647	64,904
Factory	103,847	-32,200	77,566	-25%	108,559	-11476	-17,961
Warehouse	123,588	41,400	159,450	29%	117,473	-17,219	72,209

Table 7: Floorspace requirement to 2016

Policy LO7 – Employment Land

- 7.4 Policy LO7 of the Surrey Structure Plan 2004 states that there should be a review and reallocation of surplus or unsuitably located employment land. The expectation is that this will result in the loss of 20% of unsuitably located secondary employment land across the County.
- 7.5 Woking has identified the following sites as ‘secondary’ (see section 8 of this report for details and reasoning):

Secondary Site	Site Area (ha)
Robin Hood Works	0.6
The Lansbury Estate	2.15
Camphill Industrial Estate	2.2
Poole Road (including Butts Road)	1.9
Byfleet Village Centre	1.3
Goldsworth Road Estate	0.6
Rest of Urban Area	2.8
Green Belt*	7.2
TOTAL	18.75

* This figure reflects the calculated ‘footprint’ of buildings in the Green Belt. Given that there is national and local policy that presumes against the increase in the size of the ‘footprint’ this figure was preferred over the site area of these properties as wider intensification would be unlikely.

- 7.6 A 20% reduction on this secondary employment land would represent around 3.75 ha. This would mean a loss of around 22,500m² of floorspace.
- 7.7 As stated above, policy LO7 states that this loss would be from ‘*unsuitably located*’ secondary employment sites. However, it further states that:
- The overall amount of floorspace should not be reduced, and may well increase over the Plan period
 - Established commercial and industrial land in town centres, business parks and industrial estates should be retained, although there is scope for redevelopment for more intensive, higher density employment uses, and the potential for mixed uses in town centres
 - Employment uses within district or local centres should be retained unless there is a lack of market interest or amenity problems caused by the current use

- Commercial and industrial sites scattered throughout the urban area have the potential for change of use, particularly to residential. However, the assumption that the site should remain in employment use pertains unless it is poorly located in terms of public transport accessibility or generates significant adverse amenity impacts.
- Some employment sites isolated within residential areas may be considered for reallocation for housing or mixed uses.

7.8 However, policy LO7 also requires that any employment site which is being considered for change of use should be assessed for its viability and suitability for continued employment use in terms of accessibility, impact on amenity and marketability. Section 8 of this report provides details of Woking's employment sites and addresses the issues raised in this report to date.

8.0 Capacity of Existing Employment Sites in Woking

- 8.1 The following section provides a summary of the employment sites surveyed by the Council in 2004/5 and identifies what capacity these sites have for intensification or redevelopment to alternative uses in light of the considerations outlined in previous sections of this report. It identifies key features of each site in terms of current mix of premises, vacancy, quality of the site, accessibility, etc. It is supplemented by information provided to the Council from consultants Vail Williams on the marketability and potential future role of the sites. In addition, issues regarding road access were discussed with officers at Surrey County Council.
- 8.2 A summary of some of the methodology is provided.

PTAM

The Public Transport Accessibility Model is an indicator provided by Surrey County Council which is essentially an updated version of the PTAL indicator that has been previously used by the Council. The figures give a calculated range which indicate the average time that someone would be expected to take to reach the Woking Railway Station either through walking or using public transport (or a combination).

Qualitative Assessment

As part of the on-site analysis of employment buildings, officers assessed each building, rating them either excellent, good, average, fair or poor. This assessment essentially entailed a visual evaluation of the amenity qualities and upkeep of the building. Modern buildings of high quality building materials would score highly while older buildings in obvious need of maintenance would generally be rated poor.

Calculation of Vacancy Rates

As part of the Council's site surveys, officers recorded, as much as possible, the amount of vacant and partially vacant buildings. Percentage vacancies were then calculated using the information officers had on the amount of employment floorspace in buildings. These figures may be prone to some degree of error so should be treated as generally indicative rather than exact figures. They were calculated from January to March 2005.

8.3 Woking Town Centre

The Woking Town Centre serves as the most important employment site in the Borough, with an estimated total employment floor space of around 238,000 m². Employment buildings in the area are virtually all office buildings (B1a), with just the one identified building with another use class, the Woking Sheet Metal building at the edge of the Town Centre on Goldsworth Road, which is B2. Much of the office space is made up of large multi-storey buildings which generally range from medium to excellent amenity quality. The balance tends to consist of smaller units above or adjoined to retail uses which are generally of a lower quality. The above mentioned B2 building appears to be very run-down, with very limited parking and close to residential properties (giving rise to potential adjacent use issues). It could be considered for a change of use.

- 8.4 Calculations of vacancy rates for employment floorspace in the Town Centre are approximately 22.2%. This figure is however balanced to some extent by a lower figure for A class uses (8% vacancy Borough-wide in December 2003 according to the Woking Borough Retail and Commercial Leisure Study). The 'Saab Miller House' on Church Street West was empty due to being refurbished at the time of the survey and is large enough to have an effect of more than 2% extra vacancy upon the overall figure.
- 8.5 Woking Town Centre has a number of advantages in terms of its strategic location. In particular the Town Centre has excellent train access with regular rapid services to London and to other centres in the South East and South West regions. The Centre is considered to be well located in terms of access to the M25 and other towns via the A320.
- 8.6 The limited number and quality of road access routes in to the area, due to the restrictions imposed by the railway and the Basingstoke canal is a recurring issue in consultation regarding the competitiveness of the Woking Town Centre. The restricted vehicle access applied to many areas in order to make the area more pedestrian-friendly also appears to raise some issues for businesses who wish to have delivery access to their premises.
- 8.7 In terms of public transport access, the vicinity of Woking Railway Station means that most parts of the Woking Town Centre have good public transport access. PTAM ratings mostly range from 5 (the highest rating) to 20.
- 8.8 Due to geographical restrictions imposed by the railway line to the north and the Basingstoke canal to the south, and given the projected continuing high demand for retail space (as was indicated by the Woking Borough Council Retail and Commercial Leisure Study 2004), future development of employment land will probably need to focus on more intensive use in the Town Centre. This could be achieved through more high-rise office space or more intensive worker-floorspace ratios. Alternatively, growth in to the area to the west around the Goldsworth Road and Poole Road areas is also seen as a possibility (this possibility was also raised by Vail Williams). The Goldsworth Road Regeneration Area has been identified in the Woking Borough Local Plan for this potential (policy WTC11 provides for B1a use and mixed-use developments in this area).
- 8.9 As the market for office space has slowed in recent years and there has been a large amount of apartment building, many areas of office space are becoming increasingly under pressure for conversion or replacement to residential uses. Vail Williams raised the issue of the need to retain office space in the Town Centre, to keep a future supply and protect the employment base, especially in light of the geographical constraints imposed upon the edges of the Town Centre.
- 8.10 It is considered that Woking Town Centre will continue to be a major focus of employment in Woking Borough. This will continue to be of a B1a nature, while the focus should largely be upon intensification of current employment uses, mixed-use developments, and possibly some expansion of employment areas to the west around Goldsworth Road. In light of pressures to develop residential properties in and around the Town Centre, it should be ensured that in managing this growth, the Town Centre retains the significant majority of its employment stock.

West Byfleet

- 8.11 West Byfleet is a large Village Centre consisting of a number of B1a class buildings which, combined with mostly retail buildings, make up the West Byfleet Village Centre. The total estimated employment floorspace, as calculated by the Council, is approximately 18,400m². There is a range of quality of buildings from poor to excellent quality. Of note is the prominent Sheer House building which, although currently occupied, is dated and Vail Williams suggested is likely to become uncompetitive in the near future.
- 8.12 Vacancy rates for the area were calculated as being high at approximately 23% (although, again, lower retail vacancies would likely lower the overall vacancy rate of the area). Vail Williams spoke of a weak demand in the area, even at times when the market is buoyant. Generally they were somewhat unfavourable in their assessment of the competitiveness of the area. They identified a perceived under-provision of parking as an issue making the area less attractive to the market.
- 8.13 The central train station at West Byfleet is an advantage to the area, although the train services are not as frequent or fast as those to Woking. The fact that the area to the north of the railway is not connected directly by road to the southern part of the West Byfleet Village Centre was seen by Vail Williams as making the northern part particularly unattractive to the market. Parvis Road is the main access road to the M25 motorway but is prone to congestion at peak times.
- 8.14 Although there is potential for more intensive office development in the area, present trends (which are of course liable to change) indicate there is unlikely to be the demand for this. There has been interest in changing some office buildings into residential developments. Adjacent uses (in terms of high rise developments close to existing residential uses) could be a problem in many parts of the area.
- 8.15 Although within the Green Belt, and hence technically out of the West Byfleet Village Centre, Vail Williams noted the potential of the Broadoaks development to influence the market's perception of the area. Vail Williams considered that improved access routes to the M25 could also be useful in improving the area's marketability.
- 8.16 Generally, it is considered that West Byfleet is an important Village Centre for which its employment providing role should be protected, thus justifying a Primary Employment Site designation. This situation may need to be reviewed if, over future years and a presumed improved wider market demand for offices, the area struggles to prove attractive to investors. The possibilities of intensified residential development in and around the Village Centre (although it is emphasised that this is a hypothetical scenario) may also increase the employment base for the area, attracting employers and thereby increasing demand for office space.

Byfleet Village Centre

- 8.17 Byfleet Village has a moderate amount of employment floorspace (the estimated total employment floorspace is around 15,000 m²). The area consists of a few scattered B1a buildings of generally fair to good quality, and an area of old and run-down B1c and B8 buildings on Royston Road centred

around the large Charles Austen Pumps Ltd building. Vacancy is at about 20%.

- 8.18 As a Village Centre, Byfleet has a small, localised role to play in terms of providing offices that service the local workforce. It is considered that the industrial and storage areas are generally of poor quality and less suitable for the predominantly quiet village centre character, and thus could be considered for conversion to non-employment uses. In consideration of this, the role that these units provide for employing the local workforce would need to be taken into account, however given the proximity of the area to the Byfleet Industrial Area (discussed below) this may be less important.
- 8.19 As an alternative to the strategic management of Byfleet Village Centre as a small peripheral area, it is noted that like the Industrial Area to the north, the area could have potential for development in light of its proximity to the M25 and the Brooklands Estate. This would entail a change of character however, from the quiet Village Centre it presently resembles, and there could be compatibility issues with adjacent residential uses. Nevertheless, it is considered that such an alternative approach maybe worthy of future consideration.

Goldsworth Road Industrial Area

- 8.20 The Goldsworth Road Industrial Area consists of a small estate bordering the edge of the Town Centre. The buildings are predominantly B2 uses, with some auxiliary B8 floorspace, mixed with some non-employment trade-servicing retail uses. The area is small, with less than 2,000 m² of floorspace, and there were no vacancies recorded as part of the officer survey.
- 8.21 The PTAM rating for the area shows moderate access to public transport at 15-20 minutes. The area has clear strategic advantages in terms of its vicinity to the Town Centre.
- 8.22 The estate is notable for its particular parking pressure, undermining the suitability of its current uses. In addition, there is a limited buffer zone between some buildings and neighbouring residential properties, indicating possible problems with noise pollution. These issues contribute to the assessment that the area is a Secondary Employment Site. It is also considered that the area may not necessarily be best managed as a predominantly B2 employment site.

Byfleet Industrial Area

- 8.23 This large area comprises of two adjacent industrial estates, situated adjacent to the former Brooklands motor racing track. The amount of employment floorspace (estimated at 81,500 m²) represents a considerable contribution to the Borough's overall stock. It consists of a mix of commercial uses, including B1a, B1c, B2, B8 and *Sui Generis*. The overall vacancy rate is close to 25%, although it is noted that we recorded no vacancies in the B1c, B8 and *Sui Generis* uses (although these make up a small component of the overall total).
- 8.24 Generally, there is a mix of quality of buildings in the Byfleet Industrial Estate. Some are very modern and of excellent condition while others are dated and in need of refurbishment. The buildings of the adjacent Sprint Estate tend to be of a poorer quality, most having been assessed as 'fair' quality in the site assessment.

- 8.25 Vail Williams were positive about the market outlook for this area and spoke of a steady demand. This was attributed in part to the proximity of the area to M25 junctions. However, although the area is close to the M25, it should be noted that HGV access to the area is constrained to some extent by the railway bridge under Byfleet and New Haw Railway Station (actually outside Woking Borough), which has a height restriction and where there is a one way system.
- 8.26 It is thought that, in light of its strategic advantages, the Byfleet Industrial Area will continue to be a major source of employment in the area and should therefore continue to be managed for these purposes as a Primary Employment Site.

Old Woking

- 8.27 Old Woking is an employment area with a moderate amount of floorspace (estimated at 24,000 m²). It is located on the edge of the Borough, which contributes to its somewhat distinctive character. The buildings on Manor Way are of B1c, B2 and B8 use classes and although they tend to be of fair-to-poor quality, vacancy levels are low. This may be reflective of the low rents in the area.
- 8.28 Hipley Street tends to have higher quality industrial and storage buildings, S Murray & Co owning three of them (one of which is empty). Again, vacancy levels in this part are low. A significant part of Westminster Court, an area of modern B1a offices, is empty. Real estate agents Morgan Smithyes commented on the distance from the Town Centre and the fact that leases do not allow tenants to sub-let at rates less than what is construed as being 'market-rates' as factors in this. The overall vacancy rate for Old Woking is relatively low at approximately 6.5% (source: WBC survey).
- 8.29 To the rear of Hipley Street is a new office and apartment development, which will increase supply of employment floorspace in the area. Vail Williams considered this may help to draw business attention to the area.
- 8.30 Vail Williams considered the area to have some strategic locational value in being between Woking and Guildford Town Centres, although in comparison to many of the other employment areas in the Borough it is not considered that Old Woking is amongst the best located sites in the Borough when considering factors such as proximity to the Town Centre and the motorway network. The PTAM indicator shows reasonable access to public transport (ratings of between 25 and 30 minutes are presented in the area). Access roads are mostly good, with fairly good access to the A3. However congestion can sometimes be an issue along High Street (A247), which although is considered an A class road, passes through residential areas and is thus subject to fluctuations of traffic around peak hours. Vail Williams appeared reasonably optimistic about the outlook for the area. Should there be market demand there is potential for increased employment land provision in the area, while the nearby former Martha Printing Works, situated in the Green Belt, may have potential as a range of employment uses providing these are consistent with planning policies, particularly those relating to the Green Belt.
- 8.31 It is considered that Old Woking plays an important role in providing for employment generating businesses in the southern part of the Borough and should therefore be treated as a Primary Employment Site.

Butts Road and Poole Road estates

- 8.32 These adjacent small industrial areas are bounded by the railway to the south and the Town Centre to the northeast. Butts Road is a small area (with approximately 2,000m² of employment floorspace) containing a mix of B1a, B1b and B2 uses. Although the buildings ranged from poor to average in the quality assessment, there were no vacancies recorded in these buildings.
- 8.33 The area described as Poole Road, which also includes buildings on Cherry Street, contains around 4,000m² of employment floorspace. These are a mix of B1a, B1c and B2 class buildings, also assessed as poor to average quality. The vacancy rate in this part was assessed by staff as being around 4%, entirely from vacant B1c buildings.
- 8.34 The reasonably low vacancy rates may indicate attractiveness of the properties to the market. This is aided by the proximity to the Town Centre and reasonable proximity to Woking Railway Station (The PTAM rating for the area is 15 to 20 minutes). There are, however, issues of limited parking in the Poole Road Estate. If, as expected, the office market improves in the future, there may be market interest in converting these centrally located areas to office use. Alternatively, given recent market trends, there could be interest in converting the area to high-density housing, which would also be an attractive use to the market due to the location.
- 8.35 In terms of the road access, this area is not seen as being ideal for industrial use (and associated HGV traffic). Access is restricted via Poole Road which is a 'D' class road. Poole Road also has a constrained junction which affects vehicle access.
- 8.36 It is important to consider the strategic location of the Poole Road and Butts Road Industrial Estates in relation to the Town Centre when considering the land-use outlook for this area. Should there be demand for growth around the Town Centre, this area is seen as an area that may be better utilised through alternative uses – perhaps through office or mixed-use development. The low site density is reflective of this. Therefore, despite our assessment that the area is currently of 'Secondary Employment Site' value, the strategic potential of the area should be noted.

Monument Way West

- 8.37 More than half of the floorspace in this moderately-sized area (containing around 18,000 m² of floorspace) is B1c with the balance a mix of B1a, B8 and B2. Most buildings were judged to be of a fair-to-good quality, with the buildings in the Boundary Business Centre of a higher quality. Vacancy rates were surveyed at approximately 13%. With reference to this area, Vail Williams discussed their perception that there is less demand for B2-style buildings in this type of location and more for offices or lighter industry.
- 8.38 The area is favourably located within vicinity of the Town Centre, and public transport access is reasonable with PTAM ratings falling within the 15-20 minutes range. However the lower socio-economic nature of the neighbouring residential areas was perceived by Vail Williams to be a negative influence upon the market. Also, comments from Morgan Smithys indicated that the mix of industrial and office uses does not reflect the image that some businesses, particularly office users, wish to portray.

- 8.39 The area is generally well serviced by parking, particularly in the spacious lay out of the Boundary Business Centre.
- 8.40 The general continuity of industrial and commercial uses from the Town Centre to Sheerwater has the effect of grouping common uses together and thereby minimising adjacent use issues. This, combined with the fact that the area is generally not currently of a high-density nature, makes Monument Way West a favourable location for future intensification. In considering this, it should be noted that in some areas such as those close to the Boundary Business Centre, existing residential sites are close to employment buildings. Like the adjacent areas of employment land, the area is best considered a Primary Employment Site.

Monument Way East

- 8.41 The employment buildings in the Monument Way East area are located in an small estate with a mix of B1a, B1b, B1c, B2 and B8 uses, while additional employment buildings are situated on the part Monument Way East leading up to the estate. The estimated total employment building floorspace is around 10,500m², making it a small to moderately sized employment area by comparison to others in the Borough. Most buildings were assessed in the fair to good range by staff in the site assessment. The Council's survey showed that vacancy rates are very low (less than 3%, made up entirely from B1a property).
- 8.42 To the north of Basingstoke canal, and within the Green Belt, the Britannia Wharf Building was considered an excellent quality building, with a high level of parking provision.
- 8.43 Public transport access in the area is reasonable with PTAM ratings ranging from 20 to 25 minutes. Road access to the estate is good with Monument Way East leading off Monument Road, which crosses both the railway and Basingstoke Canal. Vail Williams, however, noted that access to Albert Drive/Forsyth Road would improve the site's marketability and the continuity of employment land uses in the area northeast of the Town Centre. It would appear that there is some scope for intensification within the area of the estate. This may be less suitable to the south of the employment area where there is a limited buffer zone between industrial and residential properties.
- 8.44 The Monument Way East area should continue to be considered an area of primary importance in providing for employment in Woking Borough.

Forsyth Road/Albert Drive

- 8.45 This large area with around 78,000 m² is a significant employment area for the Borough. It is made up of mostly B1a and B8 uses with some B1c and a small amount of B2. The quality assessment rated most buildings in the area highly. In particular the Genesis Business Park and River Court areas have excellent quality buildings. Of note, the Wandsworth Electrical buildings are of a poorer quality.
- 8.46 Vacancy rates were calculated at approximately 14%, although Vail Williams were positive about the areas outlook in any upturn of the market. It is notable

that, like Woking Business Park, the move by McLaren to a new site (although at the time officers surveyed the area it appeared the company was still occupying some buildings) has contributed to higher vacancy levels.

- 8.47 Road access to the area is considered reasonable via Albert Drive. The area has moderately good public transport access with a PTAM rating of 25 minutes. The nearest Village Centre is Sheerwater, with straight-line distances from buildings to the Village Centre ranging from 90 to 500 metres. It is likely employees who work at the closer end of this range would be more inclined to walk to access basic retail services, while at the further end of the range they would be more likely to rely on motorised transport.
- 8.48 Compared to other employment areas in the Borough the Forsyth Road/Albert Drive employment area is quite intensively occupied in terms of the land area to floorspace ratio. Nevertheless, it was considered by officers in the site assessment that parts of the area have potential for intensification.
- 8.49 As an area with a large number of high quality employment buildings and a strategically desirable location, (close to other employment areas and the Town Centre), the Forsyth Road/Albert Drive employment areas should be regarded as being of primary importance for Woking Borough.

Woking Business Park

- 8.50 This park is a modern area of employment land with high quality buildings, two of which are very large and of a high value. The estate is moderately sized, consisting of about 18,500m² of B1a, B1c, B2 and B8 buildings. The overall vacancy rate was assessed as being around 15%.
- 8.51 McLaren were the major occupiers of the Park and continue to occupy or partially occupy three of the buildings. However, it is noted that McLaren may not be fully utilising the prominent building at the entrance to the park (which is shared with Storage-Tech). Future decisions by McLaren Cars as to their use of Woking Business Park, may influence the vacancy rates of the area.
- 8.52 Woking Business Park is adjacent to the Monument Way East Area. However, the estate is accessed from Albert Road meaning it functions more in commonality with the nearby Forsyth Road/Albert Drive area, with which it shares a PTAM rating of 25 minutes, indicating reasonable public transport access.
- 8.53 There is an extensive provision of parking at the site. This may need to be compromised if an attempt to provide more intensive employment land were sought. As in the cases of adjacent areas of employment land, Woking Business Park is of primary importance and should continue to be managed for employment purposes.

Camphill Industrial Estate

- 8.54 This relatively small area of employment land, bounded by the Basingstoke Canal and the railway, with a mix of B1a, B1c, B2 and B8 buildings. Relative to other employment areas which include non-office uses, the area is quite intensively utilised, particularly in comparison to other areas rated as Secondary Employment Sites in this report. It was calculated that there is around 14,185 m² of employment floorspace. Although the area and its

buildings are somewhat run-down in appearance, three of the buildings nearer the entrance to the estate were assessed as being of good-to-excellent quality.

- 8.55 The Estate was assessed as having vacancy rates at around only 2%. This may be reflective of the generally low rents. Access to the area for HGV's is limited by narrow bridges over the canal and under the railway and by limited vision at the access way off Camphill Road. In addition to these problems, Camphill Road is subject to a 'traffic calming package'.
- 8.56 Despite the already relatively high floorspace to land area, officers considered there may be some space for intensification of employment use buildings in the area. However, the above-mentioned access issues would likely pose problems for such proposals. The area could also be attractive for conversion to housing, (Vail Williams identified the proximity to the Basingstoke Canal as making residential development attractive) although the area is mostly occupied through its currently designated uses, and is relatively densely occupied meaning a large amount of employment floorspace would be lost in proportion to land, would counter against arguments for allowing such a land-use change.
- 8.57 The area's high PTAM rating of 45 minutes indicates that access to Woking train station is not favourable. However, the area is a fairly short distance from the West Byfleet station (between a 500 and 800 metre walk) indicating that the workforce may not be especially dependent on the car for travel to work.
- 8.58 On balance it is considered, that the area is best described as a Secondary Employment Site. Any proposal to redevelop the site for non-employment uses would require the consideration of the notable advantages and disadvantages of the site as a contributor to Woking Borough's stock of employment land.

Goldsworth Park Estate

- 8.59 This vast majority of this area is made up of B8 storage use, with a very small amount of auxiliary office space as well as a major Royal Mail sorting office which is classified as *Sui Generis*. Despite the large size of the employment area (around 9ha), the estate is not intensively utilised in comparison to other Employment areas in the Borough with around 38,000m² of employment floorspace. Vacancy rates in the Area are high, however the very high overall vacancy rate of approximately 42% is disproportionately contributed to by the very large storage building called 'Massif', which has approximately 17,500m² of floorspace. The building was built in 2003 and while clearly appealing to a limited, large-scale market, has so far failed to attract an occupant. Of the vacant units, Vail Williams noted that this is partly due to a number of leases expiring simultaneously.
- 8.60 The area has good road access with the A320 leading to the M25. Buffer zones from residential properties are large, ranging from 70 to 200 metres. Despite this it should be noted that there have been complaints of noise pollution from the area in the past. There would seem to be potential to intensify current uses in the area of the estate and possibly some conversion to industrial uses.
- 8.61 The Estate is fairly isolated from the nearest Village Centre (it is at least an 850 metre walk between Horsell Village Centre and the closest building of the Estate), meaning that employees on the site would likely not walk to access

basic retail services, however the PTAM rating of 25 is moderate, indicating reasonable access to public transport.

- 8.62 As an area that provides something of a specialist role in the Borough, (it provides around 32% of the Borough's B8 storage or distribution building floorspace), and being well serviced with purpose-built roads, the area should continue to be treated as a site of primary importance for employment generating land-uses in the Borough.

Lansbury Estate

- 8.63 The Lansbury Estate is a privately-owned, small-to-medium sized estate of predominantly B1c floorspace, with some B1a and B1b uses. The industrial buildings are mostly of a fair quality, having been built in the 1950's. There is approximately 10,800m² of employment floorspace of which it has been assessed around 16.5% is vacant.
- 8.64 Town Centre, and limited public transport access to there. Similarly the Estate The PTAM level of 45 minutes is indicative of the long distance from the area to the is relatively far from any designated Village Centre. However, road access is reasonable with good access to major roads to and around Woking Town Centre and to Guildford.
- 8.65 The area is well maintained with substantial parking provision. Although the Estate's entrance is on to an unclassified road, this is only a short distance to the A324 indicating the estate has fairly good road access. There is some potential for more intensive development of employment land. The smaller B1a buildings that have been added on-site are an example of how this could be undertaken.
- 8.66 Given the distance of Lansbury Estate from the Town Centre, other major service areas and public transport services, it is recommended that Lansbury Estate be considered a Secondary Employment Site. Despite this designation, it is considered that the role the site plays as a local employment site is a significant one.

Robin Hood Industrial Estate

- 8.67 This area is a small industrial estate consisting of three adjoining buildings with a total floorspace of approximately 2300m². The buildings are a mix of uses including B2, B1a and *Sui Generis*. The area is entirely surrounded by residential property, meaning there could be adjacent use issues if there was intensification of current uses (WBC officers have received complaints about noise in the past, relating to the small Post Office sorting office).
- 8.68 Vail Williams discussed the lack of a prominent entranceway affecting the marketability of the properties. The narrow entrance path is also problematic (traffic issues of this nature have arisen as problems in historic planning applications). The entrance way appears unsuitable for HGV's and would probably make any intensification of current uses unsuitable.
- 8.69 Public transport to the area is limited (the PTAM rating is 45), while road access is reasonable in terms of local access but less competitive on a larger scale.

- 8.70 At present 39% of the floorspace is vacant. Given the overwhelmingly residential nature of the surrounding area, there is, and it can be assumed will continue to be, interest in converting the estate to residential use. However, although there are apparent reasons for allowing residential development, the role the area plays in terms of a local employer and in providing services such as car repairs (which residents in the Knaphill area may otherwise have to travel further afield for), may also need to be considered.

Other Sites

- 8.71 Employment Areas not identified up to this point are those that were not designated in Industrial Areas or Town or Village Centres in the Woking Borough Local Plan (1999). These are usually stand alone buildings situated within the urban area (for example Elmbridge House in Kingfield) or the areas of employment buildings situated within the Green Belt. All are considered Secondary Employment Sites. Among those situated within the Green Belt, of note is the Mayford Centre complex centred around an historic school building. The site offers a large number of short-term leases to small businesses (at least fifty of them). The businesses are mostly of a B1a and B1c nature. Nearby Surrey County Council occupy some pre-fabricated style buildings which were assessed as being of poor quality.
- 8.72 Centred around a locally listed building of historic and/or architectural value, West Hall provides around 9000 m² of office space, The site is currently occupied by Mouchel Parkman. The area is off Pyrford Road, close to the Broadoaks development and the West Byfleet Village Centre.
- 8.73 Links Business Centre situated by the entrance to the Hoebridge Golf Course provides modern offices with a large provision of parking. At the time the Council surveyed the area the vacancy rate was assessed as high – around 61%, although some parts appeared to be being refurbished at the time. Given the amenity qualities of the area (it overlooks Green Belt) and its proximity to the golf course, there may be interest in the future to develop the area into housing.
- 8.74 The area known as Studley Court, situated off Chobham Road in the north of the Borough is a mix of small B1a offices with two B8 warehouses. Being surrounded by countryside the area is far from any public transport or Village Centre. The nearby large former NFT warehouse has now been given conditional planning permission for redevelopment for housing.
- 8.75 Although the contribution sites in the Green Belt provide in terms of employment floorspace and employee numbers is significant, the conditions that their designation within the Green Belt precludes, means that prospects of intensification or diversification of uses are unlikely. This, combined with the fact that areas are usually isolated from retail services and require dependence on car transport, has meant that these areas have been designated as Peripheral Employment Areas.
- 8.76 Situated within the urban area of Woking Borough is the former James Walker site known as Hoebridge Works. The area, consisting of a large B2 factory and associated warehouse was a significant employer in the Borough, but since James Walker ceased operations on the site in early 2004 the buildings, somewhat run-down in appearance, have remained vacant. The proximity of the B2 use close to residential housing provides for potential adjacent use

issues. The area has now been given conditional permission for residential development by the Council.

- 8.77 The Martlands Estate is an area subject to a complex planning history which has developed over a number of years in a Green Belt site close to Worpleston Station. The somewhat ad hoc nature of the site reflects the manner in which it developed. The area provides a mix of B2, B1c, B8 and *Sui Generis* uses. The combined floorspace is only around 4,000 m², although this is somewhat deceptive as most of the area is given to such uses as scrap yards and coach parking with little or no building on site. The overall site area is more than 3.5ha, with more than fifty units on site (all of which appeared full when the area was surveyed). There is a lack of paved roads and the buildings are very poor quality. Generally there is a lack of infrastructure and it is likely to be contributing to pollution issues. It is also probable that a large part of the site would be considered contaminated. However, despite the unsightly nature of the area, it is considered that it does play a role in the Borough in providing low value business accommodation and by grouping uses together in an area which is mostly shielded from public view and may otherwise be subject to adjacent use issues were they located areas closer to other uses. Vail Williams discussed many of the issues the area raises (see appendix 2).

The Heather Farm buildings, which formerly housed the Blue Prince Mushroom operation, are also situated within the Green Belt. Located near the northern boundary of the Borough, there is a large amount of floorspace (approximately 15,500 m²), which was assessed by officers as being of average quality. The site was being used for composting and is thus treated as *Sui Generis*. It is currently vacant.

- 8.78 Close to Brookwood Cemetery, Stonemasons and Red House are office buildings rated by officers as average and excellent, respectively. Both had no vacant office space when surveyed.

9.0 Conclusions

9.1 In summary:

- Assuming that outstanding planning permissions for office developments come forward, there is still a requirement for an additional 43,000m² of office floorspace in the Borough (an 18.5% increase between 2005 – 2016).
- At April 2005 there were actually planning permissions accounting for a net loss of warehousing of floorspace, mainly attributable to permissions at the former NFT site on Guildford Road and at Abbott Close in Byfleet. There is a requirement for an additional 64,000m² of warehousing floorspace by 2016 (a 35.5% increase between 2005 – 2016).
- At April 2005, there was outstanding planning permissions accounting for the loss of around 11,000m² of industrial floorspace – mainly attributable to the redevelopment of the former James Walker site in Old Woking. There is potential for the loss of a further 25,000m² of industrial floorspace due to the forecasted loss of jobs in Woking that will require this type of floorspace in 2016 (a 28.5% decrease between 2005 – 2016).

9.2 One of the primary objectives of the assessment has been to identify Woking's primary employment sites. These are the sites that are most suitable for intensification for employment purposes. The borough's employment sites have been categorised as follows (see section 8 of this report for justifications):

Primary	Secondary
Woking Town Centre	Robin Hood Works
West Byfleet	The Lansbury Estate
Byfleet Industrial Area	Camphill industrial Estate
Old Woking	Poole Rd/ Butts Rd
Monument Way East and West	Byfleet Village Centre
Forsyth Rd/ Albert Drive	Goldsworth Road Estate
Woking Business Park	Rest of urban Area
Boundary Road	Green Belt
Goldsworth Park industrial Estate	

9.3 Policy LO7 of the Surrey Structure Plan 2004 states that there should be a review and reallocation of unsuitably located employment land, with the expectation that this will result in the loss of 20% of secondary employment land across the County. For Woking, a 20% loss of secondary employment

land equates to around 3.75ha. This is equivalent to around 22,500m² of floorspace. It is noted that the planning permission for redevelopment of the Hoe Bridge Works site has already involved the loss of 3.2ha of such land.

Accommodating Additional Office Space

- 9.4 The assessment has shown that it would be possible to accommodate the additional office floorspace requirement within the primary employment locations, including the town centre. There is an opportunity for intensification of employment uses in and around the town centre, for example, to the west of the Town Centre in the Goldsworth Rd area. The potential for redevelopment of Butts Road/ Poole Road for a more intensive employment use is also noted.
- 9.5 This survey has made no assumptions about any reductions in vacancy rates, due to inconsistencies in data. However, it is recognised that a key factor in accommodating the growth in the number of jobs is the assumption that the vacancy rates will fall as the market starts to pick up again. The Council survey found that, for example, 22% of office floorspace in the Town Centre was vacant. If all this floorspace was to become occupied, around 3,200 workers could be accommodated.

Accommodating Additional Warehouse Space

- 9.6 Additional warehouse floorspace would need to be accommodated mainly within the primary locations such as Goldsworth Park Trading Estate, Forsyth Road and Monument Way West, which are currently used for warehousing purposes and are presently developed at fairly low densities. The Council's site survey has found that there may be some scope for intensification of these sites for this purpose. The potential redevelopment of industrial floorspace for warehousing purposes is also a possibility.
- 9.7 Again, a key factor in the accommodation of workers requiring warehousing floorspace will be the occupancy of currently vacant buildings. For example, the Massif building on Kestrel Way (which is around 17,500m²), when occupied, could provide jobs for approximately 350 workers – nearly half the number of jobs in warehousing forecasted to 2016.

Loss of Industrial Space

- 9.8 As discussed above, it is forecasted that there will be a loss of around 700 jobs in the borough that require industrial type accommodation (equating to a potential loss of a further 32,200m²). It is possible that this land could be redeveloped to accommodate the additional need for offices and warehousing. It could also be redeveloped for housing, or other appropriate uses.
- 9.9 The assessment has found that there are areas in the borough that are currently in industrial use that may be better suited to alternative uses. Robin Hood Works, for example, which is a fairly run-down site, with high vacancy and poor access may be better suited to residential use. As mentioned in Para. 9.4, above, the Butts Road/ Poole Road area may be ideal for consideration for alternative uses. Likewise, the assessment has identified that there are other smaller industrial buildings in the village centres and rest of the urban area that may also benefit from redevelopment to alternate uses.

Monitoring

- 9.10 It is clear that the employment situation must be closely monitored in the future in order to inform Council policy. The key economic indicators such as the level of employment, the rate of development and the amount of vacancy will be monitored annually as part of the Council's Local Development Framework Annual Monitoring Report.

Appendix 1: Use Class Order

Class A1. Shops

Class A2. Financial and professional services

Class A3. Restaurants and Cafes

Class A4. Drinking Establishments

Class A5. Hot Food Takeaways

Class B1. Business

B1a - Office other than a use within class A2 (financial and professional services),

B1b - for research and development of products or processes, or

B1c - for any industrial process, being a use which can be carried out in any residential area without detriment to the amenity of that area by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit.

Class B2. General industrial

Use for the carrying on of an industrial process other than one falling within class B1.

Class B8. Storage or distribution

Use for storage or as a distribution centre.

Class C3. Dwelling houses

Use as a dwelling house (whether or not as a sole or main residence) —

(a) by a single person or by people living together as a family, or

(b) by not more than 6 residents living together as a single household (including a household where care is provided for residents).

Sui Generis. This term describes uses that do not fit into any of the use classes described in the Order.

