



Local Economic Assessment 2021

Executive Summary

This assessment explains through a wide range of both published information and new research a detailed assessment in relation to the Spelthorne economy. It has been written in unprecedented times with the Covid pandemic and in the first year since the UK leaving the European Union.

1. It shows the economy is made up by a complex interaction of businesses, employees, and consumers but it is not self-contained.
2. Spelthorne lies in a traditionally economically buoyant area to the west of London and is within north Surrey, although like all other areas of the UK, it is in the process of recovery from the pandemic. Therefore, throughout this assessment benchmarks its position with adjoining areas as well as the rest of Surrey to provide context to each aspect of the economy that is set out. Additionally, the data also seeks to illustrate the position of Spelthorne in 2016 when the last economic assessment was completed, where we are now, and what that journey tells us about the economy.
3. Spelthorne has significant strengths with a large business base and a wide range of business sectors represented including a significant presence of businesses of national and international renown. This is further strengthened by its proximity to Heathrow Airport and its good communication links to London and the rest of the UK. However, having such a large reliance upon a single employer also comes with its risks, as we have seen a significant loss of jobs by those residents who rely heavily upon this industry for employment as well as its supply chain.
4. During the pandemic there were also a disproportionate amount of the Spelthorne community who were furloughed as the airport all but closed down for passengers and relied upon cargo to generate an income. It has a significant retail sector including two shopping centres in Staines-upon-Thames, which is focussed largely on meeting the needs of residents and those situated outside the fringes of our geographical boundaries.
5. Unemployment levels have risen significantly over the last year due to Covid 19 at a greater rate than Surrey, the southeast or indeed Great Britain; this was exacerbated by the reliance upon jobs at Heathrow Airport where pre-COVID around 3,700 of our residents relied directly on jobs within the airport.
6. Unemployment in the 16 to 64 age group within the Borough peaked in November 2020 with the highest percentage across Surrey at 5.7% compared to 1.5% in 2019. This figure dropped to 4.1% in September 2021 which is positive news and suggests that we are on the road to recovery; this compares to 5% in Great Britain
7. Education in the borough has seen a significant improvement with the number of 16–64-year-olds with an NVQ 4 or higher. In 2016 there were 37.8% with this level when the last LEA was produced, whilst Surrey had 47.8%. In 2020 Surrey average was 53.4% and Spelthorne achieved 54%, so now boasts a higher level of qualifications compared to the average in the county.
8. At the time of preparing this assessment the UK economy has had a testing period with covid 19 entering its second year and the impact of leaving the EU. In 2020/21 economic growth was down 2.4% in qtr1, -20.8% in qtr2 and -8.6% in qtr3. For the 4th quarter predictions are -4.2%¹.
9. Heathrow passenger numbers from the first lockdown in March 2020 to December 2020 compared to the same period in 2019 were down 84.9% from

¹ ONS January 2021

69,547,441 to 10,568,494²

- 10.** This economic assessment will be the key tool to help inform the contents and actions contained in the new 2022 – 2027 Economic Strategy.

² Heathrow January 2021

1. Introduction	6
2. Overview of the Borough	7
3. Transport	11
4. COVID-19: Economic Impact on Spelthorne Jobs and Businesses	15
5. The pandemic and its impact on different age groups	20
6. Population / Employment within Spelthorne	24
7. Business Sectors	28
8. Retail Performance	30
9. Business Births & Deaths	32
10. Business and Enterprise	34
11. Support for Small Businesses	45
12. Business Turnover	46
13. Economic Performance	47
14. Staines-upon-Thames BID	52
15. Skills and Qualifications	54
16. Quality of Life - Health and Wellbeing	56
17. Deprivation	63
18. Superfast Broadband	66
19. Natural Environment	66
20. Business Organisations in Spelthorne and the Wider Area	69
21. Sustainability	71
22. Additional charts collected late in 2021.....	73

1. Introduction

- 1.1 The purpose of this Local Economic Assessment (LEA) is to clearly show the various elements that make up the Spelthorne economy. This is done by presenting a wide range of economic information from which the main characteristics of the Borough can be understood. It will inform a new Economic Prosperity Strategy 2023 – 2028 so that a coherent and focused set of actions to further improve the economy and help address any blockages to local growth and help achieve economic success
- 1.2 Economies by their nature involve a complex interlinking of activities which have local, regional, national, and international dimensions, the global pandemic has also impacted on how these elements interlink with each other. For this reason, a local authority's administrative area cannot be treated as if it were a self-contained economic area. This is particularly true for Spelthorne where it is part of the Heathrow area economy, part of the wider outer West London area, and also of the Thames Valley area and Northwest Surrey. This LEA is being prepared in unprecedented times with minus growth figures for the key indicators in 2020³. UK GDP – 11%, Household consumption – 11.25%, Business Investment -18.75%, Housing investment -19.25% and Exports -11.75%. The Bank of England are predicting growth figures in these areas for 2022 and 2023.
- 1.3 The UK left the EU on 31st December 2020. It is too early to say how this will affect the UK economy in the long term. Since leaving the EU the delay in goods being held at borders is causing concern with companies moving from sea to air to transport the goods which provides some benefit for Heathrow Airport. There is also concern about the number of people available for employment with high levels of vacancies available, particularly in hospitality, retail, and farming sectors (October 2021). The impact of leaving the EU has also been clouded due to the effect on the economy by the Covid pandemic. Early indicators have shown that there are number of key jobs that now appear to lack staff. HGV drivers have been in the headlines brought about by the shortage of fuel at petrol stations and some items running short in supermarkets. Additionally, the pig farming industry is under pressure with a lack of abattoir staff. The government has needed to use temporary visas to bridge that gap, but time will tell how temporary the use of visas will be to fill key vacancies to keep the UK economy running.
- 1.4 Experts have forecast that GDP will drop 0.1% (best case scenario) to a drop of 3.9% (worst case scenario)⁴. In a survey by the London School of Economics in January 2021 of 39 European and US economists 86% believe that the UK economy is likely to be several percentage points smaller in 2030 than it would have otherwise been. Only a quarter believe the same applies to the EU economy while 41% don't consider that the impact on the EU economy will be strongly negative.
- 1.5 A drop in GDP will impact on employment, other occupations could be adversely affected for example the NHS. Due to the impact of Covid it is unclear of employment levels moving forward but there could be a lack of resource in various occupations

³ Bank of England monetary policy report November 2020

⁴ Oxford Economics

due to leaving the EU. In October 2021 there were just over a million jobs unfilled across the country.

- 1.6 The national and regional economic impact on the economy make it all the more important that local councils do what they can to support local businesses. Whilst preparing such assessments which is discretionary⁵ for borough councils, Spelthorne Borough Council sees this work as an essential step in preparing an Economic Strategy which will set targeted local economic priorities.
- 1.7 By their nature economies are dynamic and therefore any LEA can only provide a 'snapshot' of what the economy is like at a particular point in time and based on the information that is available
- 1.8 This assessment therefore compares available economic data for Spelthorne with adjoining areas to get an understanding of its nature, importance and where possible, its degree of success

2 Overview of the Borough

- 2.1 Spelthorne is a relatively compact area of some six by two and half miles. It is located 15 miles from central London and shares its northern border with Heathrow Airport. The river Thames defines its long southern boundary.
- 2.2 The Borough's population is approximately 99,800 and has a significant employment base. Its main town is Staines-upon-Thames, the other main urban areas in the borough are Ashford, Shepperton, Sunbury-on-Thames, and Stanwell.
- 2.3 No part of the open land in the Borough is more than half a mile from the urban area. Therefore, none of this open land can be regarded as 'rural' in the sense that its economy is so remote that it needs to have a degree of self-sufficiency and independence.
- 2.4 Before the covid epidemic 6.9% (around 3,500 people) of residents worked at Heathrow Airport which had an on-site workforce of approximately 76,000. Its role as one of the world's largest international passenger airports and significant air cargo function has a economic influence on the wider area, including indirect roles e.g. supply chain this rises to 133,600. An estimated 10.6% of these roles were filled from Spelthorne residents. The projections (depending on covid travel restrictions) are that Heathrow related jobs will return to pre covid levels in 2023 jobs⁶
- 2.5 Staines-upon-Thames is a major shopping centre serving an area well beyond the Borough itself, as well as being a large office and commercial centre. It has direct rail access to Waterloo, Reading, Windsor and Weybridge and is less than 10 minutes' drive from the M25 and Terminal 5. In fact, it is the nearest major town centre to Heathrow Airport.
- 2.6 Sunbury-on-Thames is the second major office location within the Borough with Junction 1 of the M3 immediately alongside it. Sunbury also has BP's International Centre for Business and Technology which is the company's largest centre in the UK

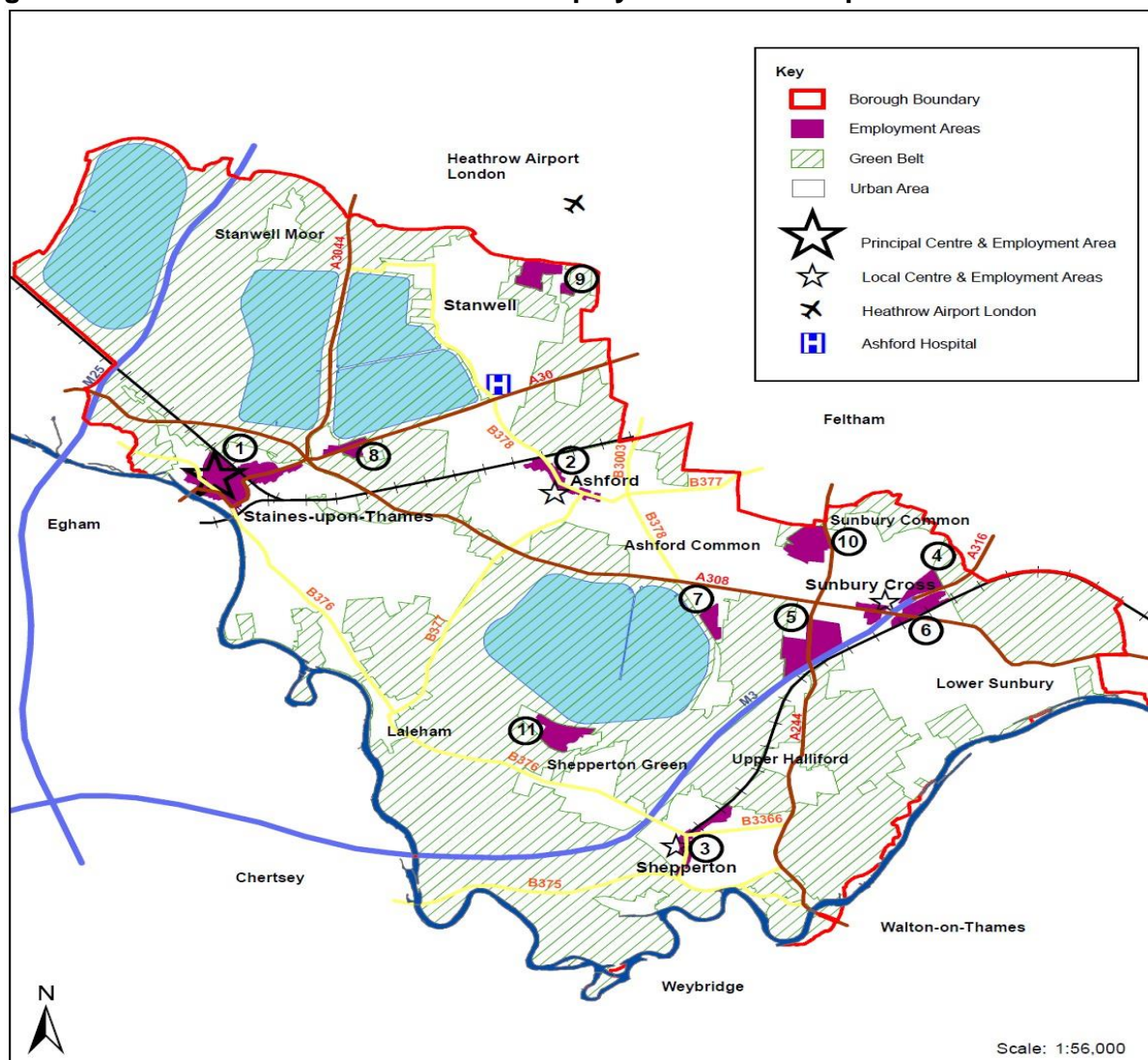
⁵ The Local Democracy, Economic Development and Construction Act 2009 only places a statutory duty to prepare Local Economic Assessments on County and Unitary Councils.

⁶ Oxford Economics The economic impact of reduced activity at Heathrow sept 2020

with over 5,000 employees. In October 2016 Spelthorne Borough Council purchased the BP site leasing it back to BP. Sunbury has several other significant industrial estates The Dolphin, Windmill Trading Estates and The Summit Business Park which the borough purchased in September 2019, this site includes The Summit Centre which is the location of the boroughs Business Hub which opened in June 2021, all of these locations have ready access to the motorway.

- 2.7 Shepperton is home of the world famous Shepperton Studios and part of the Pinewood Studios Group. Along with BP they represent part of a significant high technology presence within the Borough. In 2019 Netflix signed a 10-year lease to rent Shepperton Studios. Pinewood have invested £500 million to develop the Shepperton site which shows the confidence they have in the borough. Work started on the site in March 2021.
- 2.8 The current nature of Spelthorne's economy is, however, very much a product of its history. That history is one of massive growth in the 20th century through the production of linoleum which has shaped the economic and social character of the Borough today. In the 40 years between 1921 and 1961 the Borough saw an enormous growth in house building with the population increasing more than threefold.
- 2.9 The origins of this growth lay in London with the decentralisation of industry from Inner London. This process was driven by the shortage of space to expand, high land values, poor air quality and congestion. This decentralisation coincided with an enormous growth in manufacturing generally. Between 1932 and 1938 nearly half of all new factories opening in the country employing more than 25 people were in the Greater London area.
- 2.10 The decentralisation was not, however, evenly spread around London. Due to cleaner air to the west in comparison to the east of London, and easier links to the Midlands and north of the country, there was a particular growth to the west and north-west of London. This growth was particularly pronounced north of the Thames. It is in this area that a lot of new light industry located providing the new electrical consumer goods, cars, and processed foods that society was beginning to demand.

Figure 1: Location of Town Centres and Employment Areas in Spelthorne



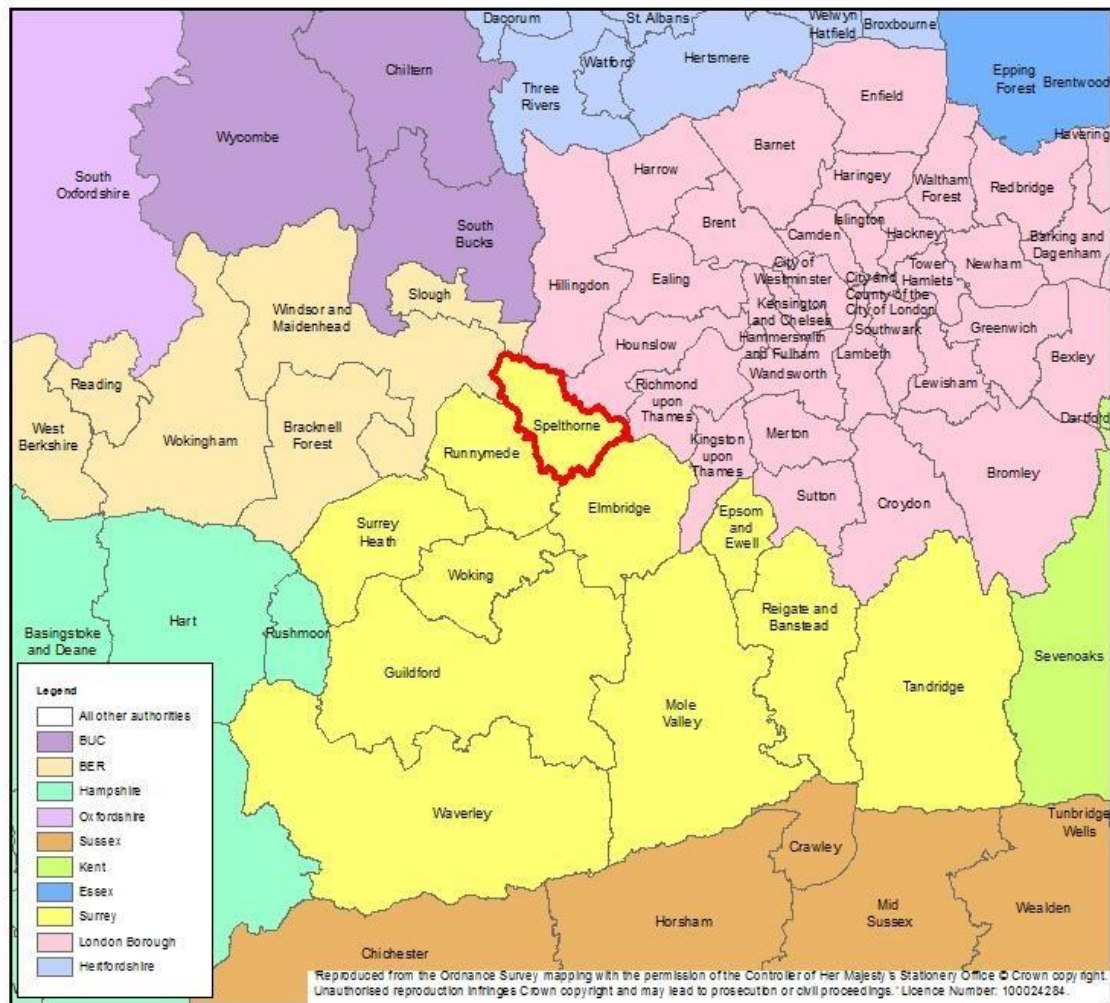
1	Staines Town Centre	7	Ashford Road, Littleton Road & Spelthorne Lane, Ashford
2	Ashford Town Centre	8	London Road (east of Crooked Billet roundabout), Staines
3	Shepperton Centre	9	Bedfont Road, Long Lane, Stanwell (including Northumberland Close & Camgate Estate)
4	Sunbury Cross Centre	10	BP Chertsey Road, Sunbury
5	Windmill Road, Sunbury	11	Shepperton Studios, Shepperton
6	Hanworth Road & Country Way, Sunbury		

- 2.11 Many new large industrial estates and areas were developed in West London at places such as Park Royal, Willesden, Acton, Greenford, Wembley, Southall and Hayes as well as ribbon development along the main arterial routes such as the Great West Road, Bath Road, Great Southwest Road and Edgware Road.
- 2.12 In Spelthorne at this time, whilst there were already notable industries such as Staines Linoleum, new industrial areas and businesses were started. This included BP who moved to Sunbury in 1917, Shepperton Studios which started in 1931 and the Poyle Trading Estate (now located in Slough) which started just after the First World War.

- 2.13 Due to the general expansion of manufacturing and other businesses, and aspirations for better living conditions, large areas of new housing were created. At this time there was little strategic planning generally and the growth of manufacturing and housing for workers was not coordinated. Large dormitory estates were created involving new patterns of commuting.
- 2.14 Whilst the advent of Green Belt policy around London from 1956 generally saw a halt to further unrestrained building across the countryside, growth in the previous few decades had already been substantial.
- 2.15 The types of housing inevitably matched the means of the growing population who were made up by a significant proportion of workers in the new industries. For example, in Spelthorne and other areas of nearby West London there was a particular prevalence of semi-detached as against detached houses. The nature of employment and housing of its workers created a particular socio-economic character.
- 2.16 Following the Second World War Heathrow Airport's expansion brought further economic growth and diversification of business activity. It has also provided significant amounts of unskilled and semi-skilled work.
- 2.17 The origins of this development of the wider West London area and its socio-economic consequences go a long way to explain the differences between Spelthorne and the rest of Surrey.
- 2.18 This Local Economic Assessment uncovers a lot of characteristics of Spelthorne which have been formed by its economic and social history⁷.

⁷ The account given in paragraphs 2.9-2.18 has been drawn from the Greater London Development Plan 1944 prepared under Professor Patrick Abercrombie – published by HMSO 1945.

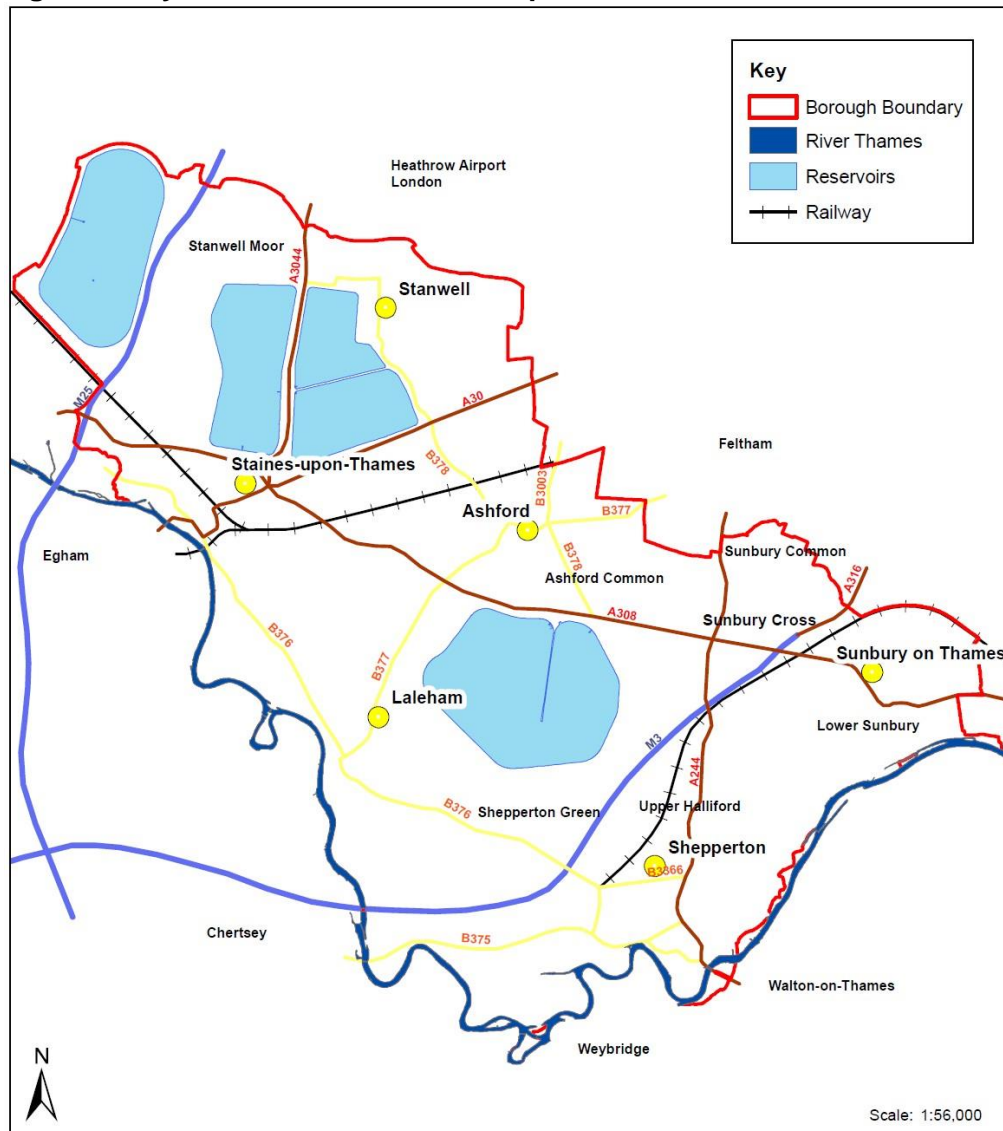
Figure 2 Location of Spelthorne



3. Transport

- 3.1 Spelthorne is located to the south of Heathrow Airport and is adjacent to West London. The M3, M25 and A30 trunk road all pass through the borough, the M4 and M40 motorways are within 10 minutes' drive. Junctions 13 and 14 of the M25 lie on the periphery of the Borough whilst junction 1 of the M3 sits in the southeast of Spelthorne at Sunbury. Given its location in relation to the strategic road network, Spelthorne has excellent road connections to London and Heathrow and Gatwick Airports. This connectivity also means that Spelthorne has good access to the wider Southeast and Southwest regions.
- 3.2 Six rail stations are located within the borough to further enhance its connectivity. Staines is the fifth busiest passenger station in Surrey and London Waterloo is 32 minutes travel time via Staines with services also running to Reading, Hounslow, Windsor and Weybridge. The Shepperton branch-line also provides services to London Waterloo via Kingston-upon-Thames

Figure 3 Key Road and Rail Links in Spelthorne



- 3.3 Spelthorne is well connected to the national motorway network, but congestion is a problem both in parts of the Borough and the wider area, particularly into London. The M3 motorway passes through the southern section of the Borough and links London via the A316 with Southampton and beyond, with Junction 1 of the M3 at Sunbury Cross.
- 3.4 The M25 motorway is an orbital route around London and passes through the northwest of the Borough, less than a mile from Staines Town Centre. From the M25 there is quick access to the M4 motorway (London to South Wales) and the M40 motorway (London to the Midlands).
- 3.5 The A30 passes through the northern part of the Borough with a bypass round Staines Town Centre, linking with the M25 at Junction 13. The A30 provides a dual carriageway link into London.
- 3.6 The A308 is a dual carriageway which links to the A30 just north of Staines and travels due east to Sunbury Cross. It then continues as a single carriageway to Kingston.
- 3.7 There are bridging points over the River Thames at Staines, Chertsey and Walton as well as the bridges for the M3 and M25.

- 3.8 The A3044 (Stanwell Moor Road) and B3003 (Clockhouse Lane) provide access from within the Borough respectively to the west and east sides of Heathrow Airport, which lies immediately to the north. There is also access to the airport from the M25 (Terminal 5 spur at Junction 14b) and the A30 at Hatton Cross.

Rail

- 3.9 There are two rail lines serving Spelthorne. The Staines to Waterloo line provides access to London in 32 minutes on fast services. Ashford is also on the Staines to Waterloo line. From Staines trains continue to either Reading, Weybridge or Windsor. From Weybridge there are trains to Woking, Southampton, Portsmouth and Exeter.
- 3.10 The Shepperton to Waterloo branch line is separate from Staines to Waterloo line. It also has stations at Upper Halliford, Sunbury and Kempton Park. The Shepperton line goes to Waterloo via Kingston.
- 3.11 Staines is the fourth busiest station in Surrey. The total “entry” and “exit” figures for all Spelthorne stations for 2014/15, 2018/19 and 2019/20 are shown below. It shows that Staines and Ashford passenger use had grown slightly between 2014/15 and 2018/19 whilst the other four stations passenger use had decreased, all six stations decreased in 2019/20 compared to 2018/19 which will be the first sign of the impact of travel due to covid. Figures by station are not yet available for 2020/21 but for Great Britain passenger numbers were 77.7% down and represents the lowest level of annual passenger usage since before 1872.
- 3.12 Staines station was the 221st and Ashford 588th busiest stations out of 2567 in 2019/20 which puts them in the top quartile

Figure 4 Usage of railways stations in Spelthorne

Station	Passenger usage per annum			Most used station rank
	2014/15	2018/19	2019/20	
Staines	2,881,160	2,867,034	2,678,088	221
Ashford	1,043,988	1,076,006	986,432	588
Sunbury	436,480	409,878	381,432	1049
Shepperton	442,564	392,426	358,762	1086
Upper Halliford	134,534	129,378	117,876	1657
Kempton Park	71,498	52,822	45,670	2025

Source: Office of Rail and Road

- 3.13 In July 2016 the council voted to fully support a local campaign for Spelthorne to be absorbed into the Transport for London Zone 6 area and access to a Oyster card, which would provide cheaper and more accessible rail travel to and from London. There is support for this from residents and stakeholders both in and out of Spelthorne including Heathrow Airport, Shepperton Studios and Thorpe Park. Discussions on this are still ongoing.
- 3.14 Spelthorne has excellent transport connectivity however has suffered with problems around congestion. Despite the high proportion of Spelthorne residents employed by Heathrow (pre covid), there is no current direct access by rail meaning travel to work patterns are mainly made by road. If Crossrail 2 goes ahead, then this will also have negative implications for the borough as current plans will lead to a loss of rail services to London Waterloo and therefore the council will need to effectively lobby against this. Currently Crossrail 2 has effectively been mothballed for the short to

medium term due to the lack of funding available. The scheme would likely be restarted in its current state depending on available funding

Bus Routes

- 3.15 Spelthorne has a relatively dense network of bus services and benefits from a number of services in London terminating at Staines and Sunbury. There are 32 bus routes that operate a service in or that passes through Spelthorne including the Hospital Hopper that connects Ashford Hospital and St Peters Hospital
- 3.16 Staines Town Centre has a bus station at the southern entrance to the Elmsleigh Centre. A number of bus services terminate in the town. These services go to London, Berkshire, the rest of Surrey and Heathrow.

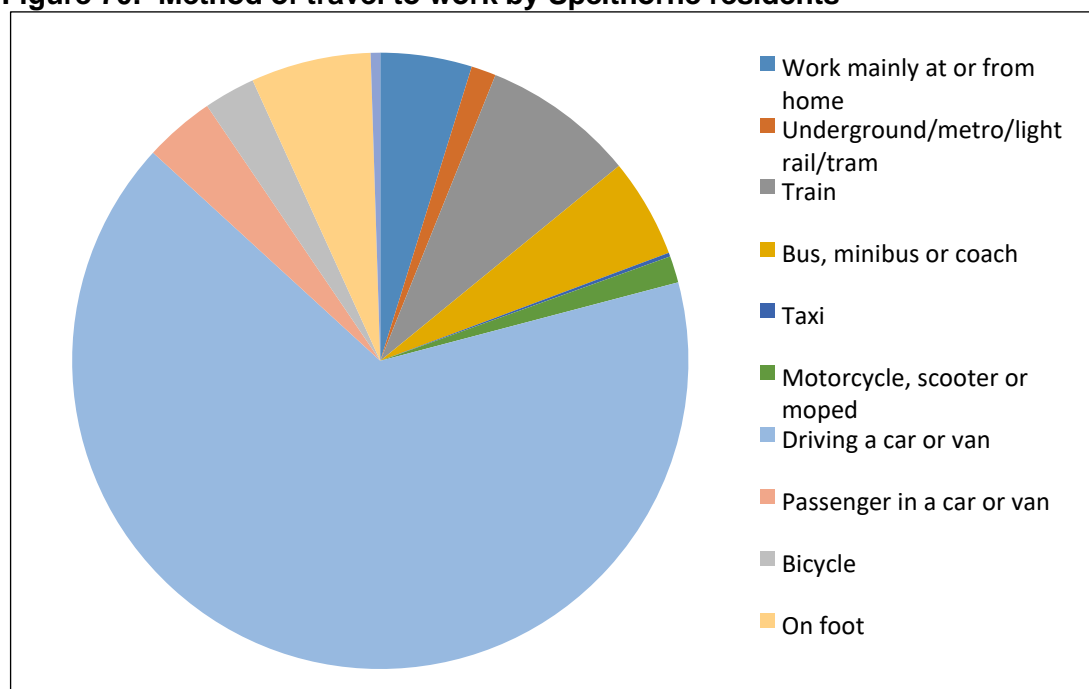
Heathrow Access

- 3.17 Heathrow has direct links to it via spur roads from both the M4 and the M25 which are respectively on the north and west side of the airport. There are also links on the south and east side from the nearby A30 trunk road. Access to the airport from Spelthorne is via Stanwell Moor Road to the south-west corner of the airport from which access to all terminals, including the cargo terminal, can be gained.
- 3.18 Existing rail links to Heathrow comprise the “overground” to London Paddington with dedicated Heathrow Express services. The Piccadilly line underground service also extends to all passenger terminals.
- 3.19 However, direct access for residents who literally live a few hundred yards away from the perimeter fence remains difficult as it does for any residents living in Spelthorne. Discussions are on-going with government departments, Surrey County Council and others in respect of southern access to Heathrow. There have been several options presented. The Spelthorne solution is a light rail option that would travel from Staines-upon-Thames town centre to Heathrow in 10 minutes.
- 3.20 It is likely to be many years before work starts on the agreed solution, so this will not be elaborated on within this document, except to say that the Spelthorne preferred option will bring with it many economic advantages and other solutions including one that by-passes Spelthorne offer no economic reward.

Travel to work

- 3.21 The graph below shows details from the 2011 Census on the mode of travel Spelthorne residents use to get to work. Please note this is the latest available information.

Figure 70: Method of travel to work by Spelthorne residents



ONS Travel to Work Areas/Spelthorne Functional Economic Area Analysis 2016

Travel to work patterns

- 3.22 The ONS 2011 Travel to Work Areas shows Spelthorne focussed more towards Southwest London and the eastern area of the Thames Valley. Based on the analysis on travel to work areas and commuting data in the joint Spelthorne & Runnymede Strategic Housing Market Assessment it is clear that notable flows from Spelthorne to London, and especially Heathrow, can be identified. The greatest commuter flows to London Boroughs from Spelthorne are to Hounslow (13.5 %,) Hillingdon (10.2%) and Richmond-upon-Thames (5.1%) but with notable flows also to Elmbridge (4.3 %,) Runnymede (10.2 %,) Slough (3.4%) and Windsor & Maidenhead (1.7 %.)

4 COVID-19: Economic Impact on Spelthorne Jobs and Businesses

Background

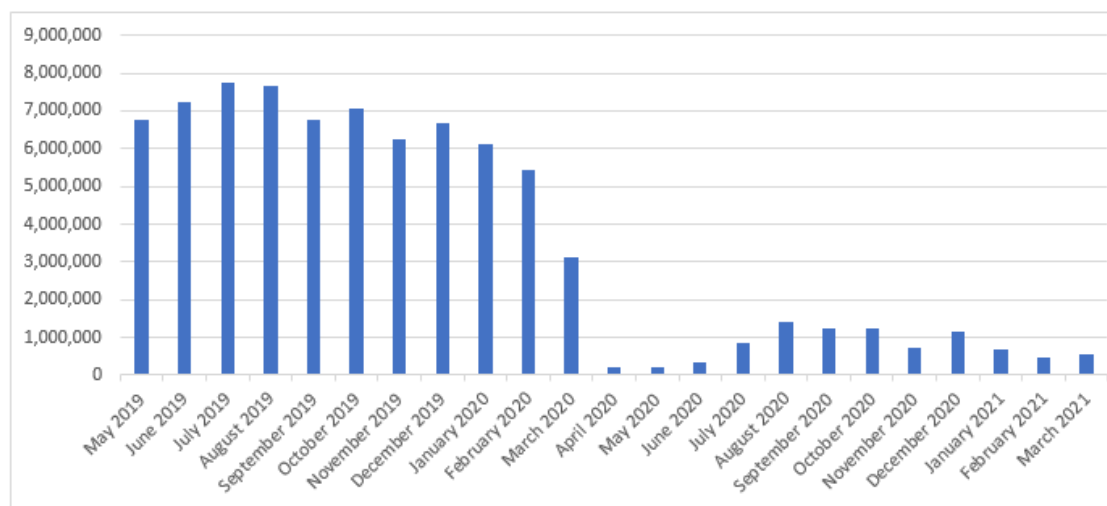
- 4.1 From midnight on the 23 March 2020 the government required as many people as possible to stay at home and to only make essential journeys. All non-essential businesses and workplaces were required to close, in addition to the earlier closure of schools and the leisure and hospitality sectors. Social distancing was introduced for everyone, and for the most vulnerable to the infection, a shielding programme was activated. These 'lockdown' measures were put in place until it was determined that the reproduction rate of the virus had fallen to a level to suppress the virus, save lives and protect the NHS.
- 4.2 As the UK moved to a position allowing pubs and restaurants to open and the 2-metre social-distancing rule relaxed, the economy slowly and nervously returned in slow steps towards 'normality'. However, the subsequent lockdown (December to March 2021) deepened the financial impact on many retailers with both winners and losers emerging. The majority of the rules were ended on July 19th 2021 but the impact is still affecting how people go about their daily lives.

Heathrow

- 4.3 Heathrow Airport Limited is the major employment location for residents within the Borough, so a strategically important employer. Heathrow, like the whole of UK aviation, has been severely impacted by the COVID-19 pandemic. Before the pandemic, Heathrow was part of an expanding and successful industry employing approximately 114,000 people in the local area (either directly employed by HAL, working 'on airport' or in the local supply chain). Nationally it was contributing more than £16 billion of economic output. A third runway was being planned to serve the increasing demand for the airport. The pandemic has put the future of the runway into question with the CEO (John Holland Kaye) telling the UK Transport Select Committee that "whether the third runway will be needed will have to see how things turn out over the next few years. If we are successful in rebuilding the UK economy, we will need that in 10 to 15 years' time. If not, I think we are all in a different world."
- 4.4 Figures 3 & 4 show how COVID-19 has impacted on passenger numbers and cargo tonnage. Due to covid passenger numbers have drastically reduced from 80.9 million passengers in 2019 to 22.1 million passengers in 2020 which is a 72.7% drop in numbers, this includes fewer than 4 million passengers on North American routes – compared with nearly 19 million in 2019. Cargo volumes in 2020 were down 28%.

Figure 5. Passenger numbers May 2019 to March 2021

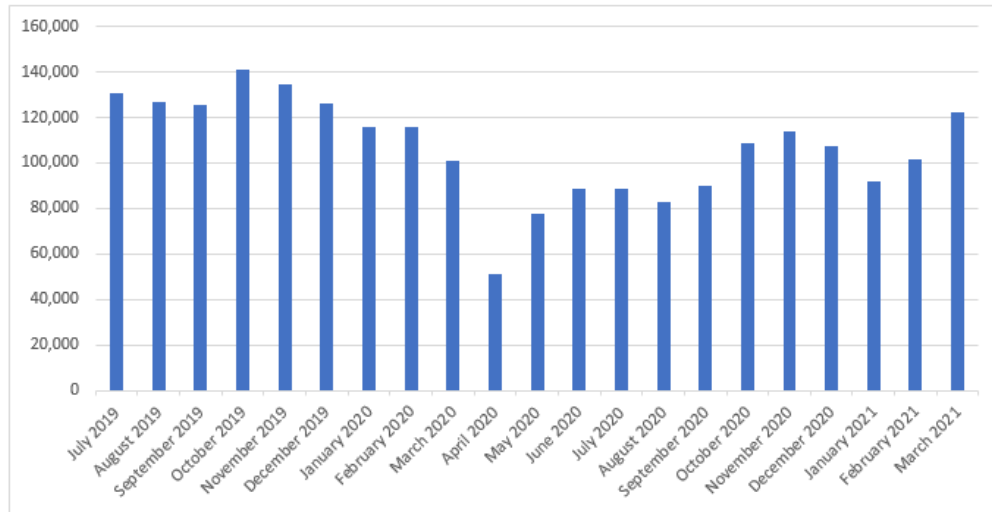
Passenger numbers



Source: Heathrow.com traffic statistics April 2021

Figure 6: Cargo numbers July 2019 to March 2021

Heathrow cargo by tonnage



Source: Heathrow.com traffic statistics April 2021

- 4.5 In May 2020 the green, amber and red coding system was introduced which meant passenger numbers could start increasing and COVID- 19 permitting, the passenger numbers will reach pre COVID numbers in 2023. The amber coding has since been removed as this was causing confusion for the travel industry and the public. Travellers from the majority of Europe and America no longer need to self-isolate when arriving in the UK.

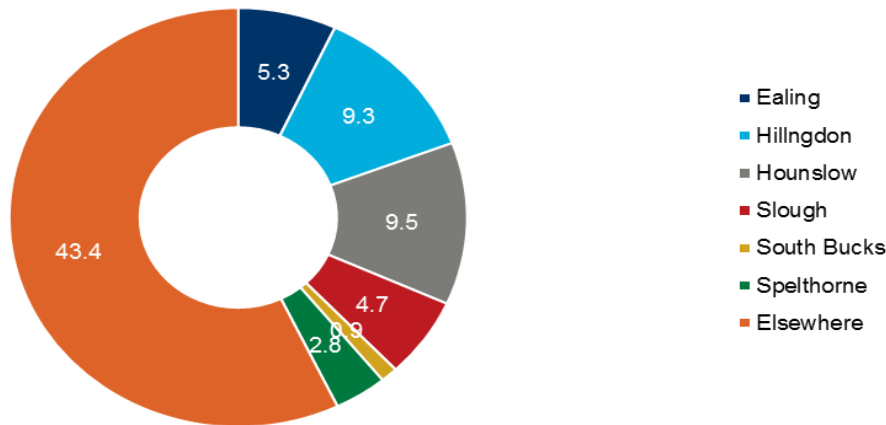
Impact on Heathrow Jobs

- 4.6 An Oxford Economics report commissioned by Heathrow in 2020 estimated that workplace-based employment reliant on Heathrow would fall by 21,300 jobs in 2020. It indicated job losses would be concentrated in the transportation & storage sector, particularly in air transport activity.
- 4.7 The balance of evidence suggested that male, older, full-time, and less well-qualified workers were most vulnerable. However, the report indicated job losses would not be confined to those matching these characteristics alone: many jobs were expected to be lost in the distribution, hotels & catering sector which will affect younger workers, and those more likely to work part time. Job losses in Spelthorne connected to Heathrow were expected to reach 1,500 in 2021 with a total of 16,000 job losses across Hillingdon, Hounslow, Spelthorne, Ealing, Slough, and South Bucks. By September 2021 these were the 'hard to fill' vacancies where the supply of jobs outstripped demand.
- 4.8 Pre pandemic, 5,800 of our residents were in Heathrow related employment, 10.6% of the Spelthorne workforce, and the airport as a whole is not expected to return to 2019 levels until 2023 at the earliest. It is estimated that about 45% of our residents working at Heathrow live in Stanwell and Ashford, leaving them more exposed to the volatilities around the aviation industry. Any recovery in this sector is likely to take years rather than months unless there is a significant change in circumstances, as the prevalence of new variants and high levels of deaths and infections nationally and globally will impact on passenger travel in particular.

According to Heathrow in 2019 there were 76,000 on-airport jobs generated by 400 companies. Approximately 32,600 jobs, or 43%, are taken up by residents from the boroughs listed in the graph below.

Figure 7: Heathrow jobs by location

Jobs (000s)



Source: Oxford Economics

4.9 In general, local residents are understood to be mostly employed in lower value-added occupations.

Employment is highest in: -

- passenger services (6,400 jobs);
- catering & retail (5,200);
- apron, ramp, drivers & baggage (4,300); and
- security & access control (4,300)⁸

4.10 Direct-off airport employment, along with ONS BRES data we estimate off-airport employment equates to 12,900 jobs in 2019, across the study area. More than two-thirds of off-airport jobs are located in Hillingdon (9,100 jobs), followed by Hounslow (1,600), Ealing and Spelthorne (both 700). Heathrow therefore supported an estimated 88,900 direct jobs⁹.

4.11 Central government intervened by giving business the option to furlough staff as an alternative to redundancy or indeed closure of the business. This has been a costly but necessary process with 9.6m people furloughed (August 2020) and landed the government with an expected deficit of £300bn in the last financial year. But it has reduced the potential for high unemployment levels at this time. In the March 2021 budget, the Chancellor announced that the furlough scheme will be extended to 30th September 2021. After this it was expected that we will see a sharp rise in unemployment as businesses will have to start paying wages of staff and many may choose to make redundancies instead. In the three months to March 2021, there were 253,000 redundancies made in the United Kingdom, decreasing from the 308,000 redundancies made in the three months to January 2021. In September 2021 the number of payroll employees showed another monthly increase, up 207,000 to a record 29.2 million in September 2021, returning to pre-coronavirus (COVID-19) pandemic (February 2020) levels.¹⁰

4.12 The number of job vacancies in July to September 2021 within the UK was a record high of 1,102,000, an increase of 318,000 from its pre-pandemic (January to March 2020) level. This will no doubt be attributed to the UK leaving the E.U and workers returning to their home countries.

⁸ FN Oxford Economics Sept 2020

⁹ FN Oxford Economics Sept 2020

¹⁰ <https://www.statista.com/statistics>

- 4.13 Should the borrowing continue because the economy does not bounce back, there is likely to be tax rises to help repay the debt, as already has been seen with the increase payments on national insurance by employer and employee to support healthcare. People may have less money in their pocket to spend, and production of goods and services may well fall as a result. Lower tax collection rates and fewer jobs may well leave the country in a more precarious position moving forwards.
- 4.14 This chart shows the total unemployment rates from February 2020, just before the pandemic to January 2021. Spelthorne unemployment rate has increased from 1.7% to 5.6%, Surrey from 1.2% to 4.0%, Southeast 2.1% to 5.1% and GB from 3.0% to 6.2%
- 4.15 Figure 8: Unemployment levels

Date	Spelthorne	Surrey	Great Britain	South East
February 2020	1.7	1.2	3.0	2.1
March 2020	1.7	1.2	3.1	2.2
April 2020	3.2	2.4	5.1	3.9
May 2020	5.3	4.0	6.4	5.3
June 2020	5.1	3.8	6.2	5.1
July 2020	5.2	3.9	6.4	5.2
August 2020	5.5	4.1	6.5	5.4
September 2020	5.6	4.1	6.4	5.3
October 2020	5.5	3.9	6.2	5.1
November 2020	5.7	4.0	6.3	5.2
December 2020	5.7	4.0	6.2	5.1
January 2021	5.6	4.0	6.2	5.1

Source: [Nomis](#)

This table shows how the COVID-19 pandemic has affected the unemployment rate in the 13 Wards in Spelthorne from February 2020 to January 2021. The number of unemployed has increased by 328% from 1,050 to 3,450. The worst affected wards by number of claimants are Stanwell North with an increase of 275 followed by Staines 255, Ashford North & Stanwell South 245, Sunbury Common 240 and Ashford Common and Ashford Town both with 200 extra unemployed.

Figure 9: Unemployment by ward

Area	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21
Spelthorne	1,050	1,040	1,985	3,240	3,125	3,230	3,360	3,450	3,370	3,485	3,490	3,450
Ashford Common	70	65	135	220	200	225	230	250	240	260	265	270
Ashford East	70	70	140	230	220	230	225	220	210	200	200	205
Ashford North & Stanwell South	125	115	205	315	310	315	350	355	350	375	365	370
Ashford Town	70	85	130	220	215	230	235	255	260	275	280	270
Halliford & Sunbury West	55	55	120	195	170	170	190	190	175	195	185	190
Laleham & Shepperton Green	80	80	165	265	270	275	265	275	270	280	285	270
Riverside & Laleham	55	55	95	150	135	145	160	165	160	155	155	150
Shepperton Town	30	30	80	155	150	150	160	155	140	160	155	150
Staines	95	95	170	275	285	275	300	315	320	325	335	350
Staines South	80	70	135	250	245	240	245	245	240	240	250	245
Stanwell North	155	150	275	400	390	410	420	415	420	435	440	430
Sunbury Common	130	125	230	380	350	375	385	405	380	395	390	370
Sunbury East	35	40	110	190	185	190	190	205	200	195	180	185

Source: Nomis

5 The pandemic and its impact on different age groups

- 5.1 **Age 16 – 24:** In January 2020 there were 155 young people claiming benefits. In March 2020 Covid lockdown restrictions were introduced which had a detrimental effect to the employment market. Claimants for this age group peaked in February 2021 at 660 a 425.8% increase. This figure has started to decrease since February 2021, the relaxing of lockdown restrictions, increased foreign travel and the end of the furlough scheme will affect this figure in the short and long term
- 5.2 Apprentices were a key vehicle to obtain employment for the young people, but the pandemic has brought an end to many of those opportunities as businesses furlough staff or making redundancies. The increased level of unemployment for this age group in Spelthorne as of June 2021 was 8.8% compared to Surrey 6.1%, the Southeast 6.4% and Great Britain 7.7%

5.3 Figure 10 Claimant Count in Spelthorne 16-24 year olds

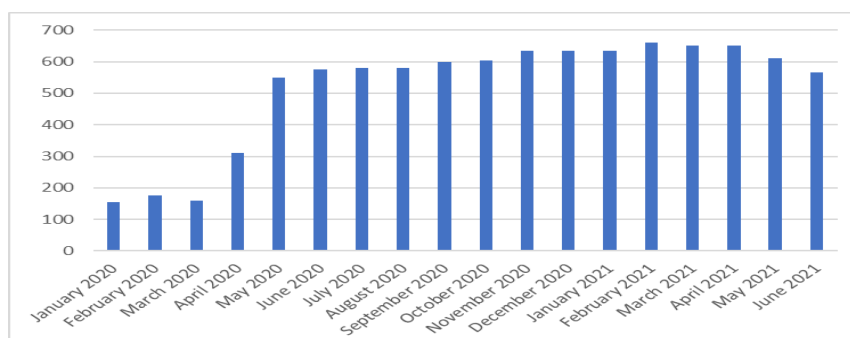


Figure 10 shows that in January 2020 there were 155 (2.34%) young people unemployed and as the year progressed to January 2021 this number increased to 635 (9.59%). This has started to reduce, dropping to 565 in June 2021.

- 5.4 Apprentices were a key vehicle to obtain employment for the young people, but Covid has brought an end to many of those opportunities as businesses furlough staff or make redundancies.
- 5.5 Figure 11 shows the percentage of unemployment for this age group in Spelthorne compared to Surrey, the Southeast and Great Britain. The unemployment percentage is reducing in all these areas with Spelthorne reducing the slowest, this is likely to be due to how reliant Spelthorne is on employment at Heathrow Airport and businesses connected to this industry.

Figure11: Percentage comparison of unemployment for 16 to 24 year olds in Spelthorne with Surrey, the Southeast and Great Britain

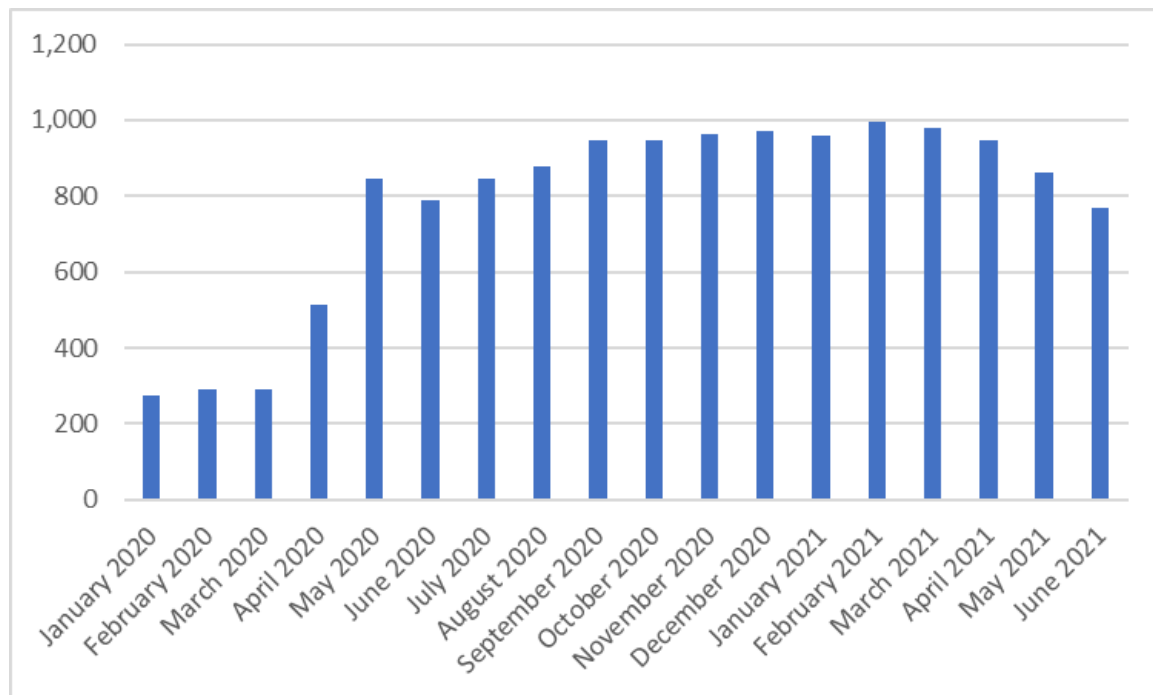
	Jan-20	Jan-21	Jun-21
Spelthorne	2.3	9.6	8.8
Surrey	1.5	6.1	4.7
Southeast	2.9	7.8	6.4
Great Britain	4.1	9.2	7.7

Source: Nomis July 2021

The over 50 population are often a cohort that attracts greater difficulties in obtaining employment once a job has been lost. This is despite the Equalities Act 2010 which expressly prohibits bias based upon age.

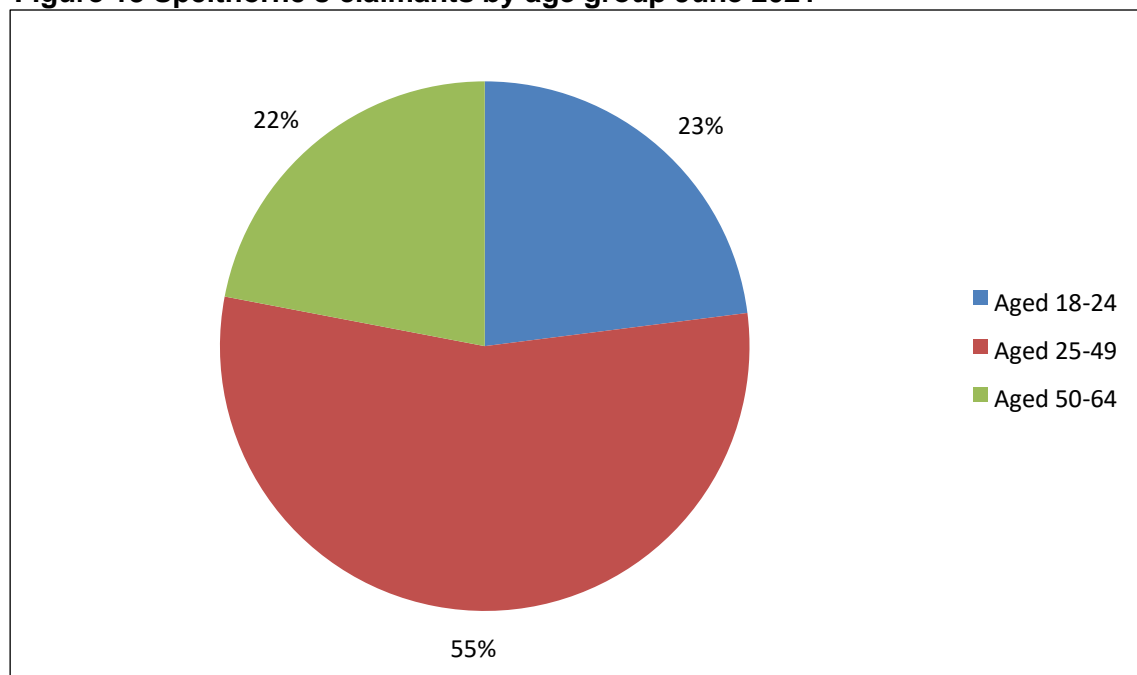
- 5.6 In January 2020 there were 275 (1.5%) people in this age group who were claiming benefits to 960 (4.8%) by January 2021. Research has suggested that most people who may lose their jobs at Heathrow are likely to be from this age group and be low skilled. Low skill sets decrease the opportunity of future employment as there will be a smaller job pool to apply for, additionally these will nearly always be at the lower end of the pay scale in terms of financial remuneration. In January 2020 there were 275 over 50' unemployed. In March 2020 Covid lockdown restrictions were introduced which had a detrimental effect to the employment market. Unemployment for this age group peaked in February 2021 at 995 a 361.8% increase. This figure has started to decrease since February 2021, the relaxing of lockdown restrictions, increased foreign travel and the end of the furlough scheme will affect this figure in the short and long term.

5.7 Figure 12 Claimant Count in Spelthorne for over 50-year-olds



Source: Nomis July 2021

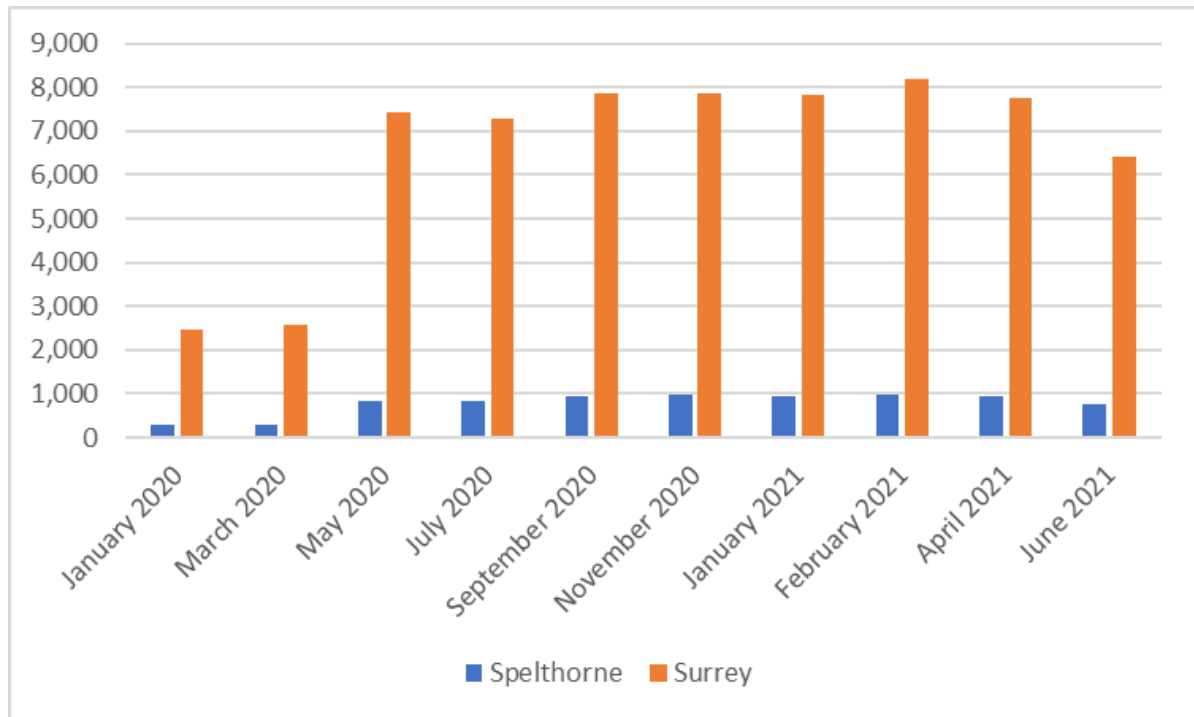
5.8 Figure 13 Spelthorne's claimants by age group June 2021



Source: Nomis July 2021

Although figure 13 shows that more than 50% of people unemployed are in the 25-49 age group this represents a gap of 24 years, more concerning is the 23% with the 18-24 age group that only have far less people to be counted in this calculation.

5.9 Figure 14 Claimant Count in Spelthorne for over 50-year-olds compared to Surrey



Source: Nomis July 2021

5.10 Level of furloughing across Surrey Districts and Boroughs

Figure 15 shows research carried out by Arup using data from the Wave 4 of the Office of National Statistics (ONS) Business Impact of Coronavirus Survey (20th April 3rd May 2020) which included sector-by-sector breakdown of the proportion of the workforce that has been furloughed. This does not include data from the businesses that have stopped trading. This has then been multiplied by the % of jobs in each sector within each Borough to estimate the overall proportion of the workforce which has been furloughed. It is worth noting that our near neighbours in Feltham have an estimated furlough rate of almost 38% with 23,500 residents. The total for Hounslow is estimated at 42,500, these figures are important as they will also be competing for jobs that would be attractive to Spelthorne residents.

Figure 15: Estimated Impact of number of persons on Furlough

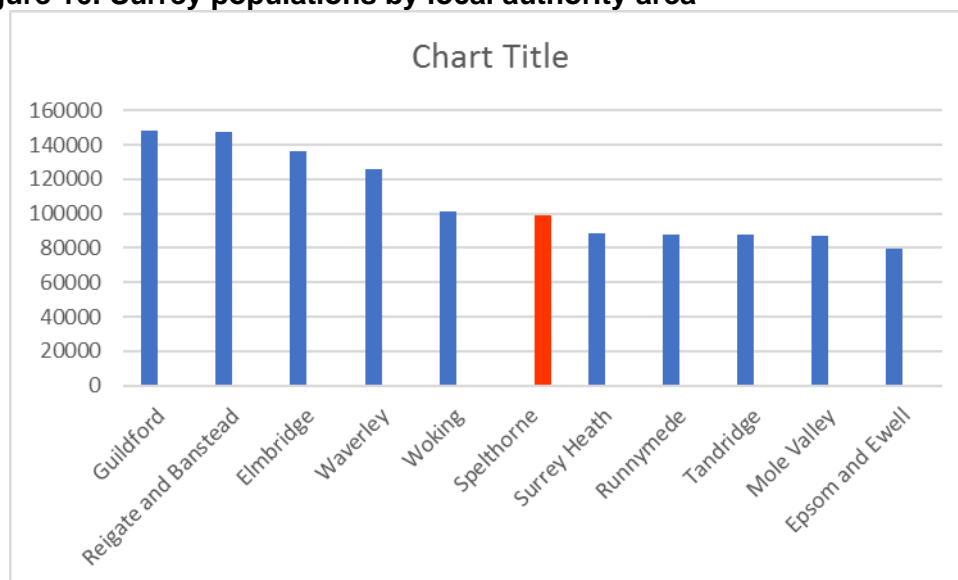
Spelthorne	27%
Woking	26%
Elmbridge	26%
Tandridge	26%
Surrey Heath	25%
Waverley	24%
Runnymede	23%
Guildford	23%
Epsom and Ewell	23%
Mole Valley	23%
Reigate and Banstead	21%

- 5.11 The working population of the borough is 57,700 according to NOMIS and with predicted 27% furloughing means that 15,500 residents are not working and on a reduced income.
- 5.12 As of April 14, 2021, approximately 11.5 million jobs, from 1.3 million different employers were furloughed in the United Kingdom as part of the government's job retention scheme.

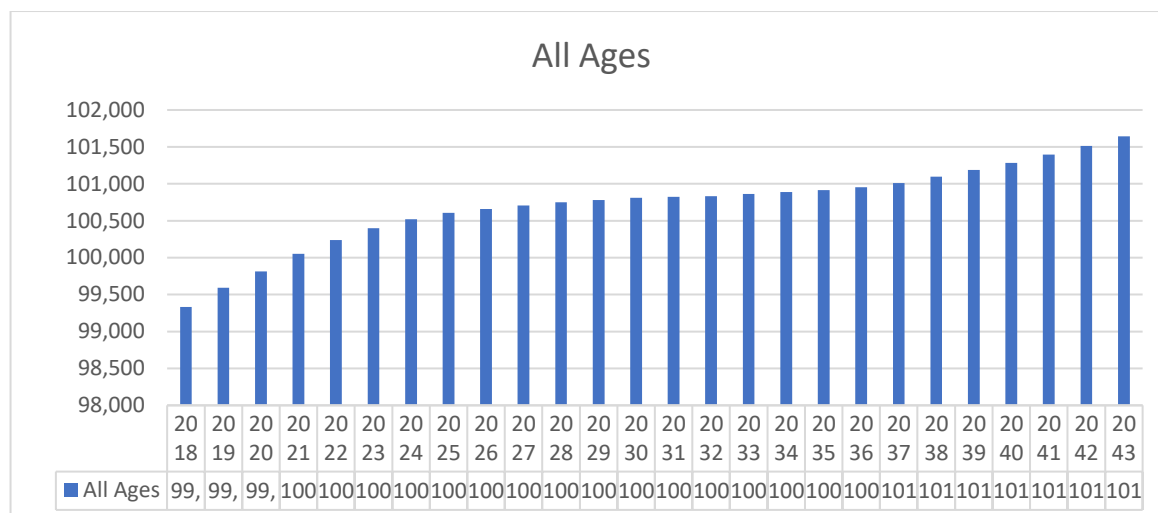
6 Population / Employment within Spelthorne

- 6.1 According to the Office for National Statistics Population Estimates as of April 2019, the population of Spelthorne stood at an estimated 99,925 constituting a 1% rise from 2016 when the LEA was last compiled. Within Surrey, Spelthorne is the 6th largest of the 11 boroughs/districts which was also the case in 2016.

- 6.2 **Figure 16: Surrey populations by local authority area**



6.3 Figure 17 Spelthorne Population Projections to 2043



7 Source: Population projections - local authority 2019

6.4 Figure 17 Shows the predicted population growth rate up to 2043, this rate is slower than previously predicted

6.5 The ONS Population projections report shows there has been and will continue to be an overall ageing of the Spelthorne population and this trend looks set to continue into the 2030s. Table 18 shows the this by age group. The standout numbers are that the over 65 age group will increase from 18.6% in 2018 to 24.2% in 2041 and the core working age, 16 to 64 decreases from 61.7% to 58.3%. The increasing over 65 age group will impact on areas like health and social care.

6.6 Table 18: Projected Population in Spelthorne by age

	Total Projected Population (Spelthorne)	0 - 15	16 - 24	25 - 49	50 - 64	65+
2018	99,334	19.7	8.7	33.4	19.6	18.6
2021	100,052	19.9	8.5	32.6	20.2	18.9
2031	100,824	18.1	10.0	30.1	20.0	21.8
2041	101,394	17.4	9.0	29.6	19.7	24.2

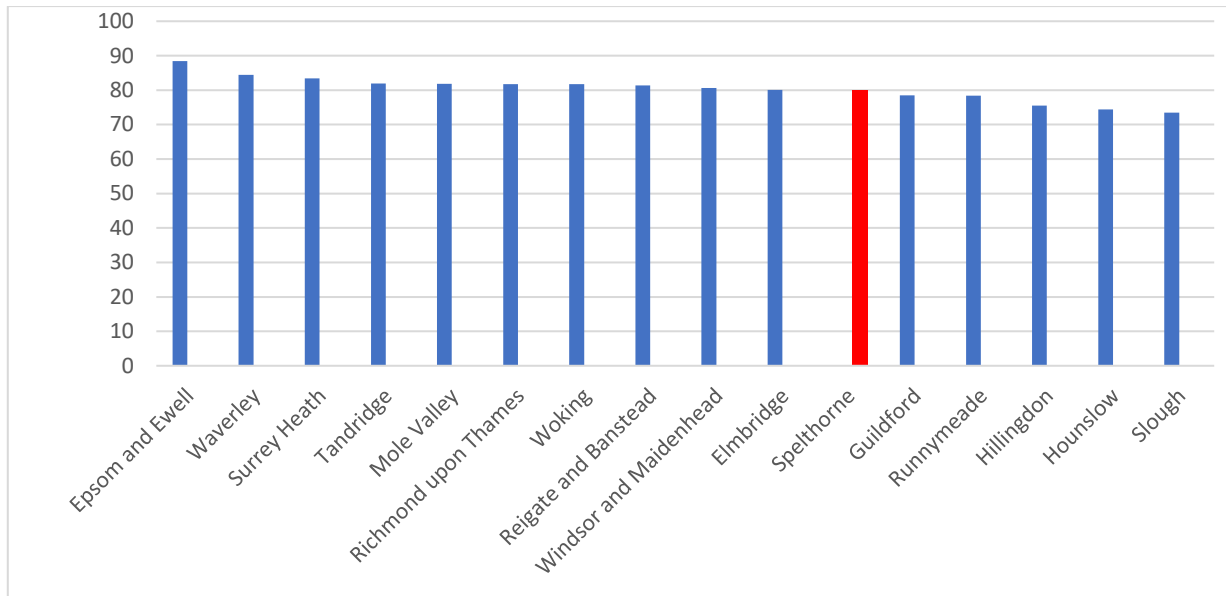
7 Source; Nomis/ONS Population projections - local authority 2019

6.7 The above chart shows that a number of factors will need to be taken into consideration by local authorities, this includes the level of provision of social support and health. Additionally, nearly 25% of the people spending money in the borough will have different needs and requirements, so businesses will need to adapt in order to best access this growing market whilst others shrink or remain almost static.

Economically Active Population

6.8 In economic terms, the proportion of the population who are economically active is important and will have a bearing on the extent to which businesses are able to recruit locally and the amount of disposable income. In comparison to the other adjoining authorities and Surrey, Spelthorne has the 5th highest proportion of economically active people. Figure 19 shows the number of people economically active

6.9 Figure 19 Percentage of economically active in employment

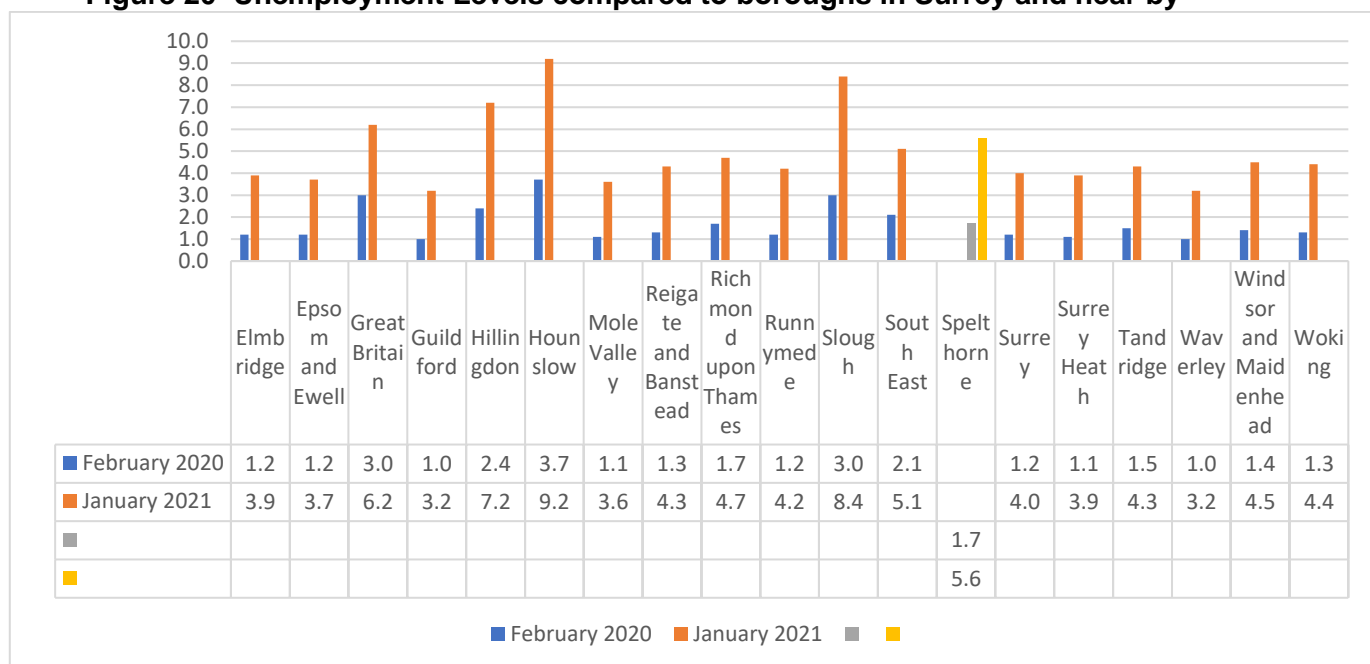


Source ONS Subnational population projections for England:2018-base

Figure 20 shows the total unemployment rates from February 2020, just before covid-19 affected the country to January 2021.

Spelthorne have moved from 1.7% to 5.6%, Surrey from 1.2% to 4.0%, Southeast 2.1% to 5.1% and GB from 3.0% to 6.2%

Figure 20 Unemployment Levels compared to boroughs in Surrey and near by



Source: Nomis January 2021

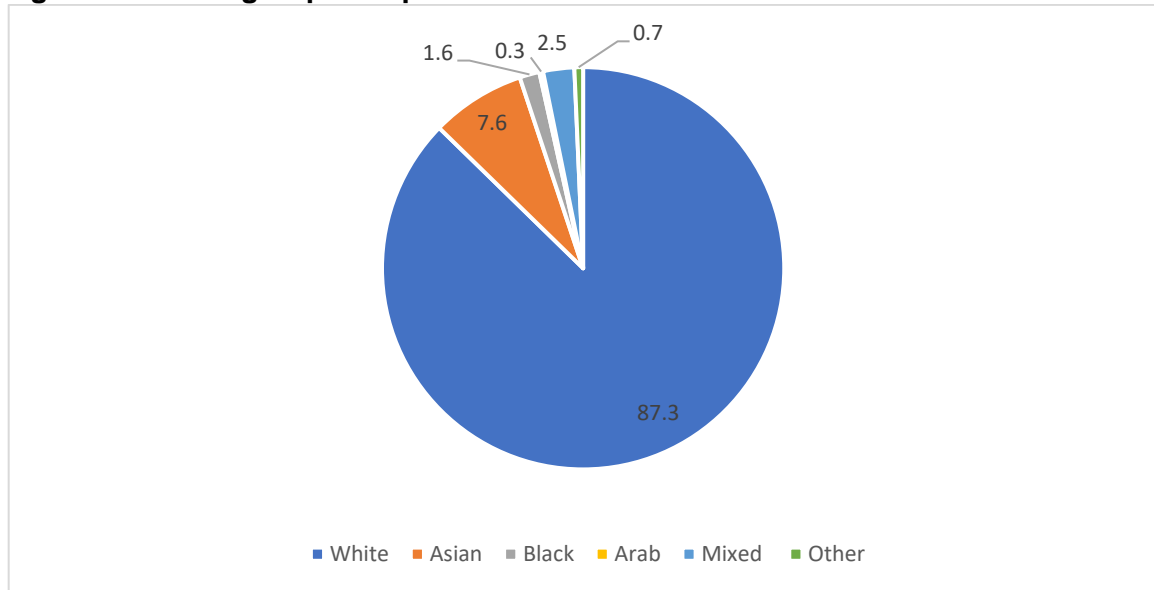
- 6.10 As of December 2020, there were 7000 residents of working age that did not want a job¹¹. Inevitably some of those of working age will either be retired, looking after family, sick or disabled, students or inactive for other reasons. As a result, the percentage in work will never get close to 100%. It should be noted that “does not want a job” is not necessarily an indication of “idleness.” For example, a person may not want a job as they have to care for a family member.

Ethnic Diversity

- 6.11 Spelthorne has a greater degree of ethnic diversity than any other Surrey borough, in the 2011 Census 81% of the population described themselves as “White British.” although nearly 86% were born in the UK. Figure 21 provides a breakdown of the ethnic groups that people identified themselves as belonging to. By comparison, most other Surrey districts are less diverse, but the other adjoining authorities are more diverse. It should be noted that this data comes from the 2011 Census. The 2014 ONS Population Projections estimates that there will be a year-on-year net rise of 1000 international migrants which may see these figures rise. This may not be realised now as the UK has now left the EU and have ‘taken control of the country’s borders.

¹¹ Nomis December 2020

6.12 **Figure 21 Ethnic groups in Spelthorne**



Source: City Population

7 Business Sectors

- 7.1 One of the most prevalent industries in Spelthorne is transportation, with double the number of businesses situated in the borough compared to the next highest density in Surrey boroughs, so cargo and logistics are an important employer.
- 7.2 In the latest available figures provided by the National Online Manpower Information System (NOMIS) (2018), There are estimated to be 3,500 people working in the Transport & Storage sector in Spelthorne which is 9.2% of our working population compared to 4.5% in the Southeast and 4.9% nationally. Given that these businesses are often closely tied to the fortunes of Heathrow airport, it is likely that there will be a significant loss of jobs within this sector. It is worth noting that in both Hillingdon and Hounslow, they have the largest number of businesses in this sector compared to the other boroughs in London and the whole of the southeast.
- 7.3 This provides for a very high level of supply where the demand is very weak. It has also been reported that trading conditions have been extremely challenging and have seen other businesses squeezing margins by reducing prices in order to obtain some of the limited demand for this service.
- 7.4 On 21st May 2020 one of the largest transport and logistics companies based in Spelthorne reported a loss of 85% of their ground handling business within a few weeks with only a few flights running and about 70% of the cargo. Therefore, by 1st April 2020 they furloughed 1200 staff in the UK, of which 55% was in Spelthorne. They also consolidated their business from 7 warehouses to 3 at London Heathrow and closed a warehouse in London Gatwick.

7.5 BP

In 2020 the company announced around 2,000 redundancies in the UK with 15% or 300 job losses taking place by the end of the year. These are expected to mainly affect office jobs, so Sunbury could take a significant hit. The number of employees that are resident in Spelthorne is not known, but the majority are expected to be the lower paid jobs such as cleaning and catering.

7.6 Businesses in the borough

There are 7673 businesses in Spelthorne, Table 12 shows the split by ward

Figure 22: Businesses in the Borough by ward

Area	Number of Businesses	% of Businesses
Ashford Common	497	6.5
Ashford East	402	5.2
Ashford North & Stanwell South	422	5.5
Ashford Town	1329	17.3
Halliford & Sunbury West	363	4.7
Laleham & Shepperton Green	522	6.8
Riverside & Laleham	278	3.6
Shepperton Town	736	9.6
Staines	1101	14.3
Staines South	396	5.1
Stanwell North	494	6.4
Sunbury Common	499	6.5
Sunbury East	634	8.2

Source: Fame May 2021

7.7 In May 2021 a survey was conducted with the businesses that were in receipt of Additional Restrictions Grant (ARG), we found that the construction services sector did not seem to be as severely hit during the pandemic. In fact, several of the businesses we spoke to have seen some growth due to the demand in the home improvement sector during lockdown

7.8 **Figure 23 shows the response from businesses regarding business confidence in the borough**

“On the basis that all Covid-19 restrictions will have been lifted, what is your level of confidence for your business succeeding over the next 12 months?”

Figure 23

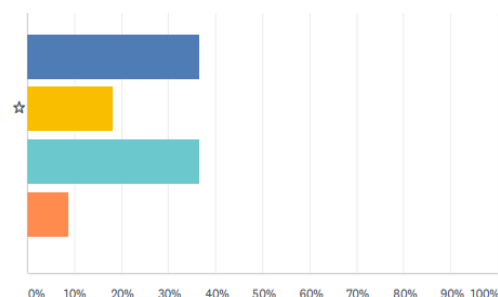
None said their business will close

30% said their business would struggle

15% said business would stay the same

30% said business would improve

7% thought their business would grow



Business will close	Business will struggle	Business will stay the same	Business will improve	Business will grow	
0.00%	36.59%	18.29%	36.59%	8.54%	
0	30	15	30	7	82

This was a very small-scale survey so is not a representative sample and as such there should not be too much read into it, nevertheless, it is interesting that out of the 15 respondents, one thought there was a likelihood that their business would close.

8.0 Retail Performance

8.1 In a November 2016 study by PropertyWeek.com³² identified the top 100 retail locations in the UK that represent significant opportunities for investment with Staines-upon-Thames coming in 20th position. In the 2020 report Staines-upon-Thames dropped out of the Top 100. This is partially due to a change of methodology due to COVID. The methodology still included headroom for future investment, residential catchment size, population growth, competition and catchment demographics and tourism potential.

The new elements included the below factors: -

- How mobile a location's population is compared with pre-lockdown levels was the main driver in the rankings, with a higher weighting than all other variables.
- The amount a location previously relied on the worker population or tourists was also taken into account
- The propensity of each location's population to shop online. This segments the population into groups based on life stage, affluence, and attitudes.
- Variables on retail mix – places with a strong independent often score strongly, reflecting the shift in consumer behaviour towards localism.

In this area, Staines Town Centre has very few independent retailers and this could be an area where the council could encourage and entice such retailers.

Staines

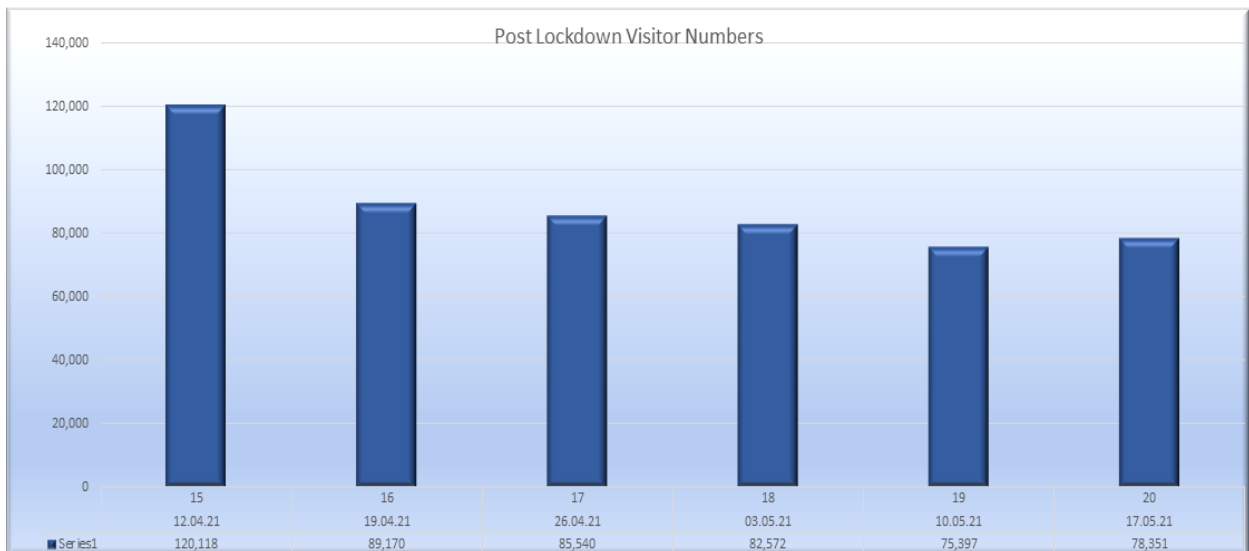
8.2 In terms of shops, leisure and hospitality, the town centre is home principally to the larger chains rather than independents. That being said, a handful of closures in the Elmsleigh Shopping Centre both during and pre-pandemic (such as Thomas Cook, Ernest Jones, Topshop, Monsoon, Ponden Home) have created openings for emerging independent retailers such as Ximiso, MBitz and Blue Inc., with other lettings in the pipeline including Tesco Metro which opens in 2021. Larger store

closures in the town centre generally, such as Debenhams and Decathlon, may be regarded as opportunities to reimagine and reinvigorate those two ends of the town centre; whilst the relocation of Marks & Spencer from the High Street to its new premises in Two Rivers facilitated a state-of-the-art fit-out to launch the new M&S Foodhall.

- 8.3 During the past year, the pandemic era has seen some changes in trends: It is clear that people still have an appetite for shopping as a pastime, and this has been borne out since the release of lockdown. In Elmsleigh, although actual shopper numbers are down compared with 2019, basket-spend over the past month has been on a par with pre-pandemic levels overall, showing that whilst people may be going out less frequently, they are still keen to go out shopping. In the High Street a notable trend is being seen towards increased pavement seating around our hospitality outlets: whilst this clearly arises from the need for social distancing and more space, the positive side impact is that the pavement café trend creating a more vibrant shopping experience for the visitor.

8.4 Table 24 shows the visitor numbers to the Elmsleigh Centre

Weekly Visitor Numbers Since 12th April 2021



Source: Elmsleigh Centre Weekly visitor numbers of weeks 15 – 20 during 2021

- 8.5 Market: The market traders have reported a slow return of trade. Many of them rely on the office workers for their trade, and until they return to working in the town the future of some of the traders is in the balance. The Farmer's Market has decided it is no longer viable to operate in Staines as footfall has been too low to sustain the market with traders choosing to go to busier towns.

Ashford

- 8.6 With 2,650 registered businesses this town, although smaller geographically than Staines-upon-Thames, has a much larger and diverse business community in terms of number and type of businesses. The high street is dominated by independent retailers although these are predominantly hair & beauty, takeaways, and estate agents, which gives the impression there is not a good mix.
- 8.7 Businesses that have been lost include during COVID-19 have included charity shops, a kitchen showroom, and a gym. On the flip side there have been a number of

new shops opening including TUT Restaurant, Best Western Supermarket, Chai Café, Pizza Parlour, Ice Cream Parlour, Sushi 2 Me and refurbishment of Armstrong's Hairdressers.

- 8.8 It is too early to tell the full impact, however at the moment the business gains on the high street have outnumbered the losses. The Local Restriction Support Grants (LRSG) and Additional Restrictions Grants (ARG) have been a lifeline for these businesses, and many have reported that they would not have survived without the grant money. The speed of recovery of trade for the non-essential retailers will determine their ability to remain open as cashflow is now one of the biggest concerns.

Sunbury

- 8.9 With 1496 businesses in Sunbury this town is split between the busy Sunbury Cross Junction and lower Sunbury parade on the Avenue and Thames Street. Businesses are reporting similar situation as the other towns with a large impact on footfall. There have not as yet been too many losses of retail businesses and there has been a new bakery store open on Thames Street with reports of strong trade despite their out of the way location.

Shepperton

- 8.10 With 1258 businesses in Shepperton & Laleham combined, Shepperton Town has a traditional High Street. Whilst we do not have footfall counters to provide year on year figures, the anecdotal evidence is that footfall was catastrophically affected during the lockdown periods.
- 8.11 On a positive note, many businesses were able to take advantage of online trading, click & collect and home delivery services. Adversely, some (e.g., Blue, a female clothing store) were left in a situation whereby they had new stock that they were unable to sell and, although not perishable, that they would not be able to sell at a later date due to weather and then fashion movements. Currently Shepperton is performing well with most of the businesses re-opening on schedule.
- 8.12 A new bakery (Cavan Bakery) has recently opened, and this will join JAMZ Café & Bakery which opened in 2020 during the pandemic. New commercial units are being fitted in the old HSC bank building, forming a new mixed development site

9.0 **Business Births & Deaths**

- 9.1 It is hypothesised that due to the increased rate of unemployment due to Covid a large number of people have decided to start their own business. From January 1st to May 27th 2021 1461 businesses started (births) and 929 closed (deaths) resulting in a net overall **increase of 532 businesses**. In our four main towns from January 2020 there have been 404 more business births than deaths compared to 63 more deaths than births in 2019.

9.2 Table 25 Business Births

Business Births	2019	2020	2021 up to 27th May
Shepperton	87	127	60
Ashford	253	369	147
Sunbury	112	156	87
Staines	133	198	81
Total	585	850	375

Source: Fame May 2021

9.3 Table 26: Business Deaths

Business Deaths	2019	2020	2021 up to 27th May
Shepperton	154	116	61
Ashford	240	221	108
Sunbury	125	104	68
Staines	129	98	45
Total	648	539	282

Source: Fame May 2021

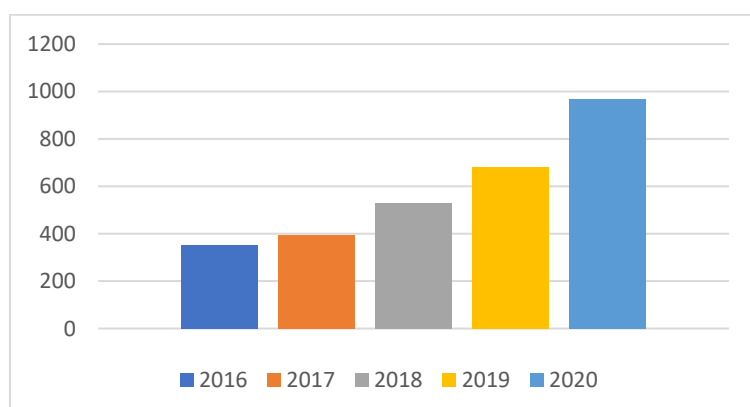
9.4 Table 27 Business Births compared to Deaths

Business Plus or Minus	2019	2020	2021 up to 27th May
Shepperton	-67	11	-1
Ashford	13	148	39
Sunbury	-13	52	19
Staines	4	100	36
Total	-63	311	93

Source: Fame May 2021

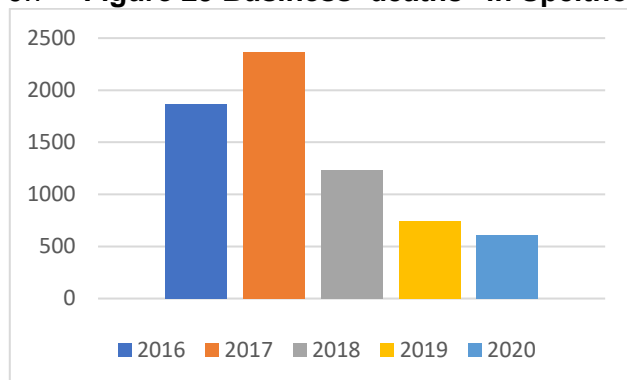
9.5 The above chart provides a very positive message with a gain of 311 businesses in 2020 and a further 93 new businesses to May 2021

Figure 28 Number of business births 2016 - 2020



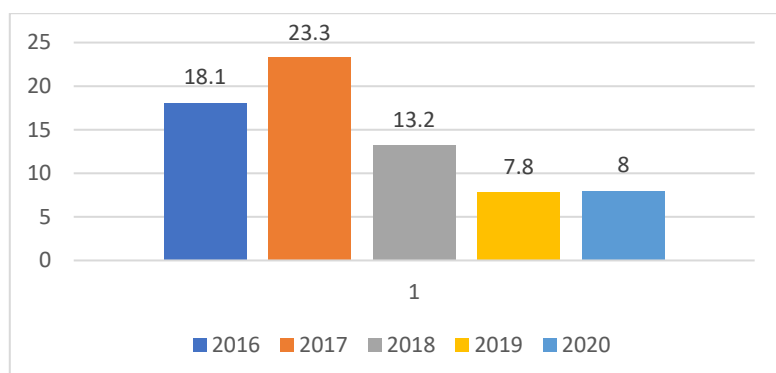
9.6 This takes data from the time of the last economic assessment and over the period of the delivery of the economic strategy and shows a sustained period of business growth. It also underpins the confidence in the borough to start a business with steady growth of new businesses in the borough rising from under 400 a year to almost 1,000 in the space of 4 years.

9.7 **Figure 29 Business ‘deaths’ in Spelthorne 2016-20**



9.8 2017 was the start of the current economic strategy, and this chart gives a vivid picture in relation to the decrease of failed businesses in the borough. This does not suggest that the strategy was responsible for this, but it is likely it played some part in this performance.

9.9 **Figure 30: Business deaths in Spelthorne as a share of the Surrey total**



This shows the percentage of business deaths in Spelthorne compared to Surrey. The percentage has decreased from a high of 23.3% in 2017 to 8% during the height of the pandemic in 2020, and in 2021 to the end of April 7.9%.

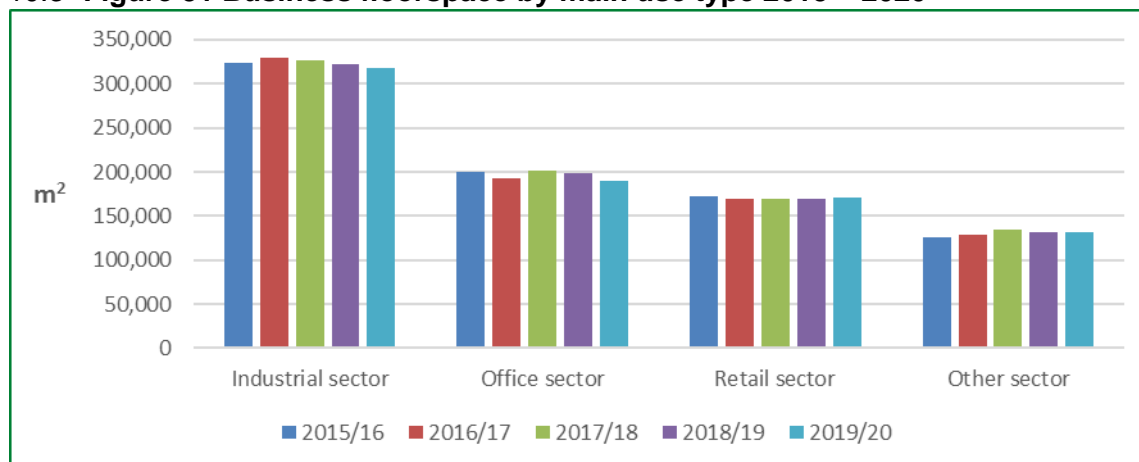
There are 11 boroughs and districts in Surrey, so from a high of almost 1 in 4 businesses closing in Surrey in 2017, there are now just 8% of all businesses that close that are situated in Spelthorne. This suggests that the economic well-being of the borough has significantly improved over time and aligned with the delivery of the 2017 – 22 Economic Strategy.

11. Business and Enterprise

10.1 Spelthorne has a significant amount of business space and a wide range of other facilities providing significant levels of employment.

10.2 The main business space categories are industry and warehousing, offices, and retail. The amount of floorspace in Spelthorne in these categories amounts to a total of approximately 820,000 sqm across all sectors as of July 2019.

10.3 **Figure 31 Business floorspace by main use type 2015 – 2020**



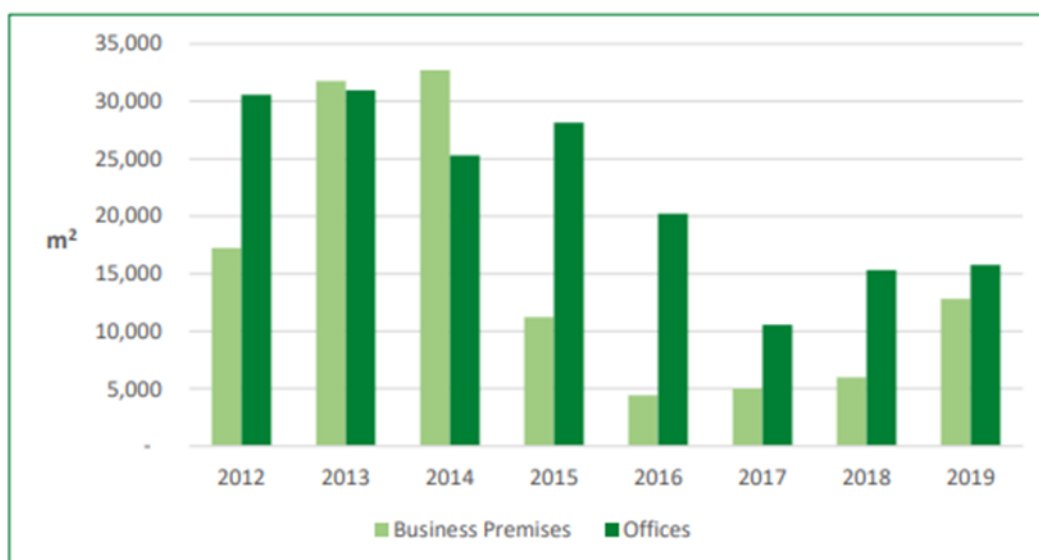
Source: VOA data July 2020.

10.4 Figure 31 uses the latest Valuation Office Agency (VOA) Non-domestic rating: business floorspace statistics published on the www.gov.uk website. These indicate a current total business floorspace of 810,000 sqm across all sectors

10.5 Much of the business floorspace is located either within the existing town centres of Staines, Ashford, Sunbury and Shepperton or major industrial estates/employment areas, as shown in Figure 1.

10.6 The annual surveys of available premises were not carried out in 2020 due to the restrictions of the Covid19 pandemic. The figures up to 2019 are published here for information. The availability of the data relating to premises which are being marketed does not allow a clear distinction to be made between industrial and warehouse premises. For this reason, the available commercial premises are broken down into just two categories, offices (B1) and business premises (industry B2 and warehousing B8). The annual survey does not record vacant premises which are not being marketed at the time of the survey.

10.7 Figure 32: Available Commercial Floorspace in Spelthorne April 2010–April 2019



Source: In house monitoring

10.8 The current state of the property market has brought forward more residential development on sites previously in commercial use. Due to change of use regulations several offices in Spelthorne have been and continue to be converted into residential units this is through 'Permitted Development Rights' which was brought in by the government to make most use of empty office space to create additional housing which is in short supply. This helps achieve the governments new homes target of 603 homes per annum for Spelthorne.

10.9 Table 33: Completed floorspace developed by employment type 1 April 2019 – 31 March 2020

	Gross floor space in m ²	Losses in floor space in m ²	Net gain in floor space in m ²
Offices (B1a)	102	4,693	-4,591
Research & Development (B1b)	0	0	0
Light Industry (B1c)	0	614	-614
Industrial (B2)	272	0	272
Warehousing/storage (B8)	0	0	0
Mixed B1/B2/B8	0	0	0

3.6 Source: In house monitoring (Tables A2/1 & A2/3)

3.6 N.B. Losses refer to any loss of floorspace arising during the monitoring year and does not necessarily relate to the loss on a site where completed development is recorded during the year.

10.10 Whilst Spelthorne has a large amount of business floorspace there is also a significant amount of space immediately adjoining the Borough at Heathrow Airport, Poyle / Colnbrook and the Causeway area of Staines in the Borough of Runnymede. Following a series of local government boundary changes in the 1990s the areas of

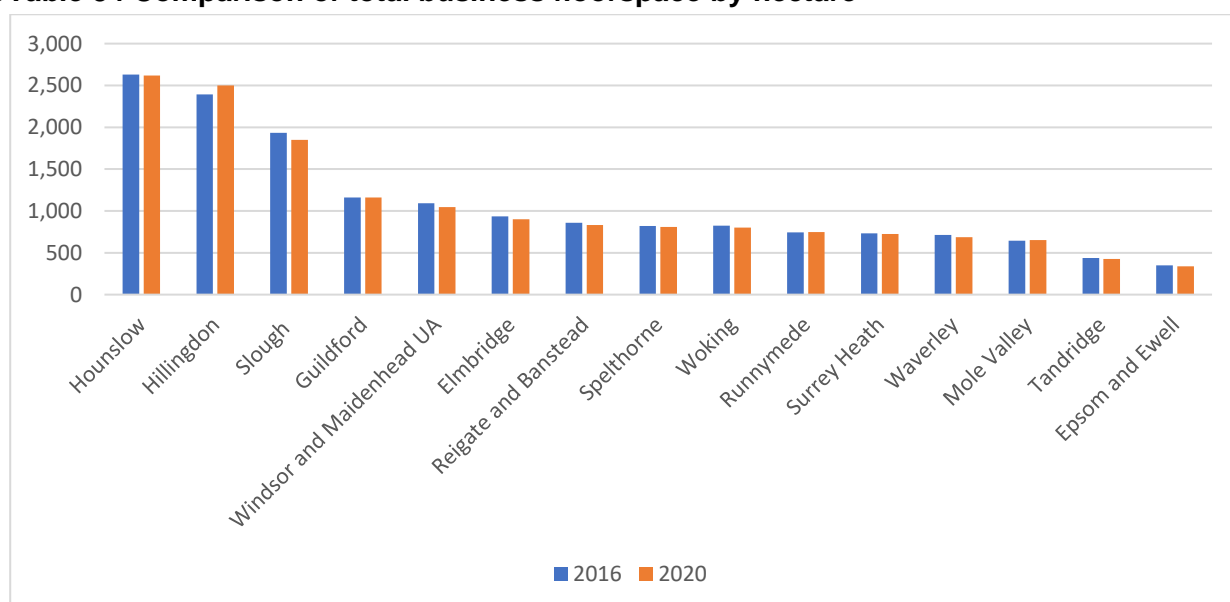
Poyle / Colnbrook, part of the Causeway in Staines, the Cargo Terminal at Heathrow Airport, half of Terminal 4 and part of the site of what is now Terminal 5 were transferred respectively to Slough, Runnymede and Hillingdon. The total business floorspace (excluding Terminal 4) amounted to 365,000m² which is almost as much as all industrial/warehouse floorspace now in Spelthorne. These 'transferred' areas nevertheless remain readily accessible to residents in the Borough

10.11 Comparison of overall business floorspace with other local authority areas

Despite Spelthorne being geographically smaller than the majority of authorities in Surrey it is the 4th largest for business space which was also the case in the last LEA report produced in 2016.

10.12 Table 24 compares the total amount of business floorspace with all adjoining and other Surrey authorities in 2016 when the last LEA was published compared to March 2020 which is the latest available information.

10.13 Table 34 Comparison of total business floorspace by hectare

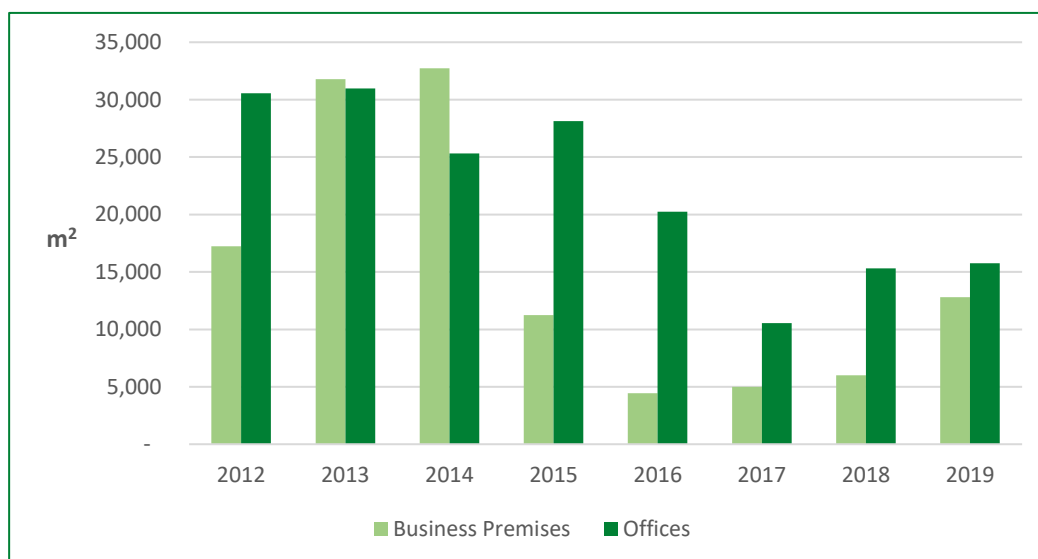


Source: Valuation Office – March 2020

10.14 However, the above comparison takes no account of the relative physical size of Spelthorne and therefore the density of business floorspace provision. Of all the comparison authorities only Slough and Epsom & Ewell have a smaller geographical area than Spelthorne. Figure 4 therefore makes a comparison of the amount of business floorspace per hectare for each authority. In this comparison Spelthorne has more floorspace per hectare than any other Surrey authority and only Hillingdon, Hounslow and Slough have a greater density.

10.15 The annual surveys of available premises were not carried out in 2020 due to the restrictions of the Covid19 pandemic. The figure up to 2019 are published here for information. The availability of the data relating to premises which are being marketed does not allow a clear distinction to be made between industrial and warehouse premises. For this reason, the available commercial premises are broken down into just two categories, offices (B1) and business premises (industry B2 and warehousing B8). The annual survey does not record vacant premises which are not being marketed at the time of the survey.

10.16 Figure 35: Available Commercial Floorspace (Square Metres) in Spelthorne April 2010–April 2019



Source: In house monitoring

- 10.17 The current state of the property market has brought forward more residential development on sites previously in commercial use but which are no longer suitable for that purpose. No commercial sites within the designated employment areas have been lost to non-employment uses apart from vacant offices being converted to residential under the “prior approval” regime. Three schemes completed this year, providing 113 dwellings, have resulted in the loss of some 5,506m² of B1a office floorspace, whilst further schemes involving the creation of 307 dwellings and the loss of just over 15,881m² of office floorspace have either commenced or are outstanding. During 2020 and 2021 the loss of office space across the borough has been keenly felt, particularly in Staines-upon-Thames.
- 10.18 The number of commercial completions has increased slightly this year, but the market remains slow at present. The redevelopment of the former Majestic House site, now known as Charter Square, is still under construction with a larger proportion of the scheme providing residential units in place of office floorspace as originally proposed. There remain several other major schemes in the pipeline, including the Centrica site in London Road Staines. Details of all outstanding commercial permissions are set out in Appendix 2 Table A2/4.

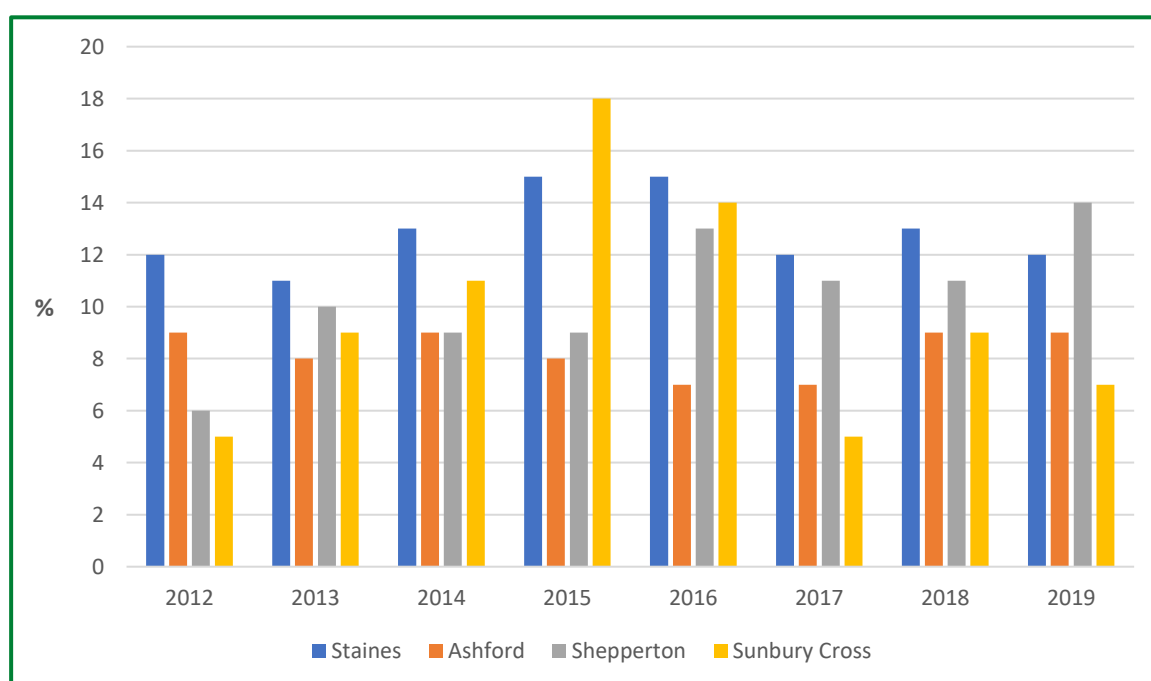
10.19 There has been very little new retail development activity throughout the Borough. The redevelopment of retail units on the north side of the High Street (at 90-106), just west of the Iron Bridge with a 155-bed hotel and over 1,435m² of ground floor retail units was completed in July 2018. There has been no further progress on the two alternative schemes to provide additional retail floorspace for the Phase 3 extension to the Elmsleigh Centre in Staines which had previously been agreed in principle. Neither scheme looks likely to proceed in its current form.

10.20 **Table 36: Completed retail, office & leisure development - 1 April 2019 - 31 March 2020**

	Total gross floorspace (m ²) Whole Borough	Total gross floor space (m ²) In town centres only
Retail (A1)	0	0
Financial & Professional Services (A2)	0	0
Restaurants, Cafes etc (A3/A4/A5)	304	177
Office (B1a)	102	0
Leisure (D2)	0	0

Source: In house monitoring

10.21 **Table 37: Vacancy rates in larger shopping centres**



Source: In house monitoring (Appendix 3 Table A3/2)

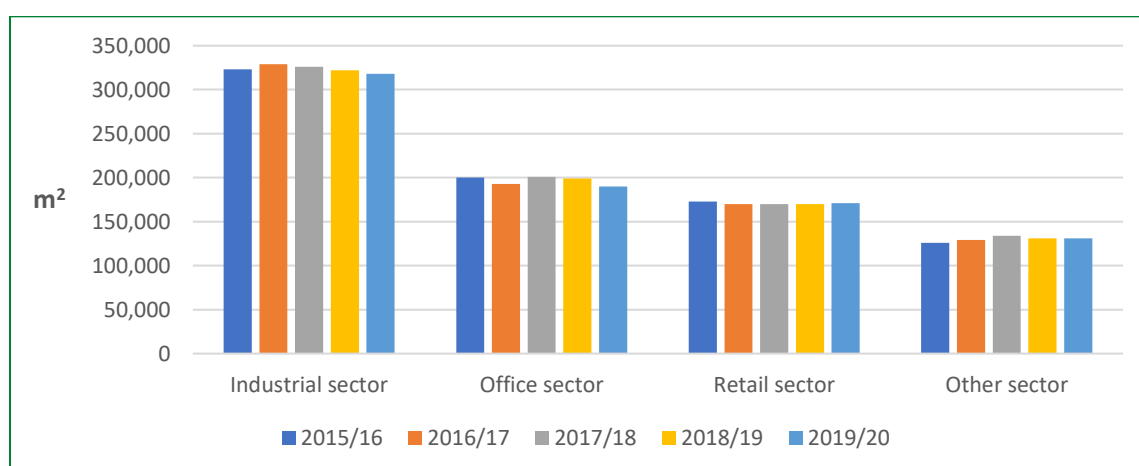
10.22 **Figure 38 Types of businesses situated within Spelthorne**

Number of Businesses by Category	
Specialised construction activities	776
Computer programming, consultancy, and related services	562
Retail trade	543
Real estate activities	510
Wholesale trade	483
Other personal service activities	458
Activities of head offices; management consultancy activities	445
Transport	368
Office administrative, office support and other business support	319
Food and beverage service activities	312
Construction of buildings	298
Human health activities	266
Manufacturing	228
Other professional, scientific, and technical activities	209
Education	205
Services to buildings and landscape activities	159
Warehousing and support activities for transportation	156
Architectural and engineering activities; technical testing and analysis	142
Motion picture, video, programming & broadcasting	133
Sports activities and amusement and recreation activities	132
Financial and insurance services	118
Legal and accounting activities	118
Employment activities	90
Creative, arts and entertainment activities	80
Information service activities	73
Social work activities without accommodation	61
Water collection & treatment, sewage & waste	56
Civil engineering	53
Postal and courier activities	52
Activities of membership organisations	52
Residential care activities	50
Security and investigation activities	49
Advertising and market research	48
Repair and installation of machinery	45
Travel agency, tour operator and other reservations	45
Accommodation	44
Publishing activities	36
Telecommunications	35
Activities auxiliary to financial services and insurance activities	35
Rental and leasing activities	33

Extraction of crude petroleum and natural gas	32
Repair of computers and personal and household goods	30
Mining support service activities	27
Public administration and defence; compulsory social security	23
Scientific research and development	12
Activities of households as employers of domestic personnel	12
Veterinary activities	10
Libraries, archives, museums and other cultural activities	9
Forestry and logging	7
Electricity, gas, steam and air conditioning supply	7
Undifferentiated goods and services-producing activities of private households for own use	5
Other mining and quarrying	2
Crop and animal production, hunting and related service activities	3
Fishing and aquaculture	1
Mining of metal ores	1
Gambling and betting activities	1

Source Fame May 2021

10.23 Figure 39 Shows the split of floorspace from 2015/16 to 2019/20

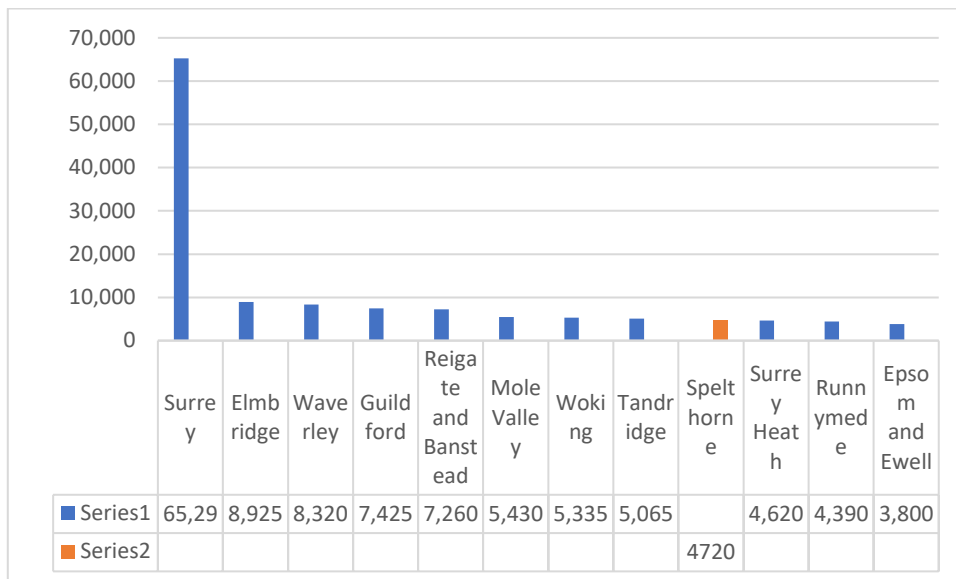


Source: AMR 2021

10.24 Types and size of businesses in Spelthorne

The previous paragraphs have considered the amount of 'business rated' floorspace in the Borough on the basis of four broad activity categories. Figure 9 categorises the VAT/PAYE registered businesses in Spelthorne using the national Standard Industrial Classification (UK SIC 2007) by Broad Industry Group.

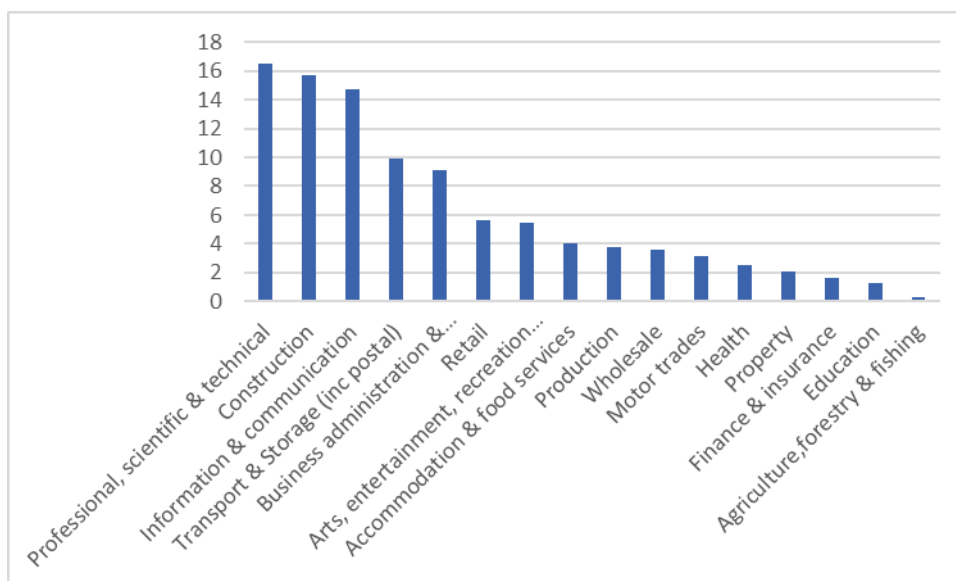
10.25 Figure 40 VAT and/or PAYE based enterprises in Surrey



ONS March 2020

The above chart shows the number of VAT and/or PAYE based enterprises by broad industry group. Spelthorne have 4,720 businesses which is 8th in Surrey, the highest being Elmbridge on 8,925 and the lowest Epsom and Ewell with 3,800

10.26 Figure 41: Percentage of VAT and/or PAYE based enterprises by broad industry group in Spelthorne



ONS March 2020

10.27 The greatest number of Spelthorne's 4720 businesses are in the 'professional, scientific & technical', 'information & communication', 'transport & storage' and 'construction' groups which was the same in the 2016 LEA. These represent 56.8% of all businesses, an increase from 52% in 2016 and from 46% in 2013.

10.28 Whilst the highest proportion of businesses in Spelthorne are 'professional, scientific & technical' at 16.5%, this is a much lower percentage than in most comparison authorities. Only Slough has a lower proportion of people employed

in this industry group. The next lowest percentage in the rest of Surrey for this group is Runnymede at 19.2%.

10.29 When comparing Spelthorne with all adjoining/Surrey authorities the proportion in

10.30 'Transport and storage' is significantly greater than the majority 9.9%; with only Slough having a higher figure on 11.8% the next closest is Hounslow 6.4%. The highest in the rest of Surrey is Runnymede at 4.3%. This high figure for Spelthorne reflects the proximity of Heathrow Airport and in particular the location of the airport's cargo centre on its south side. There is a particular concentration of air freight businesses in the Borough, the significance of any large industry sector in one area is that if that sector suffers a decline in demand, the impact on jobs is also at risk; this has been demonstrated with the impact of COVID-19 on the industry.

10.31 Relative to most other authorities, Spelthorne has a high proportion of 'construction' businesses and more in percentage terms 15.7% than any adjoining or Surrey authority apart from Tandridge 17.7%, Hillingdon 16.7% and Reigate and Banstead 16.3%

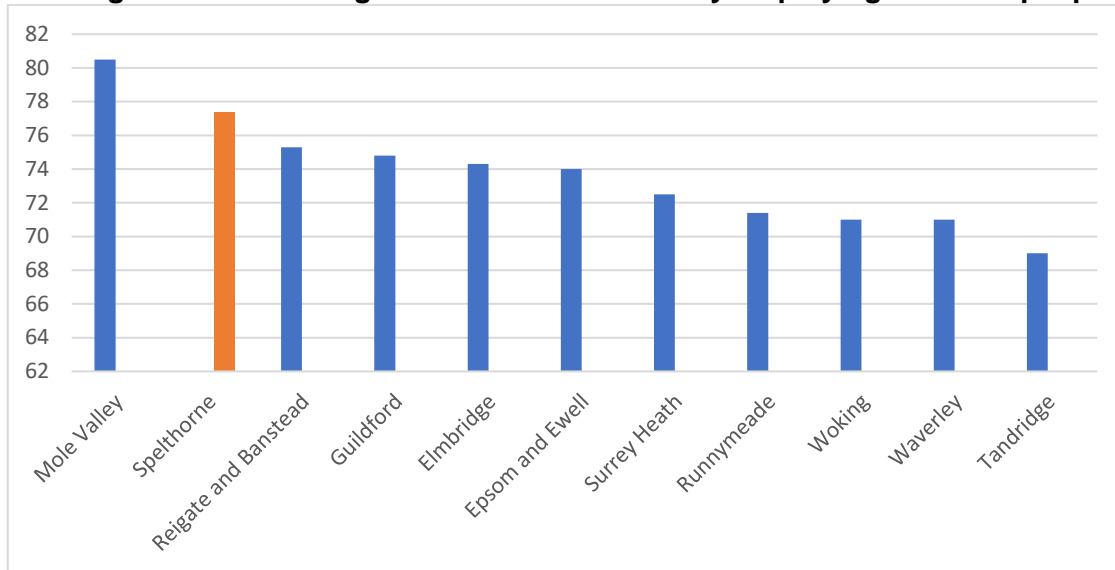
10.32 Figures 42 shows the number of businesses by employment size in Spelthorne and figure 43 shows the number of businesses employing less than 10 people in the other boroughs in Surrey. They show that a significant proportion of Spelthorne's businesses are small with 81.7% having between 1 and 4 employees and 92.7% employing less than 20 people. The 0 to 4 employees' percentage has grown from 76% at the 2016 LEA. In Surrey Spelthorne has the second highest number of businesses employing less than 10 people. This does give the borough the opportunity to support and nurture the small businesses and as they expand to keep them in the borough which will help with investment and employment opportunities.

10.33 **Figure 42 Number of businesses in Spelthorne by employment size**



Source: Fame April 2021

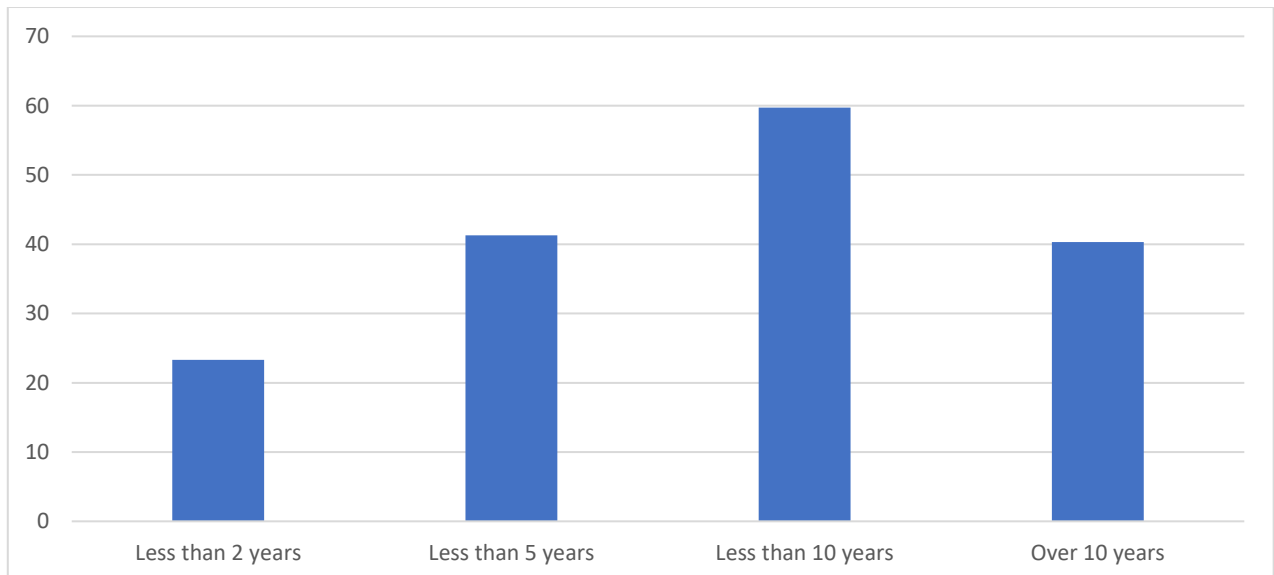
10.34 **Figure 43: Percentage of businesses in Surrey employing under 10 people**



Source: Fame April 2021

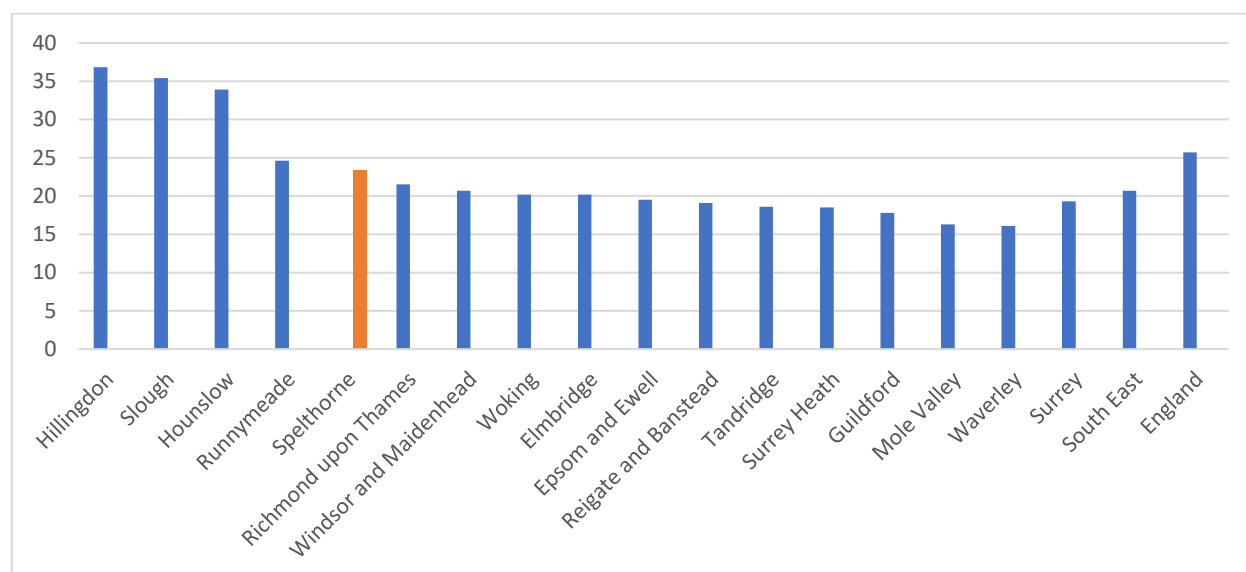
Figure 44 Published information on the age of businesses shows a broad spread between those that have operated for less than two years (23.3%) to those that have operated for more than 10 years (40.3%). Figure XX shows that four of our neighbouring boroughs have a higher percentage of businesses trading less than two years but in Surrey we have the second highest percentage. This shows that businesses still have confidence to open new businesses in Spelthorne. The benefits of our Business Incubator will further strengthen this situation.

10.35 **Figure 44 Businesses in Spelthorne by Age of Business**



Source: Fame April 2021

10.36 **Figure 45: Businesses in Surrey and local boroughs trading less than 2 years**



Source: Fame April 2021

11 Support for Small Businesses

- 11.1 The latest EM3 Commercial Property Study that was produced in 2016 highlighted the need for more specialised, flexible workspaces including business Incubators, Accelerator spaces and Co-working spaces (IACs) in order for small businesses to grow, particularly those in the 4 key sectors.
- 11.2 IACs are business premises where serviced space is available for small businesses. These generally provide space with limited up-front costs and a range of facilities that are particularly suitable for start-up businesses. Most of this space is in office buildings. When the EM3 Commercial Property Study was produced there was no incubator space in Spelthorne, this key point has been addressed with the opening of Spelthorne's Business Hub based in Sunbury upon Thames in June 2021, flexi office space is also available in the borough at various locations including The Powerhouse in Ashford and Centurion House in Staines.
- 11.3 The government allocated local authorities funding to give to businesses to help them through the pandemic, the amount allocated to September 2021 exceeded £50m. One of the grants was called Additional Restrictions Grant (ARG) where each area could provide business support on a discretionary basis. This allowed local authorities to utilise this funding (£2.9m for Spelthorne) to help businesses in a way which local conditions were best served. Spelthorne took a view that there would be 2 key phases.

Phase 1. this was based upon 'Business Survival' and as such opened 4 windows of opportunity over 12 months for businesses to apply for funding up to the value of £10 which would then be transferred directly into the business bank account for that business to use in the best way they felt fit, which would also include their own personal situation including debts and liabilities.

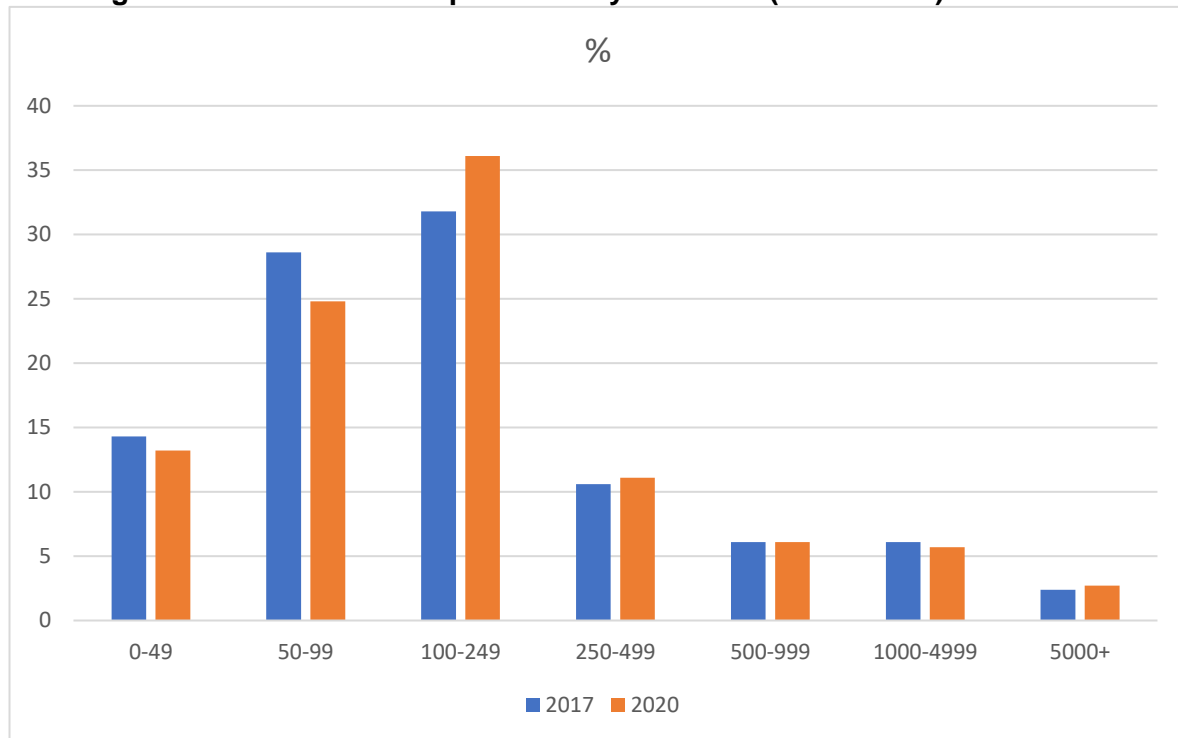
Phase 2 was 'Recovery', this targeted the funds to help businesses in 3 distinct ways.

1. To improve performance and productivity: Businesses were invited to apply for funding that would be used to purchase replacement or new equipment to make their business more competitive and grow. This allowed applications up to £20,000 with only 10% of this coming from the business.
 2. People Skills: Improve the skills and abilities of our business owners by the provision of professional business support and training. Professional business advisors available free of charge to businesses who needed support connected with running the business i.e., finance, HR, growth etcetera.
 3. Make best use of Technology: To make the best use of digital technology so that they can compete on-line / utilising social media to access new customers far and wide in addition to the traditional bricks and mortar. This comprised of the provision of free training on how to make best use of social media over 5 weeks; also, free support to get businesses on-line via a dedicated website.
- 11.4 The Spelthorne Business Forum is also an integral source of support for businesses, it is delivered by the council on behalf of businesses and has grown to nearly 1,000 members over 16 years. This not only offer a wide range of networking opportunities for new businesses but also to a free business directory and presentations.
- 11.5 The Council also organises an annual Spelthorne Business Awards event to celebrate some of the fabulous businesses within the borough and collaborates with the MP Kwasi Kwarteng in the annual Business Plan Competition for budding new businesses.

12 Business Turnover

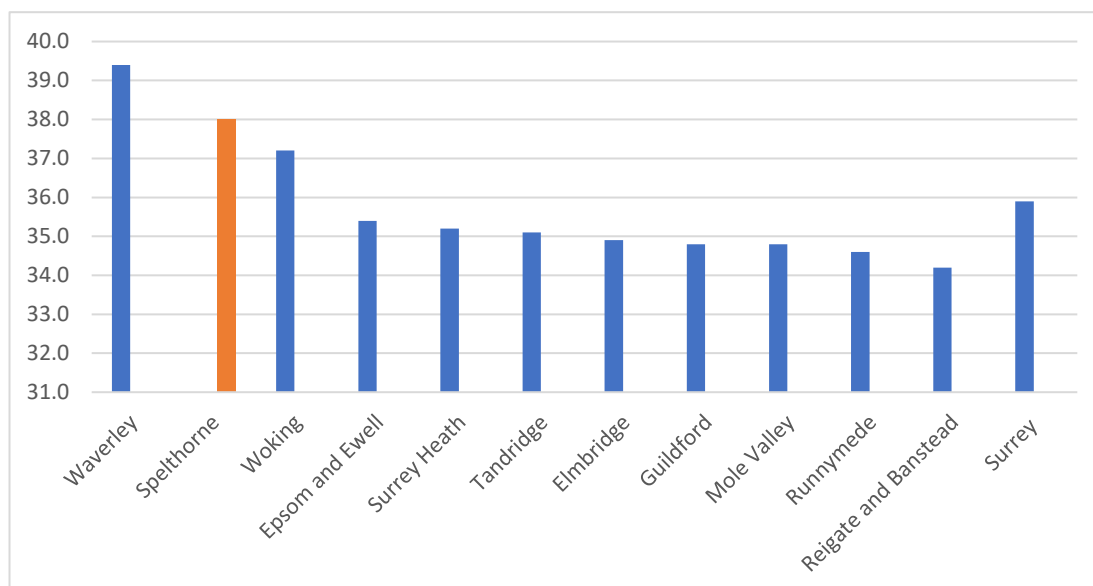
- 12.1 Figure 36 provides information on the number of businesses by turnover. Some 38% of businesses in Spelthorne have a turnover less than £100,000 per annum compared to 42.9% in 2017. Businesses with turnover between £100,000 and £249,999 has grown from 31.8% to 36.1% which indicates that businesses in the borough are growing their turnover

12.2 Figure 46 Businesses in Spelthorne by Turnover (£ thousand)– 2017 & 2020



Source: ONS 2020

12.3 Figure 47 Businesses under £100,000 in Surrey boroughs



Source: ONS 2020

13 Economic Performance

13.1 There are various measures which can be used to create a more general 'picture' of how a particular area is performing economically, one of which is the

UK Competitiveness Index. This uses 10 sets of data to produce an overall score of relative economic competitiveness for local authorities. The data sets are:

- Economic activity rates
- Business start-ups per 1,000 population
- Business per 1,000 population
- Education
- Percentage of knowledge-based businesses
- Gross Valued Added (GVA)
- Productivity output per Hour Worked
- Employment rates
- Gross weekly pay
- Unemployment rates

13.2 Table 48 shows the national rank for 2011, 2020 and 2021 for Spelthorne, the adjoining authorities, and the rest of Surrey. The lower the number the more competitive an area is. Surrey boroughs have 6 in the top 10 (out of 379) and 10 in the top 23. Spelthorne is the lowest in Surrey ranked 51st, this still puts Spelthorne in the top 20% of boroughs in the UK and a steady improvement from 68th in 2011.

13.3 **Figure 48 Relative Competitiveness¹⁶**

Authority	2011 UK rank of 379	2020 UK rank of 379	2021 UK rank of 379
Spelthorne	68	60	51
Adjoining authorities:			
Elmbridge	2	7	3
Runnymede	42	32	17
Slough	102	127	127
Windsor & Maidenhead	19	8	18
Hillingdon	144	166	115
Hounslow	163	124	86
Richmond	40	12	7
Surrey authorities:			
Epsom & Ewell	21	4	4
Guildford	16	17	10
Mole Valley	1	9	11
Reigate & Banstead	12	25	19
Surrey Heath	30	18	9
Tandridge	8	22	23
Waverley	4	4	2
Woking	7	6	5

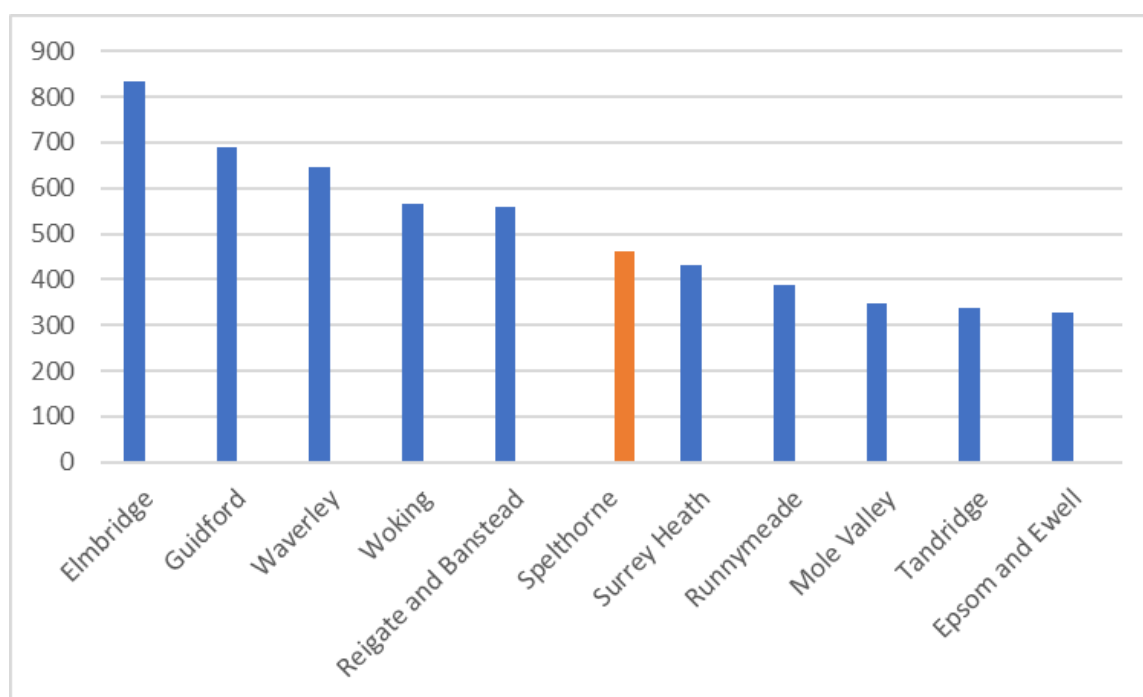
16 UK Competitiveness Index 2013 & 2019

13.4 It should be noted that the top performing region of the UK is London with the Southeast in second place. Therefore, whilst Spelthorne's scores are not as

good as in adjoining areas it is still in the top quartile nationally. Detailed examination of the factors making up the 'Index' show that the single issue contributing most to the Borough's lower ranking is educational attainment and specifically the relatively low percentage of residents with a degree or equivalent. Compared to the 18 adjoining / boroughs in Surrey Spelthorne ranked 15th out of 16¹². NVQ4 or higher improved in the borough in 2020 with 50% now achieving this.

- 13.5 Computer Software and Hardware companies. The National Planning Policy Framework (NPPF) requires local authorities to “plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high-tech industries.” It is therefore relevant to explore whether any particular clusters or networks of knowledge driven, creative or high-tech industries are present in the borough.
- 13.6 Figures 49 Shows the number and percentage of Computer Software and Hardware companies in Spelthorne compared to the rest of Surrey. Surrey has 5592 Computer Software and Hardware companies with 462 (8.2%) being in Spelthorne. One aim of the recently opened Business Hub is to attract tech companies to the borough. High tech, digital, immersive companies often offer good salaries and the potential to grow and expand as the world edges towards the adoption of artificial intelligence (AI) to advance science, technology, pharmaceuticals, vaccines and much more.

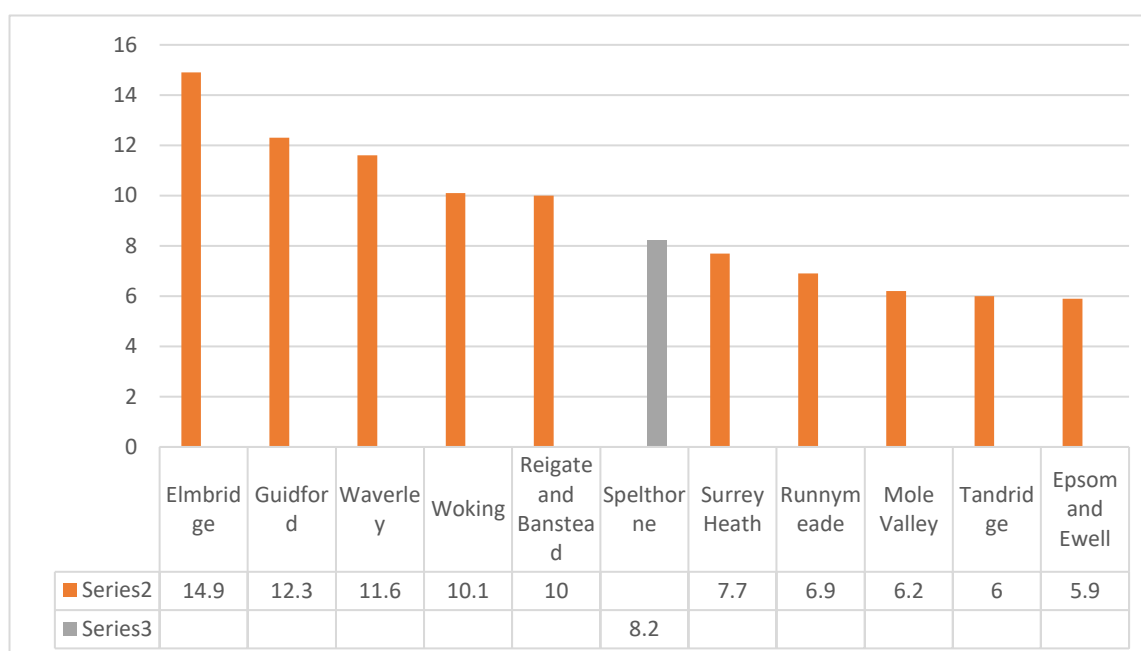
13.7 Figure 49 Number of Computer Software and Hardware companies in Surrey



Source: Fame July 2021

¹² Nomis

13.8 Figure 50 Percentage of Computer Software and Hardware companies in Surrey



Source: Fame July 2021

13.9 Spelthorne is part of the Enterprise M3 Local Enterprise Partnership stretching from Spelthorne in the north through to Winchester in the south. The M3 area is home to the primary Sci / Tech corridor in the UK, a status gained through its combination of industrial strengths, cutting edge research and high performing universities.¹³

13.10 The study identifies 4 key priority sectors: ICT & digital, professional, and financial services, pharmaceuticals and aerospace and defence. The Upper M3 area is deemed to be a key cluster in 3 of these: ICT & digital, professional, and financial services and pharmaceuticals.

Companies House SIC Code Analysis

13.11 Figure 51 shows us the total number of company registrations across Spelthorne and Surrey from 2017 to 2020. The results show that Spelthorne is below the average per borough, but the percentage gap is reducing from 75.9% in 2017 to 93.6% in 2020. What it also shows is that Ashford is consistently incorporating significantly more new businesses than any other town in the borough.

13.12 Figure 51: Total companies incorporated in Spelthorne and Surrey 2017-2020

Surrey	Spelthorne	Surrey	Spelthorne	Surrey	Spelthorne	Surrey	Spelthorne
2020	2020	2019	2019	2018	2018	2017	2017
11358		8106		6272		5720	
1032 average per	966	736 average per	670	570 average per	528	520 average per	395

¹³ Enterprise M3 Commercial Property Study 2016

borough		borough		borough		borough	
	Ashford - 368 Shepperton & Lae ham - 163 Staines - 197 Stanwell - 84 Halliford & Sunbury - 156		Ashford - 256 Shepperton & Lae ham - 111 Staines - 134 Stanwel - 58 Halliford & Sunbury - 113		Ashford -194 Shepperton & Lae ham - 80 Staines - 117 Stanwell - 34 Halliford & Sunbury - 103		Ashford - 158 Shepperton & Lae ham - Staines - 82 Stanwell - 22 Halliford & Sunbury - 62

Source: Fame May 2021

This shows that Ashford Town has the largest percentage of businesses in Spelthorne with 17.3% followed by Staines, 14.3%. Riverside & Lae ham has the fewest with 3.6%

13.13 Figure 52: Businesses by ward

Area	Number of Businesses	% of Businesses
Spelthorne	7673	100
Ashford Common	497	6.5
Ashford East	402	5.2
Ashford North & Stanwell South	422	5.5
Ashford Town	1329	17.3
Halliford & Sunbury West	363	4.7
Lae ham & Shepperton Green	522	6.8
Riverside & Lae ham	278	3.6
Shepperton Town	736	9.6
Staines	1101	14.3
Staines South	396	5.1
Stanwell North	494	6.4
Sunbury Common	499	6.5
Sunbury East	634	8.2

13.14 Table 53 shows the number of transportation and storage companies incorporated in Spelthorne from 2018 to May 29th 2021 and the percentage compared to Surrey. The categories included are land transport and transport via pipelines, water and air transport, warehousing and support activities for transportation and postal and courier activities. These categories have been consistently stronger than Surrey as a whole. This is largely due to the proximity of Heathrow Airport and the motorway network.

13.15 Figure 53: Transportation and storage companies incorporated

New Businesses	Spelthorne	Surrey	Spelthorne	
	Jan 1st to May 29th 2021	Jan 1st to May 29th 2021	2020	
TRANSPORTATION AND STORAGE				
Total	35	130	79	
% of Surrey	26.9		21.9	

Source: Fame May 2021

13.16 Figure 54 shows the type and number of businesses in Spelthorne. There are 56 different categories in operation in the borough. The top 10 categories accounts for 59.2% of all businesses in the borough and the top 15 categories 74.2%

This also shows the percentage of businesses by category compared to Surrey. The top two categories by % are Transport (land, air & sea) at 19.6% and Warehousing and support activities for transportation 17.9% which reflects Spelthorne's location to Heathrow airport and also our reliance to this sector as well as the access to various motorways.

Figure 54: Type and number of businesses in Spelthorne and Surrey

Top 20 Spelthorne Businesses by Category compared to Surrey			
Category	Spelthorne	Surrey	%
Specialised construction activities	776	7203	10.8
Computer programming, consultancy and related services	562	7436	7.6
Retail trade	543	6947	7.8
Real estate activities	510	8865	5.8
Other personal service activities	458	5381	8.5
Activities of head offices; management consultancy activities	445	9584	4.6
Transport (land, air & sea)	368	1884	19.6
Office administrative, office support and other business support	317	6008	5.3
Food and beverage service activities	312	3970	7.9
Construction of buildings	298	4813	6.2
Wholesale trade	271	3261	8.3
Human health activities	266	4377	6.1
Manufacturing	210	3139	6.7
Other professional, scientific and technical activities	209	4055	5.2
Education	205	3046	6.7
Services to buildings and landscape activities	159	2170	7.3
Warehousing and support activities for transportation	156	870	17.9
Architectural and engineering activities; technical testing and analysis	142	2382	6.0
Motion picture, video, programming & broadcasting	133	1727	7.7
Sports activities and amusement and recreation activities	132	2184	6.0

14 Staines-upon-Thames BID

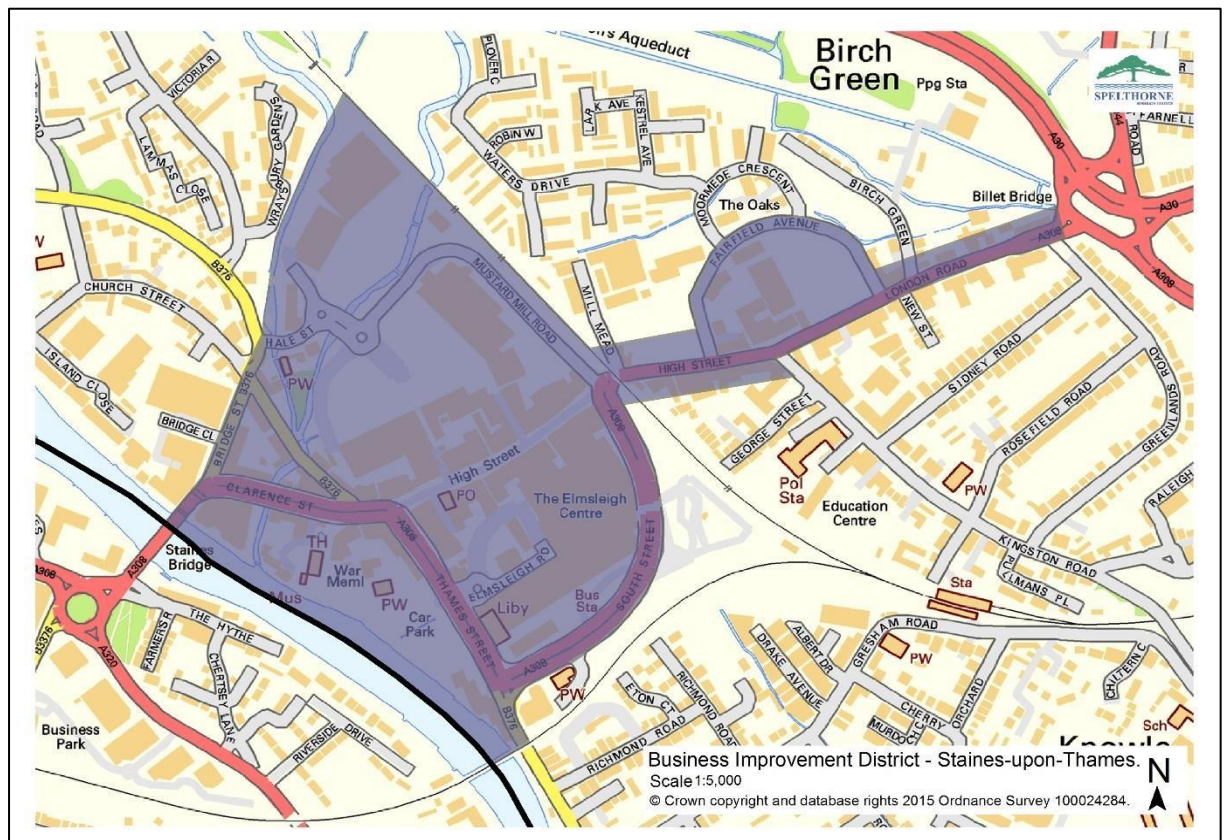
14.1 Visit Staines Business Improvement District¹⁴ (BID) was established in 2017. BIDs are business-led initiatives, taking advantage of government legislation that gives local business the power to raise their own funds through a levy on their business rates. This can then be spent on their business priorities as identified in the BID Proposal to improve their trading environment on things such as events, town rangers, Christmas lights etc. A BID term is 5 years after which a new ballot must take place. The new ballot will be in 2022, due to the effect covid has on the high street and the closure of a number of main

¹⁴ www.visitstaines.co.uk

contributors to the BID including Debenhams there is no guarantee that the new ballot will be successful. In October 2021 the BID Board decided to slightly increase the area the BID covers, thereby taking in additional hereditaments.

14.2 The business rates levy has been set at 0.75% for businesses in serviced accommodation (Two Rivers, Elmsleigh Shopping Centre's) and 1.5% for all other businesses. The BID area can be seen in the map below. The BID area is for the most part retail only, however there are some non-retail businesses also included.

14.3 Figure 55: Staines-upon-Thames Business Improvement District



Source: Spelthorne Borough Council

3.91

14.4 The Staines-upon-Thames BID aim was provide £1.6 million of new investment for over 300 business over the 5 year term. It has currently invested £1.1m based on the BID levy collected so far

14.5 The BID board identified the following as their key objectives:

- Create a strong collective business voice in the town
- Increase footfall and boost trade
- Improve the economic opportunities and the trading environment for businesses in Staines-upon-Thames
- Create a new brand and identity for Staines-upon-Thames
- Market Staines-upon-Thames to a local, regional and national audience through high profile marketing campaigns, multi-channel media advertising, year-round events, festivals and markets
- Capitalise on the heritage and location of Staines-upon-Thames

- Increase awareness of businesses and town centre events by marketing to residents and employees
- Supply businesses with useful data on town centre performance e.g., footfall, car park and dwell time figures
- Make the town more welcoming, attractive, and safer

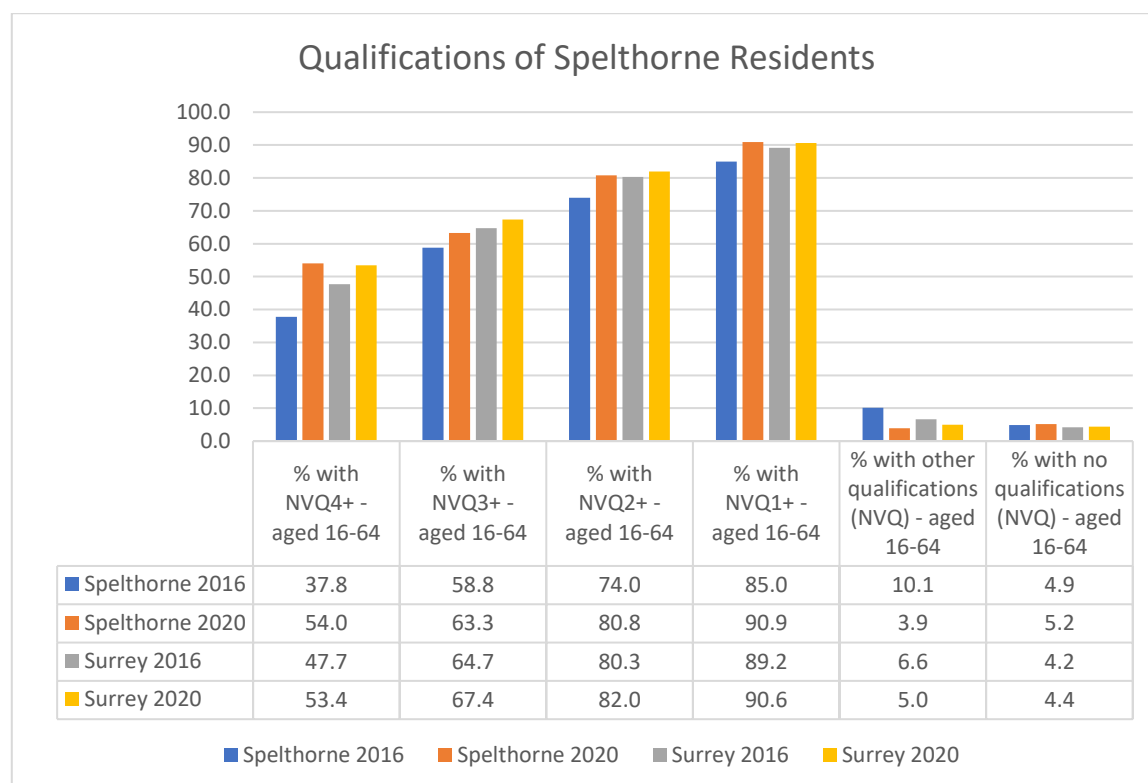
All the objectives have been addressed with further activities to attract people to the town to continue.

15 Skills and Qualifications

15.1 The latest Spelthorne Business Survey has once again shown evidence that some businesses have experienced a shortfall in the necessary qualifications and experience when seeking to recruit.

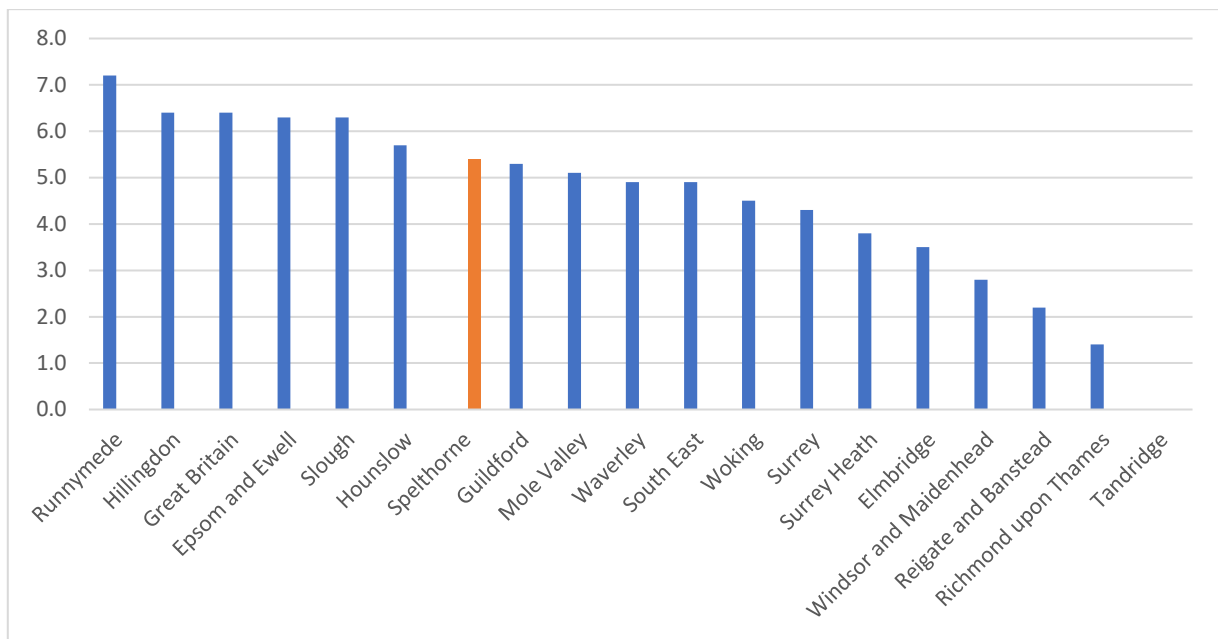
15.2 Figure 56 shows that there has been continued significant improvement since the last economic assessment in 2016 when only 37.8% of our residents had obtained NVQ4+ compared to 47.7% average across Surrey. The latest data available in 2020 now shows that instead of being significantly behind the Surrey average, Spelthorne now has a slightly higher than Surrey average with NVQ4+, with residents at 54% compared to Surrey's 53.4%.

15.3 **Figure 56 Qualifications of Spelthorne Residents compared to the Surrey average 16 to 64 years old – 2016 and 2020**



Nomis to December 2020

15.4 Figure 57 Comparison of 16–64-year-olds with no qualifications

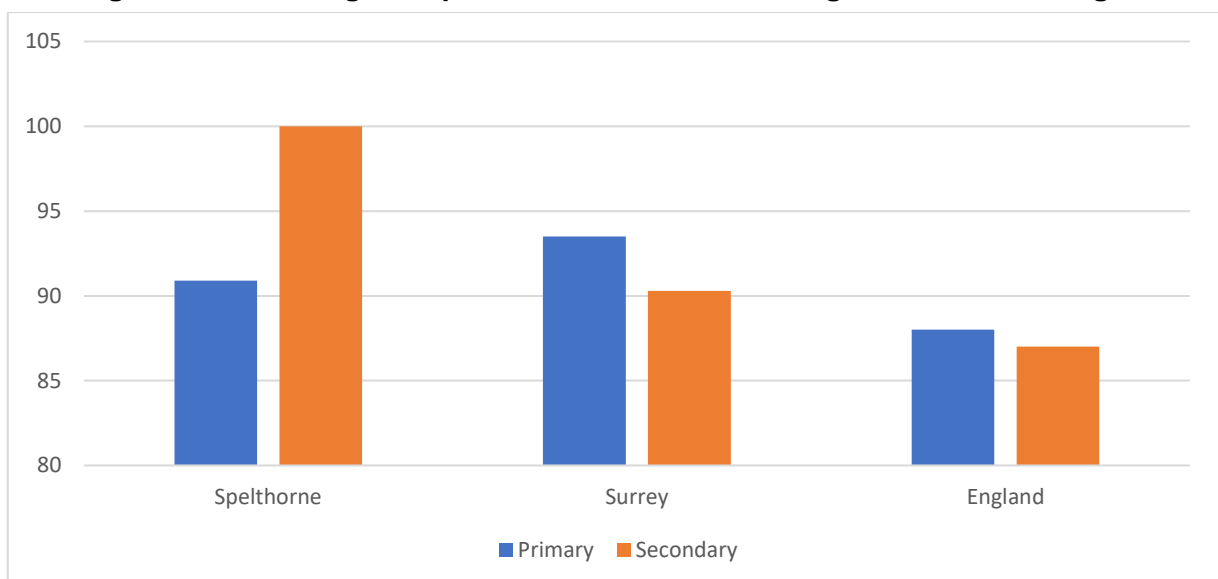


Nomis to December 2020

15.5 Improvements have been made in all areas with the exception of those residents without any qualifications where it has risen slightly from 4.9% to 5.2%. This puts Spelthorne as the local authority area with the second most residents without qualifications in Surrey, but well below the Great Britain average as can be seen by Figure 57

15.6 Figure 58 shows the percentage of primary and secondary schools deemed “good or outstanding” in Spelthorne in relation to Surrey and England. The results show improvement on the level of performance from the 2016 LEA, with Spelthorne schools continuing to fair better than the level for England. (Please note that not all schools had available data on the Ofsted or Gov UK sites)

15.7 Figure 58 Percentage of Spelthorne Schools deemed good or outstanding



Source: Ofsted/Gov.UK

- 15.8 The above data in Figure 58 is likely to be a key reason why qualifications are improving within Spelthorne as the quality of the education provided, particularly at secondary level as measured by Ofsted is exceptional compared to Surrey and G.B.

16. Quality of Life - Health and Wellbeing

- 16.1 The county of Surrey is one of the least deprived in the country and its population generally enjoys good health and wellbeing. In Spelthorne, many of the Borough's residents also enjoy good health compared with other areas, but there are small pockets of deprivation in specific wards. Significant problems also persist in the population which can lead to ill health, particularly obesity, smoking and physical inactivity, which are important causes of early death and ill health.
- 16.2 In April 2016 the council adopted its Health and Wellbeing Strategy. The following tables give a snapshot of Spelthorne in comparison with the rest of the Southeast and England.

16.3 Table 59 Data Summary for England, South East and Spelthorne

	England	South East	Spelthorne
Total number of carers (2011 census, please note that this is the latest information available)	5,430,016 (10.2%)	108,433 (9.6)	9,844 (10.3%)
Admission episodes for alcohol related conditions per 100,000 (2018/19)¹	664	525* (this figure might be 10% higher due to recording issues)	665
Smoking Prevalence (2019)¹	7.8%	12.2%	13.9%
Excess winter deaths (2018-19)¹	15.1%	14.3%	22.1%
Excess weight in adults - the percentage of adults classified as overweight or obese (2018-19)¹	62.3%	60.9%	56.8%
Obese children (year 6 2019/20)¹	21.0%	16.4%	18.0%
Homelessness acceptances – per thousand households (2017-18)¹	0.8	0.7	0.1
Percentage of physically active adults – those achieving 150 minutes of at least moderate intensity activity per week (2018-19)¹	67.2%	70.2%	62.2%

Source: Public Health Profiles 2020 (Public Health England)

16.4 Table 60 Surrey and Spelthorne Comparison Table

	Surrey	Spelthorne	Comments
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Life expectancy¹⁵	84 years for women 80.5 years for men	84.2 years women 80.9 years men	The life expectancy varies greatly from the most deprived areas compared to the least deprived
Bed and Breakfast / Temporary accommodation	Numbers not available	76 Households in B&B and 32 Households in temporary accommodation arranged by local authority	Numbers as of 28 th July 2021

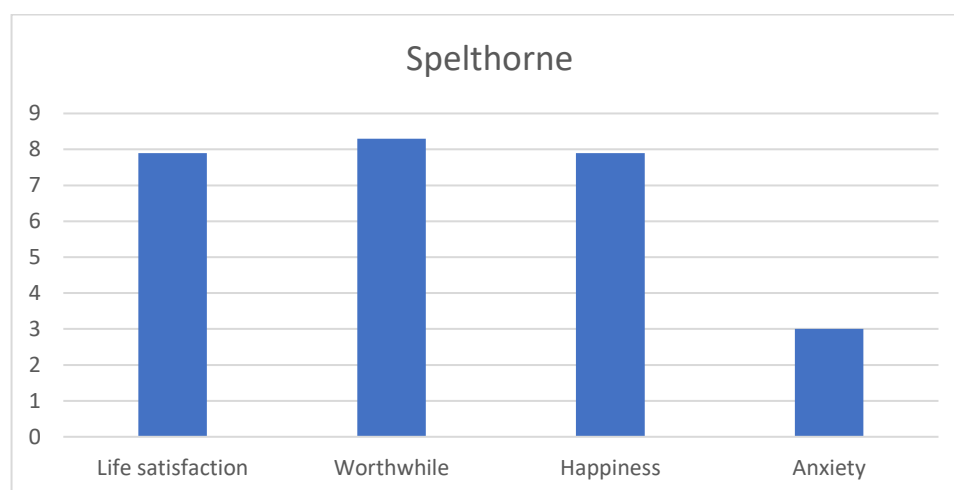
16.5 Figure 61: Levels of Personal Wellbeing Spelthorne

Spelthorne came out as the “happiest place to live in Surrey”

The ONS broke down the average ratings of four factors, the score is out of 10. Life satisfaction scored 7.9, the feeling that the things done in life are worthwhile 8.3, happiness 7.9 and anxiety 3.0. The latest data covers the period between April 2019 and March 2020, which does include the run-up to the first lockdown period.

Using these measures, Spelthorne came out on top across the county.

16.6 Figure 62: Levels of personal wellbeing in Spelthorne



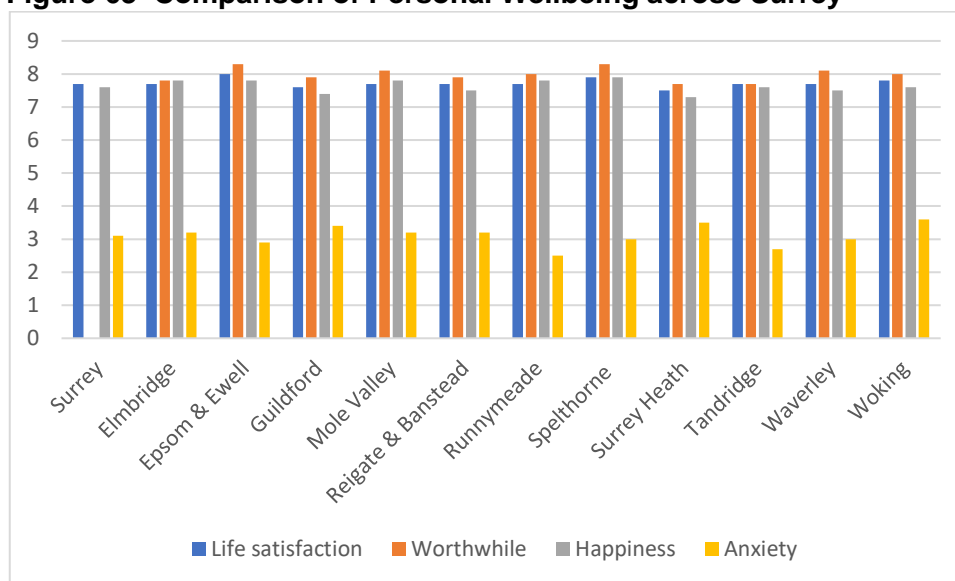
Source ONS March 2020

Figure 62 shows the personal wellbeing levels across Surrey and the adjoining authorities. Spelthorne outperforms the Surrey average in all four factors which indicates that although the borough has higher levels of unemployment than the rest

¹⁵ Public Health Profiles 2017-19 (Public Health England)

of Surrey, people are happy with their personal well-being which suggests Spelthorne is a great place to live.

16.7 Figure 63 Comparison of Personal Wellbeing across Surrey



Source: ONS March 2020

- 16.8 The **UK Prosperity Index**¹⁶ published in August 2021 shows Spelthorne moving from 75th place in 2011 to 63rd in 2020 then 56th place in 2021 compared to 379 other local authority areas in the UK. This suggests that Spelthorne is continuing to improve as a destination to live, work and run a business. Under the various measures, Spelthorne performs worst under 'natural environment' at 360th place and best under 'living conditions' where we are placed in 13th position.
- 16.9 An important factor in attracting people and businesses to live and set up their business is the offer available in relation to health, entertainment, and facilities. The table below shows that Spelthorne currently falls behind for indoor sports facilities in Surrey, for squash courts, indoor bowls rinks and indoor tennis courts and are worst in Surrey for sports hall courts and 9th for swimming pool lanes. Spelthorne has the most gym stations in Surrey (1,036) this is an increase of 37% (756) since 2016 compared to the rest of Surrey that saw an increase of 1% (121). A new leisure centre at Knowle Green has been approved and will make available modern state of the art facilities when completed in the next 2 or 3 years.
- 16.10 This indicates that the public and private sector could explore opportunities to bridge the gap, and if seen as financially viable enhance the current offer. Staines town has little more than a cinema as entertainment to attract people to its night-time economy and would for instance benefit hugely by an indoor bowls rink or other entertainment offers.

¹⁶ <https://li.com/reports/uk-prosperity-index-2021/>

16.11 Table 64 Indoor sports and leisure facilities

	COMMUNITY CENTRES	SPORTS HALL COURTS	SWIMMING POOL LANES	SQUASH COURTS	GYM STATIONS	INDOOR BOWLS RINKS	INDOOR TENNIS COURTS
Elmbridge	7	69	60	25	1,012	4	6
Epsom & Ewell	2	55	34	16	701	1	2
Guildford	11	111	51	13	797	6	4
Mole Valley	3	57	32	13	359	4	0
Reigate & Banstead	3	68	45	13	565	6	0
Runnymede	4	57	17	8	596	6	4
Spelthorne	4	40	21	7	1,036	0	0
Surrey Heath	5	36	12	9	644	6	0
Tandridge	6	47	35	11	341	0	3
Waverley	2	107	67	14	937	0	3
Woking	4	28	18	12	739	0	10
SURREY	49	674	392	140	7,727	33	32

Source: Surrey County Council and Sport England Active Places April 2017

Table 64 shows the figures across Surrey for outdoor sports provision. Spelthorne lags behind Surrey with no athletics tracks and the lowest number of golf courses and 10th for tennis courts. The lack of these facilities further hampers the boroughs' ability to be competitive compared to other destinations and may lose out on inward investment. The fact that Spelthorne is a small borough and much of the above can be located within a few miles of the Spelthorne boundary does mitigate the overall threat.

16.12 Table 65 Outdoor sports and leisure facilities

Outdoor sports and recreation

	GRASS PITCHES	ARTIFICIAL GRASS PITCH	TENNIS COURTS	ATHLETIC TRACKS LANES	GOLF CLUBS
Elmbridge	298	17	111	12	8
Epsom & Ewell	149	9	48	6	3
Guildford	209	12	40	12	10
Mole Valley	137	5	33	0	7
Reigate & Banstead	182	14	49	6	8
Runnymede	142	16	72	12	7
Spelthorne	99	12	31	0	2
Surrey Heath	165	11	24	0	6
Tandridge	205	9	52	0	13
Waverley	241	25	99	12	12
Woking	100	11	54	10	11
SURREY	1,927	141	613	70	87

Source: Surrey County Council and Sport England Active Places April 2017

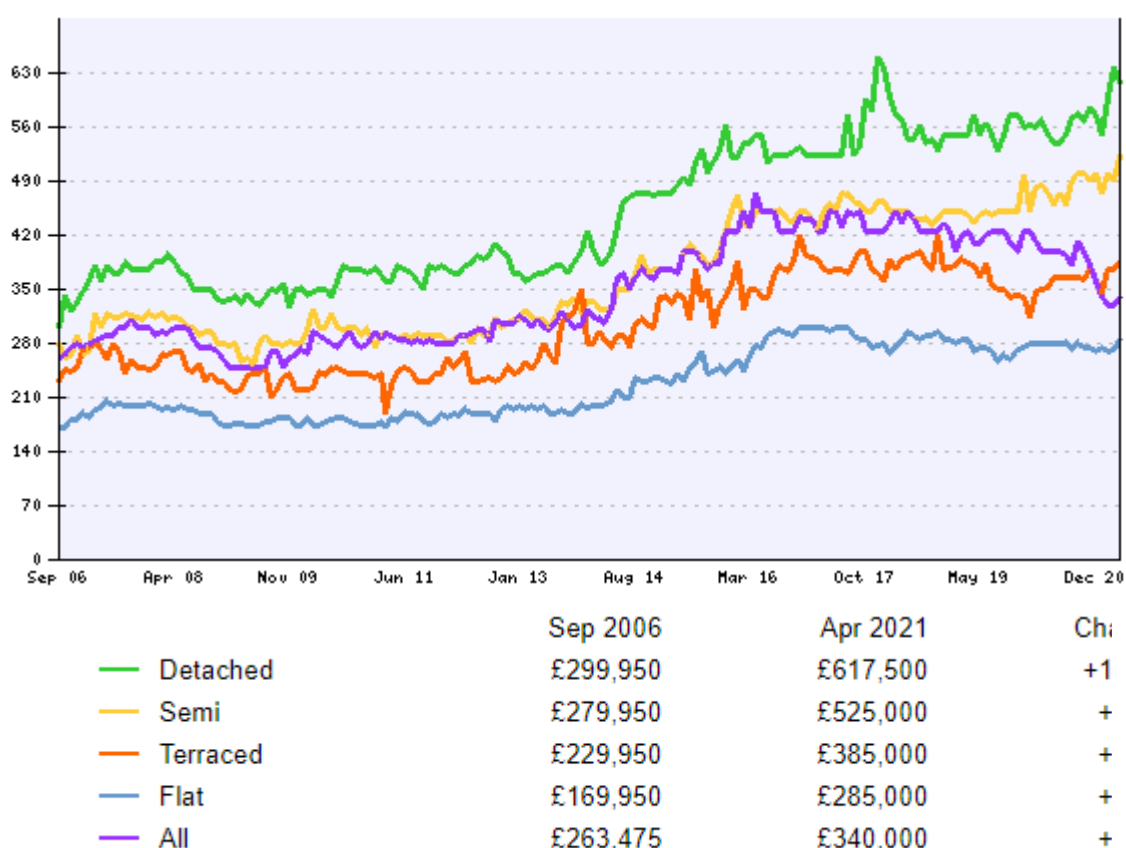
Housing Affordability

16.13 The relative cost of housing can have a bearing on the extent to which those on lower incomes can afford to live in an area. In turn this can have an impact on local labour supply. Housing is an important factor within economics, particularly inward investment opportunities. If salaries are not sufficient to purchase or rent a property, then this may cause significant problems recruiting talent and a business owner may select somewhere more affordable.

16.14 Figure 66 illustrates that housing costs are high in Spelthorne. In December 2020 the median value of a semi-detached house was £525,000, an increase of 16.6% since the 2016 assessment.

16.15 In terms of the rented sector again costs are high. As of March 2021, the median rent for a home in Spelthorne was £1,049 pcm¹⁷.

16.16 Figure 66 Median annual house prices in Spelthorne by type of dwelling (£000's)



Source: home.co.uk

16.17 In comparison with most adjoining authorities and Surrey, house prices in Spelthorne are lower. Only Slough's semidetached house prices are lower than Spelthorne's. In absolute terms the cost of property in relation to incomes means that without substantial additional financial assistance first time Spelthorne buyers on average incomes have no realistic chance of purchasing a property.

16.18 The cost of housing across the UK has become one of the defining issues for the Government. The housing crisis in London is particularly acute, however this does provide investment opportunities for adjoining boroughs such as Spelthorne, with

¹⁷ Home.co.uk

businesses looking for cheaper areas nearby to London to base themselves and their staff.

16.19 In 2019 a study compiled by comparison website TotallyMoney.com ranked the top London commuter towns to buy a home. Each location was scored out of 40 based on 4 available metrics:

16.20 House price, commuting time, season ticket prices and life satisfaction.

16.21 Table 67 shows that Staines-upon-Thames ranked 18th which was the second best location in Surrey only beaten by Walton on Thames that was 17th. The only other Surrey town in the top 25 was Epsom at 22nd. The only borough that is near to Spelthorne and not in Surrey that came in the top 25 was Slough at 21st.

16.22 Table 67: Top 25 London Commuter towns

Rank	Town	County	Commute Time (mins)	Av. House Price	Season Ticket Price	Life Satisfaction
1	Cheshunt	Hertfordshire	26	£384,248	£2,288	7.92
2	Waltham Cross	Hertfordshire	28	£390,612	£2,028	7.92
3	High Wycombe	Buckinghamshire	30	£331,092	£3,668	7.95
4	Hatfield	Hertfordshire	25	£344,459	£2,808	7.83
5	Gravesend	Kent	23	£284,497	£3,616	7.76
6	Broxbourne	Hertfordshire	32	£408,915	£2,848	7.92
7	Watford	Hertfordshire	19	£416,680	£3,204	7.76
8	Basingstoke	Hampshire	44	£320,082	£4,604	8.09
9	Overton	Hampshire	55	£215,395	£4,740	8.09
10	Hemel Hempstead	Hertfordshire	26	£361,817	£3,832	7.79
11	Harlow	Essex	34	£297,226	£2,288	7.7
12	Didcot	Oxfordshire	43	£311,060	£5,528	8.06
13	Purfleet	Essex	33	£214,907	£2,448	7.59
14	Rayleigh	Essex	44	£378,427	£4,028	8
15	Potters Bar	Hertfordshire	18	£510,539	£2,220	7.65
16	Ebbfleet	Kent	18	£339,462	£4,816	7.7
17	Walton-on- Thames	Surrey	29	£574,314	£3,036	7.9
18	Staines	Middlesex	35	£296,258	£3,024	7.71
19	Maidenhead	Berkshire	21	£517,804	£3,188	7.75

20	Hitchin	Hertfordshire	30	£407,644	£4,068	7.82
21	Slough	Berkshire	21	£354,900	£2,712	7.55
22	Epsom	Surrey	36	£519,224	£2,340	7.85
23	Princes Risborough	Buckinghamshire	39	£461,332	£3,788	7.95
24	Leighton Buzzard	Bedfordshire	32	£300,289	£4,600	7.77
25	Baldock	Hertfordshire	39	£312,815	£4,448	7.82

Source: www.totallymoney.com/commuter-hotspots

17. Deprivation

- 17.1 Since the 1970s the Government has calculated local measures of deprivation in England. The latest release of data was in 2019. This is used to create an Index of Multiple Deprivation as a composite overall measure of deprivation. It is of note that some data sources on education and business are either the same or similar to some measures used in the Index of Competitiveness which is considered earlier in this report.
- 17.2 The Index of Multiple Deprivation uses 39 separate indicators organised across seven key groupings of data:
- Income
 - Employment
 - Health and disability
 - Education skills and training
 - Barriers to housing and services
 - Crime
 - Living environment
- 17.3 From this data an overall “score” is derived, and each local authority area is ranked according to its degree of deprivation. This provides a broad indication of relative deprivation. However, within each authority area there will be variations with deprived localities in generally well-off areas and vice versa.
- 17.4 The index covers 326 local authorities in England. Within the Index a rank of 1 is the most deprived and 326 the least deprived. Spelthorne was 233rd in the 2019 index, placing it in the second least deprived quartile.
- 17.5 The table below sets out Spelthorne and authorities in Surrey and those on our borders in rank order and grouped according to which quartile they lie nationally. 1st quartile being the best and 4th the worst

17.6 Table 68 Index of Multiple Deprivation 2019

Local Authority	Rank
1st Quartile	
Waverley	313
Elmbridge	310
Surrey Heath	309
Windsor and Maidenhead	304
Epsom and Ewell	299
Richmond upon Thames	297
Guildford	296
Mole Valley	294
Woking	283
Reigate and Banstead	276
Tandridge	258
Runnymede	256
2nd Quartile	
Spelthorne	201
3rd Quartile	
Hillingdon	151
Hounslow	95
4th Quartile	
Slough	73

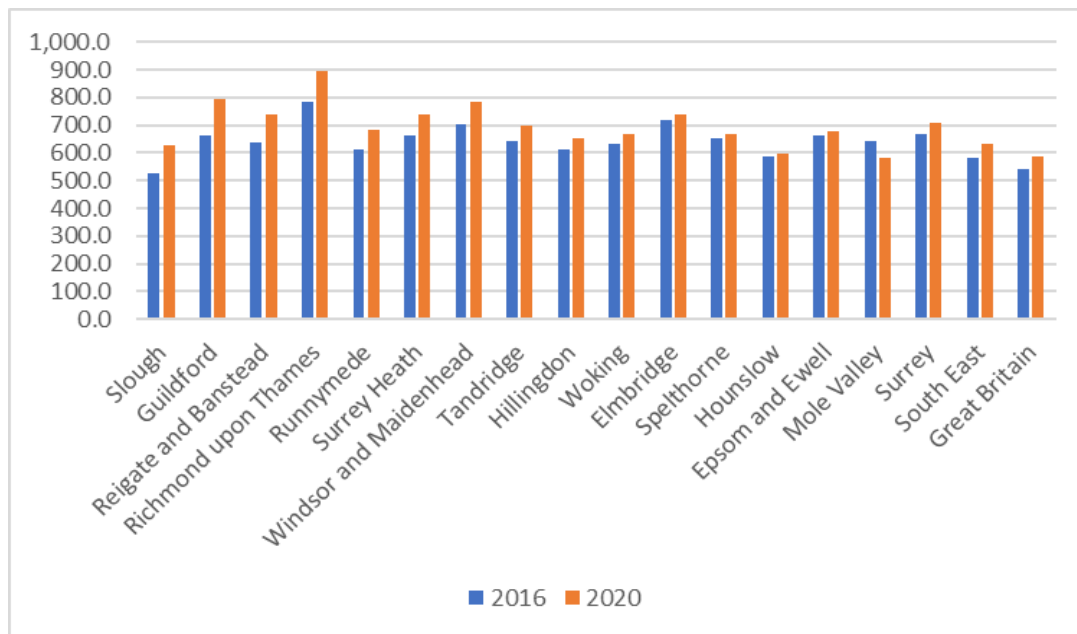
Source: DCLG- Index of Multiple Deprivation 2019

Incomes

17.7 Figure 69 shows the average earnings in pounds for employees living in the area who are on adults' rates of pay and whose pay was not affected by absence. Figures for earnings come from the Annual Survey of Hours and Earnings (ASHE). The ASHE is based on a 1 per cent sample of employees.

17.8 The average salary in Surrey for a resident in a borough ranges from £30.3k in Mole Valley to £41.2k in Guildford. Spelthorne was 9th lowest in Surrey on £34.7k but was above the average for the Southeast (£32.5k) and Great Britain (30.5k). The average salary for Surrey was £36.8k

17.9 Figure 69: Weekly full time pay across Surrey and the adjoining boroughs and districts for 2020 compared to 2016

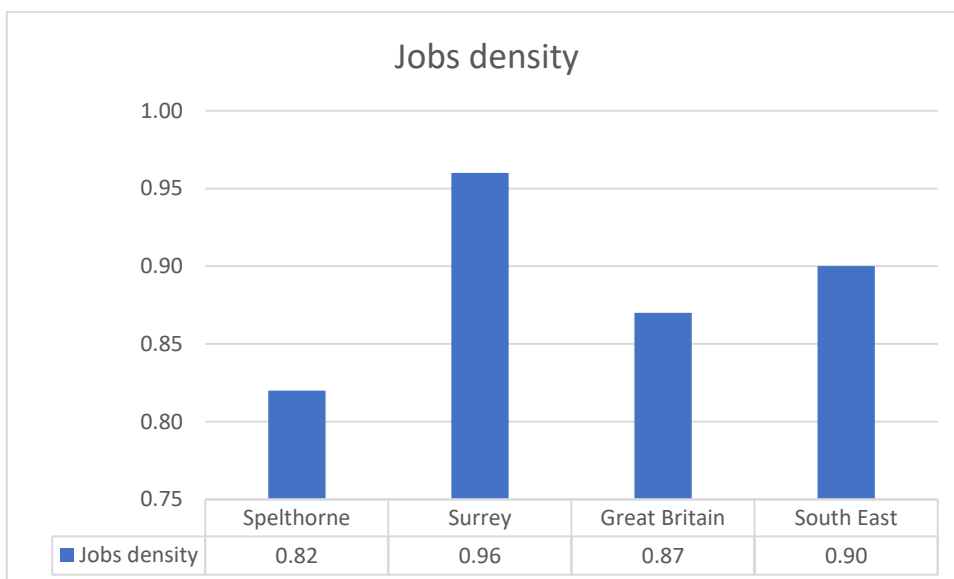


Source: Nomis December 2020

17.10 The table below shows that there are more people who live in the borough and work (50,484) than there are people currently working in the borough (41,367). Therefore, Spelthorne is a significant net exporter of labour, with more people commuting out of the borough.

17.11 This is linked by the number of jobs available within the borough. With a score of 0.82 this means that there are only 82 jobs available for every 100 residents aged between 16 and 64. Spelthorne has a disproportionate amount of people employed at Heathrow outside the borough, so this is not a serious concern. Surrey on the other hand has a significant number of jobs available across the county for its residents.

17.12 Figure 70: Job density



18 Superfast Broadband

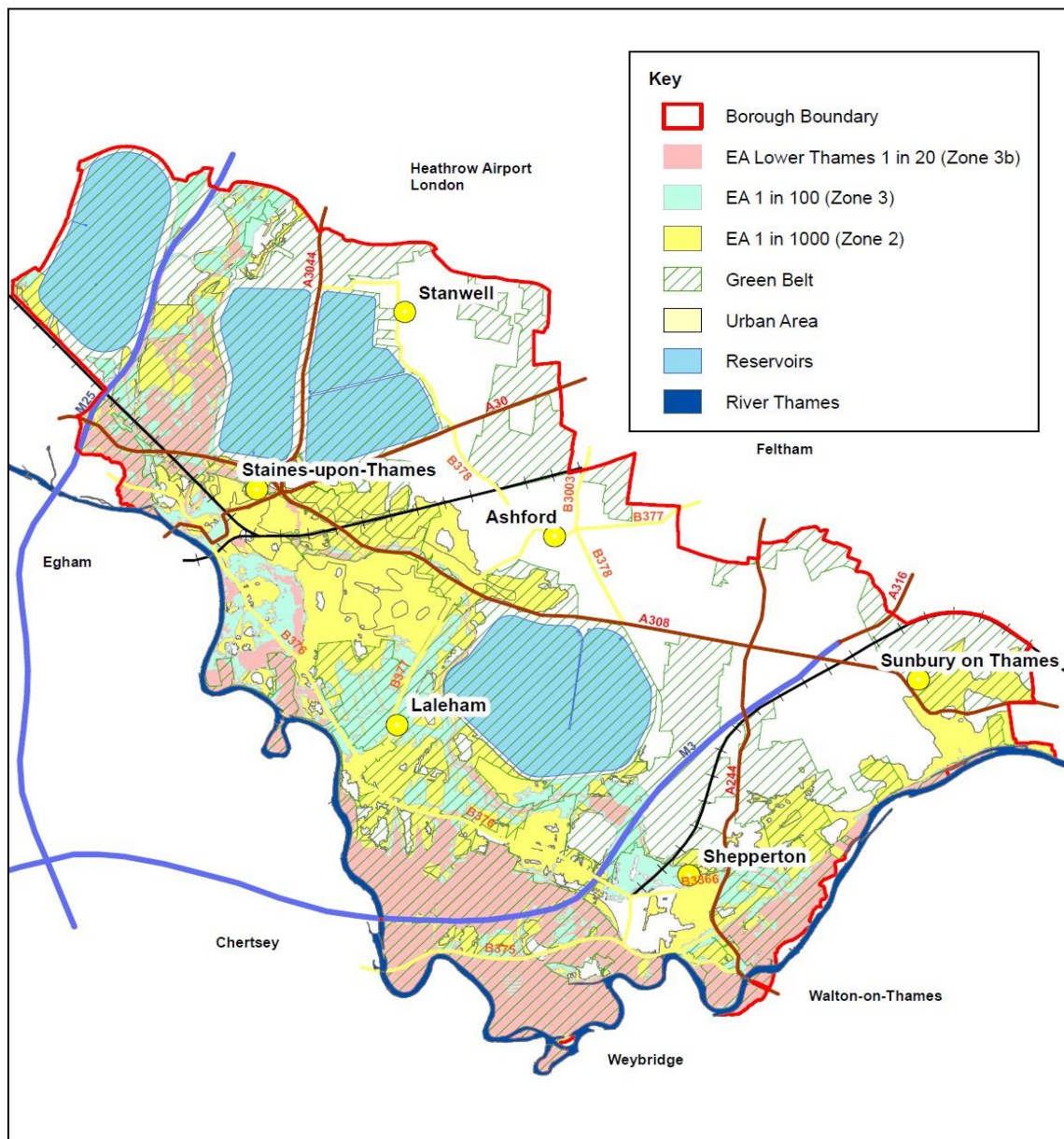
- 18.1 Superfast Broadband is classed as download speeds of more than 24mbps (megabits per second.)
- 18.2 Superfast Broadband is now a core requirement for most sectors, particularly the ICT/Digital sectors which are dependent on high upstream and downstream bandwidths for file sharing with clients and collaborators.
- 18.3 Superfast Surrey is a partnership between Surrey County Council, BT and BDUK (Broadband delivery UK) with the aim of extending the fibre broadband network to homes and businesses across Surrey. (www.superfastsurrey.org.uk). However they have so far not “rolled out” into Spelthorne.
- 18.4 Spelthorne has above average broadband speeds¹⁸ with an average download speed of 81.1 Mbps compared the southeast average of 71.6 Mbps and the UK at 72.9.
- 18.5 The speed and reliability of broadband is becoming increasingly critical to the infrastructure of successful locations. Businesses, including sole traders increasing rely upon access to good broadband speeds. In 2019 meetings took place with Openreach and Spelthorne Council met to discuss fibre to the premises (FTTP) and as a result announced that (FTTP) would be fitted throughout Sunbury as a starting point and then other locations in Spelthorne. Most towns in the country have fibre running underneath the road or footpath, but only goes as far as the cabinet. The last and shortest journey from the cabinet to the house / office is by fibre and copper, this has a dramatic effect on speeds, slowing broadband considerably. The full fibre option will give upload and download speeds of the same rate and initially will give up to 1GB speeds (1,000MB), this compares to current superfast speeds of around 60MB

19 Natural Environment

- 19.1 This section briefly outlines the key environmental characteristics of the Borough which provide the physical setting for business activity in Spelthorne.
- 19.2 Spelthorne lies within the first area of open countryside as one moves out from London. It is separated from the urban area of London by designated Green Belt land. Some 65% of the Borough is designated as Green Belt and this amount of open land enhances the attractiveness of the Borough.
- 19.3 The Borough has a 12-mile frontage to the River Thames with the towpath for much of that length on the Spelthorne bank. There are several historic Thames side villages such as Haleham, Shepperton, Lower Halliford and Lower Sunbury which are part of 8 Conservation Areas in the Borough. There are several extensive areas of public open space adjoining/close to the river, including Haleham Park, Dumsey Meadow and Sunbury Park. The Thames itself is a source of tourism both from day trips as well as longer stays either on the water or close by. Tourism is an aspect of the local economy the Council has been keen to expand.
- 19.4 The following map shows the key environmental features.

¹⁸ <https://commonslibrary.parliament.uk/constituency-data-broadband-coverage-and-speeds/>

Figure 71: Key environmental features in the Borough



5.38

19.5 There are areas at flood risk from the Rivers Thames and Colne with some 7% of the Borough at risk. The larger part of this flood risk area is undeveloped open land and part of the natural floodplain.

19.6 The Environment Agency has prepared a Lower Thames Flood Risk Management Strategy for managing future flood risk. It involves an engineered component, which includes three diversion channels between Datchet and Shepperton and improvement to areas at Sunbury, Molesey and Teddington. It is also proposed that the Desborough Cut near Shepperton will be widened to accept greater volumes of water. However, funding and the delivery timetable are still to be resolved.

19.7 There are some significant areas of the Borough which are of national and international importance for nature conservation. The most notable is the Southwest London Water Bodes Special Protection Area.

19.8 There are a number of sites designated as

- 19.9 Sites of Special Scientific Interest (SSSI) and some 26 sites designated locally as Sites of Nature Conservation Importance (SNCI). Some include extensive areas of former mineral workings, a few of which have received national awards for restoration.

Town Centres

- 19.10 Town centres are vital to the vitality of places. They are favoured by many professional service firms and investors because of their transport connections and amenities which in turn attract a wealthier, highly skilled, and often younger demographic to the workforce. Local authorities have a key role to play in shaping their town centres.
- 19.11 The Council has invested in its town centres and continues to do so to provide attractive shopping and business environments. It is within these areas that by far the greatest proportion of the retail and related service uses in the Borough are located. They are important economic centres.
- 19.12 In 2002 the Council completed two major enhancement schemes in Staines Town Centre. Following the completion of the Two Rivers Shopping Centre the Council pedestrianised the High Street to provide a traffic-free zone and also completed a scheme to enhance a large park alongside the river Thames called Memorial Gardens. The achievements were recognised by three national awards.
- 19.13 The Council is looking to continue the enhancement of the town centre including opportunities to increase the contribution of the river Thames to the attractiveness of the town centre as a whole. In 2021 a new jetty was built by Spelthorne Council which now allows river buses to set up regular journeys picking up and dropping off passengers in Staines-upon-Thames.
- 19.14 The Council is currently working on an emerging Local Plan which contains the overall vision and framework for future development in the area, addressing needs and opportunities in relation to housing, the economy, community facilities and infrastructure - as well as providing a basis for conserving and enhancing the natural and historic environment, mitigating, and adapting to climate change, and achieving well designed places. A survey was sent to residents and businesses in Spelthorne in 2021 to get their views. The emerging Local Plan will set out how the local area will develop over at least the next 15 years and once adopted, will replace the 2009 Development Plan. The next stage of the Spelthorne Local Plan is the consultation on the Publication Local Plan which is estimated to take place from February to March 2022

Secondary Town Centres

- 19.15 Spelthorne Borough Council previously won funding from Surrey County Council to regenerate secondary shopping centres in the borough. The Town Centre Revitalisation Scheme allocated up to £3 million to the county's boroughs and districts, with individual proposals of up to £0.35 million requiring match funding of at least 50%. The 4-year investment programme was used to revitalise secondary shopping areas which are vital to local communities. The scheme invested in the following sites:

- Clare Road, Stanwell
- Edinburgh Drive, Staines-upon-Thames
- Groveley Road, Sunbury-on-Thames
- Woodlands Parade, Ashford

20 Business Organisations in Spelthorne and the Wider Area

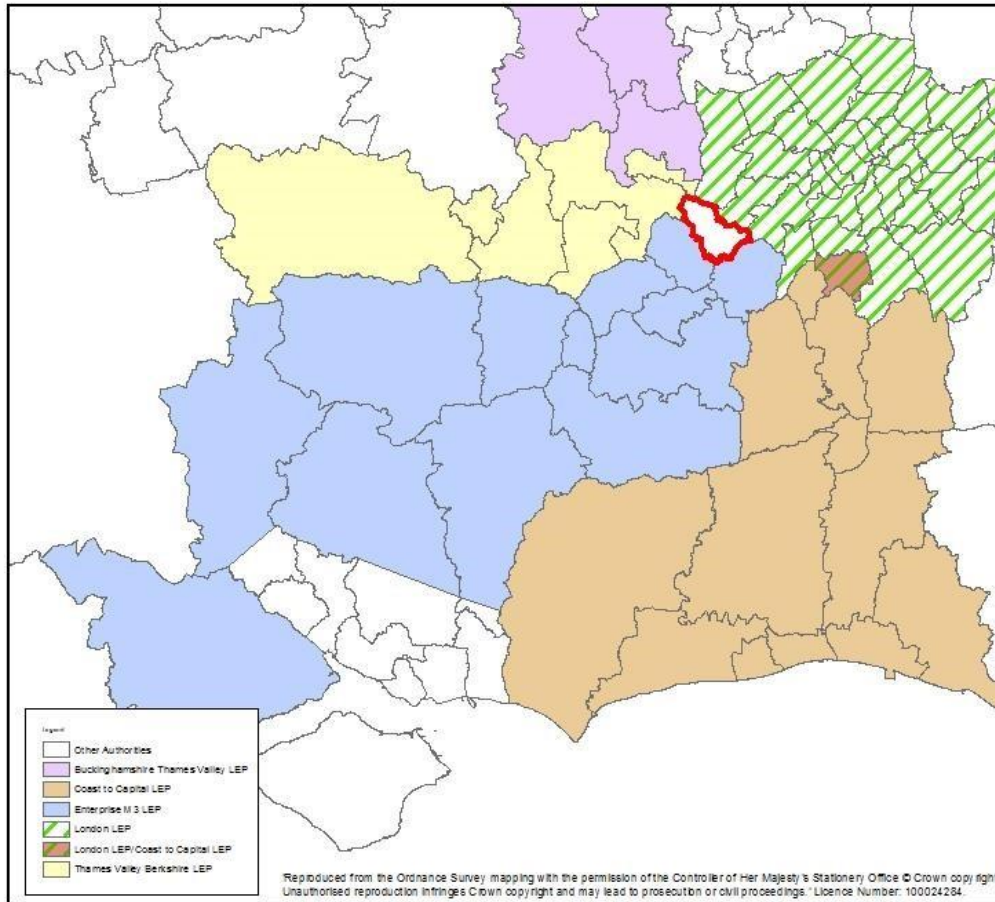
Spelthorne Business Forum

- 20.1 In Spelthorne the lead organisation for business networking and support is the Spelthorne Business Forum (SBF). It is a partnership whose aims are to provide help and support in the Borough.
- 20.2 SBF's main objectives are to:
- Provide networking and information sharing opportunities for local businesses and business stakeholders
 - Develop Links with local schools to match skills with business needs
 - Identify and represent issues which affect local businesses across the borough of Spelthorne.
 - Act as a consultation forum and contribute to local business-related decision making wherever possible
 - Seek to promote individual businesses via email, social media (Twitter, LinkedIn) where appropriate.
 - Seek to develop links with other business groups to maximise scope for business activity.
- 20.3 The SBF is a non-statutory partnership. It supports the delivery of Spelthorne Council's Economic Development Strategy. SBF currently has a membership of over 1000 businesses.
- 20.4 In addition to the SBF there are a number of other local business organisations and those seeking to promote local business as part of their wider aim. These include Ashford Wide and Staines Village Residents and Traders Association.
- 20.5 There are also other Surrey-wide organisations who are members or are connected with the SBF including Surrey Chambers of Commerce and the Federation of Small Businesses.

Organisations covering a wider area

- 20.6 The key business organisations in the wider area are Local Enterprise Partnerships (LEPs). These were established by the Government from autumn 2010 to replace a previous structure of Regional Development Agencies. LEPs are being increasingly used by the Government as the bodies to deliver local economic growth and to which to devolve funding to support this national priority.
- 20.7 Spelthorne is a member of the M3 LEP (EM3) which covers West Surrey and a large part of Hampshire. All the London local authorities are in a single LEP. East Surrey authorities are part of the Coast to Capital LEP (C2C). The following map shows the geographic extent of LEPs in this part of the Southeast.

20.8 Figure 72: Local Enterprise Partnerships



20.9 The Surrey County Council economic development teamwork in partnership between the County Council and 11 districts and the private sector to stimulate growth across the county. SCC provides a unified voice for Surrey and champions the county with the Government.

20.10 Surrey County Council seeks to position Surrey as a world class economy and shape

'a county where knowledge, creativity and innovation drive economic growth to bring prosperity and quality of life for all'.¹⁹ Specifically it seeks to foster 'smart economic growth' which brings innovation and jobs but also maintains the things that make Surrey an attractive location to live and work. It also assists in representing Surrey in the EM3 and C2C LEPs – a role that is welcomed by both of these bodies.

¹⁹ www.surreycc.gov.uk

21 Sustainability

21.1 Tackling climate change continues to be an important priority for the council. The climate change agreement in Paris in December 2015 agreed to limit global temperature increases to 1.5 degrees and the need to achieve zero net global carbon emissions by the second half of this century to achieve this commitment. As such the Council set out its aspirations in its Sustainability Strategy and Energy and Water Policy in 2015 and also declared a Climate Emergency towards the end of 2020.

21.2 Figure 73 shows the potential impact local authorities can make on emissions and the green agenda

Figure 73 How local authorities control and influence emissions



Source: Government Climate Change Committee Local Authorities and the Sixth Carbon Budget report December 2020

21.3 In 2020 the council launched a dedicated member task group with the sole aim of tackling climate change as quickly as possible by developing a strategy and action plan.

21.4 The Council has already progressed a large number of measures to address climate change including:

- Council offices have reduced its energy usage by almost 40 per cent, this has included the introduction of low energy lighting and light sensors to reduce electricity consumption.
- Solar PV installed on 2 of our Day Centres and the White House Depot
- Single-use plastics policy
- Stopped cutting large areas of grass to encouraging biodiversity through lowering grass cutting frequencies in certain open spaces
- 2 diesel vans replaced with electric vans in our fleet
- 2 electric pool cars and 2 electric pool bicycles introduced at Knowle Green for business travel use
- 53 electrical vehicle charging points across the Borough with plans to introduce at least another 30 in the immediate future

- Sustainable housing strategy to include electrical vehicle charging points for new housing and commercial developments
- Paperless Council meetings
- Over 1000 trees planted in Spelthorne in the last year
- £1.2million spent making homes in the Borough more energy efficient with funding awarded for new boilers and insulation upgrades.
- Installation of solar panels for the housing development in the West Wing of the Council Offices and the boroughs community centres
- Weekly collections of food waste, textiles and small electricals mean that these items are diverted from landfill.
- Hosting of the annual School Eco-conference
- Supporting action on Fuel Poverty – through the ECO scheme (funded externally) the latest figures show 3,062 energy efficiency measures have been installed in fuel poor households since the start of the scheme (the highest install rate in Surrey)
- The borough has secured significant funding through the Green Homes Grant Local Authority Delivery Scheme to further support households improve the energy rating of their homes, this is in the process of being delivered.
- Green/Sustainable category has been added to the Spelthorne Business Awards
- Energy & Water Efficiency Policy 2015-2021 – Had a target to reduce emissions from energy use by 12.5% over the life of the policy. An 18% reduction was achieved

21.5 Future Plans:

- A Carbon Action Plan is currently being developed and will form the basis for much of the future work. Along with tying in with the Surrey County Council Climate Change Strategy (for which one of the ambitions is the Industry & Green Economy which will focus on the transition to clean growth through the decarbonisation of all major sectors and investment in the development of clean technologies and industries that create jobs and improve the quality of life of our residents)
- LoCase – Surrey will be running a programme called LoCASE that aims to help businesses become more competitive and profitable while protecting the environment and encouraging low carbon solutions. The programme should be launched in 2021.
- Continue to collaborate with the Greater Southeast Energy Hub (part of the EM3 LEP) on funding opportunities and projects
- Transitioning our fleet of vehicles to electric/alternative fuel.
- Increasing local renewable energy generation and heat networks.
- Increasing electric vehicle charging opportunities in the Borough, this will come from a mixture of Borough, County, and private sector.
- Environmental Health with Surrey County Council have been looking at initiatives for encouraging taxis to go electric.
- New Passivhaus Leisure Centre.
- Further initiatives to improve the energy efficiency of private and social housing.
- Develop a Sustainable/Environmental Procurement Policy
- In 2023 a review of the refuse collection fleet will take place with the aim to convert to electric or hydrogen 50% of the fleet, depending on the best technology available and in 2027 to replace the remaining fleet of vehicles with electric or hydrogen.

21.6 At Surrey level a Climate Change Strategy has been developed which provides a joint framework for collaborative action on climate change across Surrey's local authorities and other partners to achieve the goal of net zero by 2050. A Climate Change Officers Group has been set up formed of Borough & District Officers and chaired by Surrey to help deliver the strategy objectives.

22 ADDITIONAL CHARTS COLLECTED LATE IN 2021 TO PROVIDE THE LATEST AVAILABLE DATA.

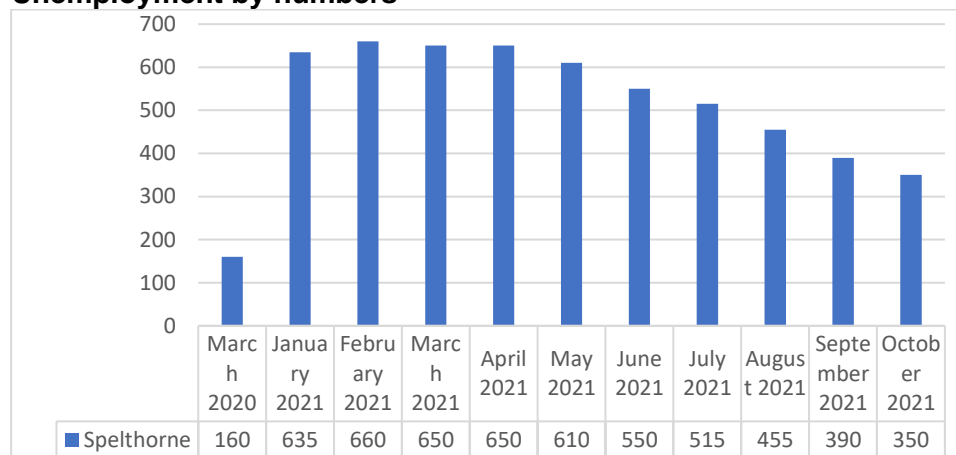
22.1 Below are a series of charts captured towards the end of 2021 which provides the latest available statistics for that year, but not used within the economic assessment to inform the new Economic Prosperity Strategy 2023-28.

22.2 Unemployment levels from the start of the pandemic to October 2021

23 Date	Spelthorne	Surrey	Great Britain	Southeast
March 2020	1.9	1.4	3.7	2.5
January 2021	6.3	4.5	7.6	6.0
February 2021	6.6	4.7	7.9	6.3
March 2021	6.6	4.7	7.9	6.3
April 2021	6.5	4.6	7.8	6.1
May 2021	6.0	4.1	7.3	5.7
June 2021	5.4	3.7	6.8	5.2
July 2021	5.2	3.6	6.6	5.0
August 2021	4.9	3.4	6.3	4.8
September 2021	4.4	3.2	6.0	4.5
October 2021	4.3	3.1	5.9	4.5

Source: Nomis October 2021

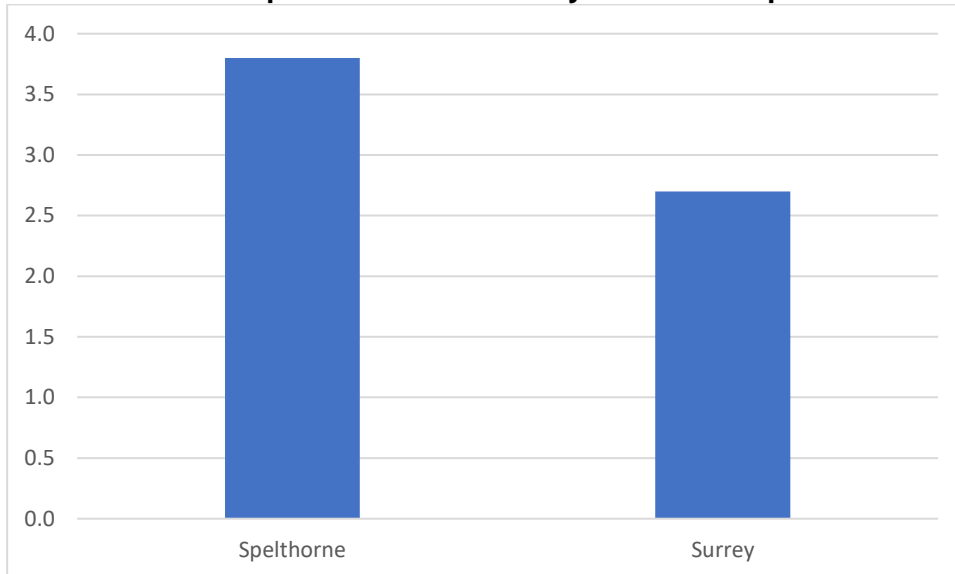
23.1 Unemployment by numbers



24 Percentage comparison of unemployment for 16- to 24-year-olds in Spelthorne with Surrey, the Southeast and Great Britain

	Jan-20	Jan-21	Oct-21
Spelthorne	2.3	9.6	5.4
Surrey	1.5	6.1	3.5
Southeast	2.9	7.8	4.9
Great Britain	4.1	9.2	6.1

25 Claimant Count in Spelthorne for over 50-year-olds compared to Surrey



25.1

Business births within our major towns and villages

Business Births	2019	2020	2021 up to 26th November
Shepperton	87	127	123
Ashford	253	369	328
Sunbury	112	156	172
Staines	133	198	161
Total	585	850	784

Source: Fame November 2021

Business deaths in our major towns and villages

Business Deaths	2019	2020	2021 up to 26th November
Shepperton	154	116	128
Ashford	240	221	220
Sunbury	125	104	140
Staines	129	98	116
Total	648	539	604

Source: Fame November 2021

Difference between business births and deaths

Business Plus or Minus	2019	2020	2021 up to 26th November
Shepperton	-67	11	-5
Ashford	13	148	108
Sunbury	-13	52	32
Staines	4	100	45
Total	-63	311	180

Source: Fame November 2021