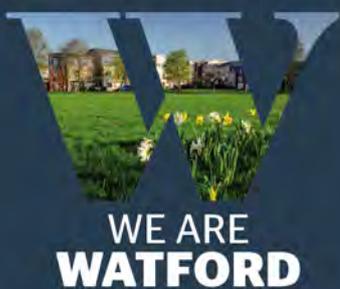
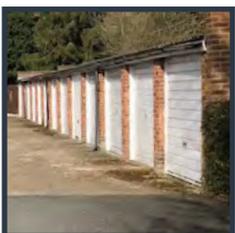
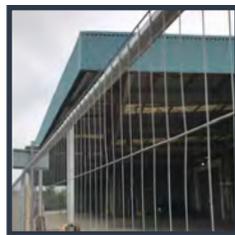


Watford Employment Land Review

September 2019

Prepared to inform the First Draft Watford Local Plan 2020-2036



watfordlocalplan.co.uk



1 Purpose of the Study

- 1.1 The Employment Land Review (ELR) is an assessment of the quantity of employment spaces across Watford. The study seeks to provide a review of the Borough's employment land, particularly with regard to: total employment floor space; site areas; plot ratios; the amount of floor space taken up by each planning use class and the amount of vacant floor space.
- 1.2 The study is quantitative in nature but a qualitative approach will also be taken to identify provision of relevant facilities and infrastructure, such as cycle and car parking.
- 1.3 The study provides an evaluation of the current situation of employment land in Watford but does not seek to analyse current provision against future growth projections. Instead, the Borough's ability to meet its future demand will be discussed in the South West Herts Economic Study, scheduled to be completed in 2019.
- 1.4 The review is not a commentary on council policy but is a technical evidence base that will inform the preparation of the New Watford Local Plan and alongside the Economic Study, may guide the future policy direction for employment land and issues of economic development.
- 1.5 The site surveys were conducted in August 2018 and the study seeks to present an accurate representation of Watford's economy at that time.

2 Policy Context

- 2.1 The National Planning Policy Framework (NPPF: 2018) states that the primary objective of the planning system is to contribute to the achievement of sustainable development. Part of achieving this is an economic objective, set out in paragraph 8, as helping to *'build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure'*.
- 2.2 The framework sets out in Paragraph 80 (Chapter 6) that *'Planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development'*.

- 2.3 The study has been undertaken with national policies and objectives in mind. The assessment of the current provision should identify potential concerns, particularly related to levels of vacancy and the type and accessibility of employment land.
- 2.4 It is necessary to briefly refer to amended permitted development rights which may have had an impact on the borough's employment stock. The replacement Part 3 Class O of the General Permitted Development Order (2015), as amended, allows a change of use from B1a (offices) to C3 (dwelling houses). Originally, this was only to be for a three year period but has since been extended.

3 Methodology

- 3.1 The scope of the study includes all the main employment sites in Watford. The assessment of floor space was undertaken using several steps:

- **Step 1) Identifying Sites**

The sites were identified in the following ways:

- Sites designated as employment land on the Watford District Plan Proposals Map (2003)
- Sites noted in the Core Strategy (2013)
- Aerial view searches to identify non-designated sites

- **Step 2) Mapping of Sites**

These sites were mapped using GIS to eliminate the risk of double counting. The maps included in Appendix 1 show the area that the listed employment site corresponds with.

- **Step 3) Site Visits**

Site visits were then undertaken in August 2018. On site, the following information was recorded:

- Address
- Occupier
- Site description
- Status (Occupied/Vacant)
- Cycle or car parking present

- Whether any of the units were for sale or to let

- **Step 4) Desktop Assessment**

With the collection of this information, a desktop based assessment was undertaken. Using the name of the business and its description, the relevant planning use class was identified. In any cases of uncertainty regarding the use class, the site's planning history and the Land Use Gazetteer was referred to for further clarity.

Some businesses operate under two uses. For example, a chain coffee shop may simultaneously have permission for A3 and A5 uses. Where this was the case, it was decided to use a site's most dominant use class to avoid double counting of floor space.

There were cases where different businesses operating under one address had different uses within them. As mixed use development is becoming more prominent in Watford, this occurred relatively frequently. In such cases, the decision was taken to split the site according to use in order to more accurately account for floor space data.

- **Step 5) Identifying Floor Space**

The floor space of each building was measured using data from business rates valuations, collected by the Valuation Office Agency (VOA) and found online at: <https://www.tax.service.gov.uk/business-rates-find/search>. As noted prior, this was then used to chart the amount of floor space attributed to each use within a building or site.¹

As the VOA data measured internal floor space, the total surface area of the sites was measured manually using GIS. Access roads were included but public highways were excluded to avoid a misrepresentation of results.

4 Previous Data

Employment Stock Study (2001)

- 4.1 There was a review of Watford's employment stock in 2001. It is not possible to make a total comparison with this 2018 survey as the amount of sites surveyed is more detailed in 2018.
- 4.2 However there are some points of interest. In 2001, Watford's employment land had a

¹ Where VOA data was not available, officers measured the floor space manually using GIS

vacancy rate identified as being 7.1%, with the majority of vacancies being long term (10+ years).

- 4.3 In total it was estimated that the site areas of all the employment sites in the study was 1,400,000m² (or 140 hectares). There was no calculation of floor space, although the study did propose sites suitable for intensification.

Authorities Monitoring Report

- 4.4 Local authorities are required to prepare an Authorities Monitoring Report (AMR) every year. Employment data is included in this report. A review of past AMRs including this year's AMR [Watford AMR 2018] give a useful context to this survey.
- 4.5 Between 2006/07 and 2017/18, Watford has seen the loss of approximately 85,000m² of employment floor space, the vast majority of which was a net loss of office space [approximately 47,000sqm lost]. Previous AMRs note that this office space loss may have been exacerbated by the introduction of the permitted development rights for office to residential.
- 4.6 The AMRs also suggest that although significant portions of this loss was in designated employment areas (35,000m² net loss), proportionately it was employment land outside of designated employment areas which appears to have taken the majority of the losses.
- 4.7 The 2017/18 AMR does note that employment sites have experienced a net gain this year in employment floor space
- 4.8 In addition, there is a significant amount of employment floor space committed through planning permission. Between 89,000 and 91,000m² of employment floor space had permission as of 31st March 2018. Clarendon Road does have a significant amount of office space permission committed (approximately 36,000m²).
- 4.9 The town centre has also seen general losses of floor space up until 31st March 2018. However, the redevelopment works of INTU may have skewed the figure.

5 Current Stock Findings

Key Findings

- Total employment floor space in the borough is 707,699m²
- Total employment land in the borough is 1,202,016m²
- The borough's employment sites have an average plot ratio of 0.6

5.1 This section reviews employment land in Watford. It will identify:

- The floor space in each employment area/site
- The site area of each employment area/site
- The plot ratio (floor space to site area) in each employment site

This will give a picture of the total amount of employment land in Watford and total employment floor space.

5.2 Figure 1 shows the amount of floor space available in each employment site.²

Figure 1: Total floor space by employment site

Employment Site	Total Floor Space (m ²)
94 Rickmansworth Road	6,861.5
126 Rickmansworth Road	2,244.8
Clarendon Road/Station Road/Bridle Path	183,474
Greycaine Road/Odhams/Sandown Road	144,156.5
Hille Business Centre	8,133.3
Imperial Way/Colonial Way	163,686
Pinner Road	1,835.6
Shakespeare Road Estate	8,630
Watford Business Park	111,822.3
Wiggenhall Road/Fishers/Trade City	13,943.9
Sydney Road Area	23,389.6
176-200 Rickmansworth Road	1,812.3

² There are some approximations due to rounding throughout the study

96-100 Cecil Street	1,121.2
Cherry Tree Road	8,962.5
Euston Avenue/Hagden Lane	1,283.3
Finway Court	2,613.2
George Street	2,851.7
Handford Court	815.5
Local Board Road	2853.9
Merton Road	1938.9
Upton Street/Exchange Road	12,006.4
Waste Site, Colne Way	2,433.3
Water Lane	24.1
TOTAL FLOORSPACE	707,699

- 5.3 As the table demonstrates, the total available employment floor space in Watford is 707,699 m². The sites with the highest totals of floor space are the Clarendon Road/Station Road/Bride Path Area (183,474m²), Imperial Way/Colne Way (163,686m²) and the Greycaine Road/Odhams/Sandown Road area (144,156.5m²).
- 5.4 There are a number of sites with small amounts of floor space. 12 sites, almost half of the total sites surveyed, contain under 3,000m² of floor space. Water Lane is the site with the smallest floor space (24.1m²) but as a recycling depot, it contains a larger amount of external land used for lorry parking and skip storage.
- 5.5 Site areas were then measured to calculate the total employment land in the borough, shown in Figure 2.

Figure 2: Total site area by employment site

Employment Site	Total Site Area (m²)
94 Rickmansworth Road	10,907
126 Rickmansworth Road	5,195
Clarendon Road/Station Road/Bridle Path	127,390
Greycaine Road/Odhams/Sandown Road	243,542
Hille Business Centre	9,345
Imperial Way/Colonial Way	342,195

Pinner Road	12,457
Shakespeare Road Estate	13,574
Watford Business Park	287,376
Wiggenhall Road/Fishers/Trade City	50,031
Sydney Road Area	26,482
176-200 Rickmansworth Road	5,752
96-100 Cecil Street	2,131
Cherry Tree Road	16,408
Euston Avenue/Hagden Lane	3,093
Finway Court	6,255
George Street	2,036
Handford Court	2,825
Local Board Road	3,705
Merton Road	3,909
Upton Street/Exchange Road	7,896
Waste Site, Colne Way	16,428
Water Lane	3,084
TOTAL EMPLOYMENT LAND	1,202,016

5.6 As the table shows, Watford contains 1,202,016m² of employment land, which equates to approximately 1/16th of the borough's land. The sites with the largest site areas are Imperial Way/Colonial Way (342,195m²), Watford Business Park (287,376m²) and the Greycaine Road/Odhams/Sandown Road area (243,542m²).

5.7 The data collected enabled the calculation of plot ratios, listed in Figure 3.³

Figure 3: Plot ratio by employment site

Employment Site	Plot Ratio
94 Rickmansworth Road	0.6
126 Rickmansworth Road	0.4

³ For reference, the Watford Economic Growth and Delivery Assessment (EGDA: 2014) recommended future plot ratio requirements of 0.4 for industrial land and 2.0 for town centre office uses. However, this is becoming outdated and further guidance may be required for future expectations of plot ratios.

Clarendon Road/Station Road/Bridle Path	1.4
Greycaine Road/Odhams/Sandown Road	0.6
Hille Business Centre	0.9
Imperial Way/Colonial Way	0.5
Pinner Road	0.1
Shakespeare Road Estate	0.6
Watford Business Park	0.4
Wiggenhall Road/Fishers/Trade City	0.3
Sydney Road Area	0.9
176-200 Rickmansworth Road	0.3
96-100 Cecil Street	0.5
Cherry Tree Road	0.5
Euston Avenue/Hagden Lane	0.4
Finway Court	0.4
George Street	1.4
Handford Court	0.3
Local Board Road	0.8
Merton Road	0.5
Upton Street/Exchange Road	1.5
Waste Site, Colne Way	0.1
Water Lane	0.0008
AVERAGE PLOT RATIO	0.6

- 5.8 The sites with the highest plot ratios are Upton Street, Exchange Road (1.5), George Street (1.4) and the Clarendon area (1.4). This is to be expected, as the three sites are located in the town centre and have commercial/office based uses. The building heights on these sites are also higher than in other out of centre locations, which may explain their higher plot ratios.
- 5.9 It would have been expected that the Clarendon Road area would have had a higher plot ratio, although the lower figure can possibly be explained by the amount of large scale

developments currently under construction.⁴

- 5.10 The sites with the lowest plot ratios are heavy industrial sites where operations primarily take place outdoors. This includes Water Lane (0.0008), Waste Site, Colne Way (0.1) and Pinner Road (0.1).

6 Use Classes

Key Findings

- *Largest proportion of floor space uses are B1a (office), B8 (storage and distribution) and B2 (general industry).*
- *The vacancy rate is 5.22%*
- *39% of floor space in the employment areas is taken up by non B uses*

- 6.1 As prior noted in the methodology, each individual unit found on site had a use class attributed to it. Using this data, it has been possible to give an estimate of the total employment floor space taken up by each use class.
- 6.2 Figure 4 shows the percentage of Watford’s total employment floor space that is taken by each use class.

Figure 4: Use classes shown as percentages of total employment floor space in Watford

Use Class	Definition	Percentage of Total Floor Space
A1	Shops and retail outlets	4.69%
A2	Professional and financial services	7.84%
A3	Restaurants and cafes	0.23%
A4	Drinking establishments	0.2%
B1a	Office based uses	29.83%
B1b	Research and development	3.5%
B1c	Light industry appropriate in a	2.67%

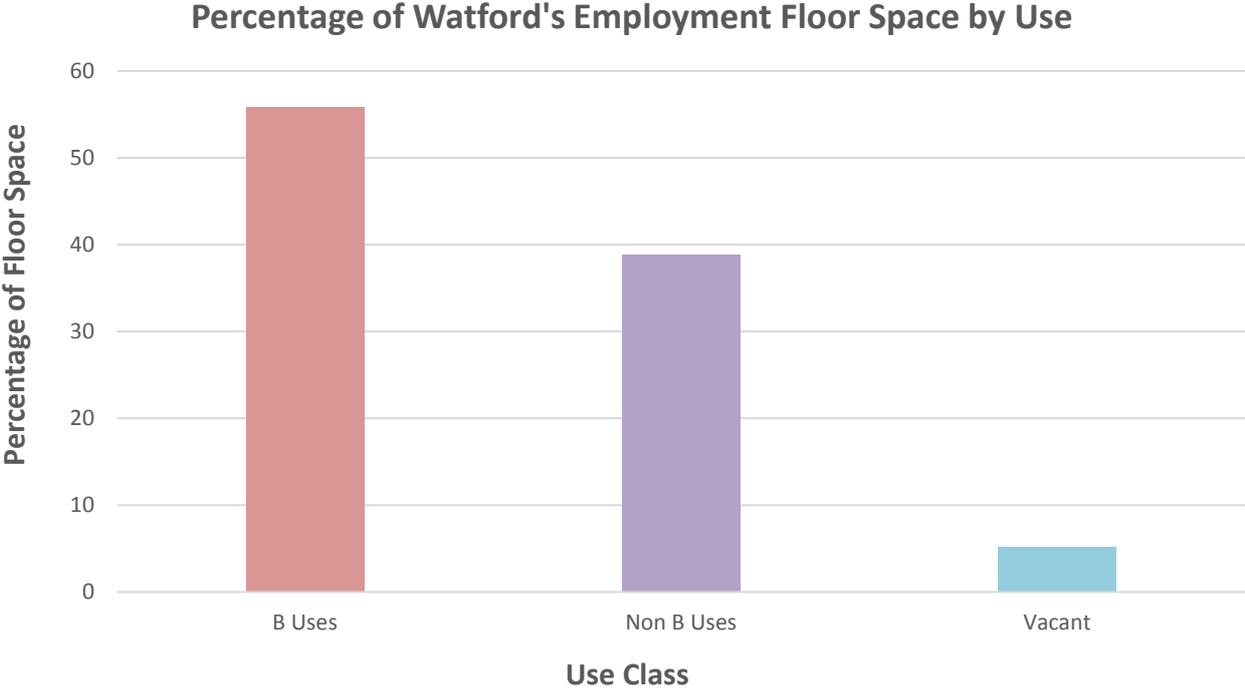
⁴ For reference, the future plot ratio at the office development under construction at 73-77 Clarendon Road is projected to be 7.4. The scale of this development indicates that the plot ratio of the Clarendon Road area will increase as extant permissions are built out.

	residential area	
B2	General industrial uses	13.71%
B8	Storage, wholesalers and distribution	19.91%
C1	Hotels	3.73%
C3	Dwelling houses	0.05%
D1	Non-residential institutions	4.65%
D2	Assembly and leisure (e.g. gyms)	0.74%
Vacant	Vacant	5.22%
Sui Generis	A use that does not fall into any particular use class	3.04%

6.3 As the table shows, the majority of floor space is taken up by B1a uses (29.83%), followed by B8 (19.91%) and B2 (13.71%).

6.4 Whilst employment sites have traditionally contained B uses, it must be noted that there are a considerable amount of non B uses now located in Watford’s employment sites. This comprises primarily of A2 and D1, which greatly outnumber B1c uses. The amount of non B uses, compared with B uses has been better represented in Figure 5.

Figure 5: Watford employment floor space by use



- 6.5 This departure from strictly B uses may be representative of the trend towards co-location, or demonstrate that non-employment institutions (such as places of worship, gyms and retail units) have difficulty finding affordable space elsewhere in the borough.
- 6.6 The data shows that there is approximately 396,311m² of B class floor space in Watford. However, the Economic Growth and Delivery Assessment (EGDA, 2014) has found that there was 672,000m² of B class floor space in 2012, which would indicate a net loss of 275,689m² of employment floor space in a six year period. This equates to 41% of the borough's total employment floor space as of 2012.⁵
- 6.7 Figures 4 and 5 also show that vacancy levels are 5.22% throughout the borough. Watford's figure is somewhat low, which may indicate lack of space.⁶ This may cause high rent prices and act as a limit to businesses who wish to expand, or relocate to the town.

7 Findings: Designated Employment Sites

- 7.1 The five sites designated in the Watford District Plan (2000) have been examined in detail for their strategic importance. Figures 6 to 15 show the breakdown of each specific use on the site to show the predominant floor space take up. Each use class has been given the same colour for ease of comparison.
- 7.2 Note that the boundaries of the sites have been amended for the purpose of the study, to reflect the additions to the sites that have taken place in the past 19 years.

Clarendon Road/Station Road/Bridle Path

- 7.3 The Clarendon Road/Station Road/Bridle Path area is dominated by B1a uses (59%), due to its regional role as a Grade A office destination. Although there was a greater total of non B uses than expected, Figure 6 shows these uses include complimentary uses to the commercial sector there, such as hotels for visiting business clients (14%) and A2 uses (18%), which have similar requirements to B1a uses for office premises. The remaining 9% is formed from a broader range of uses.

⁵ The studies used different methodologies to total the amount of B class floor space and so a direct comparison may not be useful

⁶ Note the EGDA states that normal market vacancy rates are 10% in order to provide for the turnover, intensification and upgrading of existing sites

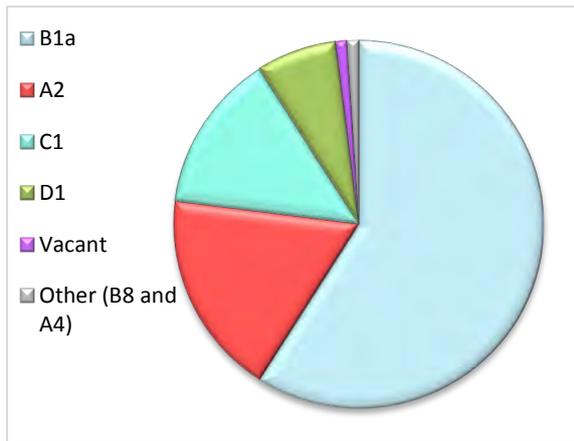


Figure 6. Floor Space Breakdown by Use

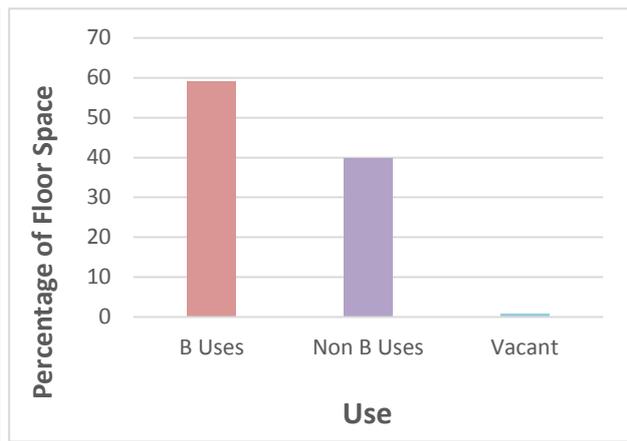


Figure 7. Percentage of Floor Space by B and Non B Uses

Imperial Way/Colonial Way

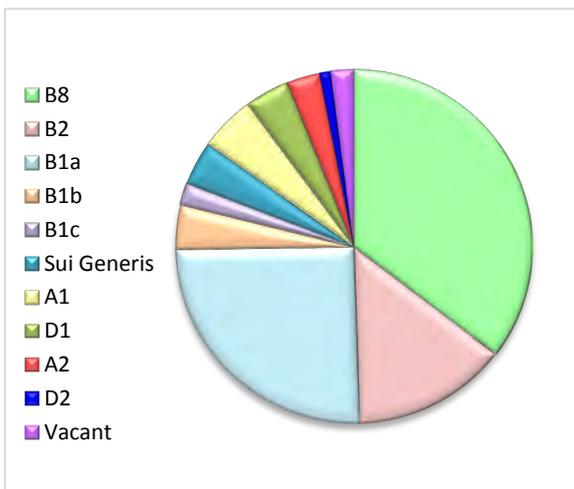


Figure 8. Floor Space Breakdown by Use

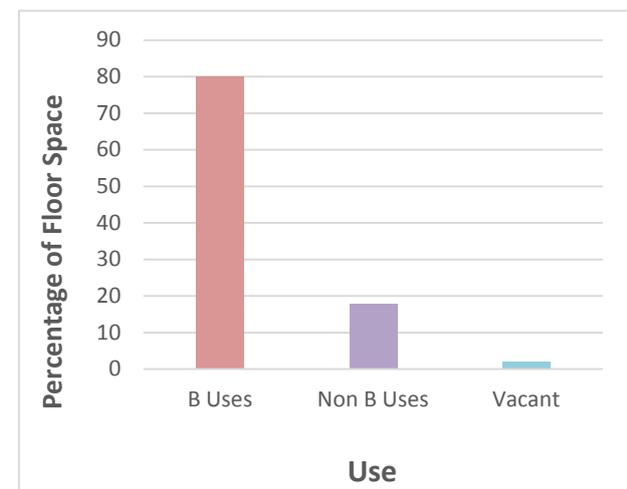


Figure 9. Percentage of Floor Space by B and Non B Uses

7.4 The largest uses of floor space at the Imperial Way/Colonial Way are B8 (35%), B1a (25%) and B2 (14%). The remaining floor space is divided between a broad mixture of uses and contains spaces being used as showrooms and retail units, religious centres and yoga studios.

7.5 The proportion of B uses to non B uses is high in this employment area. 80% of the floor space has been retained as B uses, which is higher than the borough average of 55.9%. 18% of the floor space has non B uses and vacancy is low at 2%.

Watford Business Park

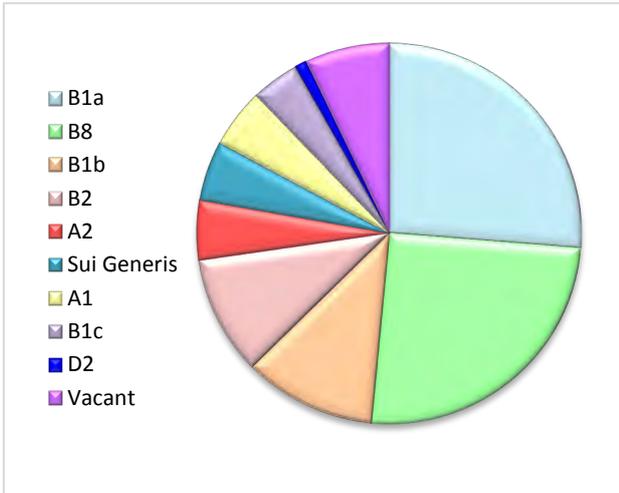


Figure 10. Floor Space Breakdown by Use

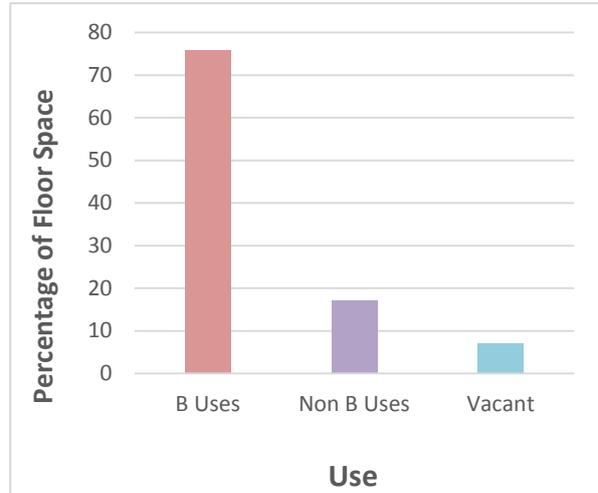


Figure 11. Percentage of Floor Space by B and Non B Uses

7.6 Similarly, Watford Business Park contains a high proportion of B1a space (26%), alongside B8 (25%), B1b (11%) and B1c (10%). The remaining 27% is relatively evenly split between other uses.

7.7 The proportion of B uses to non B uses is also high in this employment area. 76% of the floor space has been retained as B uses, while 17% have non B uses. Vacancy is slightly higher than the borough average at 7%.

Greycaine Road/Odhams/Sandown Road

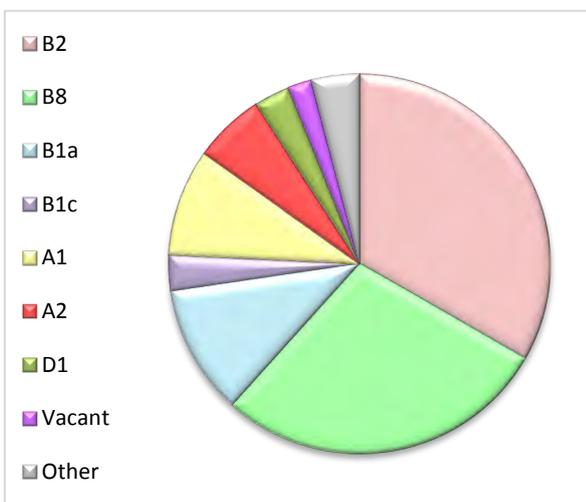


Figure 12. Floor Space Breakdown by Use

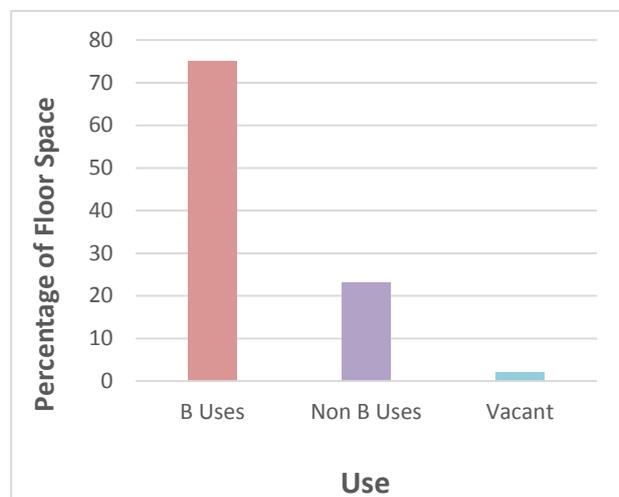


Figure 13. Percentage of Floor Space by B and Non B Uses

7.8 The Greycaine Road/Odhams/Sandown Road area is dominated by industrial uses, such as B2 (33%) and B8 (28%). Other prevailing uses are B1a (11%) and A1 (9%), with the remainder of the employment space having a variety of uses including A2, D1 and B1c.

7.9 Figure 13 shows that 75% of the floor space has been retained as B uses, while 23% have non B uses. Vacancy is lower than the borough average at 2%.

Wiggenhall/Fishers/Trade City

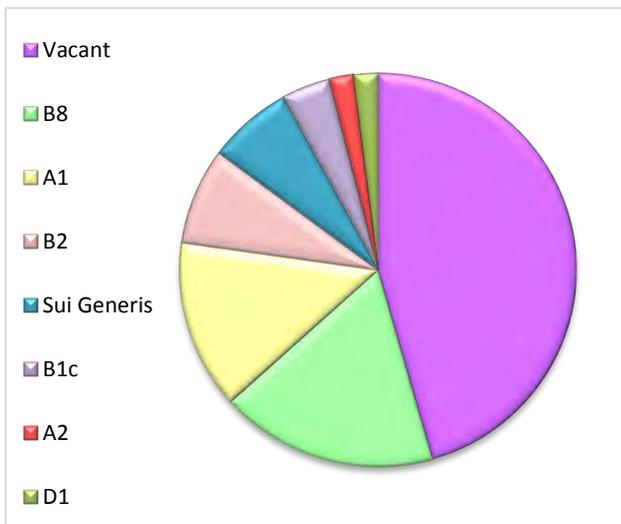


Figure 14. Floor Space Breakdown by Use

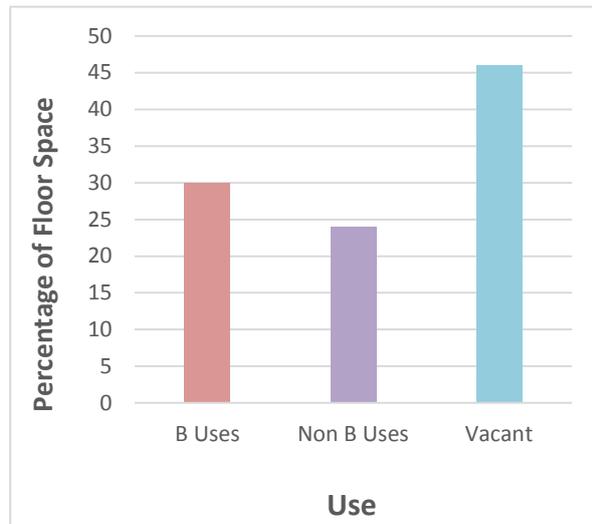


Figure 15. Percentage of Floor Space by B and Non B Uses

7.10 Wiggenhall/Fishers/Trade City contains high vacancy rates (46%). However, the high vacancy in this site can be accounted for by the recent building completions at Trade City.

7.11 The remaining floor space is predominately being used for B8 (18%) and A1 (14%) activities. 23% is split between other uses including B2 and B1c.

7.12 30% of the employment floor space has B uses and 24% has non B uses (the remainder is vacant).

8 Findings: Non-designated Employment Sites

8.1 Figure 16 shows the floor space breakdown between B uses, non B uses and vacant space in non-designated employment sites.

8.2 Numerous sites contain a higher proportion than the borough average (55.9%) of B uses. 94 Rickmansworth Road, 96-100 Cecil Street, Cherry Tree Road, Handford Court, Water

Lane and the Waste Site, Colne Way contain purely B uses. Other sites with high retention of B class floor space are the Hille Business Centre (83%), 126 Rickmansworth Road (81%), Euston Avenue/Hagden Lane (78%) and Pinner Road (76%).

8.3 Non designated sites have also seen a rise in the prevalence of non B uses, many at higher proportions than the borough average (38.9%). 176-200 Rickmansworth Road is the only site to contain purely non B uses, whereas other sites with high totals of non B uses include Local Board Road (94%). George Street (85%) and Finway Court (78%).

8.4 Town centre sites such as George Street, Local Board Road, Merton Road and Upton Street/Exchange Road all contain higher proportions than the borough average of non B floor space. Although, this is to be somewhat expected as policy directions encourage a diversity of uses in the town centre based on its accessibility and regional role as an economic centre.

8.5 The graph also shows there to be limited vacancy. 14 sites contain no vacant floor space. Sites with higher levels of vacant floor space are Sydney Road (51%)⁷, the Shakespeare Road Estate (16%) and George Street (15%). The Hille Business Centre contains some vacancy (4%) but this is lower than the borough average (5.22%).

Figure 16: Non Designated Sites Floor Space by Use



9 Qualitative Findings

- 9.1 It was decided that site appraisals were not to be undertaken as part of this review due to their subjective nature. The Economic Study will assess the suitability of the stock for meeting user requirements and outward appearance is not a true reflection of this. However, this section will discuss the availability of certain facilities throughout the sites.

Parking Requirements

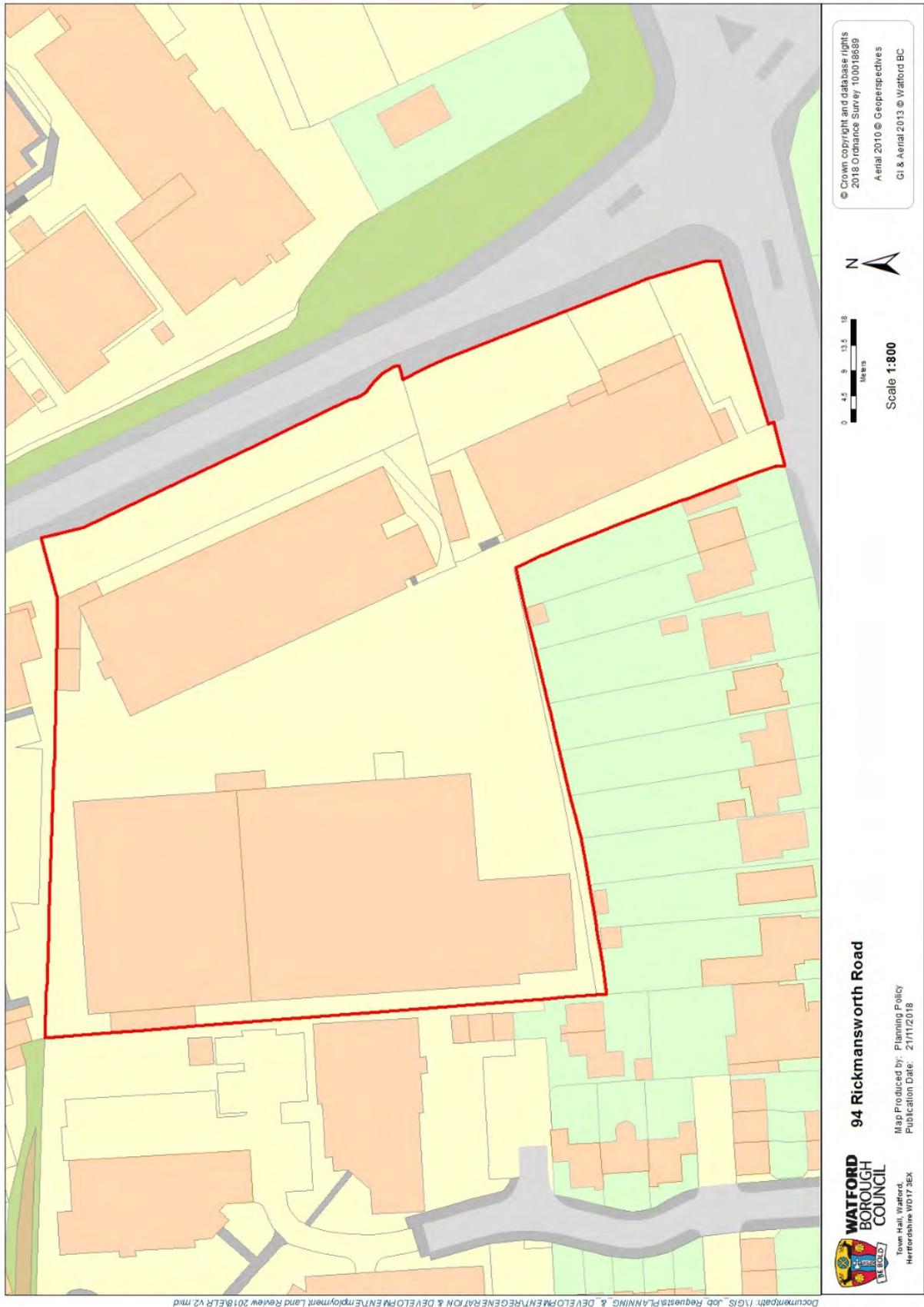
- 9.2 Whilst the vast majority of sites had access to car parking, it was noted on site visits how limited cycle parking facilities were. A small number of sites contained covered cycle stands, these being found at two premises in Watford Business Park, at the Odhams Trading Estate, Trade City and at some of the commercial buildings in the Clarendon Road area. In order to encourage the use of sustainable transport modes, further action may need to be taken to ensure that new employment sites contain covered and secure cycle parking facilities.
- 9.3 It was not within the remit of the study to assess internal facilities, such as changing facilities for employees who cycle to work. However, the provision of these facilities are also to be encouraged (in line with the Council's Cycle Parking Supplementary Planning Document).
- 9.4 The lack of electric vehicle (EV) charging points was also noted. The *Road to Zero*⁸ strategy sets out the national government's ambitions for all new cars and vans to be zero emission by 2040. In order to future proof Watford's employment land, it should be the case that any redevelopment or intensification will involve the installation of EV charging points.
- 9.5 This issue was raised more recently at Development Management Committee regarding an application for the redevelopment of the Blueprint Commercial Centre at Imperial Way/Colonial Way (Ref: 18/00338/FULM). A condition was placed on the approval of the application that no above ground construction may commence until a scheme for active and passive EV charging points has been approved by the Local Planning Authority. This case shows that electric vehicles are on the Council's agenda regarding employment sites, although further policy may be required in order to drive to this issue.

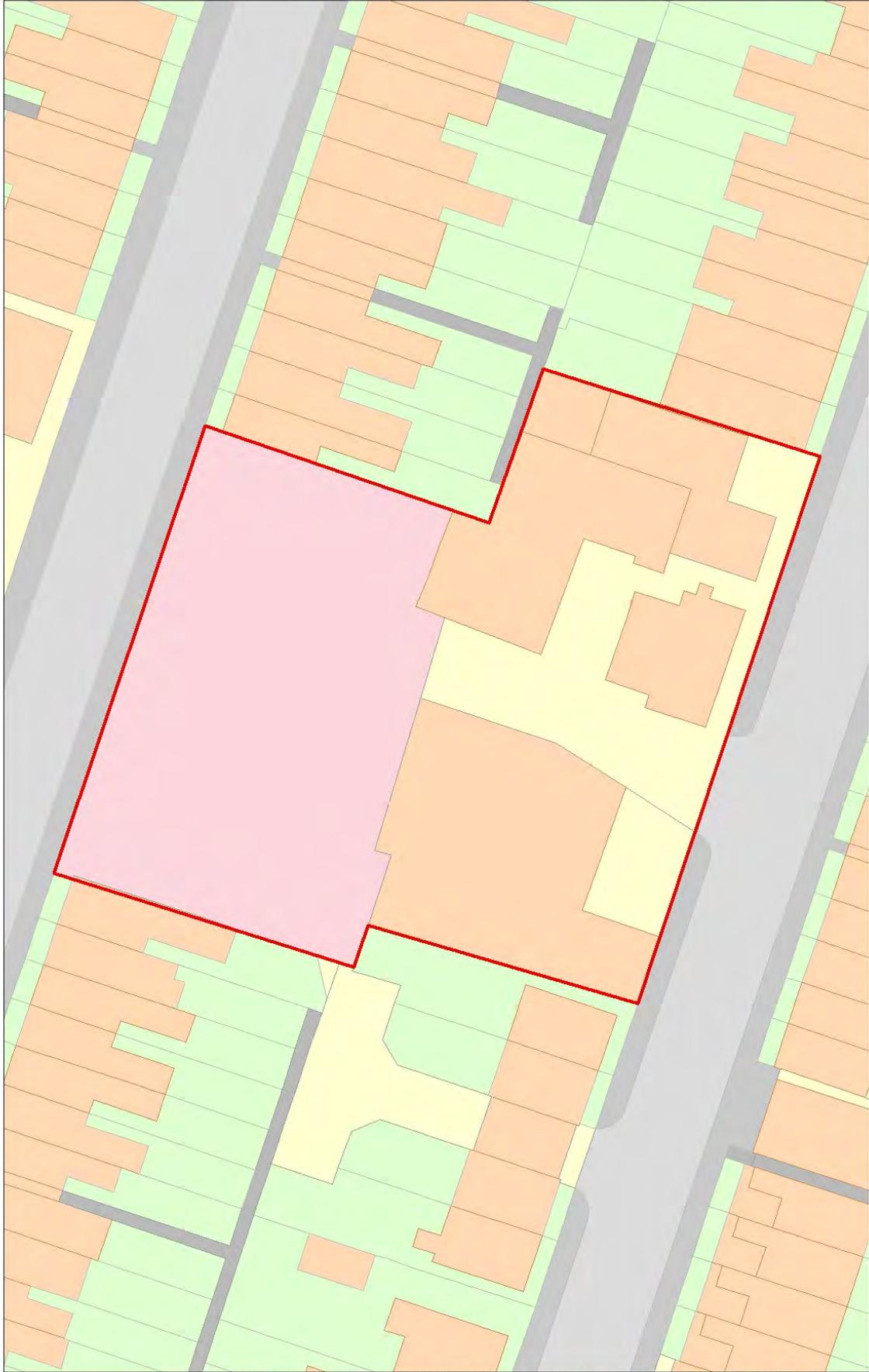
⁸https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/739460/road-to-zero.pdf

10 Summary of Findings

- 10.1 The study reviewed the current stock in Watford's employment sites which covers approximately 120.2 hectares of land and 707,699m² of floor space.
- 10.2 Watford's employment sites have an average plot ratio of 0.6, which may suggest that some sites have scope for future intensification.
- 10.3 Breakdowns of floor space uses show that the most prolific uses of floor space are B1a (office), B8 (storage and distribution) and B2 (general industry). More specific breakdowns have been provided for Watford's designated employment sites.
- 10.4 The study finds that the percentage of employment floor space taken up by non B uses (39%) is somewhat high. However, the proportion of non B uses in non-designated employment sites is generally higher, which could indicate that these sites are more vulnerable from redevelopment to other uses.
- 10.5 The level of floor space vacancy is 5.22%, which is lower than the recommended market vacancy rates.

Appendix 1: Site Maps (in alphabetical order)





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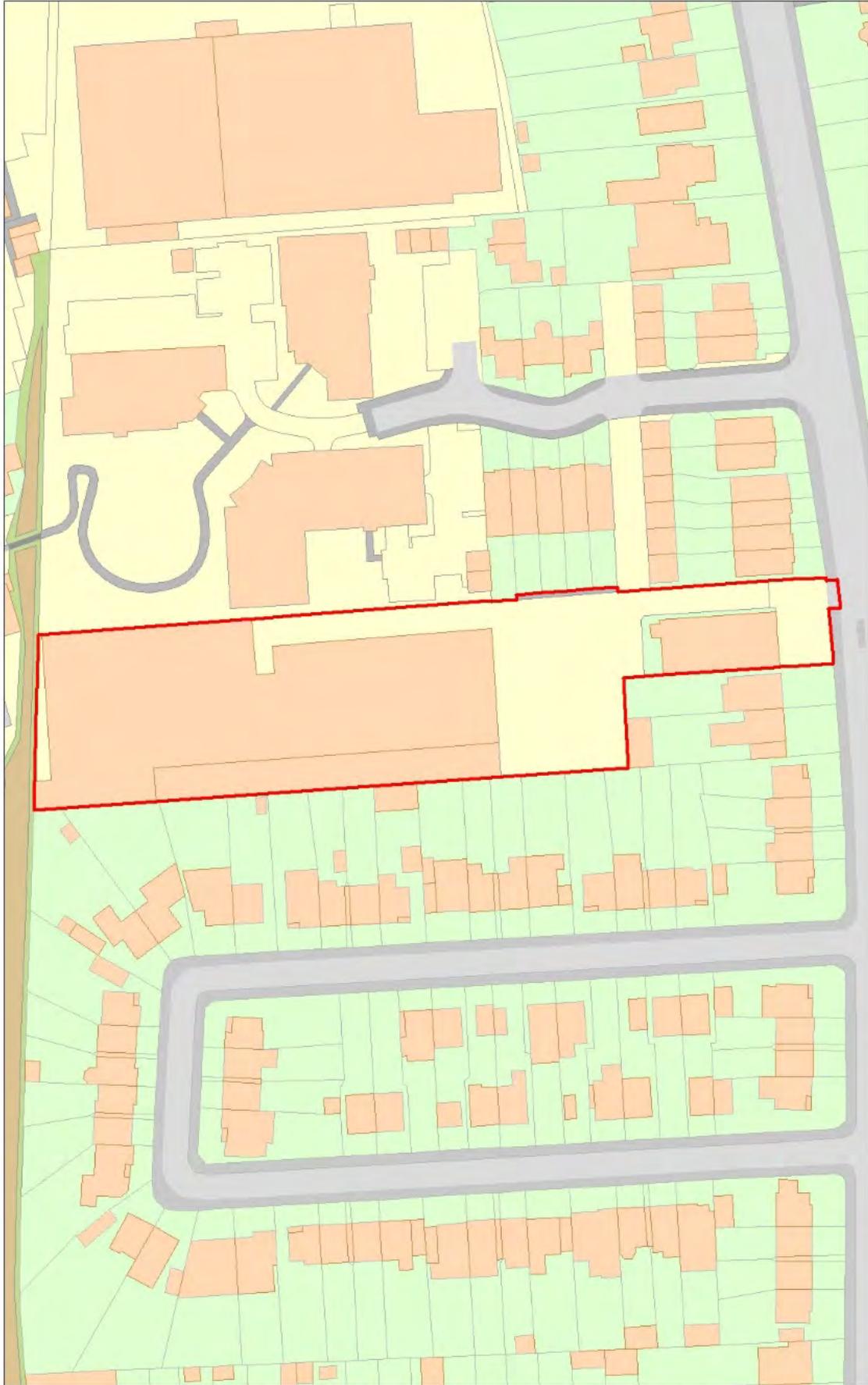
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96-100 Cecil Street

Map Produced by: Planning Policy
 Publication Date: 21/11/2018



Documentpath: \GIS_Job_Request\PLANNING & DEVELOPMENT\REGENERATION & DEVELOPMENT\EMPLOYMENT Land Review 2018\LR V2.mxd



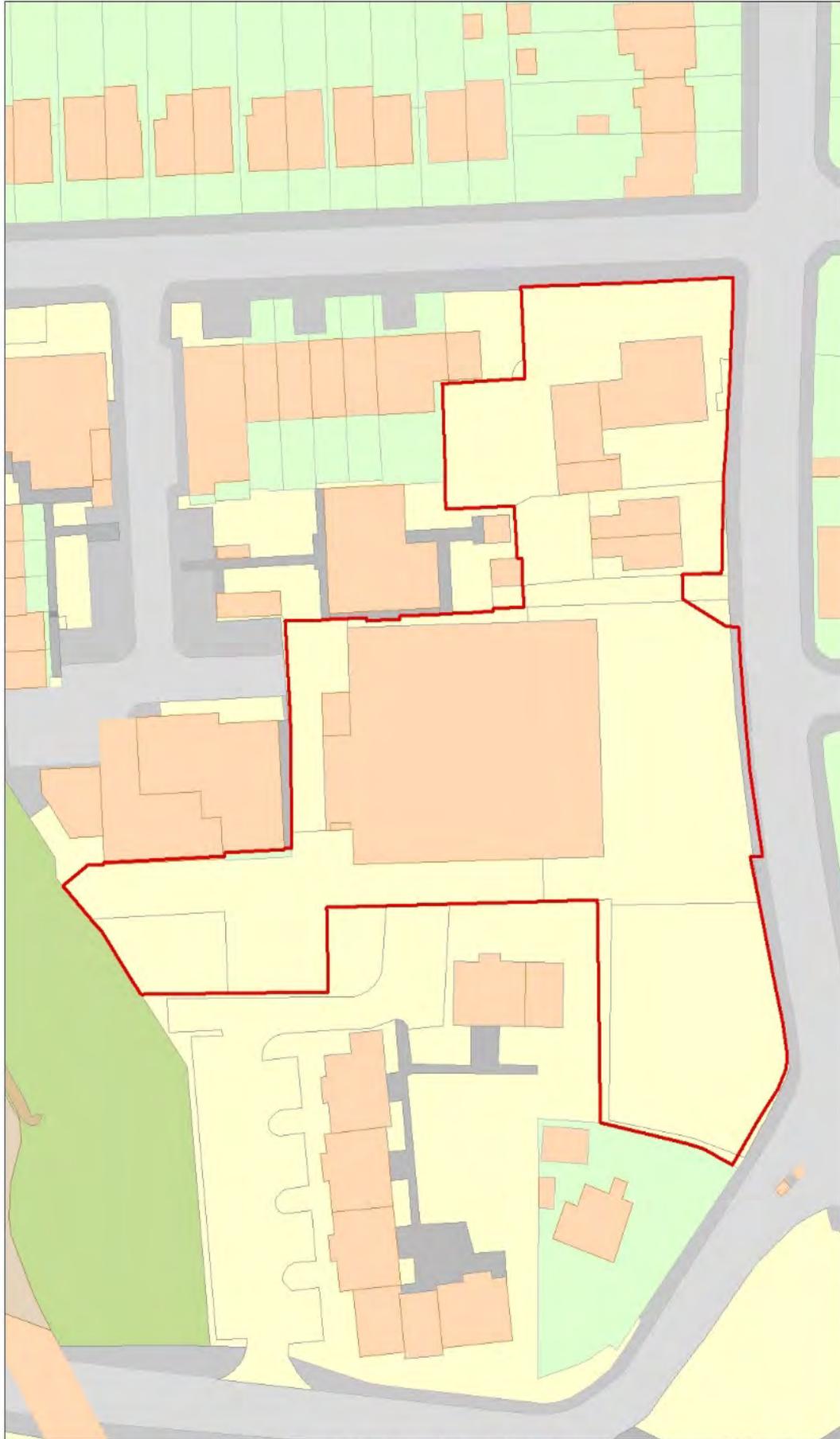
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126 Rickmansworth Road

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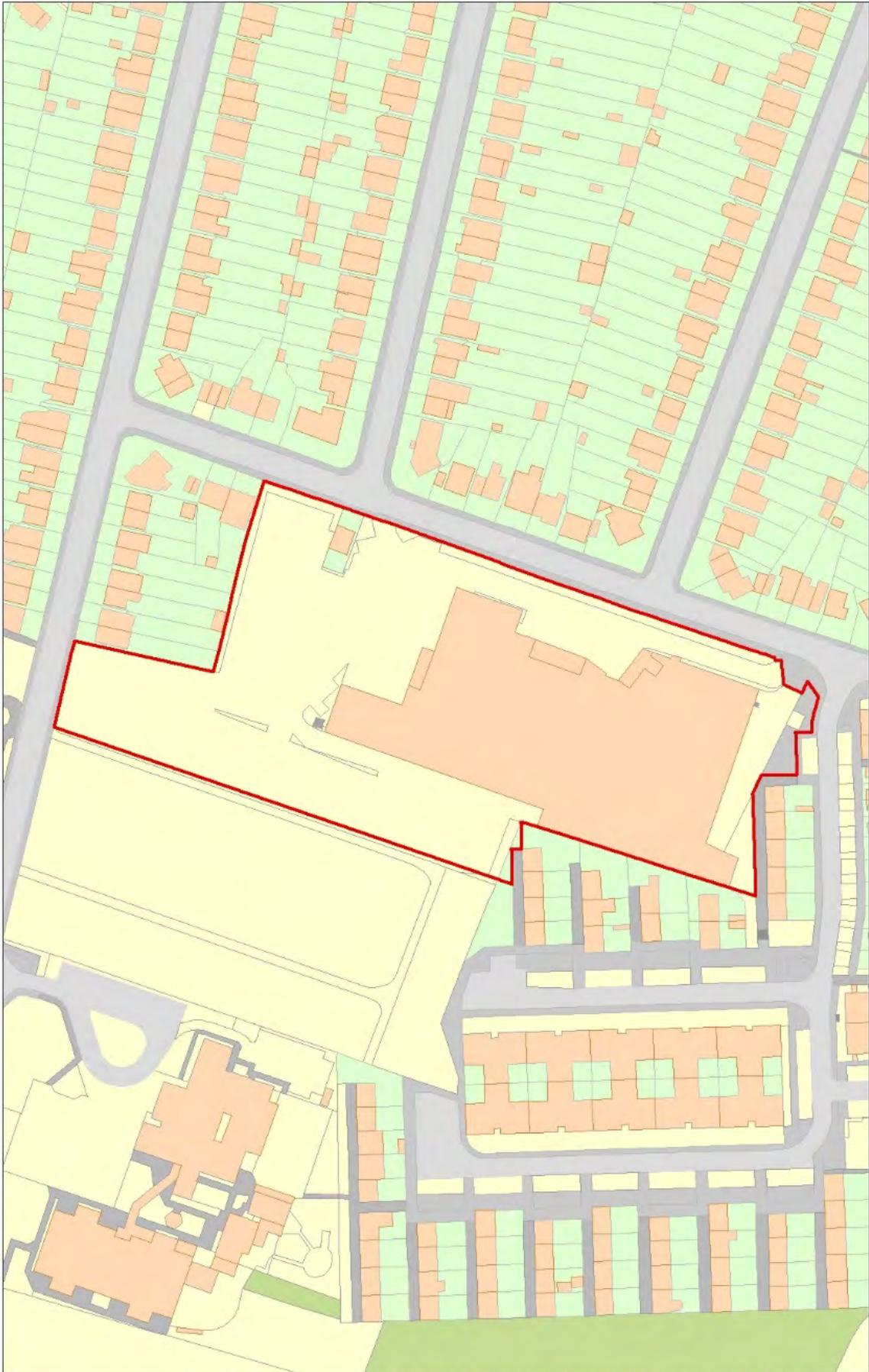


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176-190 Rickmansworth Road

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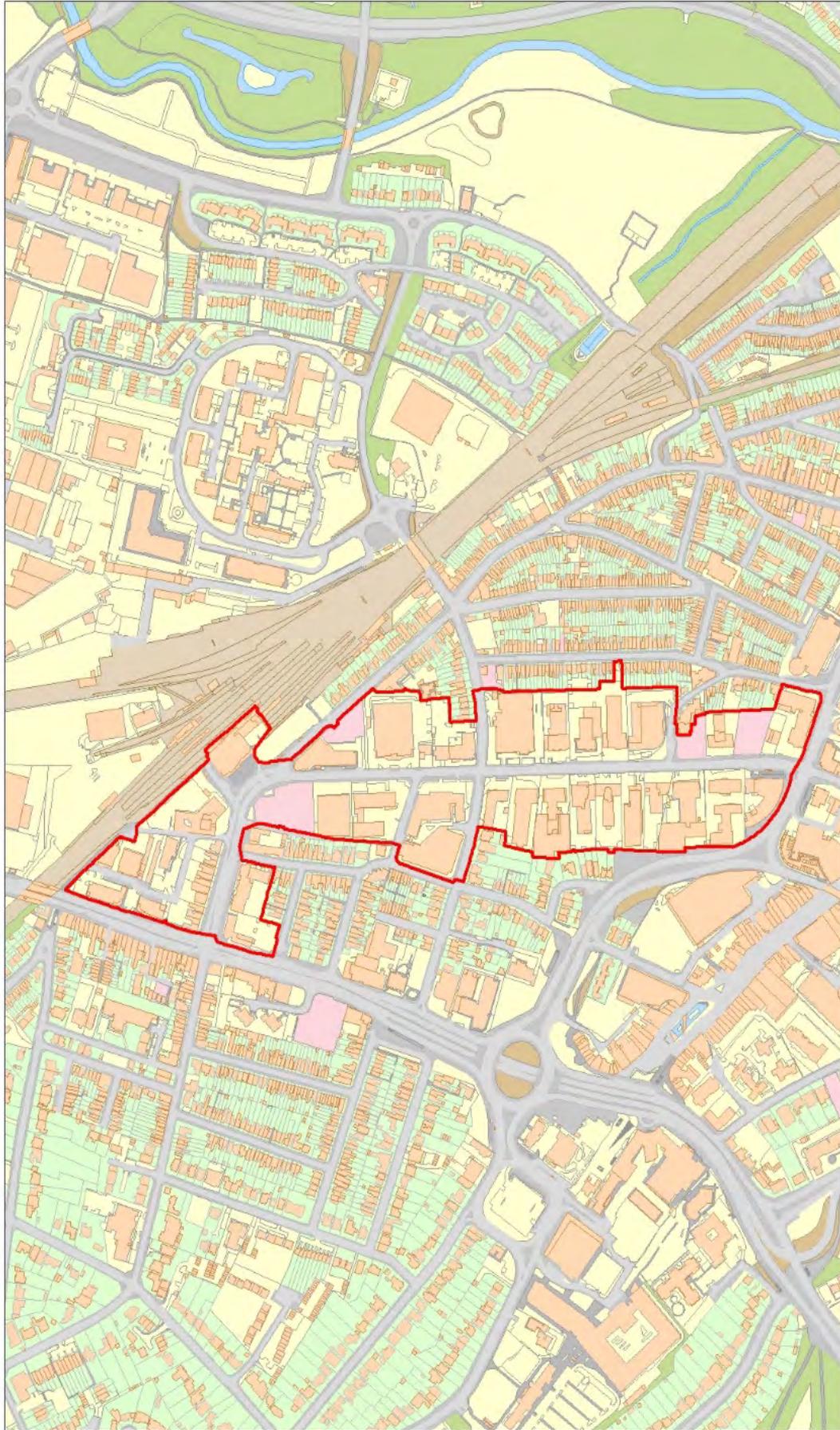
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Cherry Tree Road



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Clarendon Road/Station Road/Bridle Path

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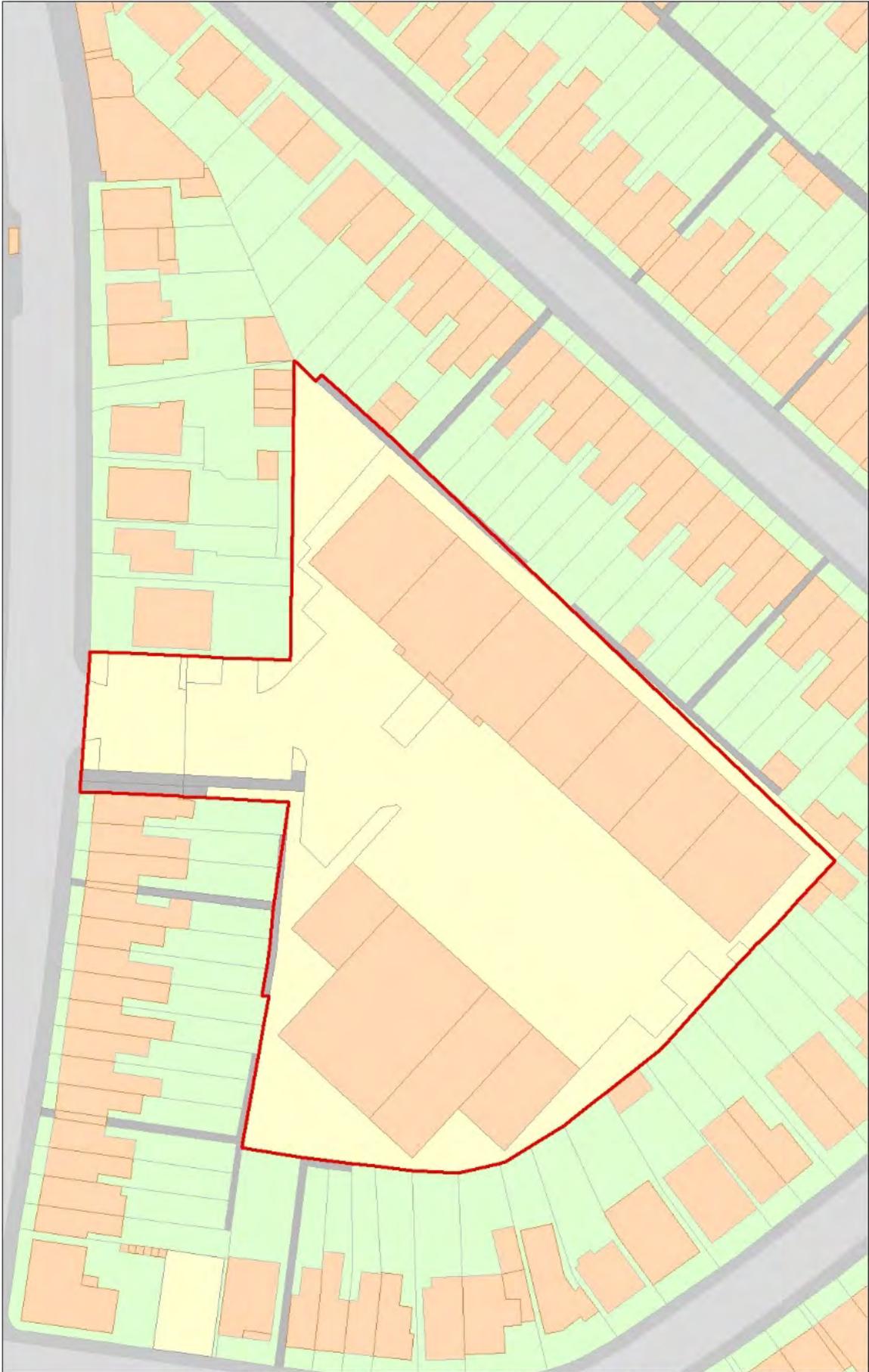


Scale 1:600

Euston Avenue/Hagden Lane

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Scale 1:700

Finway Court



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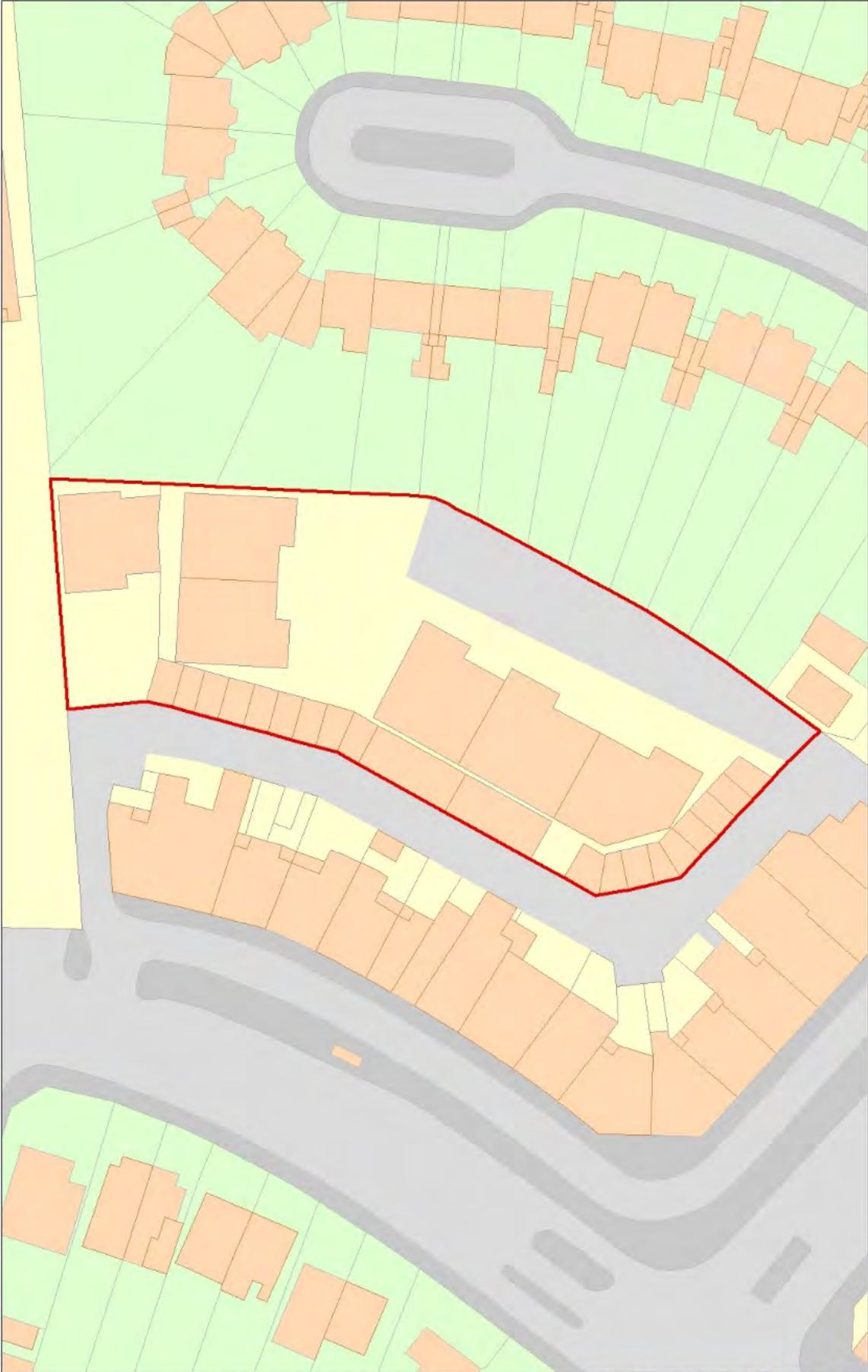


Scale 1:400

George Street

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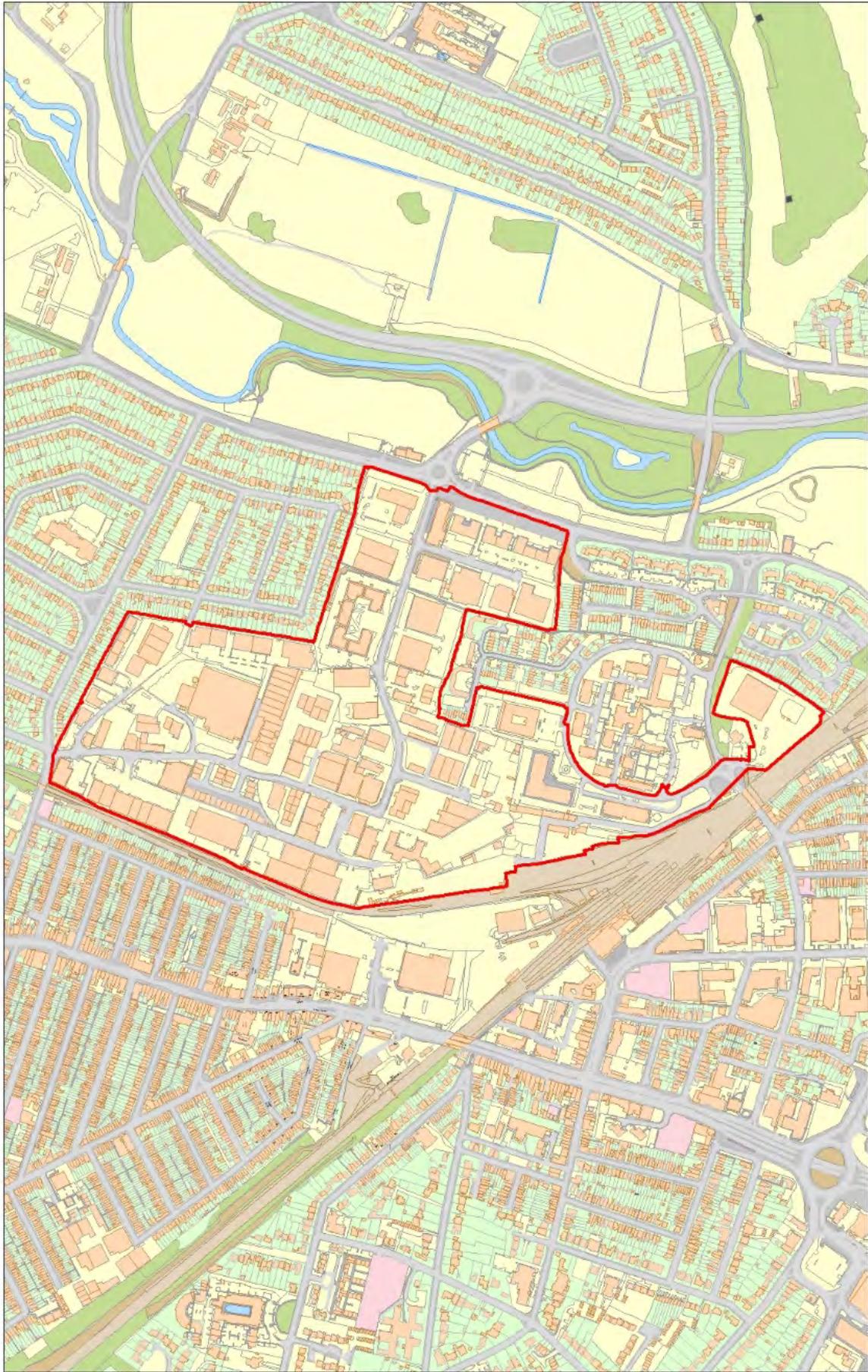


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Handford Court

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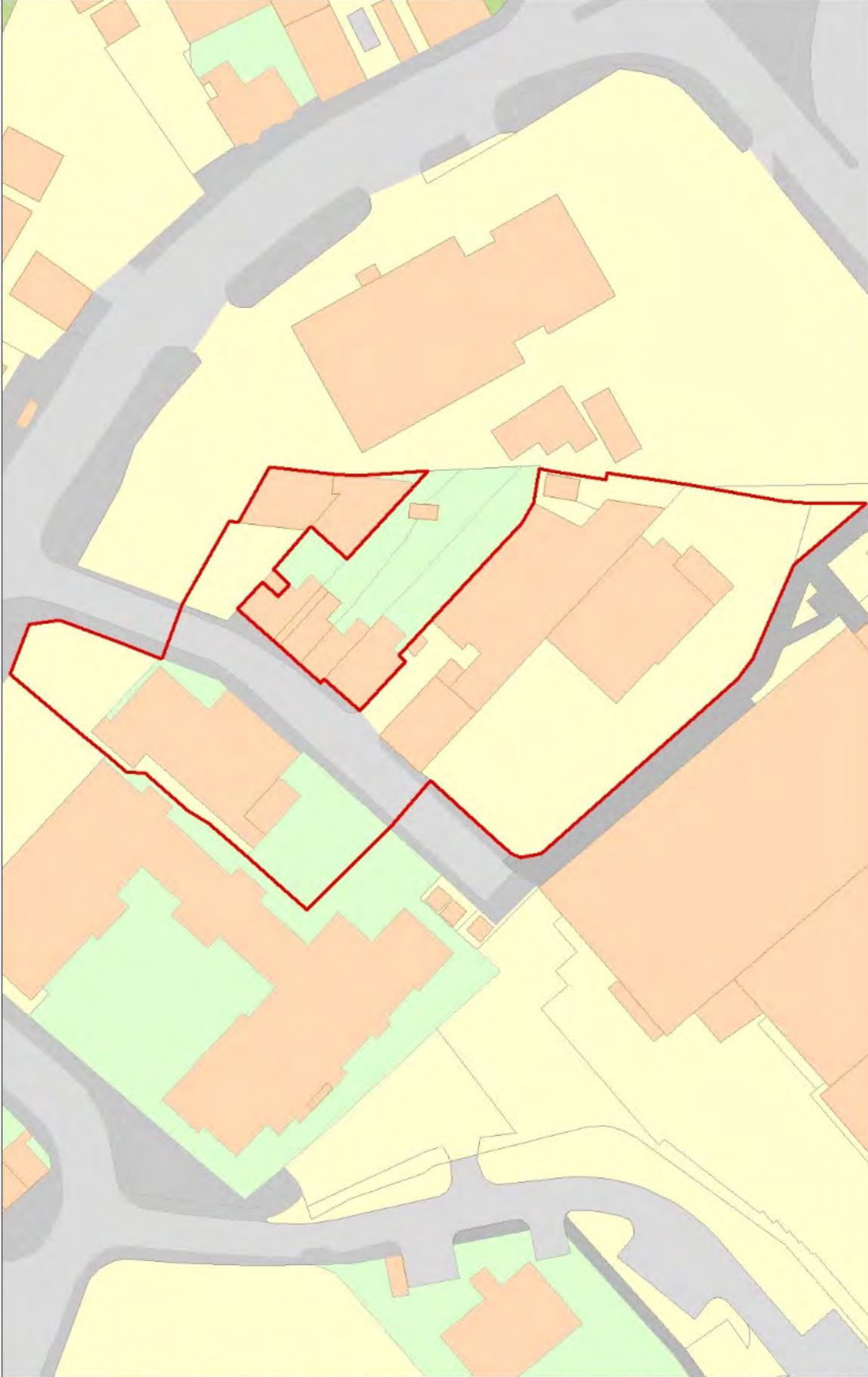
Imperial Way/Colonial Way

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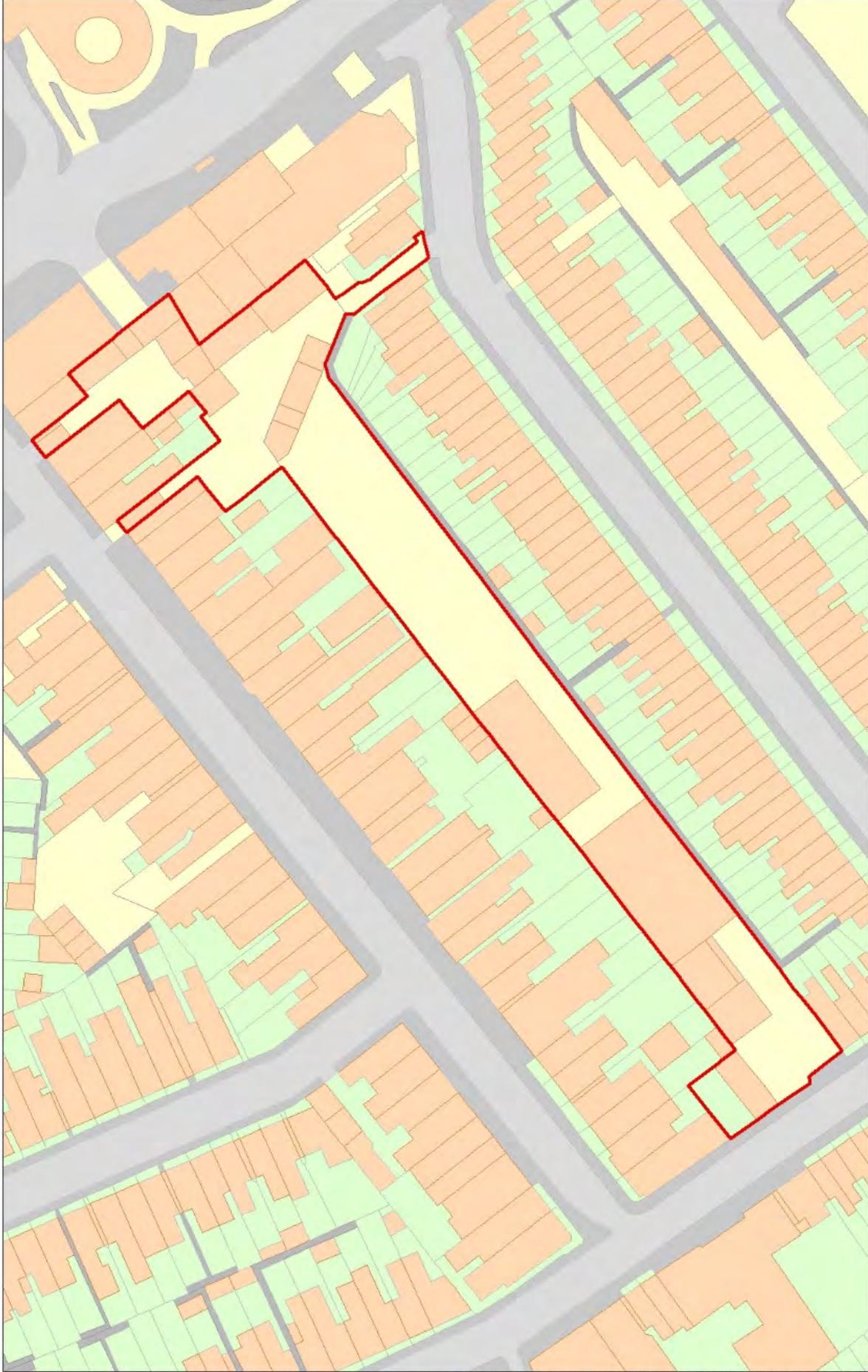


Local Board Road
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Scale 1:900

Merton Road

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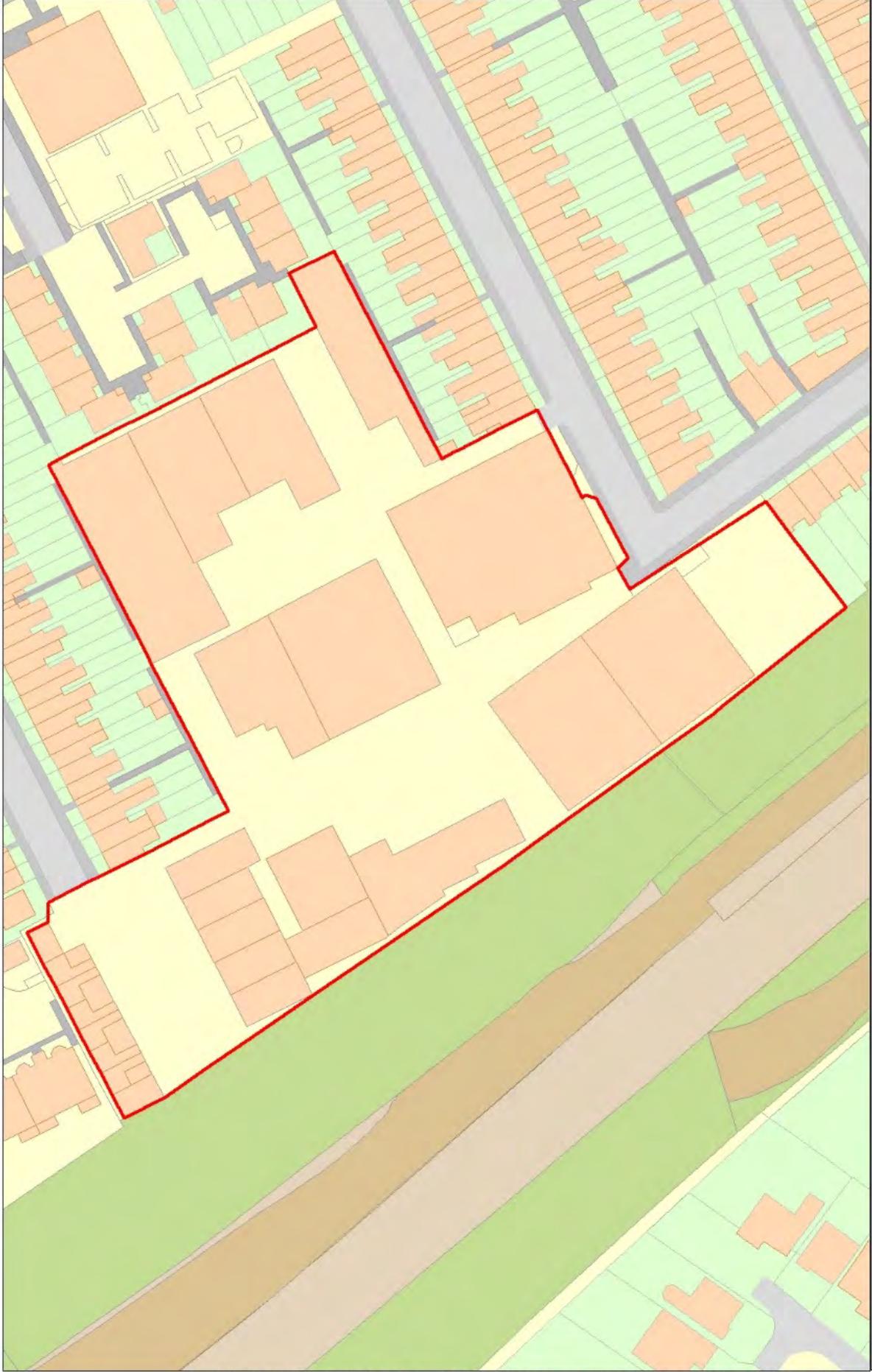
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Pinner Road



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Scale 1:1,000

Shakespeare Road Estate



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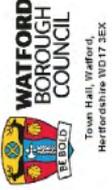
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Sydney Road Area

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Scale 1:600

Upton Street/Exchange Road



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Waste Site, Colne Way

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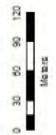
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Water Lane
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Watford Business Park



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Wiggenhall Road/Fishers/Trade City



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