Bracknell Forest Council

Authority Monitoring Report 2021-22: Economy

Bracknell Forest Borough Local Planning Framework
www.bracknell-forest.gov.uk/planningpolicy
January 2023

Region

Appendices

1 Introduction

1.1 This report deals with economic issues and covers the period 1 April 2021 to 31 March 2022. It provides commentary up to December 2022 on the implementation of economic policies in the adopted plans that form part of the Development Plan.

1.2 This document is divided into two parts. Section 2 'Context' provides background information, including national legislation and local policies. Section 3 'Monitoring against the Development Plan' looks at the implementation of the development plan policies (relating to the economy).

1.3 This AMR should be read in conjunction with other topic based AMRs such as:

- Progress against the Local Development Scheme
- Duty to Co-operate
- Housing

2 Context

2.1 National Legislation and Policy

Localism Act

2.1 The Act came into effect in November 2011 and established the duty to co-operate in relation to the planning of sustainable development. It requires a Local Planning Authority (LPA) to engage constructively, actively and on an on-going basis in relation to the duty on strategic matters with other LPAs and designated bodies.

National Planning Policy Framework (NPPF)

2.2 The revised NPPF was published in July 2021, superseding the previous versions. The document sets out the importance of the planning system in contributing to the achievement of sustainable development. The economic objective refers to ensuring that sufficient land of the right type is available in the right place and at the right time to support economic growth and takes account of the need for infrastructure provision (chapter 2). This theme is developed further in chapter 6 that covers 'building a strong, competitive economy' and chapter 7 'ensuring the vitality of town centres'.

2.3 Specifically, these sections include the following requirements:

- Para. 82 requires LPAs to produce planning policies that set out a clear economic vision and strategy, having regard to Local Industrial Strategies and other local relevant policies. The need to set criteria or identify strategic sites to meet anticipated business needs over the plan period is also mentioned together with addressing potential barriers to investment and being flexible enough to respond to changes in economic circumstances.
- Para. 83 states that the locational requirements of different economic sectors should be addressed, including making provisions for clusters of knowledge based industries, and offering a variety of scales of accessible distribution operations.
- In relation to the rural economy, para. 84 states that local plans and decisions should support the growth and expansion of all types of business and enterprise in rural areas, support sustainable rural tourism and leisure developments, and, encourage the development of local services.
- In relation to retail development, para. 86 states that LPAs should define a network and hierarchy of centres, the extent of town centres and primary shopping areas, allocate suitable sites to meet the scale and type of retail, leisure, entertainment, office, arts, tourism and cultural development likely to be needed in town centres over at least the next ten years, retain and enhance markets and recognise the importance of the role that residential developments can play in ensuring the vitality of town centres.
- Para. 87 makes it clear that the sequential test should be applied to proposals for main town centre uses that are not in an existing centre and not in accordance with an up to date local plan. It states that main town centre uses should be located in town centres. If such sites are not available, edge of centre locations should be considered, then out of centre sites.

2.4 Chapter 11 ('Making effective use of land') also states that LPAs should take a positive approach to applications for alternative uses of land currently developed but not allocated for a specific use, particularly, in respect of retail and employment land for residential use in areas of high housing demand.

2.5 Planning Practice Guidance (PPG) provides further detail on ensuring the vitality of town centres (2019) and economic land availability assessments (2019). This online guidance is updated as required. [(1)]

Changes to Use Class Order

2.6 In September 2020, the Government substantially amended the Town and Country Planning (Use Classes) Order 1987 (UCO), creating several new use classes, moving some previous retail uses to Sui Generis use and removing some use classes completely. Some uses are no longer able to change use without permission (e.g. pubs, takeaways). However, many former retail uses and business (formerly A1, A2, A3 and B1) now fall into 'Class E'. Generally, the use class in effect when the application was submitted is used.

2.7 Since many permissions were submitted under the previous Use Class Order, prior to the change on 1 September 2020, the data in this AMR often shows both the old and new use classes e.g. B1a/ Egi.

Changes to permitted development rights

2.8 In April 2016 the Government made Prior Approval Consents (PACs) for the change of use of offices to residential a permanent change - see Class O of Schedule 2 of The Town and Country Planning (General Permitted Development) (England) Order 2015 as amended by a Further Order that came into force on 6th April 2016. C3 uses consented prior to the permanent implementation of the amendment lapsed on 30th May 2016 unless the use had begun by this time. For PACs granted after the amendments came into force, the development must be completed within three years of the approval date. PACs are considered against a list of set criteria such as flood risk.

2.9 Following changes to the UCO in September 2020, offices and light industry (Class E) are in a different use class to general industry, storage and distribution (B2 and B8). Class E brings together the former A1 (shops), A2 (financial and professional services), A3 (restaurants and cafes) and B1 (business) as well as parts of Classes D1 (non-residential institutions) and D2 (assembly and leisure). Changes of use between the different types of uses listed in Class E do not constitute development. Therefore, they do not require planning permission. From 1 August 2021 new permitted development rights (under Class MA) allow for the change of use from Class E to residential subject to limitation and conditions, including cumulative floorspace not exceeding 1,500m^2 and the requirement to submit a prior approval application. There was no size limit under the previous permitted development rights under Class O. Transitional provisions retain the permitted development rights based on the pre-1st September 2020 use classes until 31 July 2021.

2.10 There are also other permitted development rights for changes of use that are subject to prior approval procedure, such as:

- Betting office or pay day loan shop (SG) to a mixed use for any purpose within Class E and up to 2 flats (Class G)

1 Accessible from https://www.gov.uk/government/collections/planning-practice-guidance

- Launderette; betting office, pay day loan shop, hot food takeaway (SG) or one of these uses in a mixed use with a dwelling house to dwelling house (C3) (Class M)

- Amusements centre or casinos (SG) to dwelling house (C3) (Class N)

2.11 Such permitted development changes are likely to continue to have implications for the stock of retail and business premises in the Borough in future monitoring years. The degree to which these can be monitored will vary.

2.12 Article 4 of the General Permitted Development Order enables the Secretary of State or the local planning authority to withdraw specified permitted development rights across a defined area. In February 2018, an Article 4 Direction came into force covering the Southern, Western and Eastern designated Employment Areas which restricted permitted development rights in respect of the change of use from offices to residential. Planning permission was therefore required to enable such a change of use to occur. However, the Government announced (in April 2021) that any existing Article 4 directions that were in place that prevented the change of use from offices to residential, would only continue to have effect until 31 July 2022. These Article 4 Directions have now therefore ceased to have affect. In a decision taken on 8 August 2022, the Council decided not to pursue renewing its Article 4 Directions to remove permitted development rights for the change of use of offices to residential.

Budget 2022

2.13 The Chancellor presented the Autumn 2022 Budget on 17 November 2022. The report sets out the Government's focus on the significant economic challenges for the UK and global economy, with a backdrop of high inflation and rising interest rates and potential for a recession. The Government's priorities are stability, growth and public services, which are based around fiscal sustainability. To achieve this the Government has reversed almost all measures set out in the previous Growth Plan 2022 (previously known as the 'mini-budget'). The Autumn budget sets several key themes:

- sustainable public finances
- taking responsible decisions
- growing the economy

2.14 The Chancellor set out that he considered the Government's plan, whilst making difficult decisions, will lead to a shallower downturn, lower energy bills, higher long-term growth and a stronger NHS and education system.

Industrial Strategy: the Grand Challenges 2017

2.15 In the Industrial Strategy, the Government sets out four ‘Grand Challenges’ to put the UK at the forefront of industries of the future. [2] These are:

- Artificial Intelligence and data
- ageing society
- clean growth
- future of mobility

2 Available to download https://www.gov.uk/government/publications/industrial-strategy-the-grand-challenges/industrial-strategy-the-grand-challenges

UK Innovation Strategy: leading the future by creating it (July 2021)

2.16 The Strategy begins by defining what the Government considers to be innovation i.e. *'the creation and application of new knowledge to improve the world'.* Innovation is important as it is viewed as the lifeblood of businesses. It allows firms to compete in the market, creating exciting new products and services for their customers and bringing down their costs by improving their efficiency. Innovative firms are more likely to win a greater share of existing markets and create new markets'. The process may involve a number of businesses and educational institutions and others that need to interact through the exchange of skills, knowledge and ideas.

2.17 The Government's wish to make the UK a global hub for innovation by 2035 is outlined. A series of actions are set out to help achieve this:

- Pillar 1: Unleashing business – we will fuel businesses who want to innovate.
- Pillar 2: People - we will make the UK the most exciting place for innovation talent
- Pillar 3: Institutions and places - we will ensure our research, development and innovation institutions serve the needs of businesses and places across the UK.
- Pillar 4: Missions and technologies – we will stimulate innovation to tackle major challenges faced by the UK and the world and drive capability in key technologies.

Levelling-up and Regeneration Bill

2.18 The Bill intends to make provision for the setting of levelling-up missions and reporting on progress in delivering them. This will cover local democracy, town and country planning, Community Infrastructure Levy, the imposition of Infrastructure Levy, environmental outcome reports for certain consents and plans, regeneration, compulsory purchase of land, information and records relating to land, the environment or heritage, among other matters. By December 2022, it was working its way through the House of Lords and at the first reading stage. The next stage will be the second reading.

2.2 Development Plan and Community Infrastructure Levy

2.19 The Development Plan for the Borough contains a mixture of planning policy documents produced under the present and former planning systems. The determination of planning applications must be made in accordance with the Development Plan, unless material considerations indicate otherwise. The Development Plan for Bracknell Forest comprises:

'Saved' Policies of the Bracknell Forest Borough Local Plan (BFBLP)

2.20 The BFBLP was adopted in 2002. Certain policies of the BFBLP were 'saved' by the Secretary of State beyond September 2007. Since the Core Strategy and Site Allocations Local Plan documents have been adopted (see below), some of these policies have been superseded, but a number remain in force until such time as further Local Plans are produced.

Core Strategy (CS)

2.21 The CS was adopted in 2008. This is a high level document containing the Council's long-term aspirations for the Borough and policies to guide and manage development in Bracknell Forest until 2026. In relation to employment and retail development, the CS directs most employment development to the identified employment areas. The document also identifies a network of retail centres including Bracknell Town Centre, larger centres (at Sandhurst and Crowthorne) and smaller centres (village/neighbourhood centres) across the Borough.

Site Allocations Local Plan (SALP)

2.22 The SALP was adopted in July 2013. It helps implement the adopted CS, mainly in terms of identifying sites for residential development. However, some policies affect employment and retail provision in the Borough, for example, through the inclusion of these uses within proposals relating to strategic sites, changes to the extent of identified employment areas and amendments of the boundaries of some retail areas. Some examples include changes to the defined boundary of Bracknell Town Centre to exclude the Peel Centre which now has a separate designation as an 'edge of centre' location. Some employment areas and local neighbourhood centres have also been de-allocated.

Community Infrastructure Levy (CIL)

2.23 The Council adopted CIL in April 2015 and commenced charging on 6th April 2015. CIL charges apply to residential developments and to convenience based supermarkets and superstores and retail warehousing (net retailing space over 280m^2 gross internal floorspace).

Neighbourhood Plans

2.24 Bracknell Forest is fully parished, and comprises six parish and town councils (Binfield Parish, Bracknell Town, Crowthorne Parish, Sandhurst Town, Warfield Parish and Winkfield Parish).

2.25 All parish/town councils have now had 'neighbourhood areas' designated for the purposes of neighbourhood planning, and of these four have 'made' plans that form part of the Development Plan:

- Binfield Neighbourhood Plan was made in April 2016 . It has a suite of policies covering transport and connectivity, community facilities, the environment, communications and built form. Policies CF1 and CF2 set out support for new healthcare facilities and a community shop at Blue Mountain.
- Crowthorne Neighbourhood Plan was made in June 2021. The suite of policies has a focus on design, but also cover retail and employment. Policy CR9 seeks to enhance the vitality and viability of Crowthorne High Street by supporting active ground floor uses and resisting the loss of shops. Policy CR10 supports active frontages and resists the loss of shops at Station Parade, Dukes Ride. Policy CR11 defines the Wellington Business Park and the Broadmoor employment area as employment areas.
- Bracknell Town Neighbourhood Plan was made in October 2021 and includes policies on the economy and employment with the objective of improving economic vibrancy and strengthening the employment base. Policy EC1 supports small businesses in the Southern, Western and Eastern Employment Areas and Bracknell Town Centre, and Policy EC2 supports micro businesses. Policy EC3 supports proposals which maintain and enhance neighbourhood shopping centres and Policy EC5 supports mixed use developments in Bracknell Town Centre.
- Warfield Neighbourhood Plan was made in November 2022 . It includes a housing allocation on land at Hayley Green and a suite of policies including a policy on 'Supporting Community Assets' which covers proposals to establish a new doctors' surgery or new dentist facility.

2.3 Emerging Documents

2.26 Some documents are currently being produced, and once adopted, will need to be monitored through future AMRs:

Bracknell Forest Local Plan (BFLP)

2.27 The BFLP was submitted to the Secretary of State for Levelling Up, Housing and Communities for independent examination on 20 December 2021. Stage 1 and Stage 2 hearing sessions were held in May/June and October 2022 respectively. At the time of preparing this document, the Council is waiting for the Inspectors' post hearings letter which should outline their initial findings on all of the matters discussed at both the Stage 1 and 2 Hearing Sessions and set out the next steps in the examination process.

2.28 In summary, the Plan includes a vision, objectives, and strategy for the level and distribution of development in the Borough up to 2037. It covers housing, economic and retail development together with new infrastructure. Specific policies relating to economic development cover:

- allocations for future economic development
- town, district and local centres
- the control of economic proposals in and outside designated employment areas and centres

2.29 The Council published an updated Local Development Scheme (LDS) covering the period 2021-2024 in October 2021[(3)]. This includes a timetable for the BFLP although this is now dependent on the Planning Inspectorate. The BFLP evidence base can be viewed online.[(4)].

Neighbourhood Plans

2.30 Whilst four Neighbourhood Plans have been made and form part of the development plan, there are a further two that are emerging:

- Winkfield Parish: the Neighbourhood Area was designated by the Council on 24 December 2015. This Plan has been submitted and was subject to a six-week consultation during Oct-Dec 2022 (in accordance with Regulation 16). The examination is due to commence in January 2023.
- Sandhurst Town: the Neighbourhood Area was designated by the Council on 20 February 2016

2.31 Progress on all Neighbourhood Plans can be viewed on the Council's web site[(5)].

2.4 Other Monitoring Information/ Background Evidence

2.32 The Council has produced a range of information which is relevant to the economy (some of which is referred to in this AMR or contained in the AMR appendices). Evidence based studies referred to below can be viewed on the Council website [(6)]. There are also a number of strategies produced by other bodies which are relevant. These are detailed below.

3 A copy of the LDS is available to view: https://www.bracknell-forest.gov.uk/planning-and-building-control/planning/planning-policy/emerging-bracknell-forest-local-plan/background

4 https://www.bracknell-forest.gov.uk/planning-and-building-control/planning/planning-policy/emerging-bracknell-forest-local-plan/evidence-base

5 Neighbourhood Planning website: https://www.bracknell-forest.gov.uk/planning-and-building-control/planning/planning-policy/neighbourhood-planning/about-neighbourhood-planning

6 https://www.bracknell-forest.gov.uk/planning-and-building-control/planning/planning-policy/emerging-bracknell-forest-local-plan/evidence-base

Planning Commitments for Employment Uses

2.33 The employment commitments document is published on an annual basis. It provides an overview of new permissions, sites under construction and completions during each monitoring year. It relates to retail uses, 'BIDS' (business, industrial, distribution and storage) uses and other employment related development. The latest report covers the period 1 April 2021 to 31 March 2022.

Bracknell Functional Economic Area Study, 2016

2.34 In 2015, the Council commissioned consultants NLP to identify the relevant functional economic area within which Bracknell Forest is located. Subsequent to this, a wider Berkshire Functional Economic Market Area (FEMA) Study was commissioned by the Local Enterprise Partnership and all six Berkshire Authorities. This identified Bracknell Forest as falling within a Central Berkshire FEMA with Reading Borough, Wokingham Borough and the Royal Borough of Windsor and Maidenhead.

Employment Land Needs Study (ELNS), 2020

2.35 The ELNS was undertaken because there had been significant changes since the original Economic Development Needs Assessment (EDNA) was undertaken (with a base date of 2016), not least the population and labour supply assumptions due to the Standard Method needing to be used to calculate the Local Housing Need (LHN). Additionally, there were concerns about the method and reality of the outputs of the EDNA. The ELNS therefore supersedes the EDNA.

2.36 The ELNS tested a number of the key assumptions with local evidence and updated the need where necessary. The ELNS took a different approach to the EDNA, calculating gross demand from known commitments in the planning pipeline. This provides a good indication of gains and losses in floorspace over the short term (Plan years 1-5) and ties in with the plan review cycle. It provides need figures for both office floorspace, and industrial & distribution floorspace in the Borough to 2036.

The Office Vacancy/Availability Update & Viability of Office Intensification Study, 2021

2.37 The Office Vacancy/Availability Update & Viability of Office Intensification Study was commissioned to provide updated evidence of office stock changes in the Borough and to establish if intensification of sites for office use was a realistic option in the longer term. The study highlights the fact that there was a reduction in overall office stock between 2018 and September 2021 in Bracknell Forest. This is attributed to vacant floorspace that would normally have been returned to the market being lost to residential use. Evidence of such a trend occurring is apparent in the data collected through the Council's annual monitoring exercises. 'Availability' and 'vacancy' rates have been falling despite the market weakening due to the global pandemic.

Retail and Commercial Leisure Assessment, 2016

2.38 The Western Berkshire Retail and Commercial Leisure Assessment (2016) was jointly commissioned by Bracknell Forest, Reading Borough, West Berkshire and Wokingham Borough Councils to identify the changes in retail trends, visitation patterns, and the future retail and leisure needs for the area. This report replaces the previous 2008 Retail Study. A specific shopping patterns and needs assessment for Bracknell Forest included both the Town Centre and local shopping areas.

Bracknell Town Centre Retail Needs Technical Review, 2020

2.39 The opening of the Lexicon in Bracknell Town Centre has been recognised as a successful regeneration project, with the Lexicon opening in September 2017. Bracknell Town Centre rose in the retail rankings (Trevor Wood Associates) to 29th in 2019 (from 255th before the redevelopment). Due to apparent changes, it was decided to undertake a technical review of the assumptions and resulting requirements set out in the 2016 Retail and Commercial Leisure Assessment, to determine whether they were still appropriate. The Review considered several matters including the impact of the Covid-19 pandemic, special forms of trading (i.e. online shopping) and the opening of the Lexicon. The Review undertook a series of sensitivity tests to estimate the impact of revised assumptions on the need for additional comparison and convenience goods floorspace within Bracknell Forest.

Retail Advice Note (RAN), May 2022

2.40 The Council commissioned the RAN to provide guidance on the current 'state of play' in respect of retail and town centre planning in light of a number of changes which have affected the sector since the publication of the Council's evidence base in respect of retail and commercial leisure needs, including a number of ongoing uncertainties in light of the Covid-19 pandemic. It included a sector update and information on market trends, looking at 'spend per head', 'online retail/ special forms of trading' and 'turnover efficiency growth'. It concluded that in addition to the changes in shopping patterns arising as a consequence of the pandemic, there are wider economic factors such as the current inflationary pressures which may bring further adjustments to consumer spending. The RAN also looked at an updated town centre vacancy assessment.

Position Statement - Monitoring of Economic Floorspace, 2022

2.41 As part of the examination into the BFLP, the Council produced a note setting out the details of employment floorspace monitoring since the base date of the BFLP (1st April 2020) and its implications. The position statement shows that whilst there appears to be an over allocation of sites for offices in BFLP Policy LP11 compared with the original need for the plan period, it is evident that the level of need is increasing due to recent planning permissions having been granted which involve losses of office floorspace. The situation for industrial need shows the level of need is decreasing due to recent planning permissions being granted that involve gains in industrial floorspace. These trends are mirrored in the latest data available on stock of floorspace in the Borough from the VOA (Valuation Office Agency) which shows losses of office floorspace during 2019/20, 2020/21 and 2021/22 but a reversal in losses in industrial/warehouse floorspace during 2020/21 and 2021/22.

2.5 Links with Other Strategies

The Council Plan 2019 - 2023

2.42 The Council Plan[7] sets out the priorities for the Council over the specified four year period. It is based on various themes, one being 'Economic Resilience'. This includes a commitment from the Council to work hard at helping the Borough to continue to thrive and recognises that there will be many challenges ahead for all sectors of the economy. Key objectives are identified. Whilst one of these is adopting a local plan, others involve securing

7 Available to download at https://www.bracknell-forest.gov.uk/council-and-democracy/strategies-plans-and-policies/service-planning-and-performance/council-plan

the delivery of the next phase in the regeneration of Bracknell Town Centre, retaining existing businesses and helping to attract new companies to the Borough, together with actively engaging with employers and supporting local businesses to drive local growth.

Climate Change Strategy 2020 - 2024 (BFC)

2.43 The Council's Climate Change Strategy [8] is a strategic framework underpinned by annual action plans that are refreshed annually. It stems from Climate Change Act (2008) which sets legally binding targets for reducing greenhouse gases. The Government's 'Ten Point Plan for a Green Industrial Revolution' includes building back better, supporting green jobs, and accelerating the path to net zero.

2.44 The objective for the BFC Climate Change Strategy is to achieve its strategic framework through four strategic principles, and the action plan has two main strands:

- reduce carbon emissions that are under the Council's control, which includes standards set out in the emerging BFLP, travel plans, information for workplaces and work to support the Bracknell Business Improvement District
- influence and lead community action against climate change, which includes working with local employers to increase employee charging points.

Local Enterprise Partnership (LEP)

2.45 LEPs are partnerships between local authorities and businesses that were created to replace the Regional Development Agencies. The Thames Valley Berkshire LEP was created in 2010 and brings together those representing education, employment and skills, small and medium sized enterprises, local authorities and the community sector. The LEP seeks to deliver economic prosperity in the Thames Valley in the next 20-30 years including deciding what the priorities should be for investment in jobs and infrastructure.

2.46 The Thames Valley Berkshire LEP has produced a strategy for the area (Delivering National Growth Locally - Strategic Economic Plan 2015/16 - 2020/21: March 2014[9]). The overarching priority is to secure better access to talented people and bright ideas. The plan proposes six main objectives to achieve this, including: ensuring that economic potential is not constrained by labour supply issues; effectively commercialising and growing knowledge within the LEP area; and making towns in Thames Valley Berkshire genuine hubs in the ideas economy.

2.47 The document estimates that implementation of the Strategic Economic Plan will deliver an uplift of around £700m in the overall wages and profits generated through Thames Valley Berkshire’s businesses; and by 2020, the Strategy estimates Gross Value Added (GVA) will be some £32.4bn (£700m higher than the baseline projection for 2020 of £31.7bn). (All based on constant, 2009, prices).

2.48 The LEP has also produced an Implementation Plan which explains how the LEP intend to achieve the objectives and realise the vision set out in the current Strategic Economic Plan. By its nature, the Implementation Plan is a live document and a live process. It will be used to inform Thames Valley Berkshire LEPs work and will be refreshed regularly. The most up to date version can be located on the LEP website www.thamesvalleyberkshire.co.uk/documents.

8 Climate change strategy | Bracknell Forest Council (bracknell-forest.gov.uk)
9 Available to download from www.thamesvalleyberkshire.co.uk/documents

2.49 Following the Government's National Industrial Strategy, the LEP has produced the Local Industrial Strategy for Berkshire (BLIS) which was published in October 2020. See www.thamesvalleyberkshire.co.uk/documents.

2.50 The Delivery Plan for 2022/23 states that the LEP continues to operate through three main programmes:

- Infrastructure and place - which includes a list of projects to improve infrastructure across Berkshire
- Business Environment - which includes supporting SME growth by continuing to invest in the delivery of a number of business support activities.
- Skills and people - which includes information on the skills and education projects and programmes that the LEP has supported and future skills capital funding.

'Good Growth for Cities' Report

2.51 This report is published annually and uses a number of indicators (including skills, income, health, housing and environment) to rank cities and areas according to their economic well-being. This is based on what members of the public think matter most. The index seeks to recognise that if growth is essentially about improving the prosperity, opportunities and well-being of the general public, the focus must go beyond traditional measure of economic success, such as GDP or GVA. In 2018 the area covered by Thames Valley Berkshire Local Enterprise Partnership (TVBLEP) was identified as the third highest ranking Local Enterprise Partnership area in the UK, when considering factors such as income levels, unemployment, the ratio of house prices to earnings, commute times and skill levels.

2.52 For the 2022 report, [10] the index of performance indicators used to determine Good Growth in regions has been changed (meaning direct comparison is not possible) TVBLEP is now ranked as performing below average overall with an index of -0.03 (this is relative to the average 2017-19 baseline score for all regions in the index). For context the highest ranked region in the same period was Cornwall and the Isles of Scilly with an index of 0.55, 18 regions were ranked below average overall. Whilst TVBLEP performed 'above average' for the income indicator, five indicators concluded the region was 'average' and six indicators found the region to be 'below average' (these were work-life-balance; health; transport; housing; income distribution; and, high streets and shops). The overall rating of 'below average' is similar to how many other LEPs in the South East scored. The report suggests that whilst it is difficult to be precise about the impact the pandemic has had on the indicators, it will probably have affected the nature of public preferences. It goes on to suggest that the cities performing well against the indicators have strong local economies but are characterised by strong environmental and safety credentials too.

2.53 The overall rating of 'below average' is similar to other LEPs in the South East. Overall, the gap has narrowed between the highest and lowest ranking cities indicating a degree of levelling up. The cities performing well against the indicators have strong local economies and are also characterised by strong environmental and safety credentials. The report suggests that the results have been influenced by the impact of the pandemic in that it appears that the relative value that people attach to the indicators has changed. It is not known whether this will be a temporary or permanent shift. If enduring, it needs to be taken into account in decisions made by the public and private sector.

10 can be found here: Good growth - Government & public sector - PwC UK

3 Monitoring against the Development Plan

3.1 Overview and Summary of Economy Indicators

3.1 There are two types of indicator against which the policies in the Development Plan are monitored: contextual and output.

3.2 Contextual indicators are indirectly related to the policies: they are aimed at providing a better understanding of the wider environment (economic, environmental and demographic).

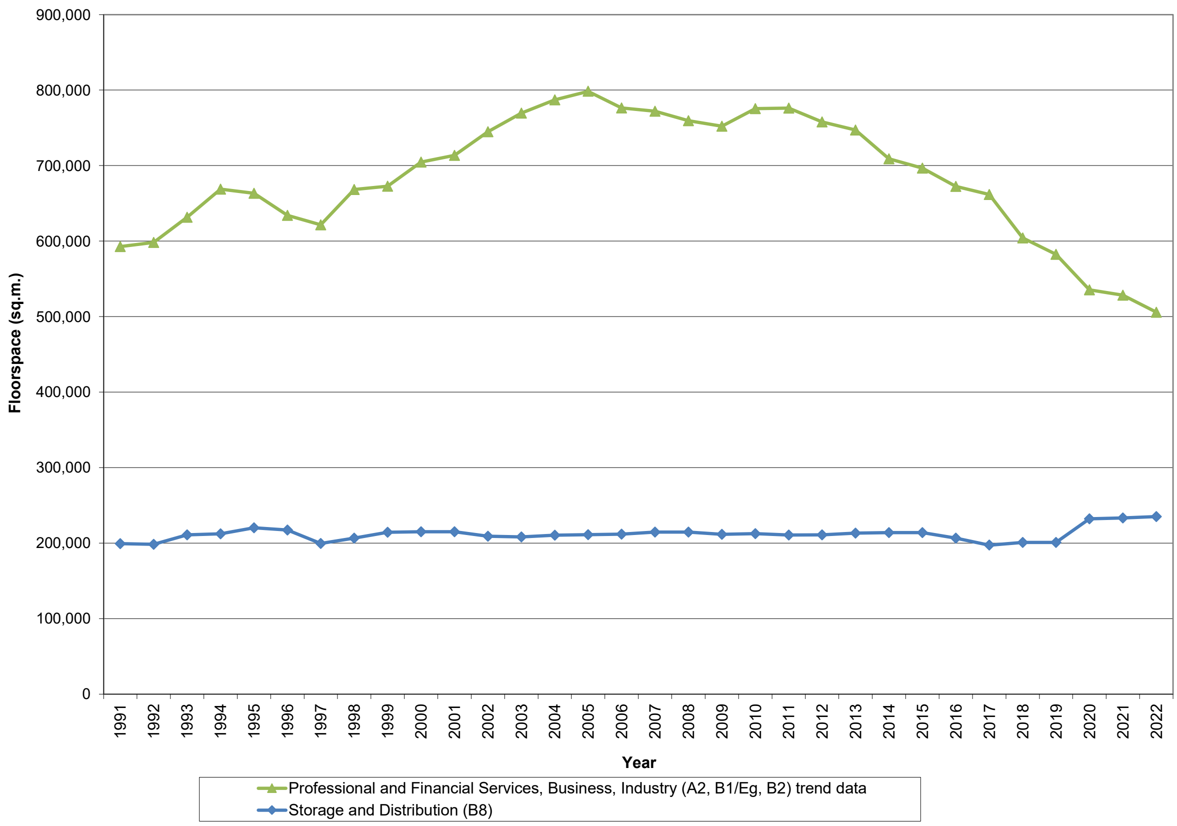
3.3 Output indicators are measures of the quantifiable, physical activities that are related to implementation of the policies. Although the Government no longer specifies which indicators should be included, they continue to be used in the preparation of this monitoring report because they are still relevant to Bracknell Forest and because it means that the data is consistent and can be compared over time. Some 'local' indicators have been added to the former government ('core') ones, which specifically relate to monitoring the Core Strategy, Site Allocations Local Plan and Bracknell Forest Borough Local Plan policies and objectives, or the local impact of government policy (e.g. amendments to permitted development rights).

3.4 For the purposes of this report, indicators that refer to 'employment' measure floorspace falling within Use Classes B1/ Eg (i, ii and iii), B2 and B8. Categories derived from the former Use Class Order have been used for consistency since the changes were made part way through the monitoring year.

3.2 Indicators

Contextual Indicators

Indicator: Employment Floorspace Stock

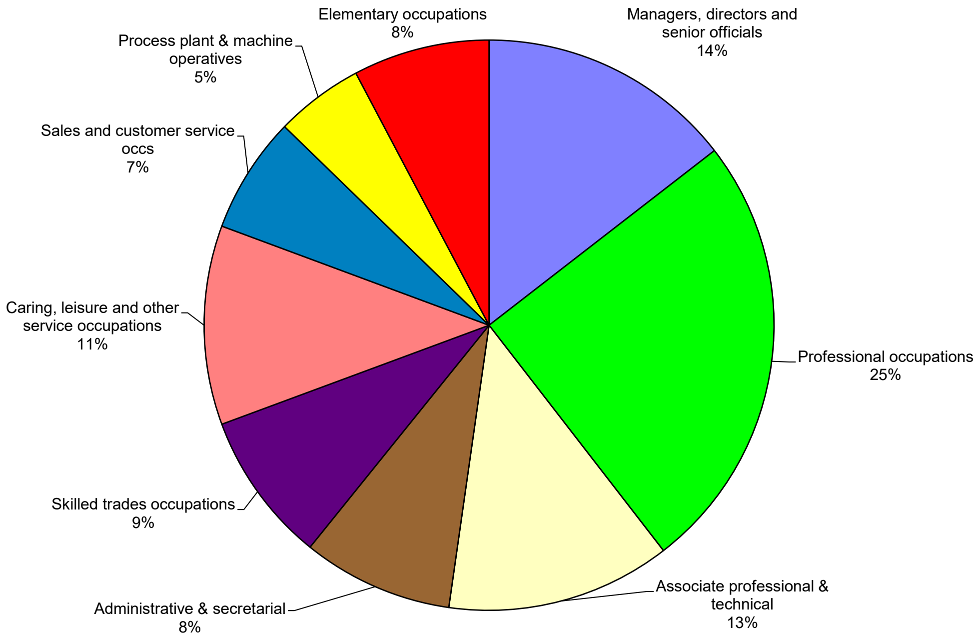


Source: *Planning Commitments for Employment Uses, BCC 1991-98, JSPU 1998-2010, BFC 2010-2022*

3.5 The total employment floorspace stock (Use Classes A2, B1/Eg and B2) for the Borough at 31st March 2022 was 505,794 m^2. This is a 3.59% decrease on last year's stock and continues the decline since 2011. The loss of employment floorspace outside Bracknell Town Centre contributed significantly to the losses measured in 2021/22, the largest of these being at the former Hewlett Packard site in the Western Employment Area.

3.6 Bracknell Forest is estimated to have a stock of 235,112 m^2 of warehouse (Use Class B8) floorspace which represents a 0.81% increase (1,904 m^2) on the previous year. This is small compared with that experienced in the 2019/20 monitoring period (15.5% or 31,294 m^2 much of which was at Segro Park in the Southern Employment Area). Trend data suggests that there is now a demand for warehouse floorspace, with the current stock being at its highest for the last 30 years.

Indicator: Distribution of Employment by occupation



Source: *ONS Annual Population Survey (Employment by Occupation) (November 2022)* *http://www.nomisweb.co.uk Labour Market Profile*

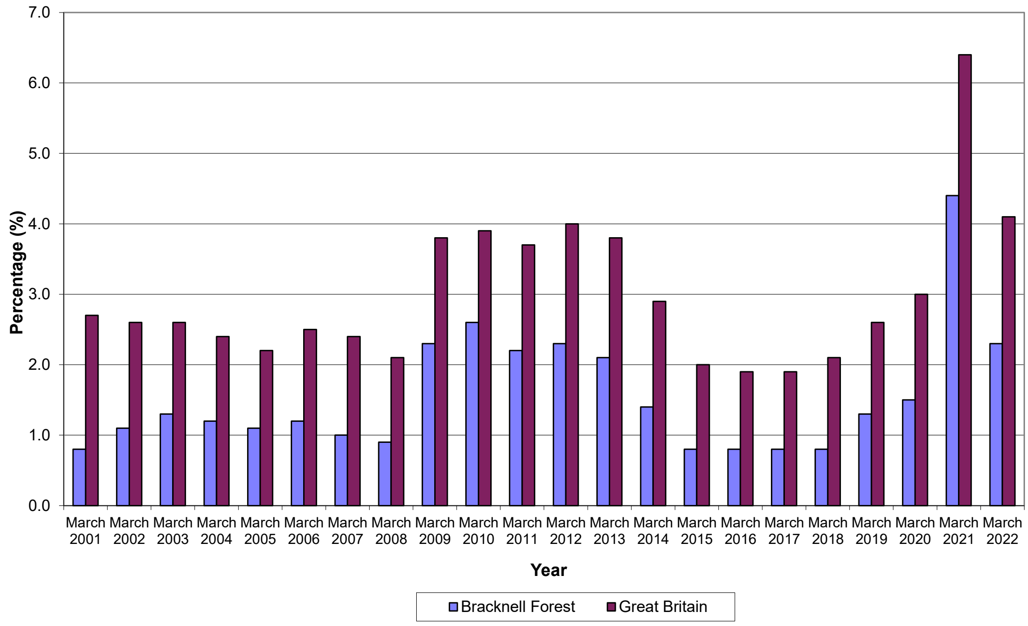
3.7 There have been no significant changes in the distribution of employment by occupation since last year or the previous report. Over the longer term, changes have reflected the national trend of an increase in employment in the service sector and a reduction of employment in the manufacturing sector.

3.8 There have been increases in 'managers, directors and senior officials' of nearly 3% since March 2021, 2% in 'caring, leisure and other service occupations' and 2% in 'elementary occupations'. These do not reflect general trends across the South East which indicate either lower growth or a decline in these sectors. There has been a decrease of over 3% in 'associate professional and technical' jobs and a 1.7% decrease in 'professional occupations' in Bracknell Forest. Again, this is not mirrored across the South East, where there has been a 2.5% increase in 'professional occupations' and a much smaller decrease of 0.6% in 'associate professional and technical jobs'. Other Berkshire authorities (with the exception of Slough) also see greater percentage share of these sectors than seen in Bracknell Forest. However, Bracknell Forest sees a higher percentage of 'managers, directors and senior officials' than the South East and many Berkshire authorities (except West Berkshire and RBWM); this sector requires *'A significant amount of knowledge and experience of the production processes and service requirements associated with the efficient functioning of organisations and businesses'*. These changes could indicate there has been some restructuring of the jobs market in Bracknell Forest, possibly due to the area being affected by the Covid-19 pandemic in a different way to the wider region, or that the Borough's sustained loss of office buildings is starting to have an impact. These buildings could have provided jobs for 'associate professional and technical' and 'professional occupations'. However the Borough is home to some Headquarters (i.e. Waitrose, Honda). Overall, since March 2021 there has been a decrease of 900 jobs in Bracknell Forest.

3.9 However, despite the decrease since March 2021 the largest of the employment sectors by occupation is still 'professional occupations', with 'managers, directors and senior officials' being the second largest sector. In contrast, the decline in the 'associate professional and technical' sector that started in March 2019, has continued. The increase in the 'caring, leisure and other service occupations' in Bracknell Forest may reflect the growth in the ageing population locally. This sector is not as significant in any other Berkshire authority (Bracknell Forest has the highest percentage), and has shown a small decrease of just over 1% in the South East during the same period.

Indicator: Unemployment benefit claimants

Unemployment benefit claimants (Job Seekers Allowance Claimants)

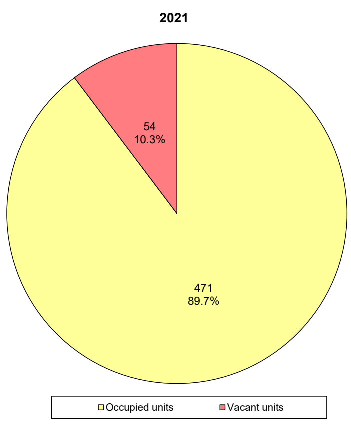


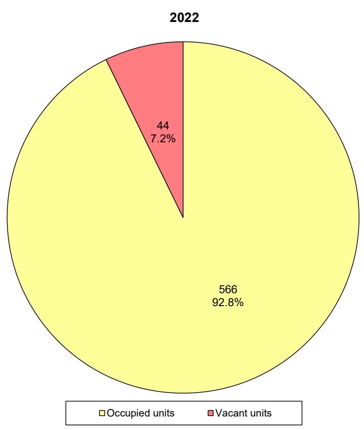
Source: *National Statistics; ONS Crown Copyright Reserved [from Nomis data published May 2021]* *http://www.nomisweb.co.uk*

3.10 The proportion of working age residents in the Borough claiming Job Seeker's Allowance (JSA) increased between 2017 and 2021. A peak was reached in 2021 which can be attributed to the Covid-19 pandemic which started in early 2020. However the rate in Bracknell Forest by March 2022 is significantly below the national average of 4.1% for JSA claimants. This reflects growth within the wider area including investment in infrastructure and the impact of the on-going regeneration of Bracknell Town Centre, for example.

Indicator: Percentage of vacant retail units across all designated retail centres in the Borough

Percentage of vacant retail units across all designated retail centres in the Borough





Source: *BFC Retail Survey, December 2022 (see Appendix 1 Retail Survey Data)*

3.11 The chart above summarises the position at December 2022. Data from the 2021 survey is provided for comparative purposes. The Council undertakes an annual survey of the defined retail centres in the Borough. These are:

- Bracknell Town Centre;
- Crowthorne Centre;
- Sandhurst Centre;

- The Peel Centre;
- All other district and neighbourhood centres listed in BFBLP Policy E5, (as amended by SALP Policy SA13 and associated Appendix 8). Jennett's Park was added to the survey in 2021.

3.12 The vacancy rate in the Borough's defined centres is 7.2% in the current monitoring year, which is lower than in 2021. The vacancy rate in Bracknell Town Centre is higher than average for the Borough at 11% but this represents a fall from 16% in November 2021. The Retail Advice Note found that there were 34 vacant units in April 2022 which had a combined gross area of approximately 14,960m^2. This was considered to reflect modest operator 'churn' whereby some retailers close and new operators commence trading in other previously-vacant units. The vacant floorspace identified included the former Bentalls Department store which is due to be redeveloped.

3.13 Further schemes are planned as part of the continuing regeneration of Bracknell Town Centre, for example, 'the Deck' which has seen the demolition of the former Bentalls Department Store to create food and beverage uses, non-residential institutional uses, assembly and leisure uses, a night club and public events area. These will help add vitality to further parts of the Town Centre.

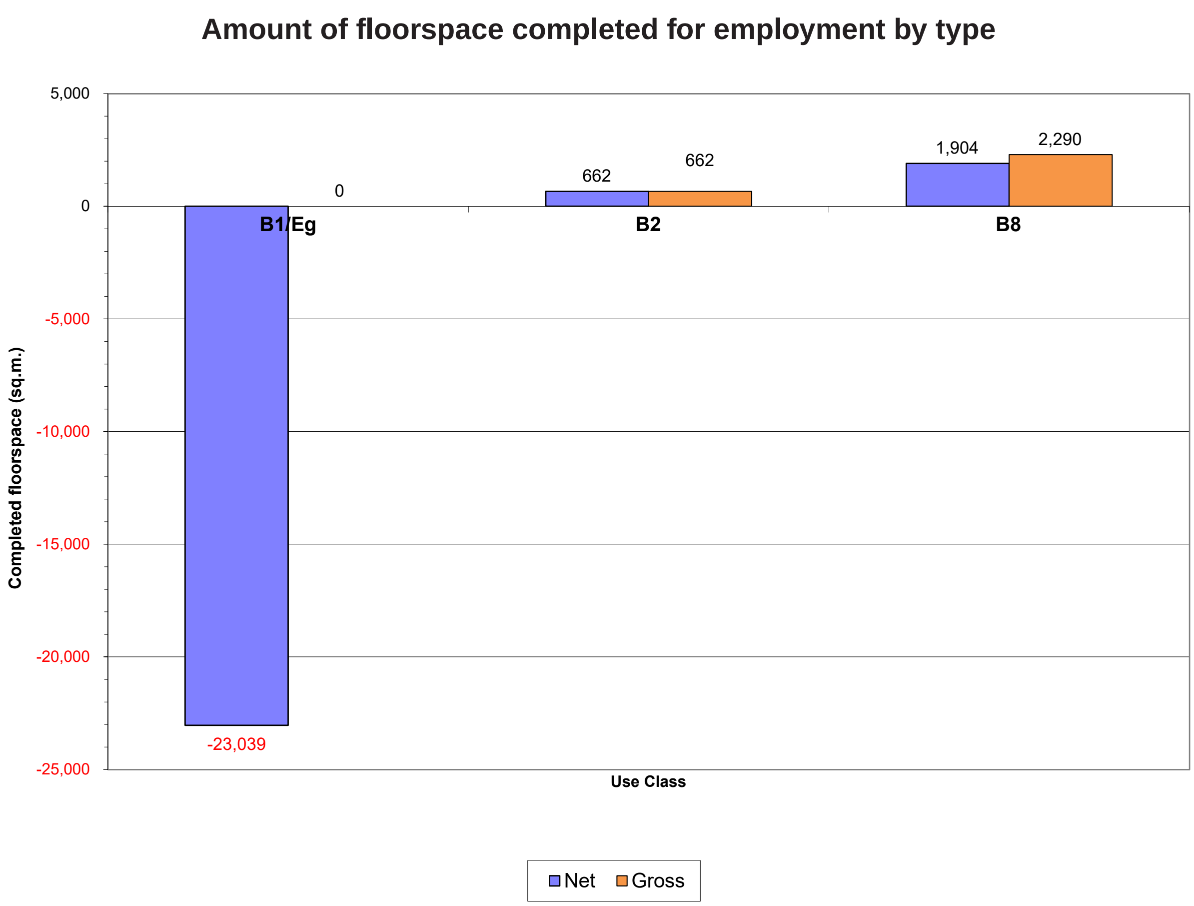
3.14 There are two other centres experiencing a vacancy rate of over 7.2%: Binfield (13%) and Crowthorne (8%). Overall, 17 of the 24 designated retail centres throughout the Borough had no vacant retail units in December 2022 (see Appendix 1).

3.15 The percentage of vacant units in the smaller centres is distorted by the fact that there are fewer units than in the larger centres. Therefore, a small number of vacant units has the potential to represent a high proportion of the total.

3.16 The health of individual retail centres is included in Appendix 1: 'Retail Survey Data'.

Output Indicators

Indicator: Amount of floorspace completed for employment by type



Source: *Planning Commitments for Employment Uses at March 2022, BFC*

Core Strategy Target

The target that no one employment floorspace type is to form 100% of all employment floorspace completed in the monitoring year has been met.

3.17 Overall, there was a net loss in the amount of completed BIDS floorspace in the Borough in 2021/22. This was primarily due to the demolition of offices at the former Hewlett Packard site in the Western Employment Area. The site is being redeveloped as a data centre (-23,039 m^2 B1a/Egi). Some modest gains in B2 and B8 were seen which can mainly be attributed to lawful development certificates (LDC) being issued confirming the lawful nature of storage uses, together with full retrospective permissions being granted for storage uses. There was also a change of use from storage to sui generis motorcycle sales in the Western Employment Area completed. These were not enough to offset the substantial loss seen in B1a/Egi.

Indicator: Amount of floorspace completed for employment by type in defined employment and regeneration areas

Amount of floorspace completed for employment by type in defined employment and regeneration areas

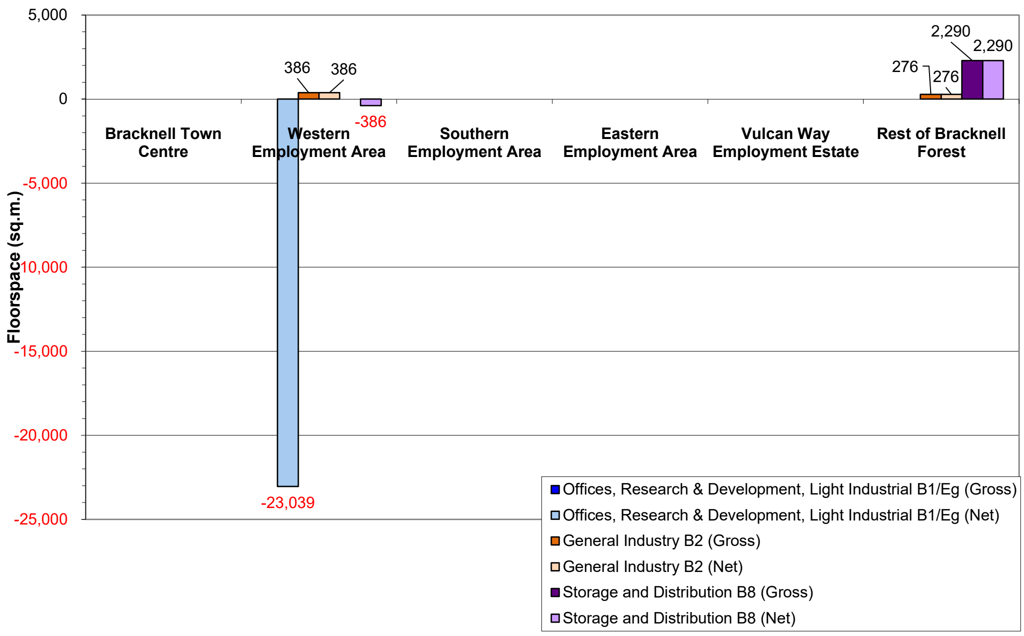


Table 3.1 Amount of floorspace completed for employment by type in employment and regeneration areas

Employment Area	Offices, Research & Development, Light Industrial B1/Eg (Gross)	Offices, Research & Development, Light Industrial B1/Eg (Net)	General Industry B2 (Gross)	General Industry B2 (Net)	Warehousing B8 (Gross)	Warehousing B8 (Net)
Bracknell Town Centre	0	0	0	0	0	0
Western Employment Area	0	-23,039	386	386	0	-386
Southern Employment Area	0	0	0	0	0	0
Eastern Employment Area	0	0	0	0	0	0
Vulcan Way Industrial Estate	0	0	0	0	0	0
Total in employment & regeneration areas	0	-23,039	386	386	0	-386
Rest of Bracknell Forest	0	0	276	276	2,290	2,290
Overall Total	0	-23,039	662	662	2,290	1,904

Source: *Planning Commitments for Employment Uses at March 2022, BFC.*

Core Strategy Target

The target that 60% of all employment types developed are to be located in employment and regeneration areas has not been met.

3.18 The graph and table show the distribution of gains and losses in different types of employment floorspace around the Borough's main Employment Areas and across the rest of the Borough. Taking gross floorspace figures, 58% of B2 and 0% of the B8 completed floorspace occurred in employment and regeneration areas; most happened in the rest of Bracknell Forest. This is because the majority of floorspace completed was as a result of issuing a Lawful Development Certificate for storage at a site in the Green Belt. All office floorspace losses occurred in designated Employment Areas; this can be attributed to the loss of offices at the former Hewlett Packard site which is being redeveloped as a data centre (this was under construction at March 2022).

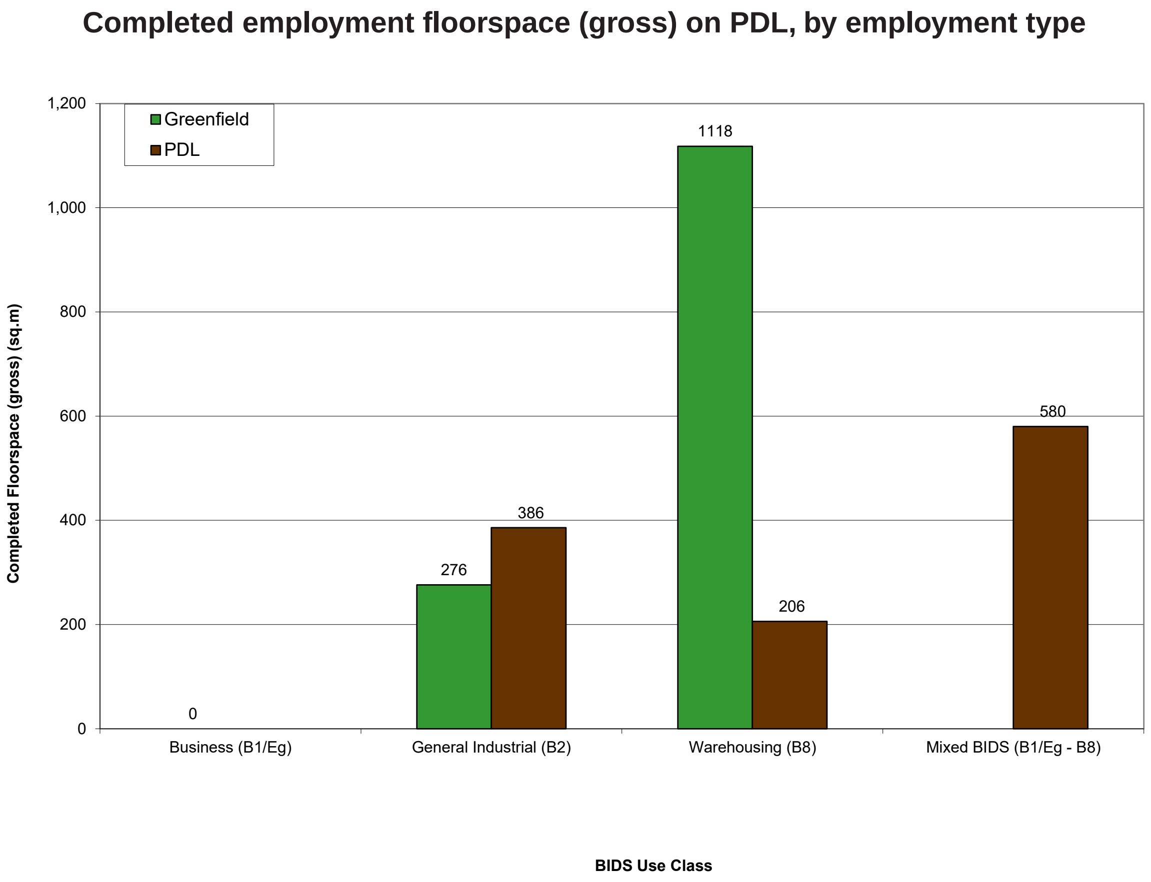
3.19 In terms of all gross completed employment floorspace, 13% was located within employment and regeneration areas.

Indicator: Total amount of completed employment floorspace (gross) on Previously Developed Land by employment type 2021 - 2022

Table 3.2 Completed floorspace (gross) on PDL, by employment type.

Type	Greenfield (m^2)	%	Previously Developed Land (m^2)	%
Business (B1)	0	-	0	-
Offices (B1a)	0	-	0	-
Research and Development (B1b)	0	-	0	-
Light Industrial (B1c)	0	-	0	-
General Industrial (B2)	276	42	386	58
Warehousing (B8)	1,118	84	206	16
Business, General Industrial and Warehousing (B1-B8 Mix)	0	-	580*	100
Total	**1,394**	**54**	**1,172**	**46**

*Flexible B8 or B8/Eg permission (counted under B8 in Employment Commitments)



***Source:** Planning Commitments for Employment Uses at March 2022, BFC*

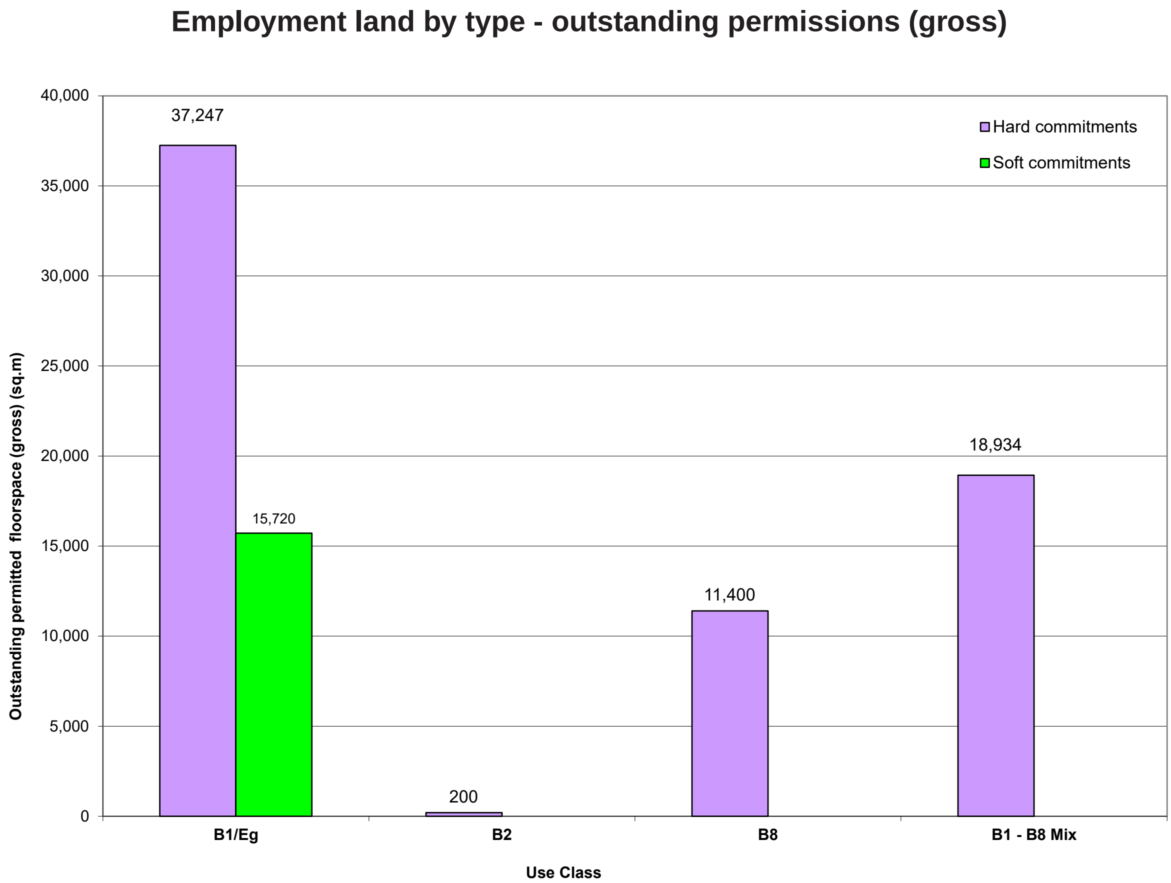
Core Strategy Target

The target of achieving 60% of completed floorspace by employment type on PDL has not been met.

3.20 The above table and graph show the developments (across all BIDS employment types) that were completed on PDL and greenfield during 2021 - 2022. There were several sites making up the gains in BIDS floorspace, however there was also a significant amount of completed floorspace on greenfield sites (54%). The greenfield floorspace can be attributed to three sites at Felix Farm, Howe Lane in Binfield which were given permission for the change of use from agricultural to: car restoration (B2); car storage (B8) and general storage (B8).

3.21 The nature of outstanding permissions suggest that the trend for a high proportion of employment development to be located on PDL will continue, with only a small proportion on greenfield. This is because the majority of proposals involve the redevelopment of existing sites.

Indicator: Employment land available by type - outstanding permissions (gross)



Source:

Planning Commitments for Employment Uses at March 2022, BFC

Core Strategy Target

The target suggesting that all types of employment land and planning commitments should not fall below 100,000sq.m. or 10 ha of land (gross) has not been met.

3.22 This indicator relates to outstanding permissions for employment development and assesses whether or not the supply is sufficient to offer a degree of flexibility and choice in the interests of economic prosperity.

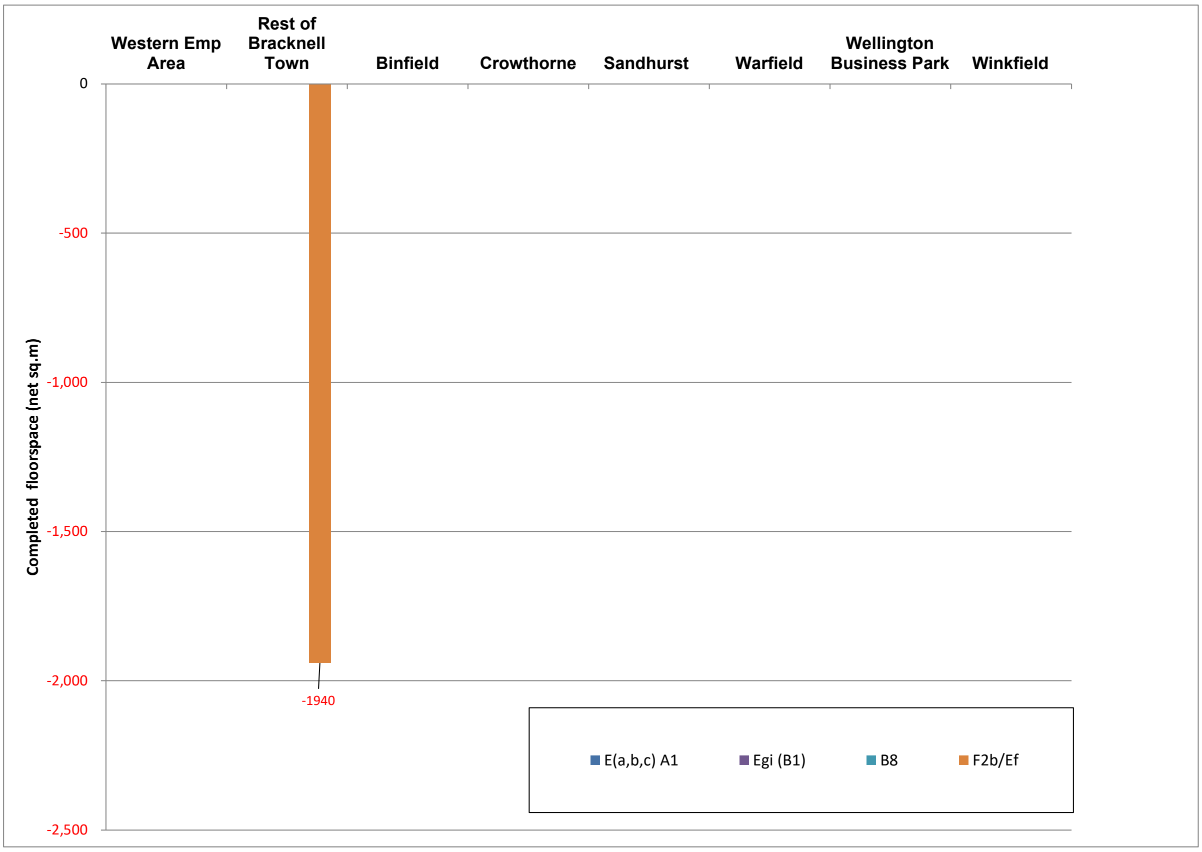
3.23 The total amount of BIDS floorspace with planning permission is 67,781 m^2 (gross). The majority of this figure is for B1 use and relates to various sites on the Western Employment Area, including the Thales site (9,290m^2). Some sites have had extant permissions for many years and as such it is unclear whether or not they will be built out. It is possible that the landowners will seek alternative uses for the land. The overall total also includes a site on the Southern Employment Area at Lovelace Road for B8 (18,580 m^2) and a site for a data centre (former Hewlett Packard site (9,443m^2)).

3.24 The 15,720m^2 of soft commitments comprises 13,021m^2 of offices at Fitzwilliam House and 2,699m^2 of offices at the former Bus Station on Market Street. Both sites are in Bracknell.

3.25 The amount of floorspace needed for BIDS has been assessed in the Employment Land Needs Study (2020); the submitted Bracknell Forest Local Plan seeks to address this need as far as possible. The Position Statement [11] updates the need based on permissions granted since the base date of the BFLP. The document concludes that recent commitments have resulted in an increase in the need for office floorspace but a slight decrease in industrial/warehousing needs compared to the start of the plan period. This follows a recent increase in interest in providing these types of B2/B8 uses in the last couple of years (as seen in the contextual Indicator - Employment floorspace stock). Speculative permissions have been being built out in the Borough; particularly in the Southern Employment Area.

Local Indicator: Amount of employment floorspace lost to residential development

Amount of employment floorspace lost to residential use by location



Source: *Planning Commitments for Employment Uses at March 2022, BFC.*

11 https://consult.bracknell-forest.gov.uk/file/6093331

Core Strategy Target

Amount of employment floorspace / land lost to residential development should be less than 10,000m^2 or 1ha.
This target has been met.

3.26 The target above relates to completed economic floorspace. A total of 1,940 m^2 has been lost to residential (C3) use during the 2021/22 monitoring year. This loss can be attributed to the redevelopment of Coopers Hill, Bracknell, which was formerly a youth and community centre. This is substantially less than in recent years, when the loss has been as high as -62,250m^2 (in the 2017/18 monitoring year). It is too early to determine if this is an anomaly or the result of a more general shift towards land use values beginning to favour industrial and warehouse floorspace, as indicated by other monitoring data.

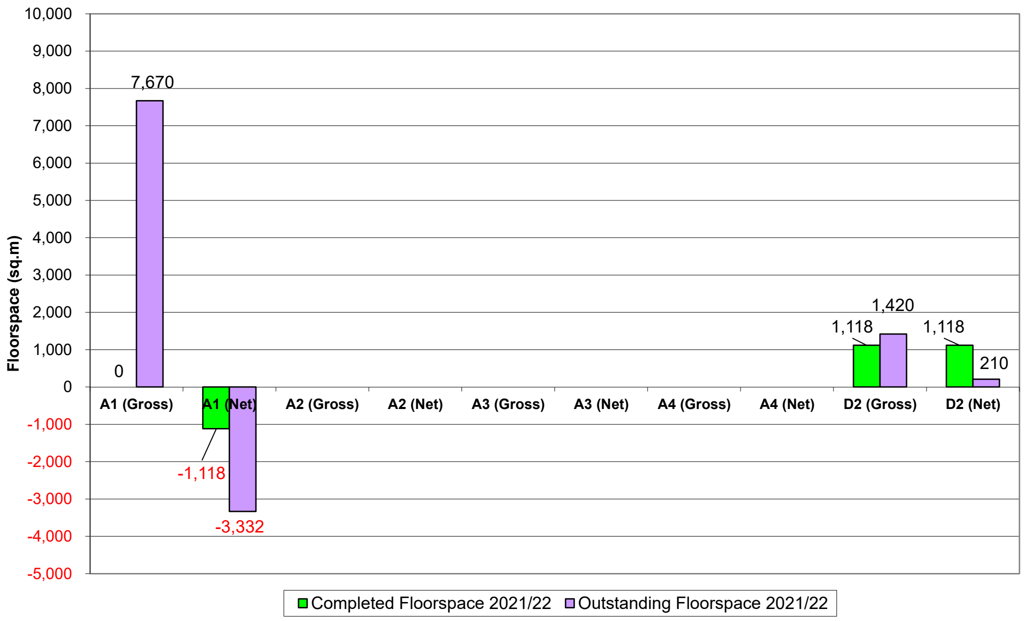
3.27 Prior approvals for changes of use from offices to residential have previously had a significant impact on the figures for loss of economic floorspace to residential. Since 2013/14, a total of -67,383m^2 floorspace has been lost via the PDR process. In the current monitoring year however, no prior approvals were completed.

3.28 Outstanding commitments signal further losses of floorspace via prior approvals. There remains -26,283 m^2 of prior approval floorspace outstanding at the end of the monitoring year (made up of two small and two large office schemes). The largest is the loss of Atrium Court in Bracknell Town Centre which involves the loss of -22,090$m^{2,}$ if completed. It is possible that the change in permitted development rights which prevent a cumulative loss of more than 1,500m^2 of office floorspace may have an impact going forwards. This threshold did not come into effect until part-way through the 2021/22 monitoring year.

3.29 As a result, it seems unlikely that this target will be met over the next couple of years, particularly if land values continue to favour residential over employment uses.

Local Indicator: Amount of completed and outstanding retail and leisure development in Bracknell Town Centre

Amount of completed and outstanding retail and leisure development in Bracknell Town Centre



Source: *Planning Commitments for Employment Uses at March 2022, BFC.*

Core Strategy Target

Amount of completed and outstanding retail floorspace, to be at least 56,000m^2 (gross) by 2011. Maintenance of, and no reduction in, the existing levels of leisure floorspace. These targets have been met.

3.30 The target above relates to completed and outstanding floorspace in the period to 2011. This period has passed and the target was met. The commentary below provides supplementary information about current and future proposals in Bracknell Town Centre including an explanation of the data provided in graphical form above.

3.31 During the current monitoring year, a change of use was completed that involved the loss of retail (A1/Ea) floorspace but gain of leisure floorspace (D2) in the form of a new gym in Princess Square (as shown by the green bars on the graph above).

3.32 The outstanding permissions relate to several sites, including the change of use of some units on the first floor of Princess Square from retail to leisure uses (gymnasium), and also the redevelopment of the former Bentalls store which will become 'The Deck'. This is planned to include a range of uses including retail, food and drink and other leisure uses.

3.33 Progress on Bracknell Town Centre Regeneration

3.34 The £240m Lexicon opened on 7 September 2017. The Lexicon has created a new social and cultural heart for the area - bringing a high-quality mix of shops, restaurants and entertainment within vibrant public spaces to the Town Centre.

3.35 There are a number of stores in The Lexicon including a three-storey Fenwick department store, M&S and Primark. Furthermore, there are restaurants, bars and a 12-screen Cineworld cinema. Notwithstanding the impact of the Covid-19 pandemic, the scheme has brought life back into the Town Centre improving both the day and night time economies.

3.36 The Lexicon has been ranked as the 25th best shopping destination in the UK in 2022, according to authoritative industry commentator Trevor Wood Associates. This compares with 255th position before the redevelopment and 29th in 2019.

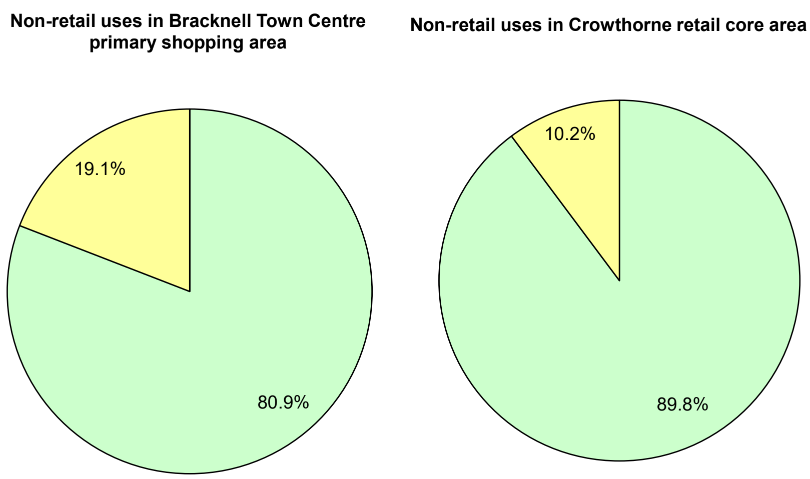
3.37 The regeneration of Bracknell Town Centre is continuing with planning permission having been granted for the development of The Deck, based around the former Bentalls store in the High Street (demolition has already occurred), and work that has been undertaken on revitalising Princess Square. The Council is also reviewing plans for Market Square and the Southern and Eastern Gateway sites together with other sites both within and on the edge of the Town Centre. It has formed a partnership with Countryside Partnerships (UK) Ltd to form the Bracknell Forest Cambium Partnership to support and further the ongoing regeneration of Bracknell Town Centre.

3.38 Amendment to Bracknell Town Centre boundary 2013

3.39 It should be noted that the SALP changed the boundaries of Bracknell Town Centre to exclude the Peel Centre (in line with definitions set out in the NPPF). The application of the sequential test to proposals means that retail uses should be directed to the primary shopping area and other main town centre uses to sites within the defined retail centre. The Peel Centre is now treated as either edge-of-centre or out-of-centre depending on the type and location of proposals. The intended effect is to focus retail development in the Town Centre. This has affected the recording of permissions and completions in the Town Centre since 2013/14.

Indicator: Percentage of non-retail uses (of any class) in defined frontages of Bracknell Town Centre primary shopping area and Crowthorne retail core area (BFBLP 'saved' Policy E9)

Amount of Non-Retail units in Bracknell Town centre Primary Shopping Area and Crowthorne Core Retail Area



Source: *BFC Retail Survey, December 2022*

BFBLP Target

Non-retail uses (of any class) should not occupy more than 22% of defined frontage area within Bracknell town centre primary shopping area, or 44% of the defined frontage area within the retail core area of Crowthorne ('saved' Policy E9).
The target has been met for Bracknell Town Centre and Crowthorne district centre.

3.40 Since the BFBLP was adopted, the Use Class Order has been altered substantially to introduce flexibility between many different uses. Former Class A1 now falls under Class E. As such, for the purposes of monitoring this policy, non-retail uses are classified as those falling outside Class E, since the Council would have no control over changes between sub-Class E uses (for example, when the policy was written, A1 uses could not change to A2, A3, A4 or A5 without planning permission).

3.41 The completion of The Lexicon and associated development in Charles Square have brought about significant changes in the layout and type of units located in the defined area of Bracknell Town Centre.

3.42 The primary frontages detailed in BFBLP saved Policy E9 now have limited application due to the new layout of the Town Centre. The revised NPPF has also introduced changes in the approach to be taken in that primary frontages no longer need to be defined - only primary shopping areas.

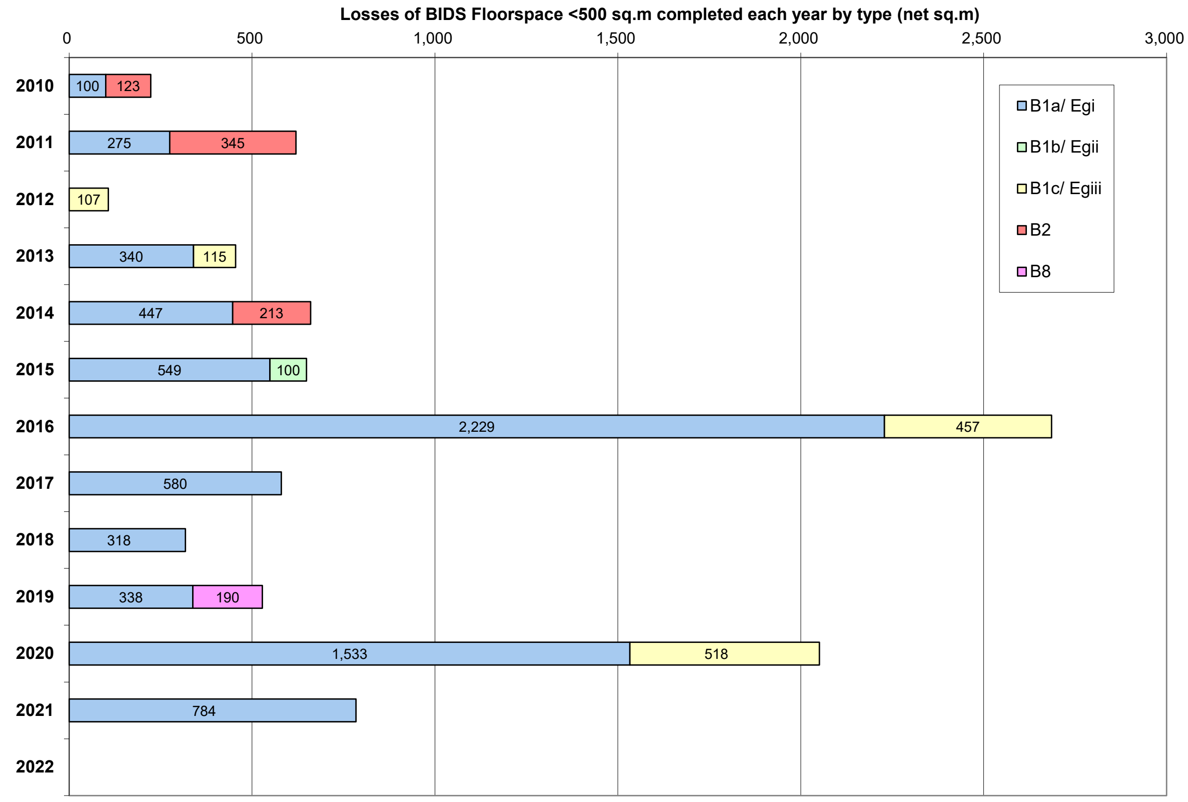
3.43 As part of the BFLP process, new policies have been developed for Bracknell Town Centre which reflect the changed nature of development and revised national policy, including defining a new primary shopping area (see 'Emerging Plan' section for further information on the Submitted BFLP which is currently at examination).

3.44 In December 2022, non-retail uses in Bracknell Town Centre accounted for 19% of uses in the primary shopping area. For Crowthorne, the graph above shows non-Class E uses accounted for approximately 10% of the retail core area of Crowthorne (as per 'saved' Policy E9); in the new defined primary shopping area set out in the emerging BFLP (N.B. this is not the same as the core area) non-Class E uses accounted for approximately 6%. For the reasons given above, these figures are not comparable with previous years.

3.45 The results of the retail survey for each centre are summarised in Appendix 1.

Indicator: Amount of floorspace (net) lost through loss of small business units (<500 sq.m) in BIDS (B1-B8) use

Loss of BIDS floorspace through business units (<500sq.m) since 2010



Source: *Planning Commitments for Employment Uses at March 2022, BFC*

Core Strategy Target

Policy CS19 - small business units (500 sq.m or less) will be protected. Target: No loss of small business units.
This target has been met.

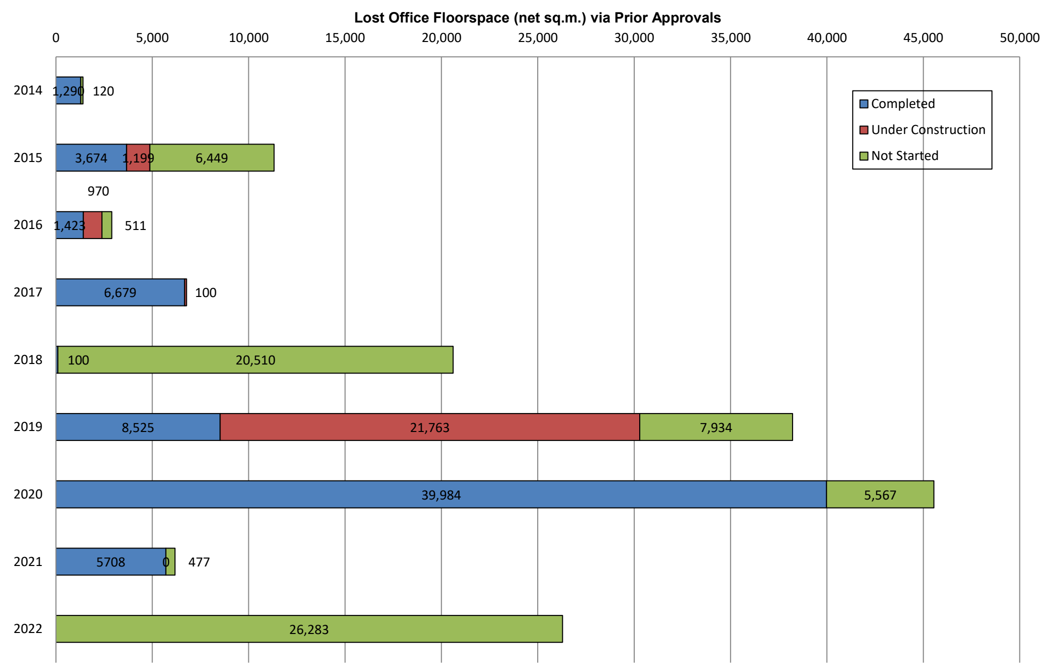
3.46 The target above relates to completed floorspace.

3.47 For the first time for over 10 years, there were no losses of small (BIDS) business units to non-BIDS uses in the Borough. Although a few changes of use of small business units were implemented, these were to other BIDS uses, such as permission ref: 21/00179/FUL which involved the change of use from B8 (Storage and Distribution) to motorcycle service and repairs (Class B2) and sale of motorcycles (sui generis).

3.48 The trend data shows that losses peaked in 2015/16. Whilst losses have continued to occur until this monitoring year, they have continued to predominantly involve office floorspace in varying amounts. Cumulatively, these have an impact although recently overall figures have been dominated by the loss of larger office developments (such as the former Hewlett Packard site). The smaller units add to the range of premises available and provide valuable accommodation for those starting new businesses. However, land values still tend to favour residential redevelopment over employment.

Indicator: Amount of B1(a) office floorspace (net) lost to residential development through prior approval consent (PAC) permissions

Amount of office floorspace being lost to residential through Prior Approval (net sq.m).



Source: *Planning Commitments for Employment Uses at March 2022, BFC*

No target. This indicator monitors the impact of the change in permitted development rights allowing the conversion of offices (B1a) to residential (C3 dwellings).

3.49 The indicator above relates to completed floorspace in the monitoring year 2021/22. For information, proposals that are under construction and not started are also shown to provide an indication of potential future losses.

3.50 The graph indicates that there were no developments completed in the current monitoring year that resulted in loss of offices to residential via prior approvals.

3.51 The graph also shows that prior approvals have been agreed but not yet implemented on other sites. It is therefore likely that there will be further losses of B1a office floorspace (26,283m^2). This is the result of four permissions; two small schemes (98 High Street, Crowthorne (20/00595/PAC) and Continuity House, London Road, Bracknell (20/00189/PAC)) and two larger schemes:

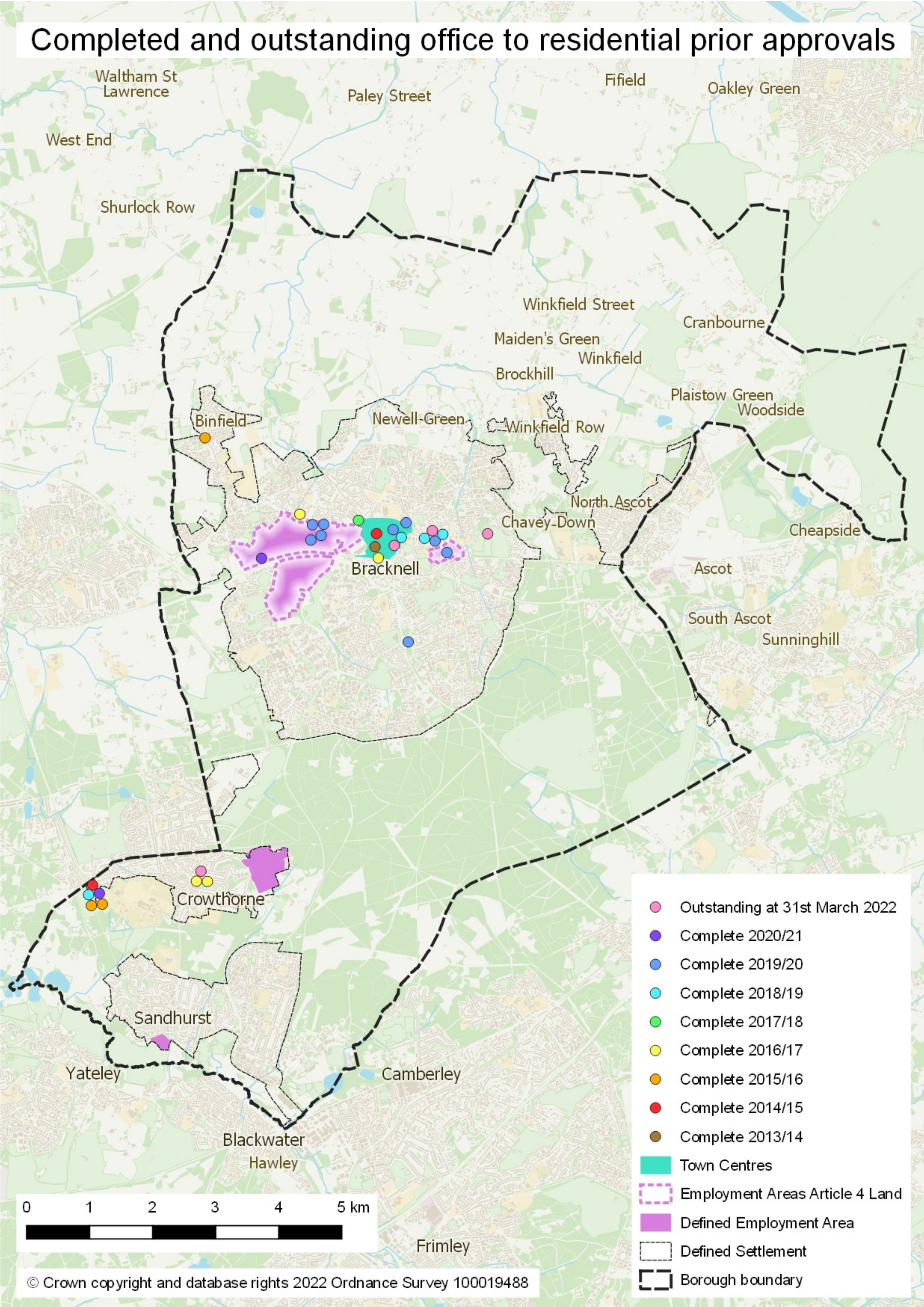
- 21/00763/PAC Atrium Court, The Ring, Bracknell: Loss of -22,090 sq.m. of offices to 150 flats
- 21/00755/PAC Lily Hill House, Lily Hill Road, Bracknell: Loss of -3,716 sq.m. offices to 33 flats

3.52 These larger applications were submitted before changes to permitted development rights, which set a cap on the cumulative floorspace that can be lost through the prior approval process, came into force.

3.53 In parts of Bracknell Forest within the zones of influence of the Thames Basin Heaths Special Protection Areas (SPA), it is necessary for the developer to enter into a S106 Agreement before any prior approvals involving the conversion from offices can commence. As such in previous years prior approvals were counted as soft commitments when the S106 Agreements had not been completed; this was changed in the monitoring year 2019/20. These permissions have since been treated as hard commitments and are captured in the graph above for these subsequent monitoring years.

3.54 The geographical distribution of completed prior approval schemes since 2014/15 is shown on the map below. Whilst most are located in and around Bracknell Town Centre and on the Western Employment Area, there have also been a number around Crowthorne High Street and the railway station. The map also shows the distribution of outstanding prior approvals, as referred to above.

Map showing Prior Approvals since 2014/15



Indicator: Amount of BIDS (B1-B8) floorspace lost to non-BIDS uses

Table 3.3 Table showing loss of BIDS floorspace to non-BIDS uses - completed floorspace (net)

Area Site Code	Existing Land Use	Proposed Land Use	B1a/Egi	B1b/Egii	B1c/Egiii	B2	B8	Total
Western Employment Area	Office	Floorspace not replaced	-13,596					**-13,956**
Total			**-13,596**	**0**	**0**	**0**	**0**	**-13,956**

Source: *Planning Commitments for Employment Uses at March 2022, BFC*

No target. This indicator monitors the loss of BIDS floorspace (net completions) to other non-BIDS uses.

3.55 The table shows that the overall loss of BIDS floorspace to other non-BIDS uses was -13,596 m^2 in 2021/22. The demolition of the former Hewlett Packard office building (completed in the monitoring year) resulted in the loss of -23,039m^2 (B1a/Egi). Whilst this is being replaced with another BIDS use (a data centre which is curently under construction, comprising of 9,443m^2 of B8 floorspace) the -13,596m^2 of B1a/Egi shown in the table is the balance of BIDS floorspace that has been completely lost from the overall supply as a result of the redevelopment of this site.

Appendices

Appendix 1: Retail Survey Data

Retail Survey Data (December 2022)

Summary	E	SG	F1	F2	Vacant	Total Units per centre	Centre vacancy (%)
Binfield	14	3	3	0	3	**23**	13%
Birch Hill	6	4	1	1	0	**12**	0%
Bracknell Town Centre	176	24	1	2	26	**229**	11%
Bullbrook	6	1	0	1	0	**8**	0%
College Town	19	6	0	0	1	**26**	4%
Crown Wood	7	1	0	0	0	**8**	0%
Crowthorne	96	8	3	0	9	**116**	8%
Crowthorne (Station)	17	2	0	0	2	**21**	10%
Eashampstead	10	4	1	0	0	**15**	0%
Forest Park	4	4	1	0	0	**9**	0%
Great Hollands	15	4	3	0	0	**22**	0%
Hanworth	1	1	0	0	0	**2**	0%
Harmans Water	9	5	2	0	1	**17**	6%
Jennetts Park	2	0	0	0	0	**2**	0%
Martins Heron	3	1	1	0	0	**5**	0%
N. Ascot (Fernbank Rd)	5	1	0	0	0	**6**	0%
N. Ascot (Warren)	6	0	0	0	0	**6**	0%
Peel Centre	11	0	0	0	1	**12**	8%
Priestwood	7	4	0	0	0	**11**	0%
Sandhurst (central)	22	11	0	0	1	**34**	3%
Sandhurst (E Swan Lane)	6	1	0	0	0	**7**	0%
Sandhurst (Old Mills)	9	1	0	0	0	**10**	0%
Whitegrove	7	0	2	0	0	**9**	0%
Wildridings	11	3	0	0	0	**14**	0%
Yeovil Road (Owlsmoor)	9	0	1	0	0	**10**	0%
TOTALS	**478**	**89**	**19**	**4**	**44**	**634**	7%
Total (%)	75%	14%	3%	1%	7%	100%	

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Nepali

यस प्रचारको सक्षेपं वा सार निचोड चाहिं दिइने छ ठूलो अक्षरमा, ब्रेल वा क्यासेट सून्नको लागी । अरु भाषाको नक्कल पनि हासिल गर्न सकिने छ । कृपया सम्पर्क गनूहोला ०१३४४ ३५२००० ।

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