

## Going Coastal

**Prepared for:**



**Prepared by:**

Vail Williams LLP  
Author: Mikael Goldsmith  
mgoldsmith@vailwilliams.com  
07435 829861

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# 1 Introduction

- 1.1. Vail Williams are instructed by The Coastal West Sussex Partnership (CWSP) to commission a report to provide an understanding on the demand, availability and the trends affecting industrial/warehouse and office accommodation across coastal West Sussex .
- 1.2. Vail Williams is a national property adviser with ten offices based throughout the North, Midlands and South of England. Vail Williams undertake considerable Agency, Valuation and Professional work in and around the subject area on behalf of occupiers, landlords, developers and banks and consequently are well suited to report as per the instructed brief.
- 1.3. The report was commissioned in May of 2022 by Mikael Goldsmith who has an extensive personal knowledge of the subject area.
- 1.4. CWSP is a public private partnership that champions sustainable economic growth across the coastal West Sussex area and brings the voice of business into policy and investment decisions.
- 1.5. The aim of this report is to inform to Local Authority partners and stakeholders to stimulate discussion and promote action regarding the key challenges and opportunities the coastal area faces to continue to grow the economy.
- 1.6. Outlined below is a the subject areas for reporting.



# 2 Brief

- 2.1. The brief under which Vail Williams are been instructed is itemised below:
- 2.2. Provide a headline assessment of the existing office and industrial stock in the Chichester, Arun, Worthing and Adur districts.
- 2.3. Provide an environmental grading in accordance with the Energy Performance Certificate (EPC) of the existing commercial stock so that the quality of space can be determined.
- 2.4. Give insight into the market appropriateness of current stock and its 'fit' with occupier demand.

- 2.5. Illustrate current availability and supply.
- 2.6. Identify the pipeline of development supply either consented, outlined in local plans or locations which could be suitable for development.
- 2.7. Assess identified strategic sites with or without planning consent which could come forward in the future and comment on the blockages and challenges that are preventing their development.
- 2.8. Comment on the likely take-up of space and latent demand providing insight into the potential gaps, if any, between supply and demand for space now, and supply and likely demand in future.
- 2.9. Identify local, national and international factor changes that will impact the business space sector.
- 2.10. Comment on post lockdown changing work patterns and how that may change demand and design of office space in the future.
- 2.11. Put forward conclusions on the current situation on the Business space sectors and provide recommendations on how these should be addressed.
- 2.12. In relation to Planning and development:
  - Comment on the responsiveness of the planning system to new development
  - Comment on the effect of reforms to the Use Classes Order September 2021
  - Suggest any key changes that could be made to improve situation

### 3 Methodology

- 3.1. The data set has been accumulated and reviewed by district and then by sector to be able to analyse such on micro and macro basis.
- 3.2. To provide both an informed and realistic view of West Sussex Coastal employment space, we have focused on business areas and estates with a critical mass of 20,000 sq ft or greater. Naturally there will be additional smaller pockets of employment space, however for the purposes of this report we have not gone into specific detail on such.
- 3.3. To calculate the current availability, we have reviewed all major online property portals as well the websites for all established commercial agencies in the various districts.
- 3.4. We have excluded areas which do not expressly have employment consent where the site may be severely commercially restricted in the offering. For example, where there may be a marine or horticultural specific designation.
- 3.5. Data has been obtained from the Valuation Office Agency (VOA) to calculate the gross employment floor areas (total accommodation) for the districts. This will naturally encompass some locations outside the scope of the CWSP focus area. Extrapolating this data in the context of this report would be unproductive and due to the economic size of these areas it is unlikely to affect the sentiment of the conclusions arrived at as a result.
- 3.6. The most recent local plan for each district has been reviewed to understand potential pipeline development and strategic sites, as well utilising our own market insight.

3.7. The data set has been reviewed according to the below sizes in the various districts. We have not compiled data below 1,000 sq ft.

| Sq m              | Sq ft           |
|-------------------|-----------------|
| 92.9 – 185.8      | 1,000 – 2,000   |
| 186.9 – 464.5     | 2,001 – 5,000   |
| 464.6 – 929       | 5,001 – 10,000  |
| 929.1 – 1,858.1   | 10,001 – 20,000 |
| 1,858.2 – 4,645.2 | 20,001 – 50,000 |
| >4,645.2          | >50,001         |

3.8. For ease and consistency floor areas are quoted in sq ft. Whereby a conversion from sq m has been undertaken a multiplier of 10.764 has been used.

3.9. To assess the environmental grading of the subject sites and locations we have obtained the EPC assessments from the online [EPC Register](#). Naturally EPC's vary from building to building as well as area to area but the range we have provided is informative for the purposes of this report.

3.10. The properties have been assessed through a combination of internal and external inspections; The collective Vail Williams team have personal experience in dealing with many of the subject properties. Our grading has been based on the following criteria:

| Industrial   | Office   |
|--|--|
| <b>Grade A</b> <ul style="list-style-type: none"> <li>Under ten years old</li> <li>Eaves height in excess of 6m up to 5,000 sq ft (8m in excess of 5,000 sq ft)</li> <li>Excellent road communication links</li> <li>Established industrial area</li> <li>Excellent yard depth and access</li> <li>EPC A or B</li> </ul> | <b>Grade A</b> <ul style="list-style-type: none"> <li>Newly constructed or high specification refurbishment</li> <li>Air conditioning, raised floors and robust IT infrastructure</li> <li>EPC A or B</li> </ul> |
| <b>Grade B</b> <ul style="list-style-type: none"> <li>Over ten years old</li> <li>Appropriate eaves height to location</li> <li>Good road communication links</li> <li>Good yard and access</li> <li>EPC C or D</li> </ul>   | <b>Grade B</b> <ul style="list-style-type: none"> <li>Second hand and modern</li> <li>Mid specification of services</li> <li>EPC C or D.</li> </ul>  |
| <b>Grade C</b> <ul style="list-style-type: none"> <li>Up to thirty years old</li> <li>Still occupiable</li> <li>Capable of being upgraded to grade B</li> <li>Limited eaves height</li> <li>Non-industrial locations</li> <li>EPC D or E</li> </ul>  | <b>Grade C</b> <ul style="list-style-type: none"> <li>Ageing but still occupiable</li> <li>Requires modernisation</li> <li>No A/C or raised flooring</li> <li>EPC D or E</li> </ul>                              |
| <b>Grade D</b> <ul style="list-style-type: none"> <li>Not suitable for occupation.</li> <li>Needs repurposing or redeveloping</li> <li>EPC F or G</li> </ul>   | <b>Grade D</b> <ul style="list-style-type: none"> <li>Not suitable for occupation.</li> <li>Needs repurposing or redeveloping</li> <li>EPC F or G</li> </ul>   |

## 4 Overview of Market Conditions

### Industrial and Warehouse

- 4.1. The commercial property market has seen significant volatility as a result of the COVID-19 pandemic. The warehouse and industrial markets, however, have remained robust, driven by a change in shopping habits with more people now favouring online shopping. This ‘boom’ in the online retail sector has put incredible strain on the supply of quality warehouse premises, where there has been limited speculative development for the last twenty years along the Sussex coast.
- 4.2. As a result headline rents and are now at record highs due to an imbalance in supply and demand. In addition, investment yields paid for accommodation have improved significantly with a large spectrum of property investors targeting this sector.

There has been significant activity from developers in targeting this sector to cater for local demand as well as larger 3PL logistics operators who require larger units, typically in excess of 50,000 sq ft.

### Offices

- 4.3. The occupational office market, even prior to the pandemic, was not significantly buoyant. All the areas discussed in the report generally have insular markets and do not attract inward migration of business. Rents have generally remained stable as they have done for at least a decade. Void periods however have increased, and accommodation is becoming obsolete and commercially unviable to consider deploying the appropriate capital expenditure to bring it up to modern standards.
- 4.4. Under permitted development rights there is scope in some locations to convert what was formerly B1(a) office space into C3 residential without the need for a full planning application, this is known as ‘PD’. This has been a controversial subject as although much of the space that has been absorbed has been obsolete, a number of what were formerly key employment sites have also been lost.

## 5 Summary of Findings

### Industrial

|  | Chichester              | Arun             | Worthing              | Adur              | Average              |
|--|-------------------------|------------------|-----------------------|-------------------|----------------------|
| <b>Total Accommodation</b>                     | 6,500,000               | 14,300,000       | 3,700,000 sq ft       | 7,300,000         | 7,950,000 sq ft      |
| <b>Current Availability</b>                    | 0.16%                   | 0.62%            | 7.75%                 | 0.44%             | 2.24%                |
| <b>Highest Headline Rent (&gt;5,000 sq ft)</b> | £12.00                  | £10.50           | £11.00                | £14.00            | £12.00               |
| <b>Consented (outline)</b>                     | 335,000 sq ft           | 400,000 sq ft    | 30,000 sq ft          | 250,000 sq ft     | 253,750 sq ft        |
| <b>Average Annual Take-Up</b>                  | 100,000 - 150,000 sq ft | 50,000 - 100,000 | 50,000 - 80,000 sq ft | 100,000 - 150,000 | 75,000—120,000 sq ft |
| <b>Typical Occupational Grade</b>              | B-C                     | B-C              | B-C                   | B-C               | B-C                  |

- 5.1. The continuing trend of demand for warehouse accommodation over the last five years has been reinforced by the Pandemic due a shift in shopping habits to online retail. This has also put

considerable strain on those more traditional industrial occupiers finding suitable cost-effective premises.

- 5.2. Industrial rents have increased by up to 50% in locations, together with stronger investment yields being paid. This has resulted in increases in industrial land values, which are higher than residential in some locations and higher than offices in almost all locations.
- 5.3. The 2023 business rates revaluation is likely to have a significant impact in the overall affordability of premises for industrial occupiers, with increases expected by up to 50% in areas.
- 5.4. There has been areas of new build industrial development and regeneration throughout the districts, particularly in Chichester. It has not been enough however to cater for the demand, and most of the schemes developed have been for units of less than 3,000 sq ft. The average vacancy rate across the districts at this time of writing stands at 2.24%
- 5.5. At present there would not appear to be enough pipeline of allocated employment land to cater for the demand in the market. Where there are sites with employment allocation there are barriers to development which are preventing such from coming to fruition.
- 5.6. The majority of accommodation across the districts is ageing and of medium to poor quality in terms environmental and occupational quality and if appropriate capital is not deployed the stock will become unlettable.
- 5.7. The geographical constraints in addition to rising constructions costs are a major factor in new industrial/warehouse accommodation coming forward.
- 5.8. Water neutrality could play a significant role in the delivery of new accommodation which would increase the time taken to see out planning applications.
- 5.9. All markets noted are generally insular in nature and are not attracting inward migration of business. Cross-district relocation of business within the areas tends to be limited to only a few examples.

## Office

|  | Chichester            | Arun                  | Worthing              | Adur                  | Average               |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| <b>Total Accommodation</b>                     | 1,200,000             | 1,000,000             | 1,200,000             | 300,000 sq ft         | 850,000 sq ft         |
| <b>Current Availability</b>                    | 4.25%                 | 1.40%                 | 1.66%                 | 4.30%                 | 2.90%                 |
| <b>Highest Headline Rent (&gt;5,000 sq ft)</b> | £17.50                | £13.00                | £14.00                | £15.50                | 15                    |
| <b>Consented (outline)</b>                     | 45,000 sq ft          | 60,000 sq ft          | 0                     | 250,000               | 120,000 sq ft         |
| <b>Average Annual Take-Up</b>                  | 25,000 - 40,000 sq ft | 15,000 - 20,000 sq ft | 20,000 - 40,000 sq ft | 10,000 - 20,000 sq ft | 17,500 – 25,000 sq ft |
| <b>Typical Occupational Grade</b>              | B-C                   | B-C                   | B-C                   | B-C                   | B-C                   |

- 5.10. The demand for offices continues to be slow however there are signs of renewed activity as 2022 progresses. With occupiers now taking approximately 50% less space in return for a quality working environment there is demand for higher specification accommodation.
- 5.11. Occupiers of less than 2,000 sq ft are opting for more flexible co-working space with short lease terms and higher specification accommodation.
- 5.12. Even the best headline office rents paid in the districts make it difficult to accommodate the quality hoped for by occupiers and aspired to by landlords. As costs continue to rise and rents remain static, deploying the capital necessary to attract occupiers and provide quality accommodation will become increasingly difficult.
- 5.13. Occupiers are now more amenity focussed as they try to attract staff back to the office as well as retaining existing and attracting new staff. These amenity rich areas tend to be in city/town centre locations which are already densely constructed and provide limited scope for redevelopment both logistically and financially.
- 5.14. As offices become obsolete it is likely that either under permitted development or through viable justification of lack of demand, they will be repurposed for alternative higher value uses, likely residential.
- 5.15. The constraints noted not only apply to refurbishment but also to new build offices where rents are not high enough to sustain speculative development. Therefore allocated office locations are likely to go alternative higher value uses such as industrial or residential.
- 5.16. All markets noted are generally insular in nature and are not attracting inward migration of business. Relocation of business within the areas tends to be limited to only a few examples.

### **Planning**

- 5.17. Environment Bill is increasing the requirements for pushing biodiversity and other environmental factors to the forefront of the planning agenda. This is in turn putting additional pressure on the planning system.
- 5.18. There is a shortage in the region of planning officers.
- 5.19. Significant changes to Use Classes order with implementation of Class E Use. Use Class E has been said to recognise better than any system before it, a building's capacity to be occupied in a number of different uses concurrently or to vary at different times of day.
- 5.20. Sentiment that Class E should have been restricted to the high street and has now put further strain on existing shortage of industrial and warehouse accommodation.
- 5.21. Previous Class O (terminated in July 2021), allowed for the conversion of office to residential. This opportunity remains under the new 'class MA',. This permission now has a maximum limit of 1,500sqm (16,146 sq ft) per building.
- 5.22. For major development proposals in the immediate future, consideration must be given to the water neutrality aspirations set out in a Position Statement by Natural England for the Sussex North Water Supply Zone (dated September 2021). This has not yet been implemented in the outlined districts however could be in the future and it is prudent for developers and stakeholders to be aware.

## 6 Recommendations

### Employment and Labour

- 6.1. It is widely acknowledged that there is a genuine shortage of labour in both the local and national economy, skilled or unskilled. This is having a knock on effect on business expansion.
- 6.2. Brexit has led to severe shortage in labour, particularly with regard to logistics. The Chartered Institute of Personal Development (CIPD) has proposed the following mitigating solutions:
  - Establish a temporary job mobility scheme for young EU nationals to act as a 'safety valve' to ease immediate, acute labour shortages.
  - Reform the Apprenticeship Levy to create a broader, more flexible training levy to boost employer investment in skills
  - Provide £60m to fund a business improvement consultancy service via the Growth Hub network to help more firms invest in new technology and improve their people management and workforce development capability.
- 6.3. CWSP to lobby local and central government for further funding in skills and investment in employment.

### Business Rates

- 6.4. Where business rates are expected to rise, a period of transitional relief would be helpful. This however is a national matter and is controlled from central government.
- 6.5. Outlined below are a number of measures which may assist occupiers preparing for the revaluation:
  - Increase business and occupier awareness of forthcoming revaluation.
  - Documenting physical changes to property which will be required under the new duty to notify.
  - Taking professional advice about future business rates liability to be able to budget accordingly.

### Existing and Proposed Sites

- 6.6. Vail Williams note that at two pipeline locations being The Redrow Housing site in Ford and Cala Development at Angmering ([See Appendix F](#)) there has been an allocation for what was formerly Class B1 accommodation, now Class E. Future employment sites need to cater for Class B2 and Class B8 uses as well to really alleviate the employment constraints of the districts.
- 6.7. There is the sentiment that B8 accommodation does not encourage skilled labour however though development of Class B8 this would free up accommodation in the secondary market creating the desired occupier churn for landlords and tenants alike.
- 6.8. From the various appendices of pipeline accommodation it is evident that there is not enough employment allocation in the subject areas, particularly for industrial.

- 6.9. In areas where there is consented or allocated employment land, there needs to be greater collaboration between private and public sector parties to deliver these sites. Generally a more robust stance should be taken to ensure these developments are forthcoming.
- 6.10. Further appropriate use of Article 4 direction to protect existing office space in the districts.

#### **Road Infrastructure Improvements**

- 6.11. From both an office and industrial occupancy point of view the road network at various points along the A27 need infrastructure improvements. Locations of note are as follows:
- Fishbourne and Bognor Bridge Road Roundabouts at Chichester
  - Crossbush, Arundel
  - Offington Roundabout
  - Grove Lodge Roundabout
  - Lyons Farm traffic lights
  - Manor Roundabout, Lancing
- 6.12. CWSP should continue to lobby government for funding to road improvements as has been undertaken on the A259.

#### **Planning**

- 6.13. Visibility of planning profession to be improved through engagement with local and national education centres to increase number of planners.
- 6.14. Increased and open communication between developers and local authorities, both at county and local level, to facilitate a “building back better, greener and faster” (Build Back Better: our plan for growth March 2021) and must present those seeking consents in West Sussex with the unique opportunity of a planning system genuinely working with “a presumption in favour of sustainable development” (NPPF para 10).

#### **Consultation and Review**

- 6.15. It is vital that local authority partners and stakeholders seek to take advice from professional local sources with granular knowledge on a frequent basis to ensure their employment strategies, allocation and vision is in line with current market conditions.

## **7 Planning and Development**

#### **Background/Overview**

- 7.1. The planning system over the past five years has faced many reforms and legislative changes, especially since the change of the Ministry of Housing, Communities & Local Government into the Department for Levelling Up, Housing and Communities.
- 7.2. The initial commitment to simplify the system that was made in the 2020 White Paper has resulted in many proposals of zoning and dynamism being later dropped, and the Planning Bill being reframed into the Levelling Up and Regeneration Bill. We have also seen the enactment of

the Environment Bill increasing the requirements for pushing biodiversity and other environmental factors to the forefront of the planning agenda.

- 7.3. Despite many of the proposed, strategic central government changes coming forward, other alterations to the General Permitted Development Orders, NPPF and Use Classes Order have resulted in many changes in the local region. This includes temporary emergency planning relaxations as a result of the pandemic, and more permanent relaxations and amendments to Use Classes, which have affected our high streets, land supply and permitted development allowances, both in and around the West Sussex region.

### **Use Classes and Permitted Development**

- 7.4. We have documented the planning classifications pre(Use Classes Order 1987 ) and post Class E implementation in [Appendix P.](#)
- 7.5. Even before the pandemic hit, the revitalisation and support of a viable High Street and repopulation of otherwise vacant commercial property was a central concern to vibrant placemaking, and the reforms of the Use Classes Order 1987 and Permitted Development Rights have gained momentum. The Government refer frequently to the modern High Street and changing town centres in their document the TCPA Use Classes Amendment England Regulations 2020. The changes seek to provide a wider range of facilities and services including new emerging uses that attract people and make these areas viable now and in the future.
- 7.6. The traditional ‘office’, ‘retail’, ‘light industrial’ all now fall under the umbrella of Class E. The flexibility between these uses may lead to a diversification of our High Streets, reduced vacancies, and an element of risk mitigation for retail-led investment portfolios. Use Class E has been said to recognise better than any system before it, a building’s capacity to be occupied in a number of different uses concurrently or to vary at different times of day. However, the planning profession remains unclear as to why such a powerful tool was not restricted to the high street, and it is believed unintended consequences to other commercial areas including industrial estates are being felt, at a time when land and industrial/warehouse supply is heavily constrained.
- 7.7. In West Sussex commercial space was already lost to previous permitted development allowing B1(a) offices to ,go to C3 (residential). Further losses to class E and the removal of certainty of use for adjacent commercial occupiers are now being seen.
- 7.8. In addition, in December 2020 the Government produced further planning system changes to permitted development. The core aim was to allow the change of use from Use Class E to C3 residential; amend the right for the extension of schools, colleges, universities, hospitals, prisons and defence sites; to consolidate and simplify existing PD rights; and to continue to protect national parks, conservation areas, and Areas of Outstanding National Beauty.
- 7.9. The Royal Town and Planning Institute were concerned that the proposed changes would reduce opportunities for community engagement, and reduce the active frontages in high streets, and many LPAs in West Sussex mirrored the concerns about the interventions. LPAs in our region have less control over developments that are site specific and less ability to work with developers to reflect local conditions or infrastructure requirements and constraints as a result.
- 7.10. The other PD right reflects the previous Class O (terminated in July 2021), which allowed for the conversion of office to residential. This opportunity remains under the new ‘class MA’, which is resulting again in the loss of commercial space. Whilst it has a maximum limit of 1,500sqm (16,146 sq ft) per building, this allows for office properties to be repurposed for residential.

- 7.11. The government has also restricted West Sussex’s LPAs use of Article 4 direction more than before. The new legislation raises the bar for LPAs to use these to retract the central government permitted development rights.

## 8 Identification & Assessment of Existing and Pipeline Office and Industrial Premises

### Chichester District

#### Industrial and Warehouse

- 8.1. Chichester much like the rest of the South-East currently suffers from a major shortage of built warehouse and industrial accommodation, Grade A or otherwise. The demand for warehouse premises in Chichester is largely driven by demand from occupiers already in the area motivated by lease events, relocating or resizing. However recently there have been signs of inward migration of business due to limited options particularly further East.

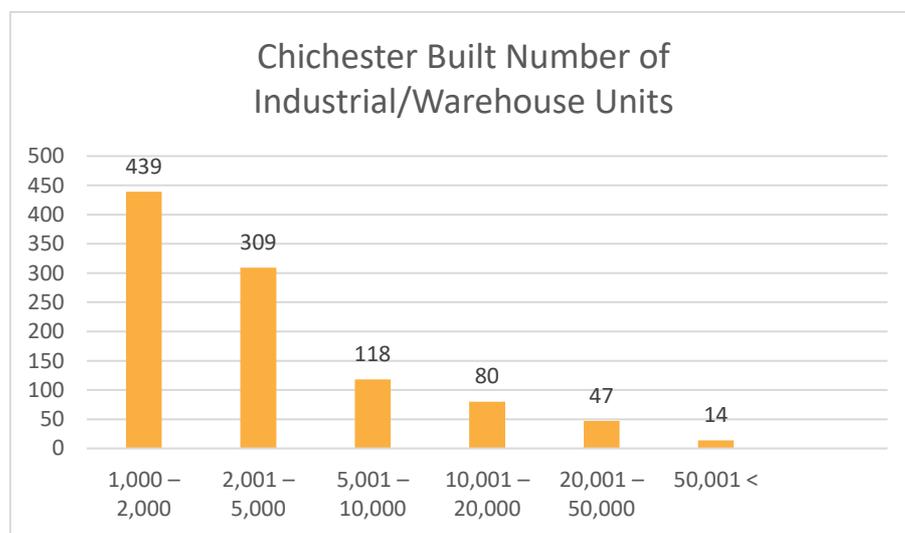
#### Keys Stats

| Total Accommodation (Built)    | Current availability          | Highest Headline Rent (>5,000 sq ft) |
|--------------------------------|-------------------------------|--------------------------------------|
| 6,500,000 sq ft                | 10,712 sq ft<br>(0.16%)       | £12.00                               |
| Consented floorspace (outline) | Typical annual take up        | Typical Occupational Grade           |
| 335,000 sq ft                  | 100,000 sq ft – 150,000 sq ft | B-C                                  |

#### Existing Accommodation

- 8.2. We have detailed in [Appendix A](#) the core industrial/warehouse areas of the Chichester District and provided both an environmental and occupational assessment as per the brief. A location map is also included.
- 8.3. Appendix A illustrates the significant variance in the age and quality of accommodation in the Chichester District with grades from A-D. The core areas being Terminus Road and Quarry Lane comprising traditional construction, older buildings with low eaves height and asbestos roofs but benefit from sporadic areas of regeneration throughout.
- 8.4. Throughout these core locations, there have been pockets of new development within the last five years including Ravenna Point, Cedar Trade Park and Basepoint Business Centre. Developments within the last twenty years include Chichester Trade Centre, Beaver Trade Park and Phoenix Business Centre.

- 8.5. In addition to development in these core areas, there have been further developments surrounding the city including the ten acre Glenmore Business Park Development which delivered in excess 100,000 sq ft of employment space between 2016 and 2018. In addition, St James Industrial Estate is currently nearing completion which will deliver another 40,000 sq ft of accommodation.
- 8.6. Further outside the city a new 40,000 sq ft warehouse was developed at Chichester Business Park for JRP Distribution in 2020. JRP relocated from Lancing due to limited options further east along the coast.
- 8.7. The below figure illustrates the existing accommodation by size category for the Chichester District



### Availability

- 8.8. At the time of writing this report, we assess there to be just 10,700 sq ft of industrial/warehouse accommodation built and openly advertised as available to let or sell. We have included a schedule below detailing the available accommodation and grade.

| Address                                   | Sq ft         | Rent   | Grade |
|---|---------------|--------|-------|
| A4 Glenmore Business Park, PO19 7BJ       | 1,396         | £15.00 | A     |
| L51 Glenmore Business Park, PO19 7BJ      | 1,345         | £10.75 | A     |
| M57 Glenmore Business Park, PO19 7BJ      | 2,000         | £10.50 | A     |
| Unit 11 Chichester Trade Centre, PO19 8ET | 5,971         | £12.50 | B     |
| <b>Total</b>                              | <b>10,712</b> |        |       |

- 8.9. As illustrated above there is very little accommodation available. The accommodation is of either Grade A or B and we would anticipate it to be occupied within a timeframe of approximately three to six months based on current market conditions.

#### **Pipeline Site and Locations – Consented and Proposed**

- 8.10. In terms of new development there is approximately 335,000 sq ft of consented industrial/warehouse space in the Chichester area. At the time of writing this report a number of these allocated sites are not anticipated to be speculatively developed.
- 8.11. [Appendix B](#) details sites and locations which are consented, allocated or may be suitable for development in the future. Also detailed are the micro factors affecting delivery and anticipated timeline for delivering such.

#### **Macro Factors Affecting Development**

- 8.12. The majority of schemes will entertain pre-lets where a building can be specifically built for an occupier who commits to a lease.
- 8.13. Whilst the pre-let scenario is ideal for the developer, the reality is that most occupiers in this sub-market are reluctant to commit to anything that is not yet built. It will normally take a minimum of twelve months to deliver a building from the point of terms being agreed. Occupiers requirements tend to be far more immediate than this. At the point of first enquiry most smaller occupiers (sub 20,000 sq ft) will usually have a maximum time frame for relocation in the region of nine months.
- 8.14. Some developers will therefore speculatively undertake construction, adopting a philosophy of “if you build it, they will come”. Undertaking such however carries risk with no guarantee of occupation.
- 8.15. As a location for development, there are also issues with traffic congestion at the A27 roundabouts surrounding Chichester. Local events such as the Festival of Speed and Glorious Goodwood, in addition to the Witterings being a popular tourist destination exacerbate this in the summer. This has an impact on attracting business both East and West with pinch points at all four roundabouts from Fishbourne to Portfield.
- 8.16. As a result, Chichester has historically been an insular market as referenced in section 5.1 above, which is largely down to the road infrastructure. This has in turn suppressed values and therefore Chichester has not been able to capitalise on its full potential as a business location.

#### **Take up and Demand**

- 8.17. According to the VOA the total built and available industrial/warehouse employment floorspace for the Chichester District is approximately 6,500,000 sq ft. With a current vacancy of 10,712 sq ft this puts the vacancy rate at 0.16%.
- 8.18. We are aware that historically, Chichester average annual take-up ranges from 100,000 – 150,000 sq ft per annum, albeit these figures will include a number of occasional larger lettings. Therefore even assuming the lower figure, the current availability only provides for provides for stock equivalent to 10% of the annual take-up.

- 8.19. It is relevant to note that if all the consented accommodation were to be built in the next twelve months, it would only allow account for a maximum of three years' worth of supply.
- 8.20. We have included a table below of several known requirements in the market to put some context as to the depth of demand. This list is not exhaustive.

| Business                  | Requirement         |
|---------------------------|---------------------|
| Food Preparation Business | 60,000 sq ft        |
| Logistics Operator        | 30,000 sq ft + Yard |
| Builders Merchant         | 25,000 sq ft        |
| Builders Merchant         | Two Acres           |
| Car Showroom              | Two Acres           |

- 8.21. Chichester has excellent fundamentals in terms of its employment catchment, and it is anticipated the demand for suitable industrial and warehouse accommodation will continue for the foreseeable future.

#### Offices

- 8.22. Chichester's office market is the largest and most active of the subject areas. The market however is insular and occupier movements and uptake are dictated largely by occupiers already in the area either expanding, contracting or motivated by lease events.

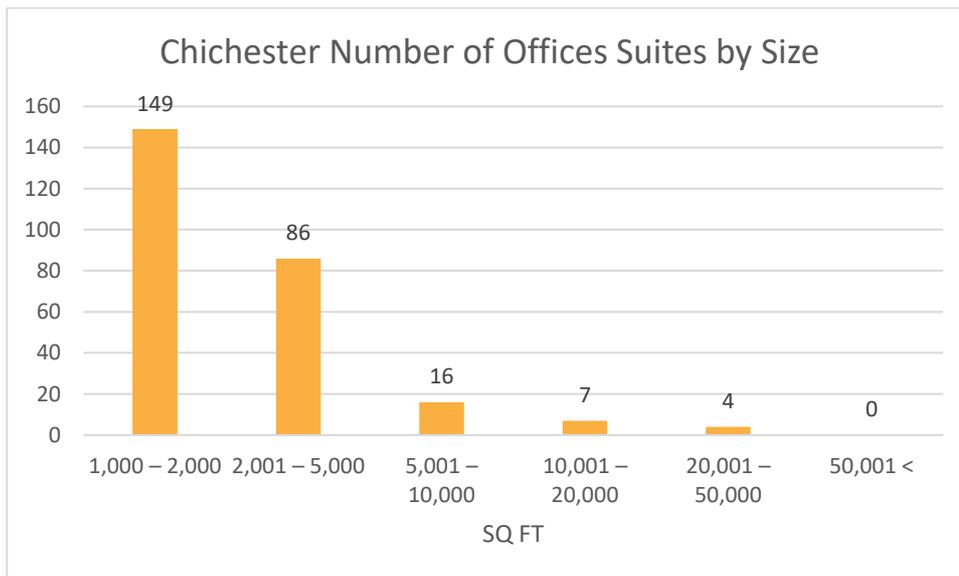
#### Key Stats

| Total Accommodation (Built) | Current availability    | Highest Headline Rents (>5,000 sq ft) |
|-----------------------------|-------------------------|---------------------------------------|
| 1,200,000 sq ft             | 51,053 sq ft<br>(4.25%) | £17.50                                |
| Consented                   | Typical annual take up  | Typical Occupational Grade            |
| 1 Acre                      | 25,000 - 40,000 sq ft   | B-C                                   |

#### Existing Accommodation

- 8.23. [Appendix C](#) details the core office areas of the Chichester District and provides both an environmental and occupational assessment as per the brief. A location map is also included.

- 8.24. Appendix C illustrates the significant variance in the age and quality of accommodation for the District. There is no core office Central Business District in Chichester as developments are located throughout the city as well in rural areas surrounding Chichester.
- 8.25. New speculative build office development in Chichester within the last five years includes Southern Gate Office Village and Basepoint Business Centre in 2018, which delivered collectively over 50,000 sq ft.
- 8.26. The below figure illustrates the existing accommodation by size category



### Availability

- 8.27. At the time of writing this report, we assess there to be approximately 51,000 sq ft of office accommodation built and openly advertised as available to let or sell. We have included a schedule below detailing the available accommodation.

| Address   | Sq ft  | Rent   | Grade |
|---|--------|--------|-------|
| Chichester Enterprise Centre, Basepoint, PO19 8FY | 5,000  | /      | A     |
| The Tannery, PO19 3RJ                             | 13,149 | ROA    | D     |
| 45 South Street, PO19 1ES                         | 5,056  | £20.00 | C     |
| Flint House, PO19 1DS                             | 4,701  | ROA    | D     |
| Unit 5 Vinnetrow Business Park, PO20 1QH          | 4,128  | £16.00 | B     |
| Metro House, PO19 1BE                             | 3,762  | £12.50 | C     |
| 76-77 East Street, PO19 1HL                       | 3182   | £10.00 | D     |

|                                       |               |        |   |
|---------------------------------------|---------------|--------|---|
| Broadbridge Business Centre, PO18 ONF | 2,705         | £17.00 | C |
| 10 Donnington Business Park, PO20 7DU | 2,140         | £14.00 | C |
| Sussex House                          | 2,126         | £20.00 | A |
| Unit 1 Southern Gate, PO19 8SG        | 1,674         | £20.00 | B |
| City Gates, PO19 8DJ                  | 1,257         | £17.50 | B |
| Chichester Fields, PO20 2FU           | 1,168         | £15.50 | B |
| 63-63 South Street, PO19 1EE          | 1,005         | £12.50 | C |
| <b>Total</b>                          | <b>51,053</b> |        |   |

- 8.28. As illustrated above, much of the accommodation available is of Grade C or D. Moreover a significant amount of the above accommodation has been marketed for in excess of eighteen months and remains available.
- 8.29. PD referenced in section 4.4 has taken place in Chichester. An example being Southgate House which comprised 20,000 sq ft (Ref: 19/00905/PA30) was converted to form over 30 apartments. However PD has not occurred in Chichester to the same degree as the other districts mentioned in the report. PD does not apply to listed buildings or those located within a conservation area. Therefore with a significant proportion of the buildings in Chichester being listed this negates some of the 'recycling' of accommodation that would have happened otherwise.
- 8.30. We calculate that approximately 40% of the accommodation currently available is ageing or obsolete and could be considered suitable for residential conversion or other alternative uses.

#### **Pipeline Site and Locations – Consented and Proposed**

- 8.31. There is limited pipeline office accommodation proposed for Chichester at the time of writing this report.
- 8.32. [Appendix D](#) details sites and locations which are consented, allocated or may be suitable for development in the future. Also detailed are the micro factors affecting delivery and anticipated timeline for delivering such.

#### **Macro Factors affecting Development**

- 8.33. Due to rising construction costs and inflation a minimum rental return in the region £30.00 per sq ft generally needs to be achieved to produce a quality speculative development and justify a commercially viable development return on investment. Maximum headline rents in Chichester for offices in excess of 5,000 sq ft are in the region of £17.50 per sq ft.
- 8.34. The majority of occupier demand is for City Centre premises and as referenced previously much of central Chichester is either listed or in a conservation area, which is problematic in terms of large scale city centre repositioning.

## Take Up and Demand

- 8.35. According to the VOA the total office floorspace for the Chichester District is approximately 1,200,000 sq ft. With a current vacancy of just over 50,000 sq ft this puts the vacancy rate at 4.25%.
- 8.36. Vail Williams are aware that historically, Chichester average annual take up is generally in the region of 25,000 sq ft and 40,000 sq ft per annum. Although the current availability equates to in excess of one years' supply much of this available stock is not suited to occupier requirements, who want modern, good condition and central accommodation.
- 8.37. Detailed below are a number of requirements of which Vail Williams are currently aware to provide some context as to market d

| Business    | Requirement  |
|-------------|--------------|
| Insurance   | 5,000 sq ft  |
| Call Centre | 10,000 sq ft |

## Arun District

### Industrial and Warehouse

- 8.38. The Arun District much like the rest of the South-East currently suffers from a major shortage of built warehouse and industrial accommodation, Grade A or otherwise. The demand for warehouse premises is largely driven by demand from occupiers between Worthing and Bognor.
- 8.39. Positively however there are new developments coming forward in the district to alleviate the supply issues currently faced elsewhere.

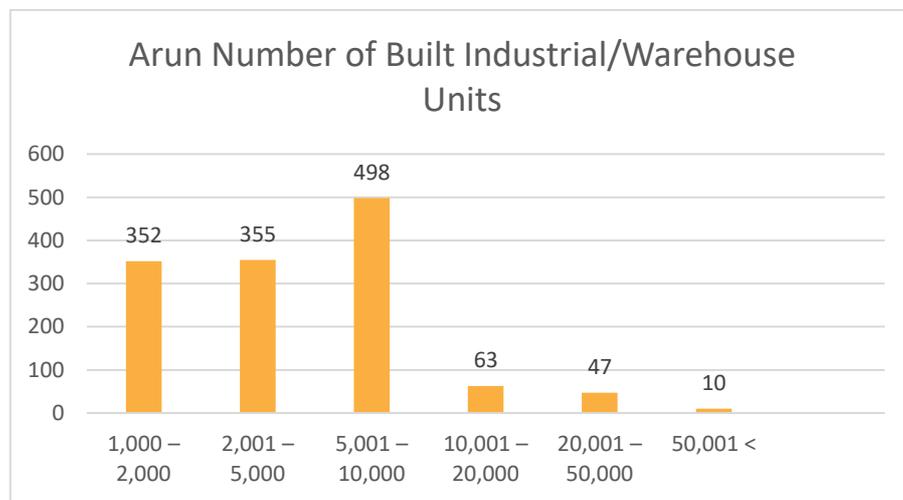
### Keys Stats

| Total Accommodation (Built) | Current availability    | Highest Headline Rents (>5,000 sq ft) |
|-----------------------------|-------------------------|---------------------------------------|
| 14,300,000 sq ft            | 88,000 sq ft<br>(0.62%) | £10.50                                |
| Consented (outline)         | Typical annual take up  | Typical Occupational Grade            |
| 400,000 sq ft               | 50,000 – 100,000 sq ft  | B-C                                   |

### Existing Accommodation

- 8.40. [Appendix E](#) details the core industrial/warehouse areas of the Arun District and provides both an environmental and occupational assessment as per the brief. A location map is also included.

- 8.41. Appendix E illustrates a significant range in the quality and age of accommodation with several estates in particular need of investment. Conversely however, locations such as Lineside Industrial Estate in Littlehampton, acquired by Legal and General in 2018, is currently undergoing a significant refurbishment programme.
- 8.42. Throughout Arun, pockets of new development include Saltbox which has already delivered 35,000 sq ft (which attracted Warburtons to the district) with another 200,000 sq ft proposed. Four newly developed trade units at Lineside Industrial Estate totalling 13,000 sq ft are currently being marketed. Prior to this, the most recent development was the OYO Estate in Littlehampton which completed around 2007.
- 8.43. Detailed below is the breakdown of existing accommodation by size category.



#### Availability

- 8.44. At the time of writing this report, we assess there to be approximately 88,000 sq ft of industrial /warehouse accommodation built and openly advertised as available to let or sell. We have included a schedule below detailing the available accommodation.

| Address                                       | Size          | Rent   | Grade |
|---|---------------|--------|-------|
| Parker Building, New Courtwick Lane, BN17 7RZ | 67,168        | £8.75  | B     |
| 33-36 Lineside Industrial Estate, BN17 7HD    | 13,222        | £12.50 | A     |
| Unit 6B Lineside Industrial Estate, BN17 7HD  | 3,376         | £9.50  | B     |
| 15 Castlegrove Business Park, PO22 9QT        | 8,000         | £8.00  | C     |
| <b>Total</b>                                  | <b>88,000</b> |        |       |

### **Pipeline Site and Locations – Consented and Proposed**

- 8.45. In terms of new development there is approximately 400,000 sq ft of consented (outline) industrial/warehouse space in the Arun District as well significant strategic opportunities, some of which are outlined in the local plan and others that are not. In [Appendix F](#) we have noted such, as well as identifying the micro issues affecting delivery and anticipated timescales.
- 8.46. Of the districts outlined in the report Arun would appear to have greatest amount of consented industrial floorspace as well as the greatest amount of strategic land opportunity to develop such.
- 8.47. With regard to developments anticipated to come forward in the immediacy, Saltbox in Bognor Regis is expected to deliver approximately 200,000 sq ft within the next 24 months. The next site to follow is the Water Lane site in Angmering where 60,000 sq ft of outline consent is approved. Estimated timescales for delivery of this site are approximately 36 months.

### **Macro Factors Affecting Development for Arun**

- 8.48. Historically rents and capital values in Arun have been at a discount to the neighbouring districts of Chichester and Worthing. The vacancy rate has also tended to be higher as well as void periods, making it less favourable to consider speculative development.
- 8.49. However, as the South-East continues to struggle for supply of industrial accommodation, rents and capital values have increased, making speculative development now commercially viable. This has been illustrated with Saltbox and the new units at Lineside Industrial Estate.
- 8.50. The road infrastructure around the A259 has struggled to cope with the increasing population size and again affected sentiment surrounding employment development. In recent years though there have been, and are ongoing significant improvements to the road network, an example of such is the new Felpham relief road. This exits immediately to the west, at the entrance to Saltbox.
- 8.51. There are continued road improvements ongoing throughout the district which bode well for employment prospects moving forward. Examples of proposed road improvement works include the following:
- [A259 dual carriageway improvements at Angmering](#)
  - [Toddington Lane, Lyminster By-Pass](#)
  - [Arundel By-Pass](#)
  - [A29 realignment scheme](#)
- 8.52. As referenced in Arun's local plan, the district does have challenges in terms of its socio-economic position, associated with low educational attainment and the health profile of its residents. At present there is significant shortage of both skilled and un-skilled labour. Businesses across the economic spectrum and district are struggling to source labour.

### **Take up and Demand**

- 8.53. According to the VOA the total built industrial/warehouse employment accommodation for the Arun District is approximately 14,300,000 sq ft. With a current vacancy of 88,000 sq ft this puts the vacancy rate at 0.6%. Prudent to note however that 80% of this vacancy is from a single unit.

- 8.54. We are aware that historically, Arun average annual take up ranges from 50,000 – 120,000 sq ft per annum, albeit these figures will include a number of occasional larger lettings.
- 8.55. However, even assuming the lower take up figure the current availability only allows for 50% of the annual take up (excluding New Courtwick Lane).
- 8.56. We have included a table below of a number of known requirements in the market to put some context as to the depth of demand. This list is not exhaustive.

| Business                            | Requirement  |
|-------------------------------------|--------------|
| Medical Supplies Company            | 50,000 sq ft |
| Cleaning Supplies Business          | 30,000 sq ft |
| Temperature instrumentation company | 10,000 sq ft |
| Logistics Operator                  | 30,000 sq ft |
| Food Distributor                    | 20,000 sq ft |
| Waste company                       | 30,000 sq ft |
| Online retailer/distributor         | 30,000       |

### Offices

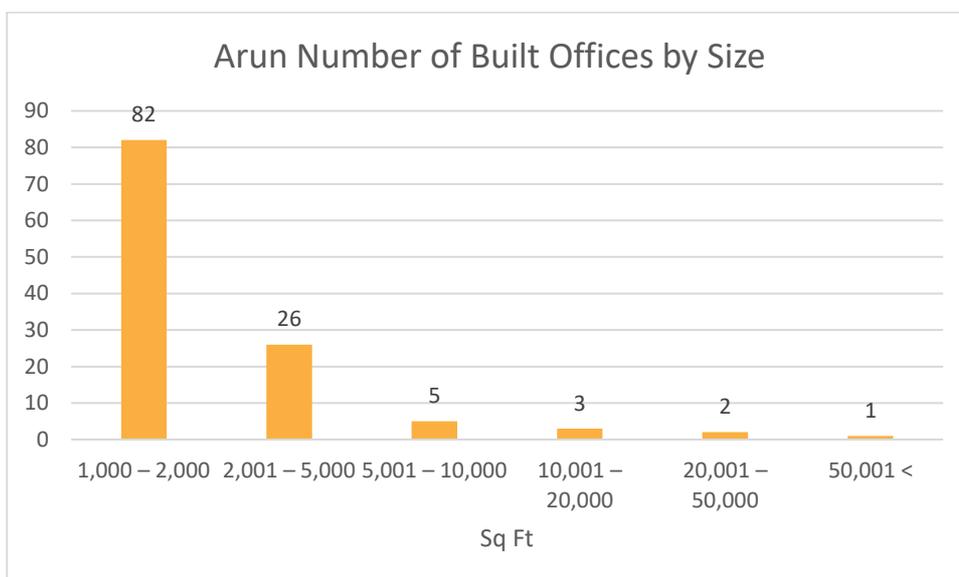
- 8.57. The Arun District does not and has not historically had an established office market. The district historically has had more of an industrial and manufacturing economy, so therefore little large scale office development has been undertaken. Much of the office demand is absorbed by the neighbouring districts of Chichester and Worthing.

### Key Stats

| Total Accommodation (Built) | Current availability   | Highest Headline Rents (>5,000 sq ft) |
|-----------------------------|------------------------|---------------------------------------|
| 1,000,000 sq ft             | 14,000 sq ft<br>(1.4%) | £13.00                                |
| Consented (outline)         | Typical annual take up | Typical Occupational Grade            |
| 60,000 sq ft                | 15,000 – 20,000 sq ft  | B-C                                   |

### Existing Accommodation

- 8.58. We have detailed in [Appendix G](#) the core office areas of the Arun District and provided both an environmental and occupational assessment as per the brief. A location map is also included.
- 8.59. Appendix G illustrates the shortage of any significant critical mass of offices, and most of the existing locations are government occupied buildings. The accommodation that is openly available to the market is generally of poorer older quality.
- 8.60. A new office development referred to as Martello Enterprise Centre was brought forward as a condition of the of the development of the Morrison’s supermarket in Wick in 2013. The intention for this was to be run as a business and enterprise centre to promote growth in the Littlehampton area. This however was vacant for close to five years before being utilised. Positively, this is now fully operational as a viable serviced office operation occupied by Bizspace.
- 8.61. Detailed below is breakdown of existing Arun district offices by size category.



### Availability

- 8.62. At the time of writing this report, we assess there to be 14,000 sq ft of office accommodation built and openly advertised as available to let or sell. We have included a schedule below detailing the available accommodation.

| Address                            | Sq ft         | Rent    | Grade |
|------------------------------------|---------------|---------|-------|
| Bizspace, Courtwick Lane, BN17 7TL | 12,000        | £33.00* | B     |
| Heath Place, PO22 9SL              | 2,000         | ROA     | D     |
| <b>Total</b>                       | <b>14,000</b> |         |       |

\* Serviced office rent

- 8.63. As illustrated above there is only one scheme available which is compatible with modern occupier requirements due to condition, orientation and location.

- 8.64. Typically in the Arun District we see a number of secondary offices which are located in non-core areas or above retail for example. However the demand for residential accommodation outweighs that of offices in these locations and much of this secondary accommodation has been, or will be repurposed to residential under PD.

#### **Pipeline Site and Locations – Consented and Proposed**

- 8.65. In terms of new development there is scope to accommodate office development at the forthcoming industrial locations ([See Appendix F](#)) stated for the Arun district earlier in our report. That said, it is highly probable that the demand and ultimately end use (being Class E) will be light industrial focussed opposed to office. This is primarily due to underlying demand and build cost. Also important to note that said locations are located out of town with modern occupiers now preferring central locations with immediate amenity.

#### **Macro Factors Affecting Development for Offices in Arun**

- 8.66. As mentioned previously the Arun District has no historic established office market. Therefore it does not benefit from the internal movement of occupiers as neighbouring districts do, resulting in suppressed existing demand.
- 8.67. Due to rising construction costs and inflation a minimum rental return in the region £30.00 per square foot generally needs to be achieved to produce a quality development and justify a commercially viable development return on investment. Maximum headline rents in Arun currently sit in the region of £13.00 per square foot.
- 8.68. As stated in the Arun Local Plan, the district has challenges in terms of its socio-economic pressures associated with low educational attainment and the health profile of its residents. At present there is significant shortage of both skilled and un-skilled labour.

#### **Take up and Demand**

- 8.69. According to the VOA, the total built office floorspace for the Arun District is approximately 1,000,000 sq ft. With a current vacancy of just over 14,000 sq ft this puts at vacancy rate at 1.4%.
- 8.70. Historically average annual take-up for Arun is generally in the region of 15,000 – 20,000 sq ft per annum.
- 8.71. There is limited new build quality accommodation available and no significant pipeline of supply coming through. At the present moment though, there is not likely to be the depth of demand to justify undertaking such any speculative development, and the Bizspace serviced office provision largely caters for the existing demand.

## **Worthing**

#### **Industrial and Warehouse**

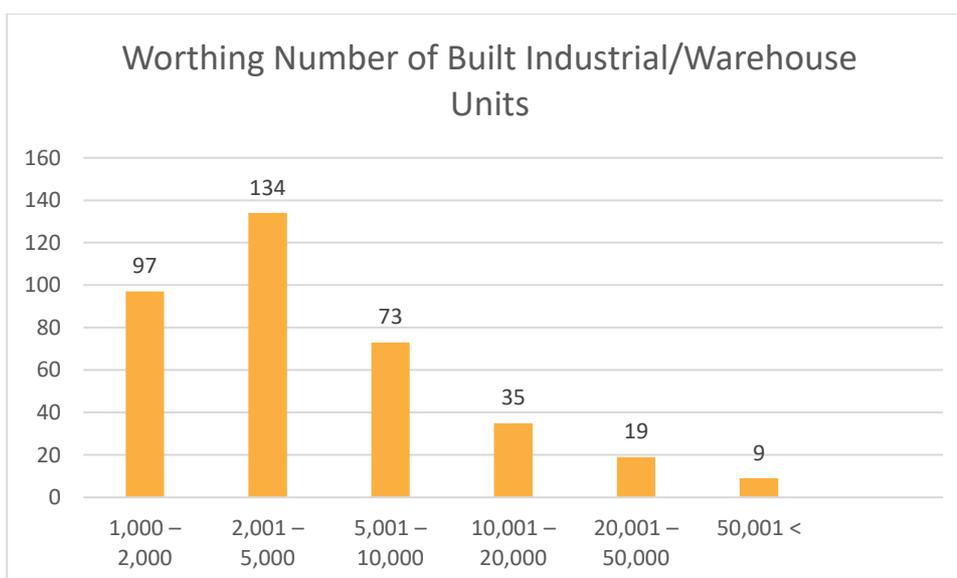
- 8.72. Worthing much like the rest of the South-East currently suffers from a major shortage of built warehouse and industrial accommodation, Grade A or otherwise. The demand for warehouse premises in Worthing is largely driven by demand from occupiers between Littlehampton and Brighton. Historically Worthing's industrial and warehouse market has been insular but in recent years there has been inward migration of business due to limited options elsewhere in the surrounding areas, particularly from the East.

## Key Stats

| Total Accommodation (Built) | Current availability     | Highest Headline Rents (>5,000 sq ft) |
|-----------------------------|--------------------------|---------------------------------------|
| 3,700,000 sq ft             | 287,000 sq ft<br>(7.75%) | £11.00                                |
| Consented (outline)         | Typical annual take up   | Typical Occupational Grade            |
| 30,000 sq ft                | 50,000 – 80,000 sq ft    | B-C                                   |

## Existing Accommodation

- 8.73. We have detailed in [Appendix H](#) the core industrial/warehouse areas of Worthing and provided both an environmental and occupational assessment as per the brief. A location map is also included.
- 8.74. Appendix H illustrates the lack any new development with grades all grades generally from B-D. The core areas being East Worthing Trading Estate, Goring industrial areas surrounding Woods Way as well Meadow Road/Dale Road.
- 8.75. The most recent industrial development in Worthing of any critical mass was Northbrook Business Park which was approximately twenty years ago.
- 8.76. Detailed below is the breakdown of existing accommodation by size category



## Availability

- 8.77. At the time of writing this report we calculate there to be approximately 267,000 sq ft of industrial/warehouse accommodation built and openly advertised as available to let or sell. We have included a schedule below detailing the available accommodation.

| Address                            | Size           | Rent   | Grade |
|------------------------------------|----------------|--------|-------|
| Dominion Trade Centre, BN14        | 1,239          | £13.50 | C     |
| Unit 13 Timberlaine Trading Estate | 2,417          | £12.00 | C     |
| Unit E Northbrook Trading Estate   | 2,503          | £12.25 | C     |
| Faraday 261                        | 261,727        | £7.50  | C     |
| <b>Total</b>                       | <b>267,886</b> |        |       |

- 8.78. The units noted above which are below 3,000 sq ft, will likely let within a maximum period of six months. This is despite the age and specification of accommodation.
- 8.79. Faraday 261 is an anomaly in the context of both the Worthing and West Sussex market. At the time of writing this report it would seem unlikely that a single occupier would take such a building. We are not aware of any requirements in the market at present that would take the building as a whole. The premises does not lend itself to splitting easily.

#### **Pipeline Site and Locations – Consented and Proposed**

- 8.80. In terms of new development there is historic consent under planning reference AWDM/1008/19 for the erection of 28,000 sq ft of accommodation in Southdownview Way (Behind the former EDF building). This scheme has now been resubmitted for a different configuration.
- 8.81. There are various pipeline schemes proposed, some of which are outlined in the local plan and some of which are not. In [Appendix I](#) we have noted such, as well as identified the micro factors affecting delivery.
- 8.82. Of the districts outlined in the report, Worthing would appear to have least scope and allowance for the development of new industrial/warehouse floorspace due to the constrained and dense geography.
- 8.83. The development likely to be forthcoming first is Southdownview Way which from reviewing the planning portal appears to be at the latter stages of the application. Following this, it is difficult to ascertain which may be the next site to be delivered.

#### **Macro Factors Affecting Development for Worthing**

- 8.84. Of the districts outlined in the report Worthing arguably has the most difficult geography in terms of land supply and in turn, the scope to allocate more land for employment. With the sea located to the South and South Downs National Park located to the North, this severely limits development opportunity.
- 8.85. Worthing is seen as an attractive place to live and as such the demand for housing is strong, which has resulted in increasing residential land values year on year. The disparity between residential and commercial land values has stymied motivation to hold ageing accommodation and instead has resulted in accommodation being repurposed for residential use in more secondary industrial areas.

8.86. The majority of modern occupier requirements are logistics led which means they rely on uncongested road infrastructure. There are several major congestion zones noted along the A24 in Worthing, being Offington Roundabout, Grove Lodge Roundabout as well as The Lyons Farm traffic lights. This naturally affects occupier and development sentiment.

**Take up and Demand**

8.87. According to the VOA the total built industrial/warehouse employment floorspace for Worthing is approximately 3,700,000 sq ft. With a current vacancy of 267,886 sq ft this puts the vacancy rate at 7.2%. Prudent to note however that 97% of this vacancy is from a single unit at Faraday Close.

8.88. We are aware that historically, Worthing average annual take up ranges from 50,000 – 80,000 sq ft per annum, albeit these figures will include a number of occasional larger lettings.

8.89. Even assuming the lower take up figure the current availability only allows for 12.5% of the annual take up (excluding Faraday Close). The Worthing local plan aims to deliver 280,000 sq ft of accommodation over the next fifteen years which again assuming the lower annual take up figure accounts for five years worth of supply. From the data there would appear to be an existing undersupply as well as an under supply of pipeline accommodation proposed.

8.90. We have included a table below of a number of known requirements in the market to put some context as to the depth of demand. This list is not exhaustive.

| Business                             | Requirement  |
|--------------------------------------|--------------|
| Electronics business                 | 25,000 sq ft |
| Temperature instrumentation business | 35,000 sq ft |
| Online retailer                      | 25,000 sq ft |
| Transport company                    | 30,000 sq ft |
| Security company                     | 7,500 sq ft  |
| Building supplies company            | 7,500 sq ft  |
| Builders Merchant                    | 20,000 sq ft |

**Offices**

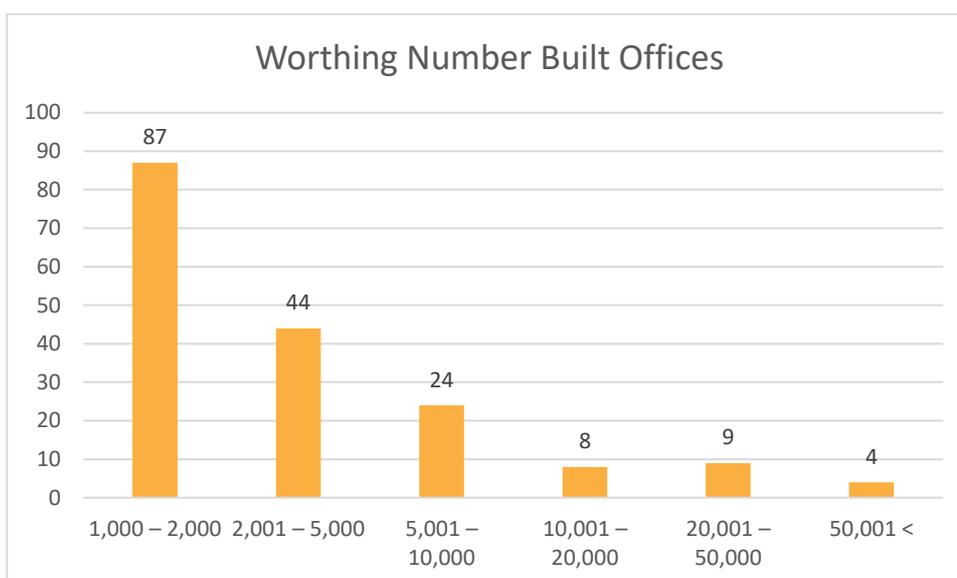
8.91. The Worthing office market although established, is generally insular with occupier movements and uptake dictated largely by occupiers already in the area either expanding, contracting or motivated by lease events. Much of Worthing’s accommodation is occupied or owned by government authority and a considerable amount of office floor space has been lost to PD.

## Key Stats

| Total Accommodation (Built) | Current availability    | Highest Headline Rents (>5,000 sq ft) |
|-----------------------------|-------------------------|---------------------------------------|
| 1,200,000 sq ft             | 20,000 sq ft<br>(1.66%) | £14.00                                |
| Consented (outline)         | Typical annual take up  | Typical Occupational Grade            |
| 0                           | 20,000 – 40,000 sq ft   | B-C                                   |

## Existing Accommodation

- 8.92. [Appendix J](#) details the core office areas of Worthing and provides both an environmental and occupational assessment as per the brief. A location map is also included.
- 8.93. Appendix J demonstrates a significant proportion of Worthing’s office accommodation is occupied by large institutions or government bodies. There is limited accommodation available to the open market in the context of the overall supply. The occupational quality of the buildings is on the whole satisfactory at present however it is envisaged that without capital investment, there is a likelihood of offices becoming obsolete over the next five to ten years.
- 8.94. There has been limited new office development in Worthing offered to the open market. The beginning of 2021 saw the development of Teville Gate House which saw over 90,000 sq ft delivered for the HMRC Tax office. This was a transaction concluded off-market, pre-let and not something that would have been deliverable on a speculative basis.
- 8.95. The Bayside residential led development delivered approximately 7,000 sq ft of office accommodation within the last 24 months. The delivery of this was off-set by the residential sales of the development.
- 8.96. Prior to this the most recent development was Yeoman Gate, approximately fifteen years ago which delivered in excess of 30,000 sq ft of office accommodation.
- 8.97. Detailed below is a breakdown of Worthing offices by size category



### Availability

- 8.98. At the time of writing this report, we assess there to be approximately 20,000 sq ft of office accommodation built and openly advertised as available to let or sell. We have included a schedule below detailing the available accommodation.

| Address                         | Size          | Rent   | Grade |
|---------------------------------|---------------|--------|-------|
| Caravelle House,<br>Goring Road | 1,249         | £8.00  | B     |
| 6 Farncombe Road                | 1,058         | £12.50 | C     |
| Chapel House                    | 2,800         | £10.00 | D     |
| Liverpool Terrace               | 3,729         | £11.50 | C     |
| Ridgeworth House                | 10,600        | £13.50 | B     |
| <b>Total</b>                    | <b>19,436</b> |        |       |

- 8.99. The above table reflects a balanced degree of availability in terms quality, price and size in the context of the Worthing market.
- 8.100. Worthing has lost a significant volume of office space under permitted development rights. Example include Columbia House, Lloyds Registrars, Durston House, 8 High Street, Westmoreland House as well as the neighbouring office to Lloyds Registrars. This has resulted in a net loss of over 200,000 sq ft of office accommodation. In addition to this over 30,000 sq ft was lost at MGM House, Heene Road which was also repurposed to retirement and assisted living use, albeit not under PD.

## **Pipeline Site and Locations – Consented and Proposed**

There is limited pipeline office accommodation proposed for Worthing at the time of writing this report. [Appendix K](#) outlines the possible locations as well as analyses the constraints faced and possible timeline for delivery.

### **Macro Factors affecting development**

- 8.101. Due to rising construction costs, inflation and yields weakening, a minimum rental return in excess of £30.00 per sq ft needs to be achieved to produce a quality speculative development and justify a commercially viable development return on investment. Maximum headline rents in Worthing currently in the region of £14.00 per sq ft.
- 8.102. Most of the occupier demand is for town centre premises and due to the constrained land supply and disparity between residential and office values, it makes undertaking any speculative central office development difficult.
- 8.103. At present as there is limited new build quality accommodation available and no significant pipeline of supply coming through. The obvious solution to this would be to develop further offices. Ultimately though the rental figures and demand base are not at present high enough to justify undertaking such.

### **Take Up and Demand**

- 8.104. According to the VOA the total office floorspace for the Worthing District is approximately 1,200,000 sq ft. With a current vacancy of just over 20,000 sq ft this puts of vacancy rate at 1.6%. As mentioned above however, much of Worthing's accommodation is occupied or owned by government authority and would not typically be offered to the open market.
- 8.105. We are aware that historically, Worthing average annual take up is generally between 15,000 and 30,000 sq ft per annum. Although the current availability equates to approximately one years supply, under current market conditions is an appropriate amount of supply in the market.
- 8.106. We are aware from speaking with agents in the local market that presently there are a handful of occupiers seeking accommodation from between 5,000 and 10,000 sq ft.

### **Adur District**

#### **Industrial and Warehouse**

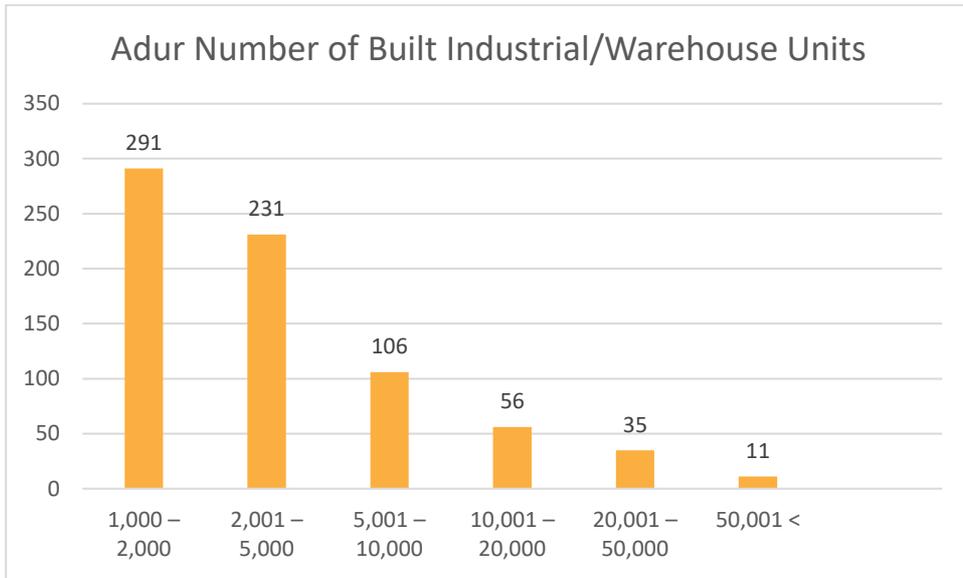
- 8.107. The Adur District much like the rest of the South-East currently suffers from a major shortage of built warehouse and industrial accommodation, Grade A or otherwise. The demand for warehouse premises in the area is largely driven by demand from occupiers between Worthing and Brighton. Positively however new speculative industrial/warehouse schemes are under way.

## Key Stats

| Total Accommodation (Built) | Current availability    | Highest Headline Rents (>5,000 sq ft) |
|-----------------------------|-------------------------|---------------------------------------|
| 7,300,000 sq ft             | 32,272 sq ft<br>(0.44%) | £14.00                                |
| Consented (outline)         | Typical annual take up  | Typical Occupational Grade            |
| 250,000 sq ft               | 100,000 – 150,000 sq ft | B-C                                   |

## Existing Accommodation

- 8.108. We have detailed in [Appendix L](#) the core industrial/warehouse areas of the Arun District and provided both an environmental and occupational assessment as per the brief. A location map is also included.
- 8.109. Appendix L illustrates the significant variance in the age and quality of accommodation in the Adur District with grades from A-D. The core areas being Lancing Business Park and Dolphin Road comprise traditional construction, older buildings with low eaves height and asbestos roofs but benefit from sporadic areas of regeneration throughout.
- 8.110. Throughout these core locations, pockets of new development/regeneration in Lancing within the last five to ten years include owner occupied sites at 6 Commerce Way and the former steel works site on Chartwell Road purchased by Bidvest 3663 in 2015. While this regeneration is encouraging, it only satisfied the existing requirement of two occupiers. Prior to this, the most recent development was The Quoin Estate, developed circa 2005 which delivered around 20,000 sq ft of accommodation.
- 8.111. New developments completed in Shoreham include Lady Bee Marina and currently under construction or nearing completion are Brighton City Logistics Park and Dolphin Way. This will collectively deliver just under 300,000 sq ft of employment space to the district.
- 8.112. Detailed below is the breakdown of existing accommodation by size category



### Availability

8.113. At the time of writing this report, we assess there to be 32,000 sq ft of industrial/warehouse accommodation built and openly advertised as available to let or sell. We have included a schedule below detailing the available accommodation.

| Address                            | Sq ft         | Rent   | Grade |
|------------------------------------|---------------|--------|-------|
| Unit 5 Chapel Road, Portslade      | 4,155         | £11.50 | B     |
| Unit A3 Dolphin Way                | 4,588         | £9.00  | A     |
| Unit 5/6 Malthouse Trading Estate, | 23,529        | £12.50 | B     |
| <b>Total</b>                       | <b>32,272</b> |        |       |

8.114. As illustrated above there is limited accommodation available and the accommodation is of either Grade A or B and we would anticipate it to be occupied within a timeframe of approximately three to six months based on currently market conditions.

### Pipeline Site and Locations – Consented and Proposed

8.115. There is approximately 500,000 sq ft of employment floorspace currently forecast over the timeframe of the next local plan as per [Appendix M](#). This details the micro factors affecting as well as the anticipated timeline for delivery.

8.116. There is 230,000 sq ft due for completion at Brighton City Logistics Park in Q2 of 2023 and we are informed approximately 30% of this has been pre-let or is under offer.

- 8.117. There are plans for further employment space at The Ikea site off the A27, Part of the Monks Farm development . At the time of writing this report, the site is currently being offered for sale in the open market. Interest has typically been from industrial/warehouse developers.
- 8.118. As per the local plan, the area surrounding Shoreham Harbour is proposed to undergo significant regeneration and investment. There are a number of occupants here however that would be very difficult to relocate in the district under current supply dynamics.

**Macro Factors affecting development for Adur**

- 8.119. Adur has similar geography constraints to Worthing in terms of land supply and in turn the scope to allocate more land for employment. With the sea located to the South, and South Downs National Park located to the North, this limits development opportunity. Moreover land to the north of the district which could have scope for allocation often lies within a flood zone as per the below extract.



- 8.120. Whilst there are mitigating strategies to counteract flood zone implications this comes at significant cost. The Monks Farm residential development had to undertake significant infrastructure work as part of their planning consent. In this scenario though, there is a significant critical mass of housing which off-set the cost of the required works.
- 8.121. Adur is deemed as an attractive place to live and as such the demand for housing is significant which has resulted in increasing residential land values year on year for over a decade. The disparity between residential and commercial land values in addition to the demand for housing from central government has stymied motivation to hold ageing accommodation and instead has resulted in accommodation being repurposed for residential use. Examples of this can be seen in locations along Brighton Road in Shoreham.
- 8.122. Many modern occupier requirements are logistics led which means they rely on uncongested road infrastructure. Brighton Road as well as Manor Road roundabout suffer from congestion at peak times.

### Take up and Demand

- 8.123. According to the VOA, the total built industrial/warehouse employment floorspace for the Adur District is approximately 7,300,000 sq ft. With a current vacancy of 32,000 sq ft this puts the vacancy rate at 0.44%.
- 8.124. We are aware that historically, Adur average annual take up ranges from 100,000 – 150,000 sq ft per annum. Even assuming the lower figure, the current availability only allows for 30% of the annual take up.
- 8.125. If all the accommodation proposed in the local plan were to be developed now , it would allow for a maximum of five years worth of supply based on lowest estimates.
- 8.126. We have included a table below of a number of known requirements in the market to put some context as to the depth of demand. This list is not exhaustive.

| Business                     | Requirement   |
|------------------------------|---------------|
| Online retail and fulfilment | 50,000 sq ft  |
| Online retailer              | 120,000 sq ft |
| Stage prop company           | 10,000 sq ft  |
| Vehicle sales and storage    | 15,000 sq ft  |
| Online retailer              | 15,000 sq ft  |

### Adur District Offices

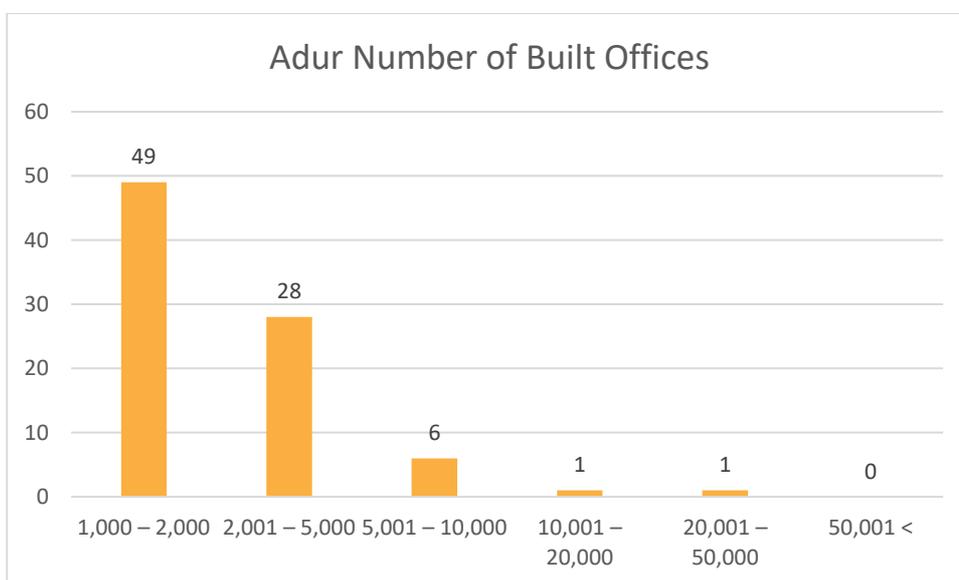
- 8.127. Historically Adur having more of an industrial economic background does not have the same established or historic office market as Brighton or Worthing. Uptake is generally insular with occupier movements and uptake dictated largely by occupiers already in the area either expanding, contracting or motivated by lease events. The letting activity generally tends to be for units below 1,000 sq ft with occupiers taking converted or repurposed accommodation located above retail for example.

### Key Stats

| Total Accommodation | Current Availability   | Highest Headline Rent (>5,000 sq ft) |
|---------------------|------------------------|--------------------------------------|
| 300,000 sq ft       | 13,500 sq ft<br>(4.3%) | £15.50                               |
| Consented (outline) | Typical annual take up | Typical Occupational Grade           |
| 250,000 sq ft       | 10,000 – 20,000 sq ft  | B-C                                  |

### Existing Accommodation

- 8.128. [Appendix N](#) details the core office areas of the Adur District and provides both an environmental and occupational assessment as per the brief. A location map is also included.
- 8.129. Appendix N demonstrates a lack of any critical mass of office space in the district. The occupational quality is generally medium to poor with the exception of the newly developed office building located at the former Civic Centre for Focus Group.
- 8.130. There has been limited new build office accommodation built, save for the Civic Centre. Prior to this the most recent development was the Basepoint Ropetackle site in central Shoreham.
- 8.131. Detailed below is a breakdown of Adur offices by size category



### Availability

- 8.132. At the time of writing this report, we assess there to be approximately 13,500 sq ft of office accommodation built and openly advertised as available to let or sell. We have included a schedule below detailing the available accommodation.

| Address                            | Size          | Rent    | Grade |
|------------------------------------|---------------|---------|-------|
| Brooklands House, Lancing          | 5,000 sq ft   | £21.00* | B     |
| Parklands Business Centre, Lancing | 8,500 sq ft   | Range   | D     |
| <b>Total</b>                       | <b>13,500</b> |         |       |

\*Serviced Office Rent

- 8.133. The table above reflects a limited availability and range of accommodation. Half of the availability which is from Parklands is either is of EPC rating F or G, requires modernisation or redevelopment.

### **Pipeline Site and Locations – Consented and Proposed**

- 8.134. There is limited pipeline office accommodation proposed for Adur at the time of writing this report. [Appendix O](#) outlines the possible locations, obstacles to delivery and timescales for potential delivery.
- 8.135. Many of the sites outlined will be more suitable for industrial and warehouse uses and are not likely to be office led.

### **Macro Factors Affecting Development**

- 8.136. Due to rising construction costs inflation and yield expansion a minimum rental return in excess of £30.00 per sq ft needs to be achieved to produce a quality speculative development and justify a commercially viable development return on investment. Maximum headline rents in Adur are currently in the region of £15.00 per sq ft.
- 8.137. Given that Adur has no existing core office market or significant depth of demand it is difficult to consider undertaking any speculative development at this time.

### **Take up and Demand**

- 8.138. According to the VOA the total built office floorspace for the Adur District is approximately 300,000 sq ft. With a current vacancy of just over 13,000 sq ft this puts of vacancy rate at 4.4%. As mentioned above, half of this availability comes from a single building that is not suitable for modern occupier requirements due to age, condition and specification.
- 8.139. We are aware that historically, Adur average annual take up is generally in the region of 10,000 – 20,000 sq ft. Although the current availability only equates to approximately one years supply, under current market conditions is an appropriate amount of availability in the market.
- 8.140. We are not aware of any significant office occupier requirements at this time in the Adur District.

## **9 Factors Driving Changes in Growth and Demand Locally, Nationally and Internationally; Affecting the business space sector**

### **Employee Availability**

- 9.1. Employee availability is one of the most significant factors affecting the business space and whole economy at present. There is a genuine shortage of skilled or unskilled labour across an enormous range of industry from construction to care and hospitality.
- 9.2. According to the Office for National Statistics, there were 1.29 million positions waiting to be filled in the first quarter of 2022, nearly 500,000 more than before the pandemic struck.
- 9.3. The identified areas in this report will always face challenges in resourcing employment due to the geographical constraints. With the sea being to the south, there is effectively only 180 degrees of

employment prospects. This coupled with the fierce employment competition of London is always likely to be a significant factor.

### **Demand for Housing**

- 9.4. Local authorities are under pressure to deliver on housing numbers with central government aiming to deliver 300,000 new homes per year nationally. With land supply already constrained due to the environmental matters mentioned earlier in the report, this only compounds matters in the competition for space.
- 9.5. Residential development land has historically sold for a far higher price than commercial land, and as such building apartments and houses has been simpler, more lucrative and carried less risk. That said, we are seeing significant increases in industrial land values which in some locations are higher than residential land values.
- 9.6. In relation to the number of residential developers active in the market at present, commercial developers are fewer in number. Commercial development is more nuanced and this lack of understanding or knowledge understandably means a considerable amount of the focus from SME developers is purely residential.

### **Build Cost and Supply Chain**

- 9.7. A combination of supply chain issues, shortage of labour and demand have resulted in significant increases in construction costs.
- 9.8. The RICS reports that tender prices are expected to rise steeply over the next year with sharp rises in materials costs and site labour rates, together with strong demand.

### **Headline Rents, Voids and Investment Yields**

- 9.9. Office rents in the named districts have remained fairly static over the last decade and are not anticipated to increase significantly in the short to medium term. Investment yields have also weakened post pandemic. Void periods which is the time a property is empty for until occupied have increased as well. This naturally affects development sentiment.
- 9.10. Conversely, industrial rents have increased in the region by over 50% in areas over the last two years. With limited availability, void periods have reduced significantly, and the industrial investment market is the strongest across the traditional commercial sectors with yields improving significantly over the last ten years.
- 9.11. The above reflects strong confidence in the industrial market which has resulted in record land prices being paid for allocated industrial/warehouse land. Accordingly this has provided enough confidence for speculative development to be undertaken.

### **Sustainability & The Environment**

#### **Energy Performance Certificates**

- 9.12. Landlords are required by law to ensure that their properties meet the required EPC rating. Currently, all commercial property must hold an EPC rating of band 'E' or better prior to any new leases or renewals being granted. From 1 April 2023 this will be extended to all rented commercial properties. This will include properties where the leases are mid-term.

- 9.13. Looking further ahead landlords also need to be aware of future proposals for the minimum standards to be increased to band 'C' by 1 April 2027 and band 'B' by 1 April 2030.
- 9.14. The new regulations are estimated to apply to 85% of the non-domestic rented building stock. Rented buildings account for 61% of the non-domestic stock in England and Wales and they produce 37.5% of all emissions from non-domestic buildings. Interestingly, commercial, and industrial buildings greater than 1,000 m<sup>2</sup> make up only 7% of all non-domestic buildings but they are responsible for over half of the total energy used and carbon emitted.
- 9.15. Financial institutions, investing in commercial property, are taking the EPC ratings of buildings seriously and it is anticipated that properties in the coming years with an EPC rating lower than D may not be mortgageable. This will have serious ramifications for those landlords that do not have the capital at hand to refurbish their buildings to the appropriate standard.
- 9.16. From the EPC data provided in the below appendices you can see that a large amount of the buildings will fall below required thresholds in the years to come if investment is not undertaken.

#### **Increases in Energy Costs**

- 9.17. As the cost of utilities continues to increase globally, occupiers in the industrial sector with higher power requirements have seen costs increase significantly. Vail Williams have personal experience of occupiers withdrawing from transactions as their forecasted operational costs have made their proposed occupation financially unviable.
- 9.18. Occupiers in the office sector who are located in multi-let office buildings whereby a service charge is payable for communal items are expected to see increases in the region of 50%-80% for costs in relation to building utilities.

#### **Water Neutrality – Which Areas?**

- 9.19. Although not currently in place for the CWSP area, for major development proposals in the immediate future, consideration must be given to the water neutrality aspirations set out in a Position Statement by Natural England for the Sussex North Water Supply Zone (dated September 2021). Concerns regarding existing abstraction within the Sussex North Water Supply Zone and its impact on the Arun Valley Special Area Conservation/ Special Protection Area has halted development abruptly.
- 9.20. West Sussex County Council continues to work with affected LPAs including Arun and Chichester to help future proposals to demonstrate no increase in water consumption by demonstrating water recycling, efficiency, and offsetting measures. Otherwise, these proposals face a refusal of planning permission.
- 9.21. This constraint currently extends to reserved matters applications, applications with pending Section 106 Legal Agreements, some permitted development applications, as well as new-build proposals. This will have evident implications for those seeking to develop greenfield land or increase the density, change the use and reconfigure brownfield land. At present this is a disincentive to developers within the region with commercial and residential planning applications stalling. This will have longer-term implications for those seeking sites or relocation within West Sussex, acting as a barrier to investment through uncertainty, viability concerns and may result in businesses moving to districts outside the area.

### **Road Infrastructure**

- 9.22. As mentioned various times throughout the report, robust road infrastructure is critical to modern warehouse requirements. Particular congestion areas noted are Chichester roundabouts, Arundel, Offington Roundabout, Grove Lodge Roundabout, Lyons Farm and Lancing Manor Roundabout.
- 9.23. Historically the A259 between Littlehampton and Angmering has suffered from severe congestion, however improvement works are underway which should significantly improve road communications.
- 9.24. Through Vail Williams significant occupier exposure we are aware that poor road communications have limited inward migration of business throughout the districts. This is a contributing factor in Chichester particularly, which struggles to attract business from commercial centres going West.
- 9.25. Worthing and Chichester being the main commercial centres in the context of this report rarely exchange occupiers even if appropriate accommodation is available. We are of the view the congested road communications between the two have a role to play on this. This is illustrated with a typical rush hour journey time between the locations of approximately 50 minutes. This journey time reduced to 30 minutes outside of these hours. This would equate to less than the average South-East daily commute time of 67 minutes per day (Moneybarn).

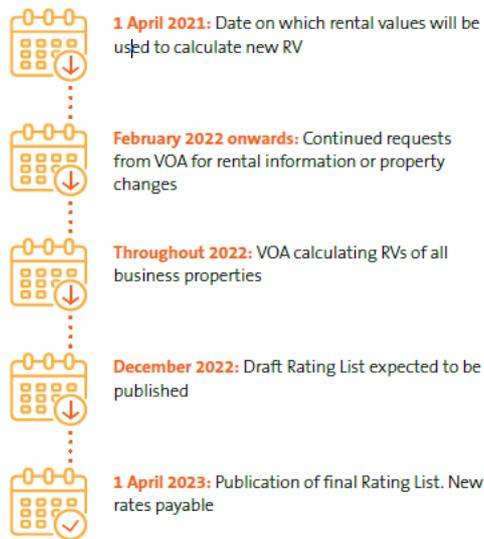
### **Impact of the Levelling Up and Regeneration Bill**

- 9.26. The most notable of changes to the planning system has just been announced. The Levelling Up and Regeneration Bill, which Rt Hon Michael Gove MP stated was set to get the country “firing on all cylinders”.
- 9.27. Part of this is proposed to be achieved by “giving local leaders the powers they need to tackle the blight of empty shops on high streets and to regenerate their communities”, in a sentiment reminiscent of the “pass power back” principles behind the Localism Act 2011.
- 9.28. However local developers and planning consultants working in the outlined districts rely on clarity and expedient decision making to ensure regeneration occurs. Developers continue to rely on clear reasoning and alignment with local planning policy for hopeful speed of determination, but with building materials and skilled labour supply still constrained and viability remaining at the forefront of successful development, the system is under intense pressure.
- 9.29. The impact on all sides is further costs, delays, and potentially missed opportunities. Add to this the national shortage in qualified planners, the complexity of Section 106 negotiations (which nearly led to their axing entirely in the 2020 White Paper), or the ever-increasing environmental constraints, such as Biodiversity Net Gain, nitrates, nutrient and water neutrality requirements, and the planning system is becoming more complex and convoluted for developers.

### **Business Rates Revaluation**

- 9.30. The next revaluation of business rates takes place on 1 April 2023. This means new business rates will be calculated based on property rental values and the state of the economy as at 1 April 2021.
- 9.31. We have detailed below the business rates revaluation process

### What happens when?



- 9.32. Whilst for the retail and office sectors this could be welcome news, industrial rents have increased by up to 50% in places. Should this be reflected comprehensively in increases to rateable values, it will have significant impact on the overall affordability of buildings.

## 10 How Post Pandemic Work Patterns are Influencing the Design of Office Space

### Office Trends

- 10.1. The pandemic has brought into the spotlight the way we work and where we work, which will prove to be a significant event for offices and the workplace going forward. The last six months of 2021 saw an increase in office market activity as businesses encouraged their workforces back into the office - albeit on a more flexible basis than before.
- 10.2. Those who are moving, are now taking in the region of 50% less space on average than they once occupied but have been willing to spend more on achieving the right space, as the flight to office quality continues.
- 10.3. With equal or lower overall revenue costs by taking less space, the normal frictional costs of moving have been reduced and this is helping to facilitate and inform decisions to relocate. This strategy is particularly true of professional services firms, who have been the early adopters of a 'back to business as usual' approach.
- 10.4. At the smaller end of the market, there has been an increase in those looking at co-working buildings offering flexibility on lease terms, and a move away from traditional ten-year leases with five yearly breaks, towards much shorter terms of five years, in some cases with three-year breaks to allow businesses to plan for future growth.
- 10.5. As 2022 progresses, there is a sense in the market that the fluidity seen can't last forever. There will come a time when businesses need to take solid action and lease events (breaks and expiries) will catalyse this in 2022.

## **Office Design**

- 10.6. Office design has evolved, with this in mind, more high-quality, amenity rich space is being proposed. By offering added extras with more flexible lease terms, these schemes will likely win out as office lifestyle becomes an integral requirement for employers and their people.
- 10.7. Hand in hand with this flight to quality, will be a continued focus on employee wellness and wellbeing, as well as sustainability. This gathered pace throughout the second half of 2021, spurred on by a mixture of COP26 and the 'great resignation' which set new employee expectations of their workplace.
- 10.8. Such is the war for talent, that occupiers and landlords recognise the need to invest in quality office space boasting a range of amenities and sustainability features; from cafés to green walls and solar PV.
- 10.9. As 2022 progresses, investment in greener office buildings will gain pace ahead of the requirement for landlords to achieve EPC ratings of B or above by 2035. It is not just legislative requirements driving more carbon neutral office buildings. There is a genuine desire by occupiers, landlords and developers alike, to address their environmental impact and this, together with the evolution of technology, will shape occupancy and design.

## **Reducing the Void**

- 10.10. Instead of looking at the net lettable area of a building, landlords are creating larger open areas such as libraries, cafés and even wellness spas to improve their amenity offering. These spaces 'in between' are blurring the lines between live, work and play and are creating the ecosystem necessary to promote a real community and identity.
- 10.11. The thought is that for occupiers, this translates into increased productivity, improved wellbeing and workplace attendance, and better engagement.
- 10.12. Whilst this strategy does not guarantee a higher rent, once capital expenditure is accounted for, landlords will reduce their void quicker and benefit from higher occupier retention.
- 10.13. Occupiers are also exploring how to free-up or carve out space to make savings whilst creating an attractive working environment. For some, this means returning high-quality space to the market. Both flexible and fitted, this high-quality space, much of which hasn't been used for the past two years, could compete with landlords space.

## **Office Evolution Continues**

- 10.14. Some are dangling the office carrot with amenity-rich space and a hybrid approach to working, others are issuing a complete recall to the workplace, and others sit somewhere in between. The latter are trying to address the headaches being faced by property teams who don't know how many people to cater for at any one time, by offering something for everyone, with 'departmental neighbourhoods' providing desks 50% of staff, additional hot desks nearby, as well as the collaboration zones in between.
- 10.15. If the future of the office is hybrid, how companies will align this with the environmental impact of their occupation is not yet known and could this result in a complete transformation of the leasing model.

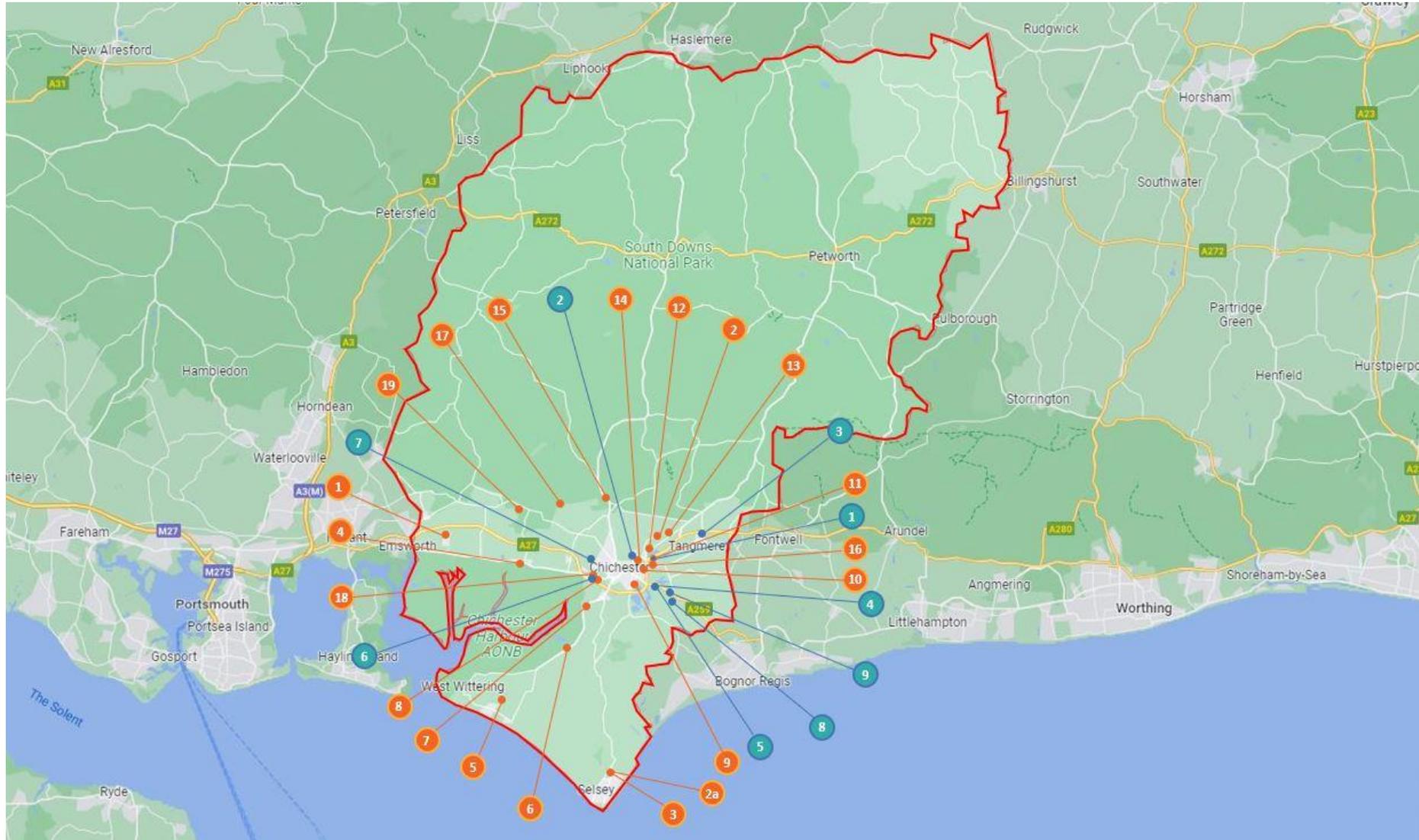
10.16. There has been a time of extraordinary change over the last two years and what some see as uncertainty, some see as a significant opportunity to level up and explore better ways of working.

## Appendix A Chichester District Core Industrial Areas

| Map No. | Address                                | Description/Assessment  | EPC | Occupational Grade |
|---------|--|---|-----|--------------------|
| 1       | Clovelly Road, Emsworth, PO10 8PE      | <ul style="list-style-type: none"> <li>Constructed approximately 1970's - 1980's.</li> <li>Located in residential area.</li> <li>Accommodation is general need of modernisation.</li> </ul>   | C-E | C-D                |
| 2       | Rolls Royce, PO18 0SH                  | <ul style="list-style-type: none"> <li>Rolls Royce facility</li> <li>Single occupancy</li> <li>High specification building</li> </ul>   | /   | A                  |
| 2       | Ellis Square, Selsey, PO20 0FJ         | <ul style="list-style-type: none"> <li>Constructed early 2,000's</li> <li>Modern accommodation</li> <li>Between 5 and 6m eaves height</li> <li>Isolated business location</li> </ul>  | B   | C                  |
| 3       | Sherrington Mews, Selsey, PO20 0FJ     | <ul style="list-style-type: none"> <li>Constructed early 2,000's</li> <li>Compromised loading</li> <li>No compatible with modern occupier requirements</li> <li>Isolated business location</li> </ul>                                       | B   | D                  |
| 4       | Broadbridge Business Centre, PO18 8NF  | <ul style="list-style-type: none"> <li>Modernised former agricultural premises.</li> <li>Low eaves</li> <li>Rural location</li> </ul>   | C-D | C                  |
| 5       | Hilton Park, PO20 8RL                  | <ul style="list-style-type: none"> <li>1990's construction.</li> <li>Combination of refurbished and un-refurbished accommodation.</li> <li>Numerous freehold ownerships.</li> </ul>   | D-E | B-D                |
| 6       | Birdham Business Park, PO20 7BT        | <ul style="list-style-type: none"> <li>Traditional construction with areas of refurbishment</li> <li>Low eaves.</li> <li>Asbestos roofs.</li> </ul>   | E-G | C                  |
| 7       | Donnington Business Park, PO20 7AJ     | <ul style="list-style-type: none"> <li>Modern construction</li> <li>Business park comprising offices and warehouses</li> <li>Hybrid quasi retail offering</li> </ul>  | B-D | A-B                |
| 8       | Terminus Road, PO19 8TX                | <ul style="list-style-type: none"> <li>Main employment area of Chichester.</li> <li>Significant range of quality and age of accommodation.</li> <li>Largely owned Long Leasehold with Chichester District Council as Freeholder.</li> </ul> | B-G | A-D                |
| 9       | Quarry Lane, PO19 8QA                  | <ul style="list-style-type: none"> <li>Main employment area of Chichester.</li> <li>Significant range of quality and age of accommodation.</li> <li>Largely owned Long Leasehold with Chichester District Council as Freeholder.</li> </ul> | B-G | B-D                |
| 10      | Ben Turner Industrial Estate, PO19 7ET | <ul style="list-style-type: none"> <li>Mixture of traditional and modern accommodation</li> <li>Roadside prominence</li> <li>Limited parking</li> </ul>   | C-D | B-C                |

|    |                                       |  |     |     |
|----|---------------------------------------|--|-----|-----|
| 11 | Glenmore Business Park, PO19 7BJ      | <ul style="list-style-type: none"> <li>• Modern development starting construction in circa 2016</li> <li>• Largely units sub 2,000 sq ft with several units of in excess 10,000 sq ft</li> <li>• 5.5m to 8m eaves</li> <li>• Parking limited on smaller units</li> </ul> | A-B | A-B |
| 12 | Rutland Way, PO19 7RT                 | <ul style="list-style-type: none"> <li>• Generally modern construction</li> <li>• Units approximately 10,000 sq ft</li> <li>• Good yard and loading provision</li> <li>• Well located</li> </ul>   | C-D | B   |
| 13 | The Mill, PO18 0FF                    | <ul style="list-style-type: none"> <li>• Constructed 2020</li> <li>• Business units from 1,200 - 5,000 sq ft</li> <li>• Excellent road links</li> <li>• 5m eaves height</li> </ul>   | B   | A   |
| 14 | St James Industrial Estate, PO19 7JU  | <ul style="list-style-type: none"> <li>• Currently under construction</li> <li>• Modern units from 1,000 - 4,000 sq ft</li> </ul>  | TBC | A   |
| 15 | Eastmead Industrial Estate, PO18 0BP  | <ul style="list-style-type: none"> <li>• Requires modernisation and investment.</li> <li>• Pending residential application</li> </ul>  | /   | D   |
| 16 | Shopwhyke Industrial Estate, PO20 2GD | <ul style="list-style-type: none"> <li>• Refurbished small unit scheme with units from 300 sq ft - 2,000 sq ft.</li> <li>• Loading and parking provision low in terms of occupier requirements.</li> </ul>   | D-G | C-D |
| 17 | Kingley Centre, PO18 9HJ              | <ul style="list-style-type: none"> <li>• Repurposed former agricultural buildings.</li> <li>• Hybrid workshop/office facilities</li> </ul>   | D-G | C   |
| 18 | Basepoint Business Centre             | <ul style="list-style-type: none"> <li>• 14 New hybrid studio/workshop units</li> <li>• Part of Regus/ Chichester District Council joint venture</li> <li>• Approximately 4.5m eaves height</li> </ul>   | /   | B   |
| 19 | Funtington Business Park, PO18 9DA    | <ul style="list-style-type: none"> <li>• New development starting 2017</li> <li>• Rural location</li> <li>• Premises generally less than 2,000 sq ft</li> <li>• Basic specification</li> <li>• Communal w/c</li> </ul>   | /   | C   |

## Chichester Industrial Locations



## Appendix B – Chichester District Pipeline of Industrial Development

|                                      | Address                              | Area proposed | Planning Reference           | Status                                    | Micro Obstacles to Delivery   | Timeline for Delivery |
|--------------------------------------|--------------------------------------|---------------|------------------------------|---|---|-----------------------|
| <b>Consented</b>                     |                                      |               |                              |   |   |                       |
| 1                                    | Glenmore Business Park, PO19 8TX     | 25,000 sq ft  | 20/00130/FUL                 | Planning granted                          | Pre-commencement issues being addressed.  | 1+ years              |
| 2                                    | St James Industrial Estate, PO19 7JU | 25,000 sq ft  | 21/03391/FUL                 | Under construction                        | N/A   | Six months            |
| 3                                    | Chichester Business Park, PO20 2FR   | 100,000 sq ft | 19/01675/FUL                 | Planning granted                          | Build cost<br>Expensive topography to develop<br>Location outside central Chichester            | 3+ years              |
| 4                                    | Springfield Park, PO20 1EJ           | 100,000 sq ft | 18/01365/OUT<br>22/00377/REM | Application for reserved matters underway | Road infrastructure works<br>Nitrate off-set<br>Would have to forego existing income to develop | 1+ years              |
| 5                                    | Cathedral Business Park, PO20 1EJ    | 85,000 sq ft  | 14/04284/OUT                 | Planning granted                          | Road infrastructure works<br>Nitrate off-set  | 1+ years              |
| 6                                    | SGN site, Terminus Road PO19 8TX     | 40,000        | N/A                          | Identified site                           | Requires planning permission  | 1+ years              |
| <b>Identified in Local Plan</b>      |                                      |               |                              |   |   |                       |
| 7                                    | Land West of Chichester              | 6 Hectares    | N/A                          | Identified in local plan                  | Heavy residential area<br>Non-core industrial location  | 3+ years              |
| <b>Possible Employment Locations</b> |                                      |               |                              |   |   |                       |
| 8                                    | Chichester Food Park, PO20 1NW       | 56 Hectares   | N/A                          | Current horticultural use.                | Current horticultural classification  | 5+ years              |

|    |   |              |     |  |  |            |
|----|---|--------------|-----|--|--|------------|
| 9  | Chichester Garden Centre, PO20 1EG                    | 1.5 Hectares | N/A | Part of site ideal for small unit scheme | Departure to local plan<br>One way traffic in and out      | 3+ years   |
| 10 | Shiphams Vacant Land fronting Terminus Road, PO19 8TX | 1 Acre       | N/A | Unused land in core industrial location  | Held long leasehold<br>Currently lease held over site      | 5-10 years |
| 11 | Leigh Road, PO19 8UE                                  | 2-5 acres    | N/A | Area of potential regeneration           | Held long leasehold<br>Various ownerships<br>Contamination | 10+ years  |

## Appendix C – Chichester District Core Office Areas

| Map No. | Address  | Description  | EPC | Grade |
|---------|--|--|-----|-------|
| 1       | Metro House,<br>Northgate, Chichester,<br>PO19 1BE | <ul style="list-style-type: none"> <li>• Purpose built four storey building</li> <li>• Central location</li> <li>• Allocated parking</li> <li>• In need of modernisation</li> </ul>  | D   | C     |
| 2       | Southern Gate Office<br>Village, PO19 8GR          | <ul style="list-style-type: none"> <li>• A staged modern development constructed within last 20 years.</li> <li>• Most recent construction 2018</li> <li>• Approximately 60% owner occupied</li> <li>• Purpose built</li> <li>• Allocated parking</li> </ul> | B-C | B     |
| 3       | Bicentennial & Wiley<br>Building, PO19 8SQ         | <ul style="list-style-type: none"> <li>• Constructed circa 2006 for Wiley</li> <li>• Part owner occupied / part let</li> <li>• Purpose built</li> </ul>  | /   | B     |
| 4       | Basepoint Business<br>Centre, PO19 8FY             | <ul style="list-style-type: none"> <li>• Built Circa 2018</li> <li>• Multi-let business centre</li> <li>• Purpose built</li> </ul>   | /   | A     |
| 5       | City Gates 2-4<br>Southgate, PO19 8DJ              | <ul style="list-style-type: none"> <li>• Modern office</li> <li>• City centre location</li> <li>• Purpose built</li> </ul>   | B-D | B     |
| 6       | Cawley Priory, PO19 1SY                            | <ul style="list-style-type: none"> <li>• Conversion</li> <li>• Listed building</li> <li>• Allocated parking</li> <li>• Central location</li> </ul>   | C   | B     |
| 7       | East Pallant House,<br>PO19 1TY                    | <ul style="list-style-type: none"> <li>• Mixture of existing and extension</li> <li>• Allocated parking</li> <li>• Central location</li> </ul>   | D   | B     |
| 8       | The Corn Exchange,<br>PO19 1BF                     | <ul style="list-style-type: none"> <li>• Conversion</li> <li>• Central location</li> <li>• Listed building</li> </ul>  | /   | B     |
| 9       | 51-55 West Street,<br>PO19 1JG                     | <ul style="list-style-type: none"> <li>• Conversion</li> <li>• Located above retail</li> <li>• Central Location</li> </ul>   | C-D | C     |
| 10      | Dukes Court, PO19 8FX                              | <ul style="list-style-type: none"> <li>• Just outside central Chichester</li> <li>• Purpose built</li> <li>• Fragmented ownership</li> <li>• Differing degrees of grade across buildings</li> </ul>  | B-D | B-D   |
| 11      | City Business Centre,<br>PO19 8DU                  | <ul style="list-style-type: none"> <li>• Central Chichester</li> <li>• Modern development</li> <li>• Hybrid of uses</li> </ul>   | C-E | C     |

|    |   |  |     |   |
|----|---|--|-----|---|
| 12 | Forum Business Centre,<br>PO19 7DN                    | <ul style="list-style-type: none"> <li>• Central Chichester</li> <li>• Serviced office building</li> <li>• Two storey</li> <li>• Ageing condition</li> </ul>               | C   | C |
| 13 | Chichester Marina,<br>PO20 7EJ                        | <ul style="list-style-type: none"> <li>• Repurposed buildings</li> <li>• Remote location</li> </ul>  | B-C | C |
| 14 | The Courtyard,<br>Vinnetro Business<br>Park, PO20 1QH | <ul style="list-style-type: none"> <li>• Purpose built</li> <li>• High specification refurbishment</li> <li>• Multi-let</li> <li>• Out of town location</li> </ul>         | A   | A |
| 15 | Vinnetro Business<br>Park, PO20 1QH                   | <ul style="list-style-type: none"> <li>• Conversion of former agricultural buildings</li> <li>• Out of town location</li> </ul>  | C   | C |
| 16 | City Fields Way, PO20<br>2FS                          | <ul style="list-style-type: none"> <li>• Purpose built within last 20 years</li> <li>• Out of town location</li> <li>• Good parking provision</li> </ul>                   | B-C | B |
| 17 | Drayton House, PO20<br>2EW                            | <ul style="list-style-type: none"> <li>• Conversion and extension of listed building</li> <li>• Multi-Let</li> <li>• Well parked</li> <li>• Picturesque setting</li> </ul> | B-D | B |
| 18 | Temple Bar Business<br>Park, PO18 0LB                 | <ul style="list-style-type: none"> <li>• Rural location</li> <li>• Conversion of former agricultural buildings</li> <li>• Multi-let</li> </ul>                             | /   | C |
| 19 | Donnington Park, PO20<br>7DU                          | <ul style="list-style-type: none"> <li>• Out of town location</li> <li>• Purpose built</li> <li>• Hybrid scheme of office and industrial</li> </ul>                        | C   | C |
| 20 | Sussex Business Village,<br>PO22 0AL                  | <ul style="list-style-type: none"> <li>• Isolated business location</li> <li>• Mixture of conversion and new build</li> <li>• Multi-let</li> </ul>                         | C-D | C |
| 21 | West Barn, Norton Lane                                | <ul style="list-style-type: none"> <li>• Isolated business location</li> <li>• Purpose built</li> </ul>  | C   | B |
| 22 | Appledram Barns, PO20<br>7EQ                          | <ul style="list-style-type: none"> <li>• Isolated business location</li> <li>• Mixture of conversion and new build</li> <li>• Multi-let</li> </ul>                         | E   | C |
| 23 | The Granary, PO20 7FD                                 | <ul style="list-style-type: none"> <li>• Semi-rural location</li> <li>• Mainly conversion of former agricultural buildings</li> <li>• Multi-let</li> </ul>                 | C   | B |
| 24 | Chilgrove Business<br>Centre, PO19 8HU                | <ul style="list-style-type: none"> <li>• Rural location</li> <li>• Serviced office centre</li> </ul>   | C-E | B |

# Chichester Office Locations



## Appendix D – Chichester District Office Development pipeline

|                               | Address  | Area proposed | Planning Reference   | Status                      | Micro factors Obstacles affecting delivery           | Estimated Timescale for delivery |
|-------------------------------|--|---------------|----------------------|-----------------------------|--|----------------------------------|
| <b>Consented</b>              |  |               |                      |                             |  |                                  |
| 1                             | Shopwhyke B1 Allocated Site (At front of Glenmore) | 1 acre        | Shopwhyke Masterplan | Outline consent             | Lack of office demand when marketed initially        | 2+ years                         |
| <b>Proposed in Local Plan</b> |  |               |                      |                             |  |                                  |
| 2                             | Southern Gateway Development                       | 25,000 sq ft  | N/A                  | Small unit offices proposed | Land assembly of parts required                      | 5+ years                         |
| 3                             | Land West of Chichester                            | 6 Hectares    | N/A                  | Identified in local plan    | - Remote office location<br>- Residentially led site | 3+ years                         |

## Appendix E - Arun District Core Industrial Areas

| Map No. | Address                                     | Description  | EPC | Grade |
|---------|---|--|-----|-------|
| 1       | Durban Road, PO22 9QT                       | <ul style="list-style-type: none"> <li>Over 50 units of secondary accommodation</li> <li>Majority of accommodation is low eaves and of older construction</li> </ul>   | C-G | C/D   |
| 2       | Rolls Royce Site, PO22 9FJ                  | <ul style="list-style-type: none"> <li>Modern construction</li> <li>High eaves</li> <li>Excellent road communications</li> <li>Excellent loading and access</li> </ul>   | A   | A     |
| 3       | Southern Cross Trading Estate, PO22 9NQ     | <ul style="list-style-type: none"> <li>Varying degrees in quality of buildings</li> <li>Typically buildings of circa 5m eaves</li> </ul>   | B-E | B/C   |
| 4       | Arun Business Park, Shripney Road, PO22 9SX | <ul style="list-style-type: none"> <li>Modern style development</li> <li>Units from 1,500 - 10,000 sq. ft</li> <li>Good eaves height</li> <li>Adequate loading</li> <li>Generally units in excess of 6m eaves</li> </ul> | C-E | B/C   |
| 5       | Shripney Trade Park, PO22 9GH               | <ul style="list-style-type: none"> <li>Modern trade counter style Scheme.</li> <li>Road visibility</li> <li>6m+ Eaves Height</li> </ul>  | C   | B     |
| 6       | Heath Place, PO22 9SL                       | <ul style="list-style-type: none"> <li>Older style small unit development</li> <li>Good road links</li> <li>Low eaves height</li> </ul>  | C-E | C     |
| 7       | Rudford Industrial Estate BN18 0BD          | <ul style="list-style-type: none"> <li>Constructed circa 1970's/1980's</li> <li>Low eaves height</li> <li>Large proportion of units have asbestos roof and low eaves height less than 4m</li> </ul>                      | C-E | C/D   |
| 8       | Baird's Farm, BN17 5RE                      | <ul style="list-style-type: none"> <li>Former agricultural buildings that have been repurposed</li> <li>Basic construction</li> </ul>  | /   | C/D   |
| 9       | Ford Lane Business Park, BN18 0UZ           | <ul style="list-style-type: none"> <li>Modern construction built within last 20 years.</li> <li>5m eaves</li> <li>Adequate loading</li> </ul>  | C-D | B/C   |
| 10      | Ford Airfield Industrial Estate, BN18 0HY   | <ul style="list-style-type: none"> <li>Older style units that have undergone recent refurbishment.</li> <li>Suitable density and loading</li> <li>Neighbouring residential</li> </ul>                                    | C-E | B/C   |
| 11      | Gaugemaster, BN18 0RX                       | <ul style="list-style-type: none"> <li>Modern style small unit scheme</li> <li>Neighbours train station</li> </ul>   | C-E | C     |

|    |  |   |     |       |
|----|--|---|-----|-------|
| 12 | Lineside Industrial Estate<br>BN17 7EH<br>BN17 7GA<br>BN17 7HD | <ul style="list-style-type: none"> <li>• Significant employment area.</li> <li>• Four new units recently developed on estate.</li> <li>• Estate undergoing refurbishment initiatives</li> </ul>                     | C-D | A/B   |
| 13 | Thorgate Road, BN17 7LU  | <ul style="list-style-type: none"> <li>• Mid size units of generally modern construction.</li> <li>• Good loading and eaves height</li> </ul>   | C-D | B     |
| 14 | OYO Industrial Estate, BN17 7GA                                | <ul style="list-style-type: none"> <li>• Modern Construction</li> <li>• Eaves Height 6m+</li> <li>• Adequate loading</li> </ul>   | D   | B     |
| 15 | Riverside Industrial Estate, BN17 5DF                          | <ul style="list-style-type: none"> <li>• Varying degrees in quality of buildings</li> <li>• Typically buildings of circa 5m eaves</li> <li>• Good loading</li> <li>• Good access and road communications</li> </ul> | C-E | B/C   |
| 16 | Harwood Road, BN17 7AU   | <ul style="list-style-type: none"> <li>• Of older construction</li> <li>• Low eaves height</li> <li>• Tight access</li> </ul>   | C-E | C/D   |
| 17 | Minster Court, BN17 7RN  | <ul style="list-style-type: none"> <li>• Modern development</li> <li>• Eaves height circa 5.5m</li> <li>• Adequate loading</li> </ul>   | C-E | B/C   |
| 18 | Martello Enterprise Centre, BN17 7PA                           | <ul style="list-style-type: none"> <li>• Of older construction</li> <li>• Access constraints</li> <li>• Limited parking</li> </ul>  | D-G | C/D   |
| 19 | Courtwick Lane, BN17 7RZ                                       | <ul style="list-style-type: none"> <li>• Modern style high bay warehouses</li> <li>• Road visibility</li> <li>• Good loading</li> </ul>   | C-D | B     |
| 20 | Watersmead Business Park, BN17 6LS                             | <ul style="list-style-type: none"> <li>• High bay warehousing</li> <li>• Modern construction</li> <li>• Good loading and road links</li> </ul>  | B   | B     |
| 21 | Dominion Way, BN16 3DS   | <ul style="list-style-type: none"> <li>• Modern, good condition trade counter scheme</li> <li>• Established industrial area</li> <li>• Adequate loading</li> </ul>  | C-D | B     |
| 22 | Brookside Avenue, BN16 3LF                                     | <ul style="list-style-type: none"> <li>• Combination of modern and traditional construction</li> <li>• Varying degree of quality due to fragmented ownership</li> </ul>   | D-E | B/C/D |
| 23 | Littlehampton Marina, BN17 5DS                                 | <ul style="list-style-type: none"> <li>• Mixture of modern and traditional construction</li> <li>• Eaves height 4m-6m</li> </ul>  | /   | B/C   |



## Appendix F – Arun District Pipeline of Industrial Development

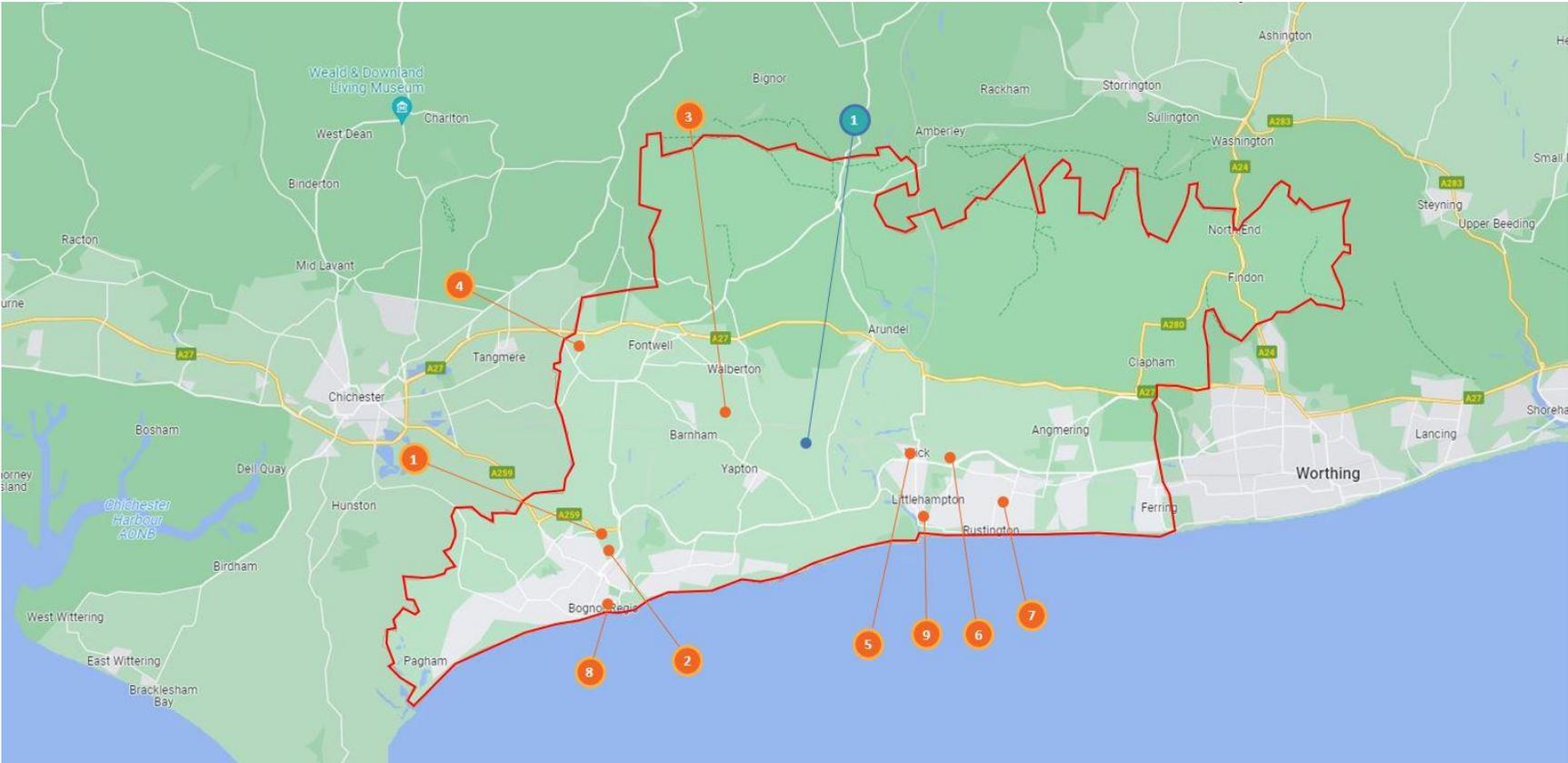
|                                      | Address                             | Area Proposed     | Planning Reference | Status   | Micro Factors affecting delivery  | Timeline for delivery |
|--------------------------------------|-------------------------------------|-------------------|--------------------|--|---|-----------------------|
| <b>Consented</b>                     |                                     |                   |                    |  |   |                       |
| 1                                    | Water Lane, BN16 4EP                | 60,000 sq ft      | A/40/18/OUT        | Outline Consent  | Residential Area<br>No B2 or B8 consent   | 2+ years              |
| 2                                    | Saltbox, PO22 9NW                   | 150,000 sq ft     | BE/135/18/PL       | Planning Granted   | /   | 1+ years              |
| 3                                    | Oldlands Farm, PO22 9NN             | 23.8 Hectares     | BE/61/13/          | Outline Consent  | Outline consent<br>In partial flood zone  | 3+years               |
| <b>Proposed in Local Plan</b>        |                                     |                   |                    |  |   |                       |
| 4                                    | Redrow Homes Site, BN18 0XL         | 90,000 sq ft      | F/4/20/OUT         | Pending Planning   | Unestablished industrial location<br>B1 consent proposed  | 5+ years              |
| 5                                    | Rowan Park, PO22 9RP                | 3.2 Hectare site  | N/A                | Identified Site<br>Subject to relocation of caravan park | Requires relocation of Caravan park   | 5+ years              |
| 6                                    | Former LEC Airfield, PO22 9FL       | 29.3 hectare site | N/A                | Identified site in local plan                            | Limited access to site<br>Flood zone  | 5+ years              |
| 7                                    | Lyminster, BN17 7TE                 | 2 Hectares        | N/A                | Identified site in local plan                            | Subject to new through road<br>Nearby residential   | 3+ years              |
| <b>Possible Employment Locations</b> |                                     |                   |                    |  |   |                       |
| 8                                    | Rudford Industrial Estate, BN18 0BF | 5 acres           | N/A                | Possible development site                                | Requires planning consent<br>May impact on residential development in area.<br>Heavy industrial neighbouring uses | 5+ years              |

|    |                                    |           |     |                                |   |          |
|----|------------------------------------|-----------|-----|--------------------------------|---|----------|
|    |                                    |           |     | Neighbours existing industrial |   |          |
| 9  | Hunterford Business Park, BN18 0FL | 10 acres  | N/A | Possible development site      | Requires planning<br>Next to waste facility<br>Neighbours proposed Redrow residential development | 5+ years |
| 10 | New Courtwick Lane, BN17 7RZ       | 7.8 acres | N/A | Possible development site      | Requires planning<br>Nearby residential<br>Access constraints                                     | 5+ years |

## Appendix G – Core Arun Offices and Locations

| Map No. | Address                                  | Description  | EPC | Grade |
|---------|--|--|-----|-------|
| 1       | Heath Place, PO22 9SL                    | <ul style="list-style-type: none"> <li>• Purpose Built</li> <li>• Industrial Location</li> <li>• Hybrid industrial/office development</li> <li>• Recently sold at auction</li> </ul> | E   | C     |
| 2       | Durban House, PO22 9RE                   | <ul style="list-style-type: none"> <li>• Purpose built government building</li> </ul>  | E   | C     |
| 3       | Biz Space, Courtwick Lane, BN17 7TL      | <ul style="list-style-type: none"> <li>• Purpose built</li> <li>• Outskirts of town</li> <li>• Full operational business centre</li> </ul>   | B   | B     |
| 4       | The Body Shop, BN17 6LS                  | <ul style="list-style-type: none"> <li>• Purpose built HQ building</li> <li>• Occupied by Body Shop</li> </ul>   | /   | B     |
| 5       | Churchill Court, BN16 3DJ                | <ul style="list-style-type: none"> <li>• Central Rustington</li> <li>• Purpose built</li> <li>• Above retail</li> </ul>  | C   | C     |
| 6       | Bognor Town Council, PO21 1LD            | <ul style="list-style-type: none"> <li>• Government building</li> <li>• Listed</li> <li>• Three storey</li> </ul>  | D   | B     |
| 7       | Arun District Council Building, BN17 5LF | <ul style="list-style-type: none"> <li>• Purpose built government building</li> </ul>  | C-D | B     |

# Arun Office Locations

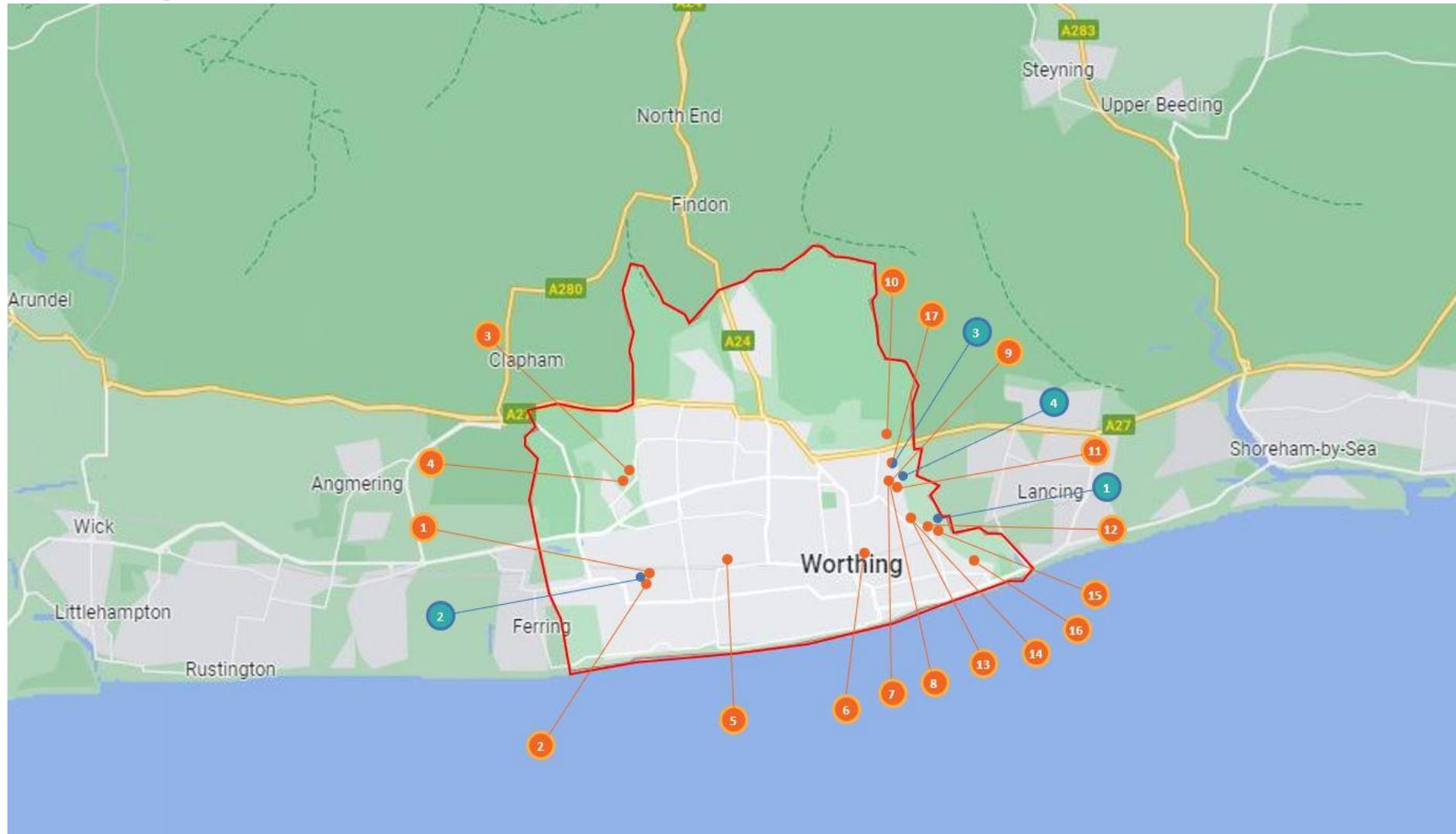


## Appendix H – Core Worthing Industrial Areas and Locations

| Map No. | Address                             | Description  | EPC | Grade |
|---------|-------------------------------------|--|-----|-------|
| 1       | Woods Way, BN14 4QY,<br>BN99 6HG    | <ul style="list-style-type: none"> <li>• Older style buildings typically with low eaves.</li> <li>• A combination of refurbished and original buildings</li> </ul>       | D   | C/D   |
| 2       | Martlets Way, BN12 4HF              | <ul style="list-style-type: none"> <li>• Modern style units</li> <li>• Low eaves</li> <li>• Mixture of condition with some requiring refurbishment</li> </ul>            | D   | C     |
| 3       | Signet Trading Estate, BN13 3RB     | <ul style="list-style-type: none"> <li>• Modern development</li> <li>• 5.5m eaves</li> <li>• Adequate loading area</li> <li>• Established industrial location</li> </ul> | B-D | B     |
| 4       | Faraday Close, BN13 3PL             | <ul style="list-style-type: none"> <li>• 250,000 sq ft unit</li> <li>• High density site</li> <li>• Residential surrounding area</li> </ul>                              | D   | C/D   |
| 5       | Garcia Trading Estate, BN13 1AL     | <ul style="list-style-type: none"> <li>• Generally lower quality industrial accommodation</li> <li>• Residential area</li> </ul>   | D-E | C/D   |
| 6       | Ivy Arch Road, BN14 8BX             | <ul style="list-style-type: none"> <li>• Generally older accommodation</li> <li>• Significant number of buildings require refurbishment or upgrading</li> </ul>          | C-E | C/D   |
| 7       | Northbrook Business Park, BN14 8PQ  | <ul style="list-style-type: none"> <li>• Modern development</li> <li>• Approximate 6m eaves height</li> </ul>  | C   | B     |
| 8       | Northbrook Trading Estate, BN14 8PN | <ul style="list-style-type: none"> <li>• Industrial/workshop style premises</li> <li>• Single access road</li> </ul>   | C-E | C     |
| 9       | Downsbrook Trading Estate, BN14 8NQ | <ul style="list-style-type: none"> <li>• Modern trade counter scheme</li> <li>• Industrial area</li> <li>• Adequate loading</li> </ul>                                   | D   | B     |
| 10      | Downlands Business Park, BN14 9LA   | <ul style="list-style-type: none"> <li>• Modern estate</li> <li>• Well located with good road communications</li> <li>• Suitable loading</li> </ul>                      | B-C | B     |
| 11      | Dominion Way West, BN14 8NT         | <ul style="list-style-type: none"> <li>• Mixture of refurbished and older style buildings</li> </ul>   | B-C | B/C   |
| 12      | Hazelwood Trading Estate, BN14 8LU  | <ul style="list-style-type: none"> <li>• 1980's construction</li> <li>• Undergone refurbishment in recent years</li> <li>• 4.5m to 5.5m Eaves</li> </ul>                 | C-D | B/C   |

|    |                                      |   |     |     |
|----|--------------------------------------|---|-----|-----|
| 13 | Dominion Way, BN14 8ND               | <ul style="list-style-type: none"> <li>• 1970's construction</li> <li>• 5.5 - 6m Eaves</li> <li>• Constrained rear loading</li> </ul>                   | C-E | C   |
| 14 | Timberlaine Trading Estate, BN14 8ND | <ul style="list-style-type: none"> <li>• Originally built 1960's</li> <li>• 22-unit scheme</li> <li>• Low eaves</li> </ul>                              | D-F | C/D |
| 15 | Hambridge Trading Estate             | <ul style="list-style-type: none"> <li>• 1960's</li> <li>• Compromised loading in area</li> <li>• Asbestos roofs</li> <li>• Low eaves height</li> </ul> | E   | C/D |
| 16 | Meadow Road/Dale Road                | <ul style="list-style-type: none"> <li>• Modern construction</li> <li>• Adequate parking and loading provision</li> </ul>                               | B-D | B   |
| 17 | Glaxosmithkline Premises, BNN14 8QH  | <ul style="list-style-type: none"> <li>• Series of modular buildings</li> <li>• HQ Style premises</li> </ul>  | C   | B/C |

## Worthing Industrial Areas



## Appendix I – Pipeline of Industrial Development for Worthing District

|                                 | Address                     | Area        | Planning Reference | Status  | Micro Factors affecting delivery   | Anticipated timeline for delivery |
|---------------------------------|-----------------------------|-------------|--------------------|---|--|-----------------------------------|
| <b>Proposed in Local Plan</b>   |                             |             |                    |   |  |                                   |
| 1                               | Decoy Farm, BN14 8NW        | 17.67 acres | /                  | In local plan   | <ul style="list-style-type: none"> <li>• Contamination</li> <li>•</li> </ul>   | 3-5 years                         |
| 2                               | Martlets Way, BN12 4UB      | 10.26       | /                  | In local plan   | <ul style="list-style-type: none"> <li>• Residential area</li> <li>• Access issues</li> <li>• Potential contamination</li> </ul>                       | 3-5 years                         |
| <b>Possible Employment Site</b> |                             |             |                    |   |  |                                   |
| 3                               | Former GSK Plot, BN14 8QH   | 3.81 acres  | /                  | Site purchased in 2020 with intention for small unit warehouse scheme | <ul style="list-style-type: none"> <li>• Site clearance</li> <li>• Complex development due to site services running through middle of land.</li> </ul> | 3 years                           |
| <b>Consented</b>                |                             |             |                    |   |  |                                   |
| 4                               | Southdownview Way, BN12 8AQ | 1.6 acres   | AWDM/0056/22       | Pending planning  | <ul style="list-style-type: none"> <li>• Neighbouring residential</li> <li>• Ground conditions</li> </ul>  | 18-36 months                      |

## Appendix J - Worthing Core Office Centres and Locations

| Map No. | Address                               | Description/Assessment  | EPC | Grade |
|---------|---------------------------------------|---|-----|-------|
| 1       | Yeoman Gate, BN13 3QZ                 | <ul style="list-style-type: none"> <li>• Purpose built modern development</li> <li>• Various freehold ownerships</li> <li>• Out of town location</li> </ul>   | B-D | B     |
| 2       | Centenary House, BN13 2PQ             | <ul style="list-style-type: none"> <li>• Purpose built government building</li> <li>• Needs redeveloping</li> </ul>   | D   | D     |
| 3       | Durrington Bridge House, BN12 4SE     | <ul style="list-style-type: none"> <li>• Purpose built government building</li> <li>• Plans for residential conversion</li> </ul>   | E   | C     |
| 4       | HMRC, Barrington Road, BN12 4SE       | <ul style="list-style-type: none"> <li>• Purpose built government building</li> <li>• Understood to be allocated for residential</li> </ul>   | D   | C     |
| 5       | Portland House, BN11 1HS              | <ul style="list-style-type: none"> <li>• Purpose built government building</li> <li>• Town centre</li> </ul>  | C   | B     |
| 6       | Teville Gate House, BN11 1UR          | <ul style="list-style-type: none"> <li>• Purpose built government occupied building</li> </ul>  | B   | A     |
| 7       | Liverpool Gardens, BN11 1RS, BN11 1TF | <ul style="list-style-type: none"> <li>• Series of purpose built 3-4 storey office buildings</li> <li>• Central location</li> <li>• Worthing's main office centre</li> </ul>                                    | B-D | B/C   |
| 8       | Chatsworth Road, BN11 1LY             | <ul style="list-style-type: none"> <li>• Generally purpose-built accommodation</li> <li>• Arranged over a series of buildings</li> <li>• Includes Environment agency</li> <li>• Town centre location</li> </ul> | C-E | B/C   |
| 9       | Wicker House, BN11 1DJ                | <ul style="list-style-type: none"> <li>• Purpose built HQ style building</li> <li>• Single Let to NHS</li> </ul>  | C   | B     |
| 10      | Southern Water Premises BN13 3NX      | <ul style="list-style-type: none"> <li>• Purpose built HQ style building</li> <li>• Recently been on market for sale</li> <li>• May go for residential</li> </ul>   | C   | B     |

|    |  |   |   |   |
|----|--|---|---|---|
| 11 | Highdown House,<br>Yeoman Way, BN99<br>3HH | <ul style="list-style-type: none"> <li>• Purpose built HQ style building</li> <li>• Occupied by Equiniti</li> </ul> | D | B |
| 12 | HSBC, Farncombe<br>Road, BN11 2BW          | <ul style="list-style-type: none"> <li>• Purpose built HQ style building</li> <li>• Owner occupied</li> </ul>       | C | B |

## Worthing Core Office Locations



## Appendix K – Possible Pipeline of Office Development for Worthing District

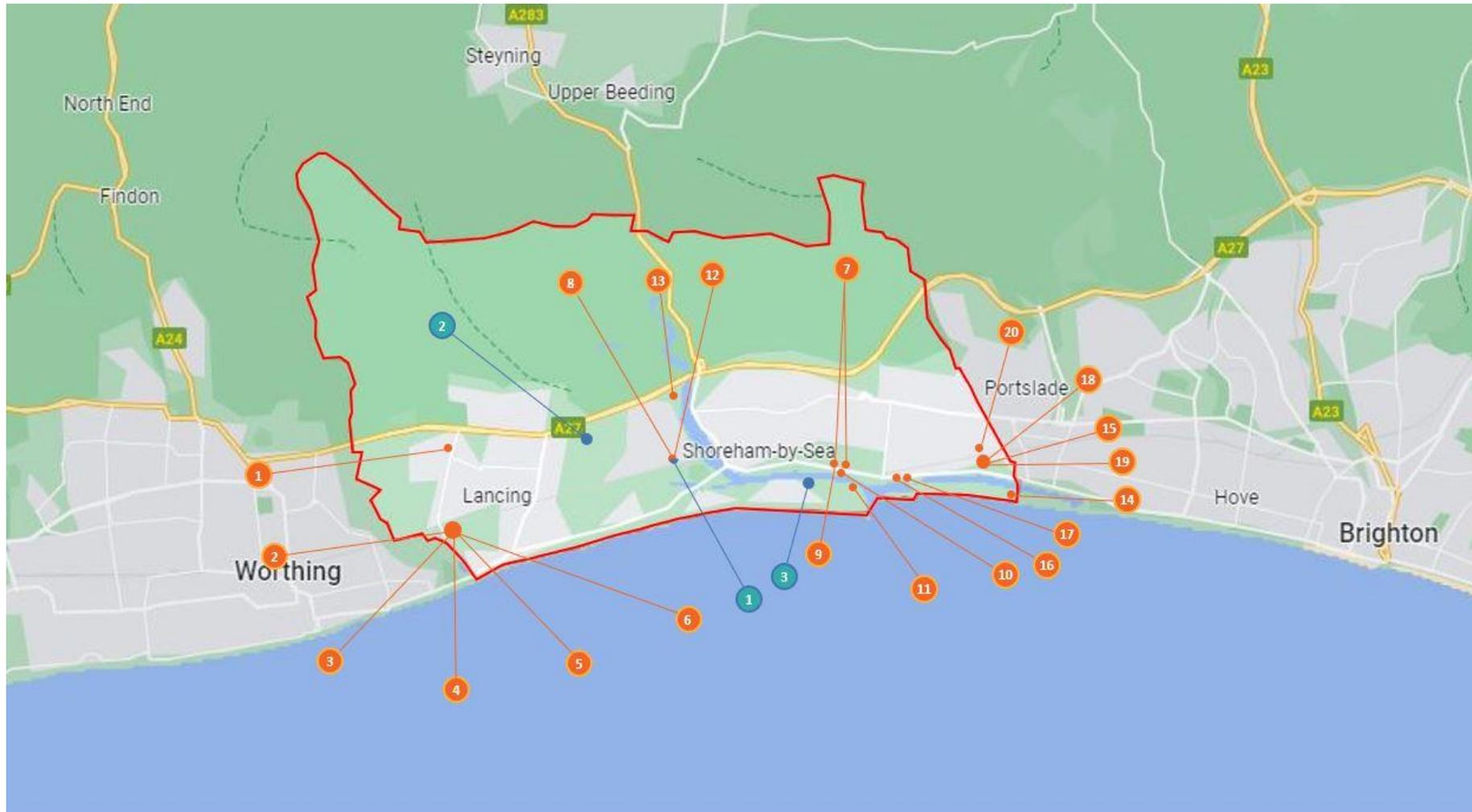
|                               | Address                   | Area proposed | Planning Reference | Status                 | Obstacles to Delivery for offices  | Timeline for delivery |
|-------------------------------|---------------------------|---------------|--------------------|------------------------|--|-----------------------|
| <b>Outlined in Local Plan</b> |                           |               |                    |                        |  |                       |
| 1                             | Grafton Gate, BN11 3PZ    | 2,500 sq m    | N/A                | Outlined in local      | Scheme likely to be retail and leisure driven                                    | 0-5 years             |
| 2                             | Centenary House, BN13 2PQ | 10,000 sq m   | N/A                | Outlined in local plan | Ageing building<br>Out of town location<br>Likely to be residentially led scheme | 6+ Years              |

## Appendix L - Adur Core Industrial Locations

| Map No. | Address   | Description/Assessment   | EPC | Grade |
|---------|---|--|-----|-------|
| 1       | Rectory Farm Road, Sompting, BN15 0DP                                 | <ul style="list-style-type: none"> <li>• Modern construction</li> <li>• 5.5m eaves</li> <li>• In residential area</li> </ul>   | C-D | B     |
| 2       | Commerce Way, Lancing Business Park, BN15 8TA                         | <ul style="list-style-type: none"> <li>• Buildings of ageing construction</li> <li>• Limited parking and loading</li> <li>• Low eaves height</li> </ul>  | D-F | C/D   |
| 3       | Peter Road, Lancing Business Park, BN15 8TH                           | <ul style="list-style-type: none"> <li>• Buildings of ageing construction</li> <li>• Limited parking and loading</li> <li>• Low eaves height</li> </ul>  | C-G | C     |
| 4       | Chartwell Road, Lancing Business Park, BN15 8AD, BN15 8SD, BN15 8TU   | <ul style="list-style-type: none"> <li>• Mixture of modern and traditional construction</li> <li>• Most recent development circa 2005</li> <li>• Significant range of quality of accommodation</li> </ul>                  | C-G | B/C/D |
| 5       | Winston Business Centre, Lancing Business Park                        | <ul style="list-style-type: none"> <li>• Modern development</li> <li>• Constrained access</li> <li>• Heavy industrial surroundings</li> </ul>  | D-G | C/D   |
| 6       | Marlborough Road, Lancing Business Park, BN15 8AF                     | <ul style="list-style-type: none"> <li>• Generally more modern construction in context of business park</li> <li>• Eaves height circa 5.5m</li> </ul>  | B-G | B/C   |
| 7       | Dolphin Road, Shoreham By Sea, BN43 6NZ, BN43 6QB, BN43 6PB, BN43 6AN | <ul style="list-style-type: none"> <li>• Combination older more industrial accommodation.</li> <li>• Recent refurbishment and new build development undertaken in pockets.</li> <li>• Single access in and out.</li> </ul> | C-G | B/C/D |
| 8       | Brighton City Airport, Cecil Pashley Way, BN43 5FF                    | <ul style="list-style-type: none"> <li>• Generally modern accommodation</li> <li>• Held long leasehold with ground rent provisions</li> </ul>  | B-E | B     |
| 9       | Brighton Road(North), BN43 6RJ  | <ul style="list-style-type: none"> <li>• Modern style accommodation</li> <li>• Roadside prominence</li> <li>• Adequate loading areas</li> </ul>  | D   | B     |

|    |  |  |     |     |
|----|--|--|-----|-----|
| 10 | Brighton Road(South), BN43 6RN         | <ul style="list-style-type: none"> <li>• Heavy industrial/manufacturing</li> <li>• Unsuitable to location in current times</li> <li>• Plans for regeneration</li> </ul>                                | E   | C/D |
| 11 | Harbour Way, Shoreham By Sea, BN43 5HZ | <ul style="list-style-type: none"> <li>• Modern style accommodation</li> <li>• Located in residential area</li> </ul>  | D-E | B/C |
| 12 | Brighton City Logistics Park, BN43 5FF | <ul style="list-style-type: none"> <li>• Currently under construction</li> <li>• Excellently located</li> <li>• Suitable for modern occupier requirements</li> <li>• Completion due Q4 2022</li> </ul> |     | A   |
| 13 | Ricardos, BN43 5FG                     | <ul style="list-style-type: none"> <li>• Single occupied HQ style premises</li> <li>• Arranged over numerous buildings</li> </ul>  | B   | A-C |
| 14 | Shoreham Harbour, BN41 1WF             | <ul style="list-style-type: none"> <li>• Heavy industrial area</li> <li>• Largely port related businesses</li> </ul>   | C-D | A-C |
| 15 | Mill Road Industrial Estate, BN41 1PD  | <ul style="list-style-type: none"> <li>• Largely motor trade use</li> <li>• Constrained access</li> <li>• Ageing buildings</li> </ul>  | C-E | C/D |
| 16 | Grange Industrial Estate, BN42 4EN     | <ul style="list-style-type: none"> <li>• Modern style buildings</li> <li>• Road prominence</li> <li>• Eaves height approximately 6m</li> </ul>   | C-E | B   |
| 17 | Lady Bee Marina, BN42 4EP              | <ul style="list-style-type: none"> <li>• Good road links</li> <li>• Industrial area</li> <li>• Low eaves height</li> <li>• Constrained loading and access</li> </ul>                                   | C-D | C   |
| 18 | Sinnis House, BN41 1PL                 | <ul style="list-style-type: none"> <li>• Residential area</li> <li>• Multi-Let Building</li> <li>• Adequate loading</li> </ul>   | D   | B   |
| 19 | Chapel Road, BN41 1PF                  | <ul style="list-style-type: none"> <li>• Industrial area</li> <li>• Good road access</li> <li>• Modern construction</li> </ul>   | C-D | B   |
| 20 | Chalex Industrial Estate, BN42 4NH     | <ul style="list-style-type: none"> <li>• Accessed through residential road.</li> <li>• Tight loading provision</li> <li>• Eaves height circa 5m</li> </ul>   | D   | B/C |

## Adur Core Industrial Locations



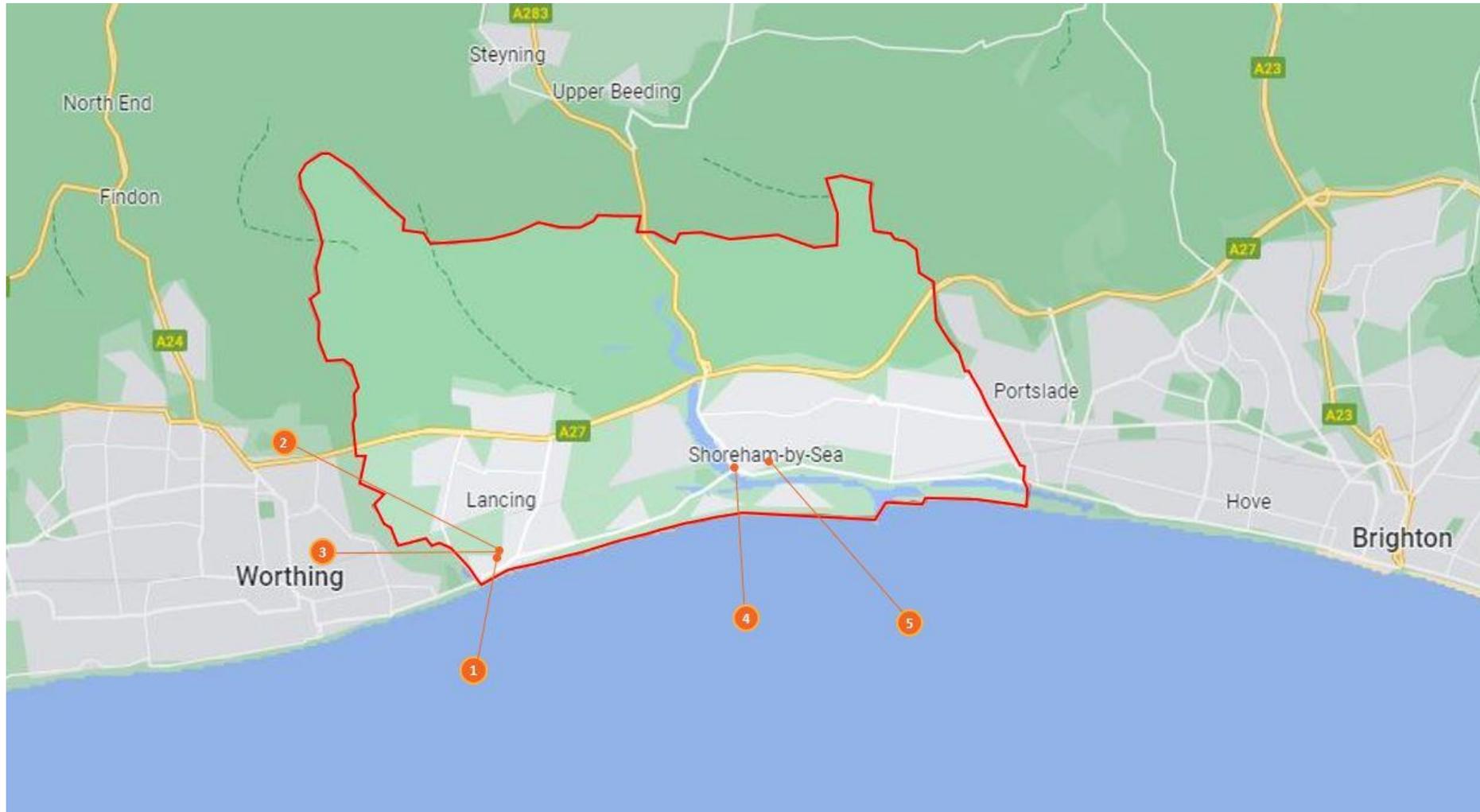
## Appendix M - Possible Pipeline of Industrial Development for Arun District

|                               | Address                                 | Floor Area proposed / Whole site size | Planning Reference         | Status                                  | Micro Factors affecting delivery  | Timing      |
|-------------------------------|---|---------------------------------------|----------------------------|---|---|-------------|
| <b>Consented</b>              |   |                                       |                            |   |   |             |
| 1                             | Brighton City Logistics Park, BN43 5FF  | 230,000 sq ft                         | AWDM/1093/17               | Due for completion Q4 2022              | N/A   | Nine months |
| 2                             | Dolphin Road, BN43 6PB                  | 20,000                                | ADC/0041/07                | Completion imminent                     | N/A   | Six months  |
| <b>Proposed in Local Plan</b> |   |                                       |                            |   |   |             |
| 3                             | Monks Farm, BN15 9HF                    | 100,000 sq ft                         | Part of housing masterplan | Site currently in process of being sold | <ul style="list-style-type: none"> <li>• Planning</li> <li>• Road infrastructure</li> <li>• Flood zone</li> </ul>   | 3-6 years   |
| 4                             | Shoreham Harbour Regeneration, BN43 6RN | 160,000 sq ft                         | N/A                        | Outlined in local plan                  | <ul style="list-style-type: none"> <li>• Fragmented ownership</li> <li>• Will be difficult to relocate occupiers</li> <li>• Congested traffic area</li> </ul> | 5 years+    |
| 5                             | Shoreham Cement Works                   | 44 Hectare site                       | N/A                        | Outlined in SNPA local plan             | <ul style="list-style-type: none"> <li>• Contamination</li> <li>• Historic significance</li> <li>• Nesting birds</li> </ul>                                   | 5+ Years    |

## Appendix N - Adur Core Office Locations

| Map No. | Address                              | Description/Assessment   | EPC | Grade |
|---------|--------------------------------------|--|-----|-------|
| 1       | Brooklands Business Centre, BN15 8AF | <ul style="list-style-type: none"> <li>• Multi-let business centre</li> <li>• Purpose built</li> </ul>                                 | D   | B/C   |
| 2       | Parklands Business Centre, Bn15 8UE  | <ul style="list-style-type: none"> <li>• Multi-let business centre</li> <li>• Purpose built</li> <li>• Ageing accommodation</li> </ul> | E-G | D     |
| 3       | The Quadrant, BN15 8UW               | <ul style="list-style-type: none"> <li>• Purpose built</li> <li>• Multi-let</li> <li>• Well-presented accommodation</li> </ul>         | C-D | B     |
| 4       | Basepoint, BN43 5EG                  | <ul style="list-style-type: none"> <li>• Purpose built</li> <li>• Central Shoreham Operational multi-let business centre</li> </ul>    | B   | B     |
| 5       | Focus House, BN43 6PA                | <ul style="list-style-type: none"> <li>• New development</li> <li>• Purpose built for current occupant</li> </ul>                      | B   | A     |
| 6       | Riverside Business Centre, BN43 6RE  | <ul style="list-style-type: none"> <li>• Hybrid office/industrial units</li> <li>• Waterfront location</li> <li>•</li> </ul>           | C-D | C     |

## Adur District Core Office Areas



## Appendix O – Pipeline of Possible Office Development for Adur District

|                               | Location                             | Area proposed | Planning Reference | Status                  | Obstacles to Delivery   | Timeline for delivery |
|-------------------------------|--------------------------------------|---------------|--------------------|-------------------------|---|-----------------------|
| <b>Consented</b>              |                                      |               |                    |                         |   |                       |
| 1                             | Civic Centre redevelopment, BN43 6PR | 10,000 sq ft  | AWDM/1450/21       | Under construction      | Likely to be retail and leisure driven demand<br>Limited parking for offices  | 0+                    |
| <b>Outlined in Local Plan</b> |                                      |               |                    |                         |   |                       |
| 2                             | New Monks Farm, BN15 9HF             | 100,000 sq ft |                    | Site currently for sale | Scheme likely to be retail and warehouse led<br>Not ideal office location for modern requirements                               | 0-5 years             |
| 3                             | Shoreham Harbour, BN43 6RN           | 160,000 sq ft | N/A                | Outlined in local plan  | Involves relocating numerous occupiers<br>Unlikely to be depth of demand for offices<br>Likely to be industrial /warehouse led. | 6+ Years              |

## Appendix P - Guide to changes in Use Classes Order

| Use   | Use Class up to September 2020 | Use Class September 2020 Onward |
|---|--------------------------------|---------------------------------|
| Shop not more than 280sqm mostly selling essential goods, including food and at least 1km from another similar shop | A1                             | F.2                             |
| Shop  | A1                             | E                               |
| Financial and professional Services   | A2                             | E                               |
| Café or restaurant  | A3                             | E                               |
| Pub or Drinking Establishment   | A4                             | Sui Generis                     |
| Take Away   | A5                             | Sui Generis                     |
| Office not in Class A2  | B1(a)                          | E                               |
| R&D   | B1(b)                          | E                               |
| Industrial process that is not detrimental to immediate local amenity   | B1 (c )                        | E                               |
| General Industrial  | B2                             | B2                              |
| Storage and Distribution  | B8                             | B8                              |

| Use   | Use Class up to September 2020 | Use Class September 2020 Onward |
|---|--------------------------------|---------------------------------|
| Hotels and Guest Houses   | C1                             | C1                              |
| Residential Institutions  | C2                             | C2                              |
| Secure Residential Institutions   | C2a                            | C2a                             |
| Dwelling Houses   | C3                             | C3                              |
| Use of a dwellinghouse by 3-6 residents as a 'house in multiple occupation' | C4                             | C4                              |
| Clinics, day nurseries and health care                                      | D1                             | E                               |
| Schools & Non-Residential institutions                                      | D1                             | F.1                             |
| Cinemas, concert halls and bingo halls                                      | D2                             | Sui Generis                     |
| Gyms  | D2                             | E                               |
| Hall or local community meeting place                                       | D2                             | F.2                             |
| Indoor/outdoor swimming baths, Ice Skating rinks                            | D2                             | F.2                             |

Class E (Commercial, business and service uses)

Class F.1 (Learning and non-residential institutions)

Class F.2 (Local community uses)

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Unit 4 Peveril Court  
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Crawley, West Sussex  
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T: +44 (0)129 361 2600

#### Brighton

Projects  
8-9 Ship Street  
Brighton  
East Sussex  
BN1 1AD  
T: +44 (0)129 361 2600

### London Region

#### London

2 Noel Street  
London  
W1 8GB  
T: +44 (0)203 589 0050

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Edmund House  
12-22 Newhall Street  
Birmingham  
B3 3EF  
T: +44 (0)121 654 1065

#### Leeds

Princes Exchange  
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Leeds  
LS1 4HY  
T: +44 (0)113 322 6246

### South Coast Region

#### Southampton

Savannah House  
3 Ocean Way  
Ocean Village  
Southampton  
SO14 3TJ  
T: +44 (0)238 082 0900

#### Portsmouth

Lakeside North Harbour  
Western Road  
Portsmouth  
PO6 3EN  
T: +44 (0)239 220 3200

#### Bournemouth

170 Magna Road  
Bournemouth  
Wimborne  
BH21 3AP  
T: +44 (0)120 255 8262

### Surrey Region

#### Woking

One Crown Square  
Woking  
Surrey  
GU21 6HR  
T: +44 (0)148 344 6800

### Thames Valley Region

#### Reading

Apex Plaza  
Forbury Road  
Reading  
RG1 1AX  
T: +44 (0)118 909 7400

#### Heathrow

450 Bath Road  
West Drayton  
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