EALING METROPOLITAN TOWN CENTRE: GROWTH STRATEGY

A report by

Ramidus Consulting & CAG Consultants

for

Ealing

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RAMIDUS

CAG CONSULTANTS

Executive Summary

This report, commissioned by the London Borough of Ealing and conducted by Ramidus Consulting and CAG Consultants, outlines a strategic framework for revitalizing and expanding the economic and employment role of the Ealing Metropolitan Town Centre (EMTC). While Ealing benefits from strong transport connectivity, including the Elizabeth Line and proximity to Heathrow, it faces significant challenges in sustaining its office economy amidst broader sectoral shifts, particularly post-pandemic hybrid work trends.

Key context and challenges

- **Decline of office space** EMTC has experienced a notable decline in office space due to outdated stock, high conversion to residential use (through Permitted Development Rights), and weak speculative investment.

- **Economic potential** Despite this, Ealing has a strong socio-economic base, a highly educated population, and robust infrastructure that position it for regeneration.

- **Employment gap** There is a mismatch between Ealing's educated resident workforce and the availability of quality local employment, particularly in knowledge-intensive sectors.

Strategic objectives

The report has two key aims.

1. Develop a **short-term land use strategy** for EMTC and adjacent areas, addressing employment space loss and identifying redevelopment opportunities.

2. Formulate a **long-term growth strategy** aligning EMTC with London's high-growth, knowledge-based industries and regional development plans (e.g., the WestTech Corridor).

Market and policy insights

- **Policy support** There is strong policy alignment at borough, regional, and national levels for encouraging office space development, affordable workspaces, and green economy sectors.

- **Economic drivers** Forecasts show demand for 47,900 sq m of new office space by 2041, driven by sectoral growth in professional services, green industries, and creative sectors.

- **Comparative positioning** Ealing ranks as a mid-sized office cluster among London's Metropolitan Town Centres, with room to improve its market competitiveness.

Emerging opportunities

- **Reimagined office demand** Hybrid work and workplace design innovation suggest a shift from traditional office formats to flexible, experiential, and sustainable workspaces.

- **Local business growth** Office demand will likely come from SMEs, start-ups, and education sector expansion, rather than large corporate relocations.
- **Development pipeline** Key projects such as 54 Broadway signal cautious optimism, although market uncertainty remains.

Strategic recommendations

- **Diversify uses** Reintroduce office, leisure, residential, and educational uses in mixed-use developments to reinvigorate EMTC.
- **Quality and affordability** Promote delivery of high-quality, flexible office space, including affordable workspaces for start-ups and creatives.
- **Spatial strategy** Implement a place-based spatial plan integrating office development with public realm improvements and better use of underutilized assets.
- **Sectoral alignment** Target growth sectors like creative and digital industries, green economy services, and higher education as anchor tenants or catalysts.

Conclusion

EMTC's renewal must balance preserving its employment function with the realities of post-Covid office demand. With strategic public intervention, aligned policy frameworks and proactive development support, Ealing can reposition itself as a vital, competitive and inclusive business hub in West London. This strategy serves as a roadmap for shaping a vibrant, knowledge-driven future for Ealing's town centre.

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1.0 Context

Ramidus Consulting Limited was appointed by LB Ealing to undertake a research study that will provide a strategy for approaching the redevelopment and growth of business employment uses in central Ealing.

The Ealing borough economy is dominated by manufacturing and light industrial uses on London's largest reservoir of industrial land – Park Royal. Economic activity is set to grow further with investment of national scale significance at Old Oak and Park Royal over the next decade. Imperial College is set to develop London's next significant life science cluster in North Acton as part of their WestTech Corridor. And, of course, Ealing is located on the doorstep of Heathrow Airport, as well as hosting three Elizabeth Line stations.

Despite this relatively positive picture of the local economy, the situation in the office economy is somewhat different. Particularly since the Covid-19 pandemic, office work has experienced significant change, with hybrid working (blending home and office work) causing widespread changes in the use of offices. In Outer London generally, the office market was declining before the pandemic, encouraged in part by the eager implementation of Permitted Development Rights, and conversion of many offices to residential and other uses.

Ealing town is one of fourteen Metropolitan Town Centres scattered across London serving wide catchments and typically containing at least 100,000 sq m of retail, leisure and service floorspace with a significant proportion of high-order comparison goods relative to convenience goods. It is here that conventional office provision has declined in recent times and where the Council has now decided that intervention is required in order to maintain and grow the economic role of Ealing Metropolitan Town Centre (EMTC).

1.1 Current situation

The Project Brief sets out a number of facets of the current situation which combine to present some real challenges for the office sector. These include the following.

- The EMTC office corridor is characterised by large floorplate, single use and predominantly older office space which is seeing vacancies and pressure for loss of employment space.
- Despite excellent physical and transport infrastructure, there is a lack of critical mass in central Ealing's employment provision and role within London.
- A lack of clarity about the role and direction of central Ealing has seen overspill of professional service employment into designated industrial areas, increasing pressure on already scarce industrial space.
- Broader shifts subsequent to COVID/WFH have changed the pattern of office use and development within London.
- Despite uncertainty within the sector, there is an impending shortfall in supply of new office provision relative to demand, together with a particular shortage of high quality space, which the borough should do its part to address.
- There is an inherent relationship between office space and industrial space as white collar work occupies office stock (such as with specialist manufacturing). We refer to this process as 'servicing the services' and will explain the implications in the study.

While the Council supports mixed and reintegrated uses, including the potential for residential growth within central Ealing, this should entail the growth of both jobs and housing, not the loss of EMTC's key employment function.

In order to address these areas of concern, the Council has commissioned this study to provide short-term and longer term strategies as follows.

- A short-term land use strategy for EMTC and its identified site allocations, accounting for overspill into Acton, Hanwell and their designated industrial areas.
- A longer term strategy to ensure the growth of the centre as a whole within London's knowledge intensive industries in the context of London Growth Plan, West Tech Corridor and growth sectors identified in Ealing's *Jobs and Skills Strategy*.

1.2 Method statement

Our approach to developing a framework for the future of ETMC has involved viewing it as an employment centre, based upon its existing specialisation in Financial & Professional Services and Creative Industries, while being cognisant of the changing nature of office and employment provision in London. We have also considered the centre as a whole and in particular its available development sites.

We began our study by summarising the macro-trends that are impacting the office market in London, including economic, business, technological, social and legislative drivers of change. These form important context for what is happening locally and help frame practical responses. The Project Brief set out at the key elements that should form the study and these are shown below to summarise our methodology.

We are grateful to a number of stakeholders who assisted us during the research for this study. LB Ealing's Regeneration team were particularly helpful, including: Mandar Puranik, Area Manager; Connor McDonagh, AD Economic Growth and Laura McLean, Area Manager. We are also grateful to: John Charlton of UWL; Andrew Rollings of Ealing Broadway Shopping Centre and Will Scott of British Land.

1.3 Existing work

LB Ealing has undertaken a good deal of research over recent years, and we have ensured that this study has built upon the findings of this work in order to avoid duplication. The work that we have reviewed for this project includes the following studies.

- Allies & Morrison (2023) *Tall Buildings Strategy for LB Ealing*
- Arup (2022) *London Borough of Ealing Town Centre Health Check*
- Centre for London (2022) *Making Space: Accommodating London's Industrial Future*
- GL Hearn (2019) *West London Employment Evidence*
- Iceni (2022) *West London Employment Land Review*
- LB Ealing (2024) *Investment Prospectus*
- LB Ealing (2024) *Ealing's Jobs & Skills Strategy 2024-2029*
- LB Ealing (2024) *Town Regeneration Framework*
- LB Ealing (2024) *Ealing's Economy After 6pm, 2024-2029*
- PRD (2022) *Industrious Ealing Inclusive Economy Baseline*
- REDO & Volterra (2022) *OPDC & LB Ealing Affordable Workspace Study*
- We Made That (2022) *Industrious Ealing Workspace Audit*

The Project Brief mentioned a sectoral strategy for the whole borough relating to existing strengths, regional trends and available resources of land and building on the broader Industrious Ealing economic evidence base. We have been unable to find this report.

2.0 Policy review

This section reviews the relevant local, sub-regional, London wide and national policy context to inform options and choices for the future office market potential in Ealing MTC. We start with Ealing policy and evidence documents, before looking at West London, London and National policy.

2.1 Borough policy context

Industrious Ealing - Inclusive Economy Baseline (PRD, 2022)

This by Ealing Council presents the latest socio-economic evidence and recommendations for enhancing the borough's economy through strategic management of industrial land. It provides evidence to support Ealing's Local Plan and outlines the socio-economic conditions of Ealing's economy. It aims to enable Ealing to maximise the value of its industrial land to ensure a sustainable, inclusive, and socially just economy.

Key challenges facing the borough include the following.

- Housing Affordability: Housing is increasingly unaffordable, causing economic issues and deprivation.
- Economic Growth: Ealing's economic growth and job creation have been below the London average.
- Employment Quality: Many jobs are low-paying, contributing to poor economic resilience and in-work poverty.

Sub-areas of the borough have differing characteristics and face different challenge.

- Southall and Northolt: These areas face acute issues of poverty and deprivation. They have experienced significant growth but in lower-paid, insecure employment.
- Ealing, Acton, and Hanwell: These are primary economic drivers with high-value, high-density employment. They face intense development pressure due to high land values.
- Greenford and Perivale: These areas host traditional industrial activities, including high-value manufacturing, but are at risk from shifts in industrial demand.

Key recommendations include the following.

- Housing and Demographics: Develop strategies to deliver genuinely affordable housing and masterplans for LSIS (Locally Significant Industrial Sites) to ensure industrial activities are not displaced.
- Economic Strategy: Focus on intensifying industrial land use, improving relations with key businesses, and considering redesignation of certain industrial areas.
- Employment and Resilience: Enhance the quality of jobs, support the transition to a greener economy, and address market failures through active public sector intervention.

The report highlights the need for a coordinated approach to maximise the socio-economic benefits of Ealing's industrial land and to ensure the borough's growth benefits its residents.

The document primarily focuses on industrial land and its socio-economic impact on Ealing's economy. However, it does mention that Ealing has a significant amount of office space, particularly along the Uxbridge Road in Ealing Broadway. This area is highlighted as a key economic driver for the borough, hosting higher value, knowledge-intensive employment.

The document suggests that there is potential for further growth in office-based employment, especially with the arrival of the Elizabeth Line, which could enhance the economic role of Ealing Broadway.

Ealing's Jobs Skills Strategy for 2024-2029 (LB Ealing, 2024)

The *Ealing Jobs and Skills Strategy 2024-2029* outlines a comprehensive plan to boost economic growth, create jobs, and enhance skills in the London Borough of Ealing. The strategy is co-owned by the council, residents, businesses, and various partners, and builds on previous initiatives to foster an inclusive economy.

Its vision is that Ealing aims to be the economic engine of west London, with vibrant local economies in each of its seven towns. Its mission is to focus resources on growing local economies and providing residents with the skills needed to meet workforce demands.

The strategy notes that Ealing contributes nearly £11bn annually to the UK economy and has a diverse population with over 160 languages spoken. But the borough faces challenges like high living costs, employment stagnation, and income inequality.

Its strategic priorities include the following.

- **High Growth Sectors:** Focus on sectors like creative and digital industries, green and circular economy, and life sciences.
- **Skilled Local Workforce:** Enhance training and education to meet the needs of high growth sectors.
- **Great Place to Do Business:** Invest in public realm and affordable housing to attract and retain businesses and workers.
- **Dynamic and Entrepreneurial Economy:** Support entrepreneurs and micro businesses with resources and affordable workspaces.
- **Career Progression Pathways:** Establish clear career pathways and job matching across high growth sectors.

The strategy aims to create a more sustainable, diverse, and resilient economy by leveraging partnerships, focusing on high growth sectors, and ensuring that all residents have access to quality jobs and training opportunities.

The sector focus of the strategy is not targeted at the types of sectors that would be expected in general to occupy town centre office sectors. Though among the identified high growth sectors creative and digital; green and circular economy; and life sciences may generate some level of office demand.

OPDC and LB Ealing Affordable Workspace Study (REDO & Volterra, 2022)

This study aimed to address the unaffordability of workspaces for small businesses, creatives, and charities which are vital for economic growth and innovation. Affordable Workspace is provision of workspace below market rents to support economic, social, and cultural uses that cannot afford open market rates.

Key issues identified include the need for better evidence and design, affordability concerns, and curation opportunities. Recommendations include flexible approaches to Affordable Workspace delivery, accounting for operator costs, and leveraging existing buildings. It also recommended a need for flexible implementation with strategies adapted to local needs and ensure policies are effective and adaptable.

It highlights the importance of providing affordable workspace in town centres to support a diverse range of businesses and activities. The study emphasises the need for flexible approaches to delivering affordable workspace, including utilising existing buildings and ensuring that new developments include a proportion of affordable space.

Ealing Town Regeneration Framework (LB Ealing, 2024)

Under the heading of 'Jobs & Businesses' it sets three objectives.

- Deliver affordable workspace for start-up businesses and grow-on space to retain employers and tackle stagnation in economic growth within the Metropolitan Centre.
- Support a wide range of businesses to enable clustering and build the ecosystem of knowledge based economy work and financial and professional services in the borough.
- Work with the BID's to deliver business support to small businesses, encouraging the uptake of vacant units, independent businesses to grow and large scale anchor retailers to diversify their local offer.

2.2 West London

West London Employment Land Review 2021-22 Update (Iceni, 2022)

The most recent borough *Employment Land Review* (ELR) was prepared on behalf of the London Boroughs of Ealing and Harrow as an update of the 2019 West London ELR. Changes to Use Classes and Permitted Development Rights and the pandemic have affected the trends identified in the original 2019 *West London Employment Land Evidence* (WLELE) report.

The ELR focussed primarily on the industrial property market, sector trends, and future floorspace demand for industrial and logistics uses. It noted that:

- Nationally, industrial demand conditions are strong, driven by e-commerce and Brexit.
- In London, demand for industrial space fell during the pandemic but has recently picked up, particularly from film production and last-mile distribution units.
- Ealing: Low industrial vacancy rate (2.8%) with strong demand keeping it low. High rents due to demand from non-traditional industrial occupiers. It reported high demand for industrial space in Ealing, driven by a diverse range of occupiers. It also reported trends towards co-location and stacked logistics/industrial developments.

Ealing is expected to see strong demand for industrial space driven by logistics and other sectors. The report recommended that Ealing should maintain and upgrade functional industrial floorspace and deliver additional floorspace where feasible.

The report does not provide extensive details about the office market in Ealing.

West London's Priorities for Growth (West London Alliance, 2024)

Priorities for growth identified by the West London Alliance are:

- Improve orbital transport: Build the West London Orbital and support improved bus and active travel to key employment hubs.
- Enable the clean energy transition: Strengthen the electrical grid through investment ahead of need, supporting development and decarbonisation.
- Equip West Londoners with future skills: Devolve skills and employment support to West London and improve data and partnerships.
- Tackle the housing and homelessness crisis: Secure immediate funding and longer-term investment flexibility.
- Promote West London as a global innovation gateway: making the most of Heathrow's links to the world and driving digital transformation, technology adoption, and export growth.

West London's Growth Potential: Leveraging the opportunity for a polycentric city (Centre for London, 2025)

This report explores the economic potential of West London, proposing a shift from the current monocentric economic model focused on Central London to a more polycentric approach. This model would leverage West London's diverse and strategically located industrial, commercial, and residential areas to distribute economic growth more evenly across the city.

Its opinion is that the current economic model is one where Central London has been the primary economic driver, and that this has led to significant socio-economic inequalities and diminishing returns on productivity and growth. The report's authors believe there is a need to re-evaluate and diversify economic activity across other sub-regions of London, including West London.

It sees West London as having significant economic potential. West London has a substantial consumer economy, a resilient secondary and tertiary economy, and strategic transport links, including Heathrow Airport. The region has seen growth in high-tech industries, such as the WestTech Corridor and advanced manufacturing sectors in Old Oak and Park Royal.

The principal challenges identified are infrastructure constraints, particularly in electricity transmission and distribution, as well as limitations in inter-borough connectivity. It also states that planning policies need to protect and enhance industrial and commercial land to support future growth.

The report makes a number of recommendations for national government.

- Expand legislative devolution to enable local and regional governments to drive growth.
- Enhance planning policy to protect industrial and commercial land.
- Invest in infrastructure improvements, including transport and electricity networks.

And for regional government.

- Integrate sub-regional economic visions into the London Growth Plan.
- Implement spatial jobs targets in the next London Plan to emphasise economic development.
- Improve transport connectivity, particularly orbital routes, to facilitate intra-regional economic activity.

Its view is that by embracing a more polycentric model, West London could unlock significant economic potential, contributing to a more sustainable and inclusive growth for the entire city. This approach would require coordinated efforts from both national and regional governments, as well as strategic investments in infrastructure and planning.

In terms of the Ealing office market specifically it highlights the growth of Ealing's office corridor as a key component of the borough's economic development strategy. The report emphasises the importance of bringing well-paid jobs to Ealing through the revival of local shopping parades, the growth of the office corridor, and the increased productivity of industrial estates. It notes the development of the Elizabeth Line is expected to further enhance Ealing's connectivity and attractiveness for office market investments.

2.3 London

London Growth Plan (GLA & London Councils, 2025)

The recently published *London Growth Plan* outlines a strategy for the city's future economic growth, led by the Mayor of London and London Councils. The plan addresses challenges and opportunities to support the UK's national industrial strategy through a range of pro-growth interventions, emphasising inclusive and sustainable growth.

The report states that London aims to be a resilient, innovative, and advancing city with goals to increase productivity, attract international investment, and create new opportunities. It notes that London has continually reinvented itself and aims to be a leader in urban growth through inclusivity, diversity, and economic growth that benefits all its residents.

The plan identifies six major shifts shaping London's future: workforce changes, nature of work, spatial growth patterns, frontier innovation, climate emergency, and global political dynamics. Its stated ambitions are as follows.

- Productivity: Aim for a 2% average annual productivity growth from 2025 to 2035.
- Inclusion: Raise the household weekly income of the lowest-earning 20% by 20% by 2035.
- Green Growth: Achieve net zero by 2030.
- Global Capital: Increase London's services exports by 6% per year on average.

Key actions identified are as follows.

- Inclusive Talent Strategy: Develop a workforce plan to support fair pay, attract global talent, and integrate marginalised communities into the workforce.
- Backing Businesses: Provide strategic support to SMEs to increase productivity, scale in growth sectors, access finance, and promote inclusive growth.
- Building Housing and Infrastructure: Focus on affordable housing, sustainable transport, and essential infrastructure to support growth.

- Investment and Promotion: Attract investment into innovative companies, net zero infrastructure, and promote London's global brand.

The plan emphasises the importance of inclusive and sustainable growth, focusing on creating a prosperous, fairer, and greener city for all its residents. The plan also focuses on the development of three innovation corridors, namely: West Tech Corridor (White City to Heathrow); UK Innovation Corridor (London to Cambridge) and the Thames Estuary (London to Essex and Kent).

Offices

The *London Growth Plan* outlines several key points about the future of the office market:

- Hybrid and Flexible Working: The plan acknowledges the shift towards hybrid and flexible working patterns, which have become more common since the COVID-19 pandemic. This change is expected to continue influencing the office market, with a focus on creating spaces that accommodate these new working styles.

- City Centre and New Clusters: London's city centre, particularly the Square Mile, West End, and Canary Wharf, will remain crucial for financial, professional, and business services. However, there is also a focus on developing new growth clusters outside the city centre, such as Old Oak and Park Royal, Royal Docks, and Brent Cross Town. These areas are expected to become significant commercial and industrial hubs.

- Sustainable and High-Quality Offices: The plan emphasises the importance of building and retrofitting commercial offices to the highest standards. This includes making them more sustainable and energy-efficient to align with London's net zero targets.

- Affordable Workspaces: There is a commitment to creating more affordable workspaces, particularly for small and diverse-led businesses. This is part of a broader strategy to support local economies and ensure that all Londoners can benefit from economic growth.

- Innovation and Technology: The office market will also be influenced by the need to support innovation and technology. This includes providing spaces that can accommodate the needs of tech companies and startups, which are expected to drive future growth.

Overall, the London Growth Plan envisions a dynamic and evolving office market that adapts to new working patterns, supports sustainable growth, and fosters innovation across the city.

The *London Growth Plan* highlights Ealing as one of the significant commercial office clusters in outer London. Ealing is identified as a regionally significant office cluster (p29), which means it plays an important role in the local economy and offers opportunities for growth and development.

The plan emphasises the importance of nurturing these clusters to support economic growth and create job opportunities closer to home for Londoners. This includes improving transport connections, supporting local businesses, and ensuring that the area remains an attractive place for investment and development.

There are a number of specific measures set out in the London Growth Plan which could be deployed to support office growth in Ealing and make it an attractive place for businesses.

- Regionally Significant Office Cluster: Ealing is identified as a regionally significant office cluster, which means it plays an important role in the local economy and offers opportunities for growth and development.
- Affordable Workspaces: The plan emphasises the creation of more affordable workspaces, particularly for small and diverse-led businesses. This is part of a broader strategy to support local economies and ensure that all Londoners can benefit from economic growth.
- Transport Improvements: Improving transport connections is a key focus. This includes enhancing public transport links to make it easier for people to commute to and from Ealing, thereby supporting local businesses and attracting investment.
- Sustainable and High-Quality Offices: The plan highlights the importance of building and retrofitting commercial offices to the highest standards, making them more sustainable and energy-efficient to align with London's net zero targets.
- Local Growth Strategies: Increasing the capacity for boroughs like Ealing to develop more local growth strategies and to win the investment needed to make them happen.

2.4 National policy

Invest 2035: the UK's Modern Industrial Strategy (HMG, 2024)

The UK government outlines a ten-year plan aimed at fostering economic growth through a modern industrial strategy. Key points are set out below.

- **Pro-business environment** Focus on creating conditions that encourage business investments in high-growth sectors such as advanced manufacturing, clean energy, creative industries, defence, digital technologies, financial services, life sciences, and professional business services.
- **Regional development** Emphasis on unlocking the potential of cities and regions outside London to enhance productivity and economic growth across the UK.
- **Job Creation** Commitment to creating high-quality, well-paid jobs while ensuring employment rights are updated for the modern economy.
- **Long-term stability** Establishment of a statutory Industrial Strategy Council to ensure policy stability and long-term planning.
- **Global trade and investment** Strengthening economic partnerships, renewing commitment to free trade, and focusing on sectors where the UK has a competitive advantage.
- **Net zero transition** Supporting the clean energy mission and environmental objectives to achieve net zero emissions.
- **Collaboration and input** The strategy calls for input from businesses, trade unions, local authorities, and other stakeholders to shape a shared industrial strategy that aligns private enterprise with public good.

The strategy is built on the UK's strengths in innovation, research, and its strong global trading position, while addressing challenges such as low productivity growth and regional economic disparities.

The document outlines eight key growth-driving sectors identified as priorities in the UK's industrial strategy. These sectors are considered to have the highest growth potential for the economy and business. The eight growth sectors are highlighted below.

- Advanced Manufacturing
  - High-value jobs outside London and the South East.
  - Opportunities from net zero and digital transformations.
  - UK's strengths in electric vehicle batteries, aerospace, and high-quality, innovative products.
- Clean Energy Industries
  - Major driver of global growth with significant capital investment required.
  - UK's comparative advantage in clean energy and developed services sector.
  - Potential for job creation and reducing dependency on fossil fuels.
- Creative Industries
  - The UK is a leading exporter of creative services.
  - Global growth opportunities in entertainment and media.
  - Importance of attracting global talent and maximising export markets.
- Defence
  - The sector supports national security and provides high-quality jobs.
  - Government commitment to a defence industrial strategy.
  - Opportunities for innovation and technological advancements.
- Digital and Technologies
  - Rapidly evolving sector at the forefront of geopolitical competition.
  - The UK has a strong track record in creating successful tech start-ups.
  - Focus on commercialising new technologies and supporting digital businesses.
- Financial Services
  - Unique role in driving growth by providing finance to businesses.
  - Opportunities in green finance and financial technologies (fintech).
  - Importance of international trade and partnerships.
- Life Sciences
  - Sector with significant potential for economic growth and health outcomes.
  - UK's strong foundation in life sciences and medicine.
  - Focus on innovation and collaboration to drive growth.
- Professional and Business Services
  - Sector with global demand and competitive advantages.
  - Opportunities to improve productivity and expand into overseas markets.
  - Importance of supporting the climate transition and digital transformation.

The industrial strategy aims to focus on these sectors to stimulate growth, innovation, and investment, leveraging the UK's existing strengths and potential.

2.5 Implications for Ealing MTC

The policy review highlights several factors that shape Ealing's potential for office sector growth.

- **Strategic location and connectivity** The arrival of the Elizabeth Line enhances Ealing's connectivity, making it more attractive for office investments. Ealing Broadway, in particular, is positioned as a key economic driver with potential for growth in office-based employment.

- **Economic and sectoral focus** While Ealing's economic strategies emphasize industrial land use and high-growth sectors like creative industries and life sciences, these sectors could indirectly boost demand for office spaces, especially for knowledge-intensive and creative businesses.

- **Affordable workspace initiatives** Policies promoting affordable workspaces aim to support small businesses and startups, which could diversify the office market and attract a broader range of tenants.

- **Sustainability and quality emphasis** on sustainable and high-quality office developments aligns with London's net-zero targets, potentially increasing the appeal of Ealing's office spaces to environmentally conscious businesses.

- **Challenges and opportunities** Ealing faces challenges like housing affordability and economic disparities, which could impact workforce availability. However, targeted strategies to improve job quality and economic resilience may create a more stable environment for office sector growth.

In summary, Ealing's office sector has significant growth potential, driven by improved transport links, strategic policies, and a focus on sustainability and inclusivity. However, addressing socio-economic challenges will be crucial to fully realizing this potential.

3.0 Economy and commercial property market

Ealing contributes nearly £11bn Gross Value Added (GVA) annually to the UK's economy, according to VOA data. It has a strong economic base with nearly 18,000 businesses registered in the borough and over 220,000 workers according to ONS analysis of Census 2021. Over the past decade the population of Ealing has increased by 8.5%, higher than both the London and England rates over the same period and is expected to continue. It includes a major mixed-employment zone at Park Royal, with other clusters in Perivale and Greenford.

The 2022 *West London Employment Land Review 2021-22 Update*, by Iceni and commissioned by the London Boroughs of Ealing and Harrow, provides evidence only in respect of industrial employment land requirements. The same was true of the 2019 *West London Employment Land Evidence* study by GL Hearn. This is understandable, given the significance of industrial and distribution within the Borough. Nevertheless, there is a significant concentration of office activity.

It is also well connected, with this being enhanced by the opening of the Elizabeth Line, with a major interchange at Ealing Broadway, with Ealing Town Centre being the major town centre in the Borough and a Metropolitan Town Centre under GLA definitions.

3.1 Ealing MTC overview

Ealing MTC runs from The Mall, just to the south of Ealing Broadway Station along The Broadway, the Uxbridge Road (the A4020) as far as West Ealing, just short of the City of Westminster Cemetery. To the south it encompasses High Street and Ealing Green and – directly opposite Ealing Broadway station – Haven Green, as well as a largely residential area west of Drayton Green Road.

The MTC is diverse, with areas of markedly different character. At the western end is The Mall, an area of Victorian and Edwardian shops with a variety of secondary retail and food outlets. This area has seen significant loss of over-the-shop offices to residential via prior approvals. Between Ealing Broadway Station and High Street is the major retail area. To the south is Ealing Broadway Shopping Centre fronted my Marks & Spencer, but with two significant office buildings, 54 The Broadway and International House, which will be discussed later.

To the North is an island sight containing the Arcadia Shopping Centre, including a large Morrisons supermarket, and an area of lower density, somewhat mixed use that is the site of the proposed Broadway Connection development. Both this and the Arcadia form a designated development site. Opposite is a row of smaller shops and offices which continues across Bond Street until Bogart House, part of the Ealing Cinema development.

On the north site a row of period buildings with offices above, some of which have been lost to residential via prior approval. West of these is the Town Hall, disused with a plan to convert it into a hotel and next to that is Perceval House, the main council office building.

Westward from here is the core of the current town centre office market, mixed in with some high-end residential and hotel uses. Several buildings are occupied by universities, including the University of West London. One cleared site occupies the corner with St Leonard's Road, while CP House, a reasonably large office building has space on the market.

West of St Leonard's Road, office activity peters out, with only a small office building and a plethora of offices above shops – again with attritional loss to residential continuing towards

Southall. The other area of note runs south from Ealing Broadway to Ealing Green, with some distinctly secondary retail units and some vacancy. Part of this is a designated development area (03EA) which is proposed for a residential-led mixed use scheme, with significant retail, employment, leisure and community uses, this presents a potential opportunity regarding creative industries, as described in Section 5 below.

Towards Ealing Green are more food and beverage uses, with some creative industry educational operations gathered, unsurprisingly, around the iconic Ealing Studios, which is self is developing new office space.

Town centre health check

In July 2022 Arup published its Town Centre Health Check for Ealing MTC. The report states that the MTC serves a wide catchment extending over several boroughs and into parts of the Wider South East. The report also highlights that northern most part of Walpole Park falls within the functional area of the town centre providing Ealing with direct access to open green space off Mattock Lane. Dean Gardens provide access to open green space within West Ealing.

Arup describe the earliest constructed properties within the functional area as dating back to the 1800s, and many of which are along The Broadway. Buildings have been constructed within Ealing at a steady rate from then until the present day, and they have a wide variety of floor sizes and configurations.

Figure 3.1 shows land use in Ealing Town Centre, showing the percentage of uses from 688 units. Arup calculate that 23% of the town centre (excluding West Ealing) premises are retail, with 3% and 20% split between convenience retail and comparison retail respectively. Much of this is concentrated in Ealing Broadway Shopping Mall and Dickens Yard. The retail offering for both convenience and comparison retail is roughly average when compared to other town centres.

Similarly, 24% of the offering within the town centre is food and beverage (or 104 units), with 14% and 10%, split between opportunities for eating in and takeaway respectively. The food and beverage town centre uses provide a good offering which is conducive to a successful nighttime economy. Community assets comprise 10% of the offering of the functional area of the town centre. The uses span the range of social, health and religious infrastructure which is beneficial to the local community. Specifically, there are numerous dentists, pharmacies and gyms.

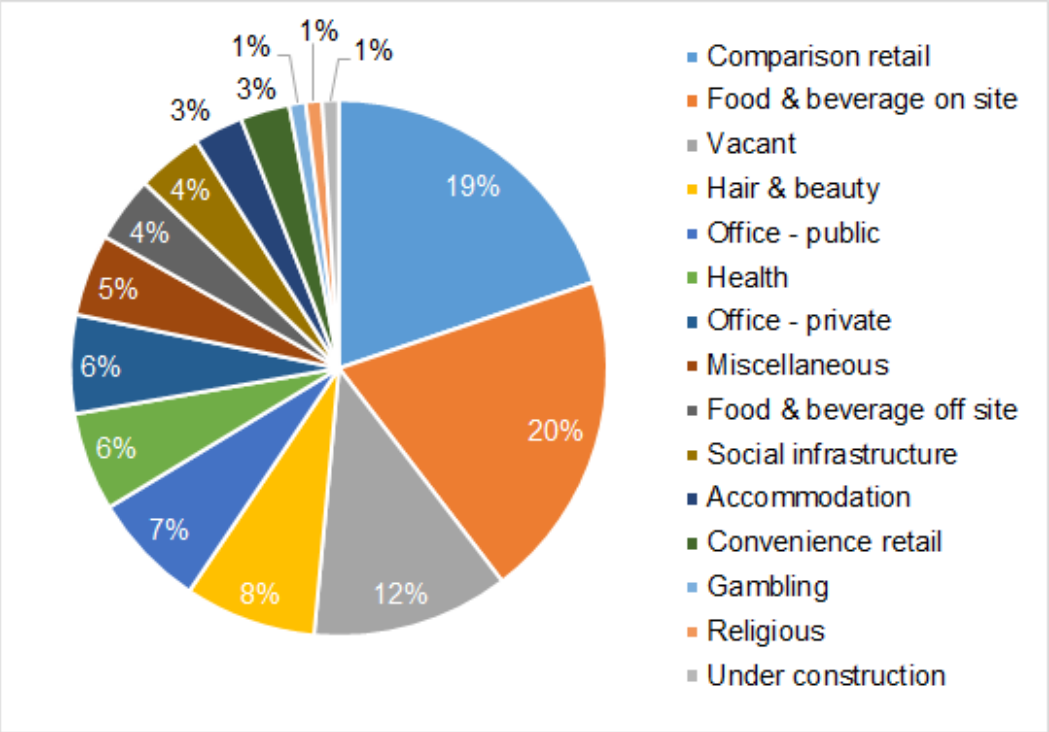
Arup conclude that Ealing town centre has a strong identity and a good range of town centre uses, all of which are above the LB Ealing average. There is a very strong presence of local businesses and near average community services. The environment is very appealing, clean and safe and there is very good street space provision. Vacancy rates of units within the town centre are near average. Connections through active travel and public transport are very strong. The town centre has good accessibility for users with limited mobility.

While Arup describe a wide range of building ages and scales, with a steady level of development, it is noteworthy that the most recent developments have been mainly residential. Of the commercial property, Arup estimated that around 7% was private offices. Arup conclude:

> *Ealing has a strong identity, a good range of town centre uses and offer which, all of which are above the LBE average. There is a very strong presence of local businesses and near average community services. The environment is very*

appealing, clean and safe and there is very good street space provision. Vacancy rates of units within the town centre are near average. Connections through active travel and public transport are very strong. The town centre has good accessibility for users with limited mobility.

Figure 3.1 Land use in Ealing town centre



3.2 Socio-economic context

The two wards that cover Ealing MTC have a very striking socio-economic profile. When measured at by resident population, the jobs typically considered part of the knowledge economy are strongly represented, as showing in Figure 3.2.

This is further emphasis when looked at in terms of job type, shown in Figure 3.3, with professional occupations, managers and senior officials more than half of all occupation types, with associate professional and technical roles making another 17.8%.

This is a strikingly skewed pattern suggesting an area that is attractive to population that is more highly educated than average and, when education is analysed, as in Figure 3.4 this certainly shows up, with a remarkable 63.1% of the population with Level 4 qualifications or above. These patterns would be striking in themselves, but are even more so when compared with workplace analysis.

It is not only the resident population that is dominated by information and communication and professional and technical jobs: they are the two most prominent private sector industries in the MSOA that cover the MTC, making up more than 43% of jobs found there (Figure 3.5). [1]

[1] ONS state that workplace population statistics were significantly impacted by the pandemic, and that it cannot be certain to what extent questions designed to capture pre-pandemic patterns were adequately filled by, for example, furloughed workers. So data should be handled with caution.

A further 20% of workplace jobs are in the education sector, which is not surprising, given the presence of three higher education institutions on Ealing Broadway itself and several creative industry educational institutions to the south, near Ealing Studios.

Figure 3.2 Resident employment in MTC wards

Industry	Count	%
J Information & communication	2,036	12.9
M Professional, scientific & technical	1,945	12.4
P Education	1,693	10.7
Q Human health & social work	1,667	10.6
G Wholesale & retail trade; repair of motor vehicles	1,527	9.7
R, S, T, U Other	1,042	6.6
F Construction	959	6.1
K Financial & insurance	911	5.8
N Administrative & support services	775	4.9
I Accommodation & food service activities	737	4.7
C Manufacturing	683	4.3
H Transport & storage	682	4.3
O Public admin & defence; social security	571	3.6
L Real estate activities	387	2.5
D Electricity, gas, steam & air conditioning	61	0.4
E Water supply; sewerage & waste management	42	0.3
B Mining & quarrying	23	0.1
A Agriculture, forestry & fishing	2	0.0
Total	**15,743**	**100.0**

Source: Census 2021

Figure 3.3 Employment by occupation in MTC wards

Occupation	Count	%
2. Professional occupations	5,109	32.5
1. Managers, directors and senior officials	3,034	19.3
3. Associate professional and technical occupations	2,802	17.8
4. Administrative and secretarial occupations	1,121	7.1
9. Elementary occupations	878	5.6
5. Skilled trades occupations	857	5.4
6. Caring, leisure and other service occupations	841	5.3
7. Sales and customer service occupations	653	4.1
8. Process, plant and machine operatives	441	2.8
Total (usual residents aged 16+)	**15,736**	**100.0**

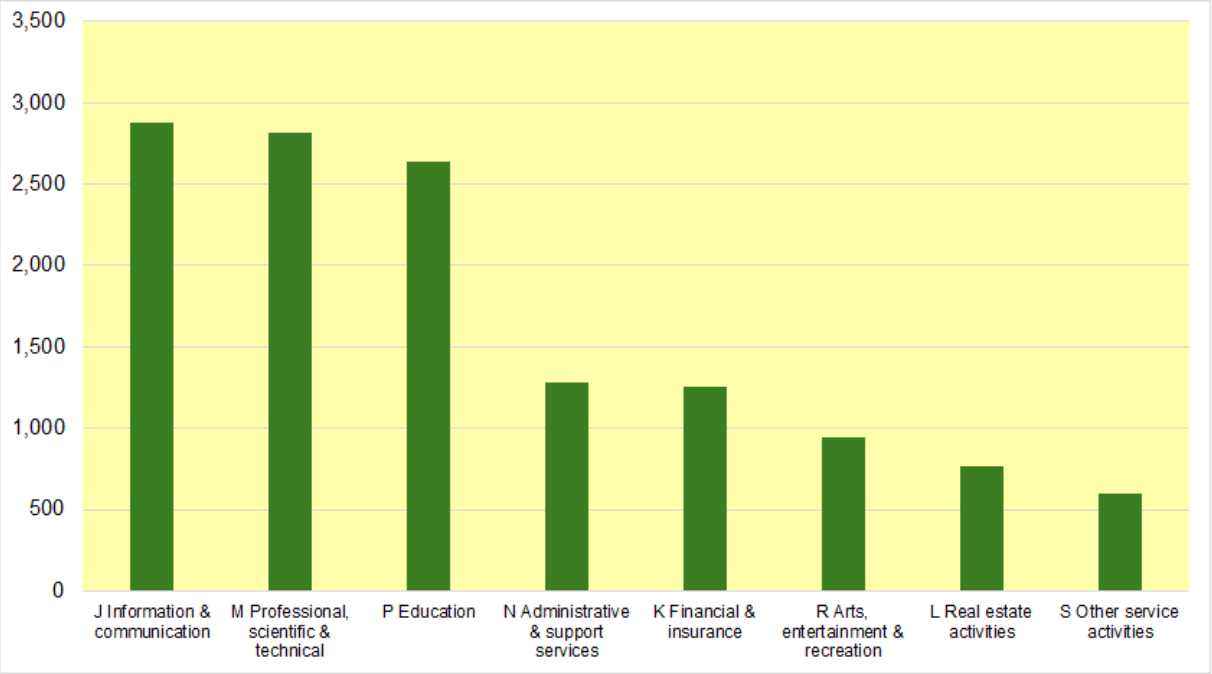
Source: Census 2021

Figure 3.4 Educational attainment in MTC wards

Highest level of qualification	Count	%
Level 4 qualifications or above	15,062	63.1
Level 3 qualifications	2,521	10.5
No qualifications	2,408	10.1
Level 2 qualifications	1,587	6.7
Level 1 and entry level qualifications	1,165	4.9
Other qualifications	639	2.7
Apprenticeship	514	2.1
Total (usual residents aged 16+)	**23,896**	**100.0**

Source: Census 2021

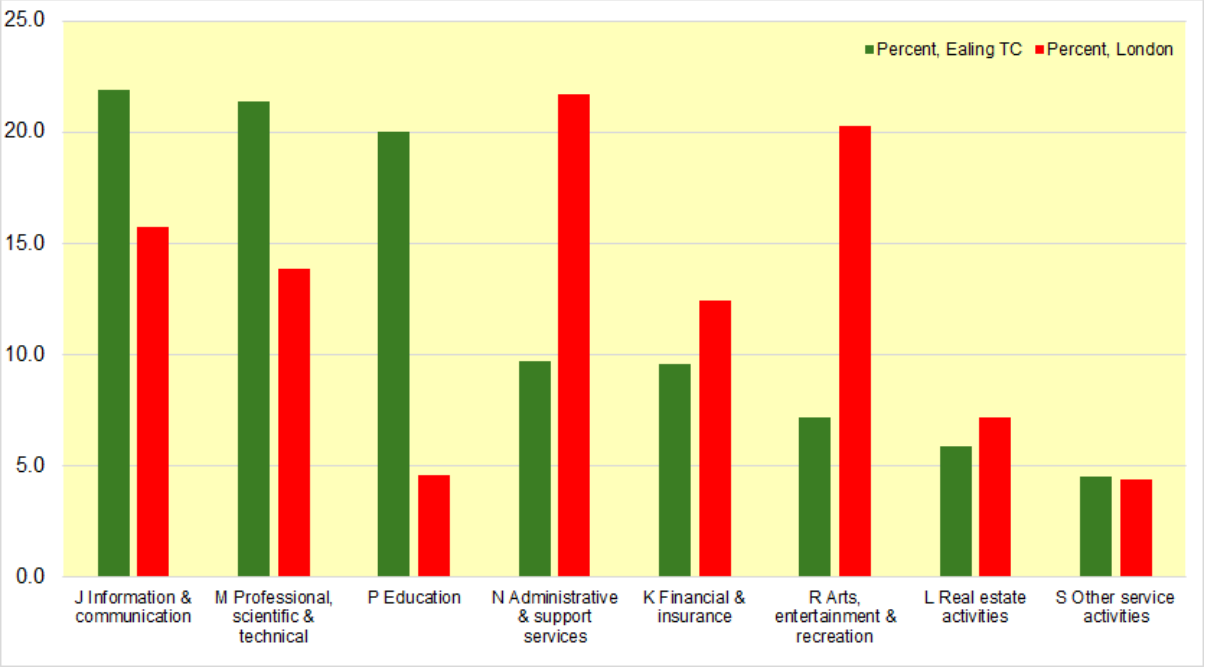
Figure 3.5 Workplace population by industry, Ealing MTC MSOAs



Source: Census 2021

Figure 3.6 shows a comparison between the MTC and London as a whole in percentage terms. The distinctive structure of Ealing's workplace population is clear, with education, information and communication and professional and technical jobs much more strongly represented than in London as a whole. One surprise is that arts, entertainment and recreation is significantly less well represented than might be expect, given the presence of Ealing Studios. While this may reflect the diverse nature of the category, with Ealing being more specialised than elsewhere.

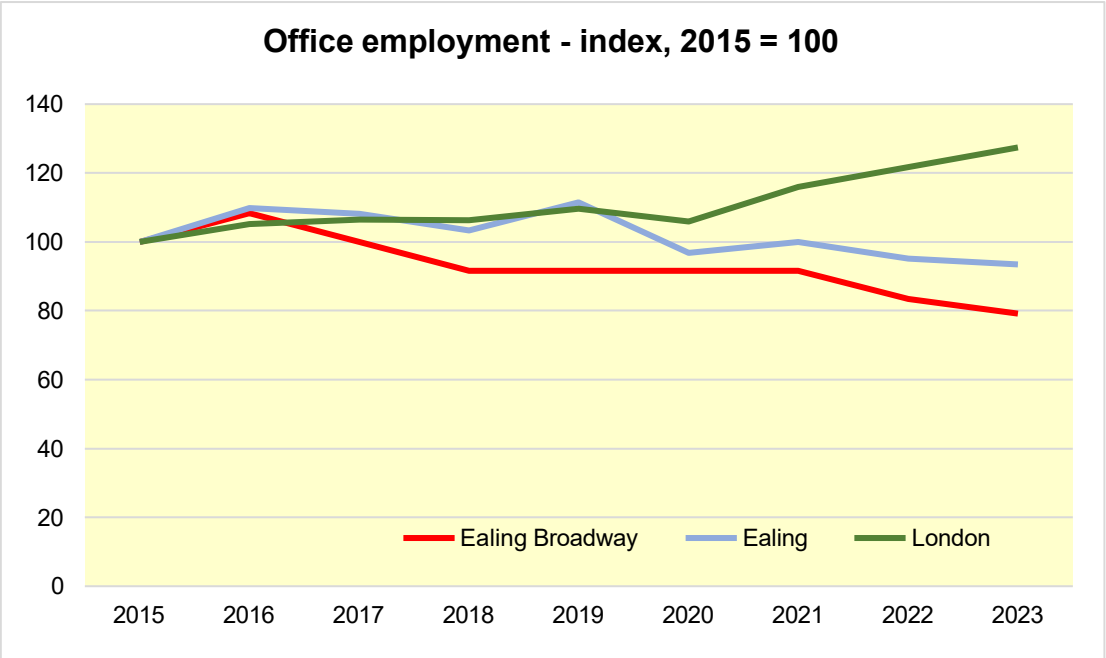
Figure 3.6 Workplace population by industry (%), Ealing MTC vs London



Source: Census 2021

Figure 3.7 illustrates recent trends in office type employment for Ealing Broadway[2] compared to the wider London economy. The divergence between Ealing Broadway and London is stark.

Figure 3.7 Office employment index



[2] The definition used here is Ealing Broadway ward.

3.3 Market snapshot

Ealing has not, historically, been seen as a major office market and, consequently, it is somewhat under-analysed when compared to even relatively nearby places such as Hammersmith and, more recently, White City. The practical effect of this is the absence of timeseries data for rents and yields, meaning analysis is inherently anecdotal.

That said, commercial agents provide enough information to offer insights. CBRE estimates that rents at White City reach £60 per sq ft, while Hammersmith rents to the south reach £50 per sq ft. [3] This is slightly higher than Knight Frank estimate a quarter earlier, at £57.50 for White City [4] while giving no figure for Hammersmith.

Ealing town centre, meanwhile, has newly refurbished space at 54 Broadway available at quoting rents of £52.50 per sq ft, while Ealing Green has space available for £32.50 per sq ft. Spot checks on some agent availability listings suggest less modern space costs around £27.50 per sq ft, a fairly steep discount to the top rents.

In this context, three developments are worth highlighting.

- **54 Broadway** This is a refurbished scheme noted above that is available in sizes ranging from c620 sq m) to c1,95 sq m) at £52.50 and has yet to secure an occupier.
- **International House, Broadway** This building has consent for a comprehensive refurbishment and extension, adding nearly 6,000 sq m to stock. However, although the building has been stripped out it has yet to be footed out as the owner focussed on 54 Broadway. It has recently been sold by British Land and is now subject to an application to convert the second to fourth floors into 148 flats. Although not in economic use, this should be seen as a loss of office stock, given that it could have been made usable, unlike the Old Town Hall.
- **Exchange Plaza, 58 Uxbridge Road** This cleared site had a consent from 2017 for development of 24,118 sq m of office space, a net gain of 16,618 sq m to stock. This lapsed in 2020 and a new scheme led by student accommodation and containing 7,683 sq m of office space, more or less matching the scale of the building that once occupied the site.

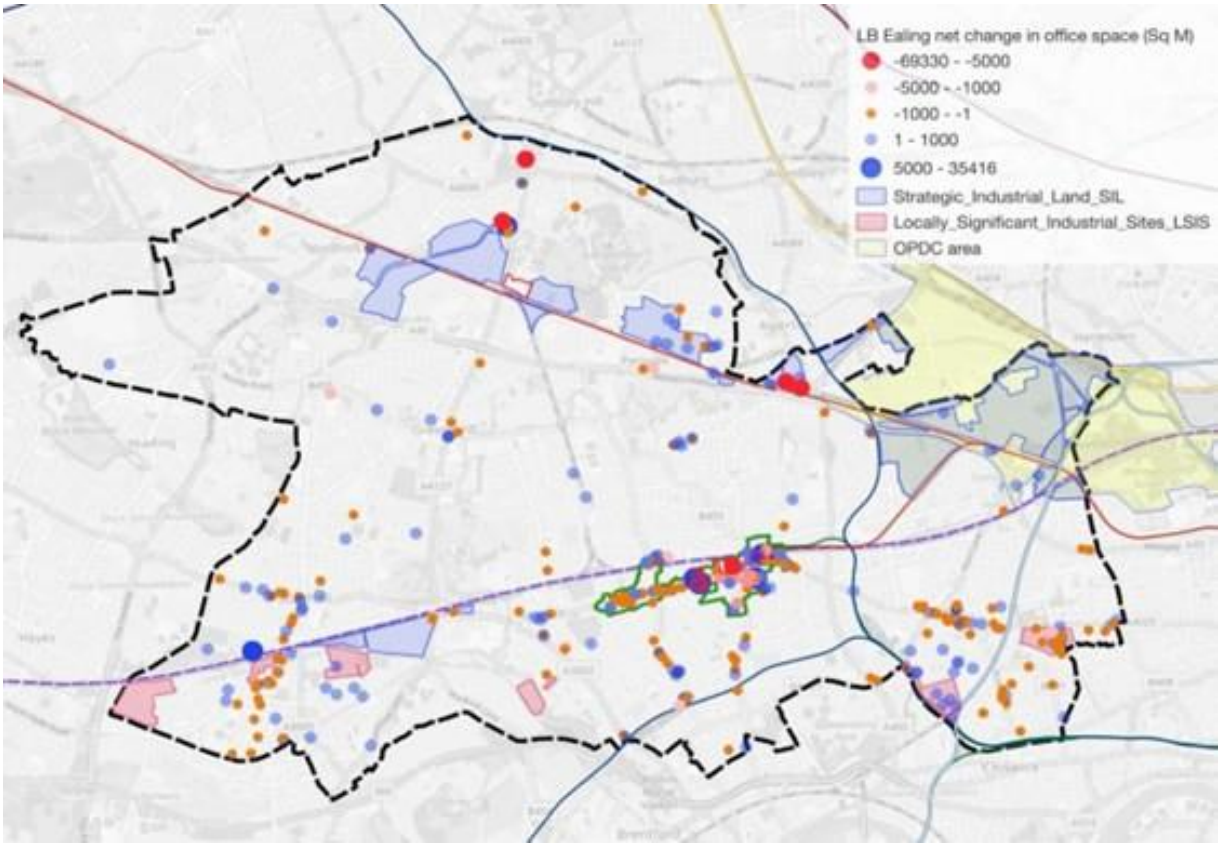
Taken together these three properties illustrate a market that is, on the one hand, cautious but, on the other, seeing clear potential. Add to this the fact that Ealing is identified by the Mayor of London's *London Growth Plan* as a significant office cluster and care should be taken in interpreting short term signals in a marketplace that has yet to fully recover from the Covid pandemic.

3.4 Development history

Figure 3.8 shows that, across LB Ealing as a whole, there are several clusters of small-scale attritional office floorspace losses, but also several large losses – by far the biggest being the former Glaxo HQ on Greenford Road, but also in the Westgate SIL. It should be noted that while around 14,000 sq m of offices were lost to residential conversion, another 11,000 sq m was lost to industrial and warehousing.

[3] CBRE (2024) *Marketbeat Central London Offices Q4 2024*
[4] Knight Frank (2024) *London Offices Spotlight*

Figure 3.8 Ealing borough developments, net change in office floorspace

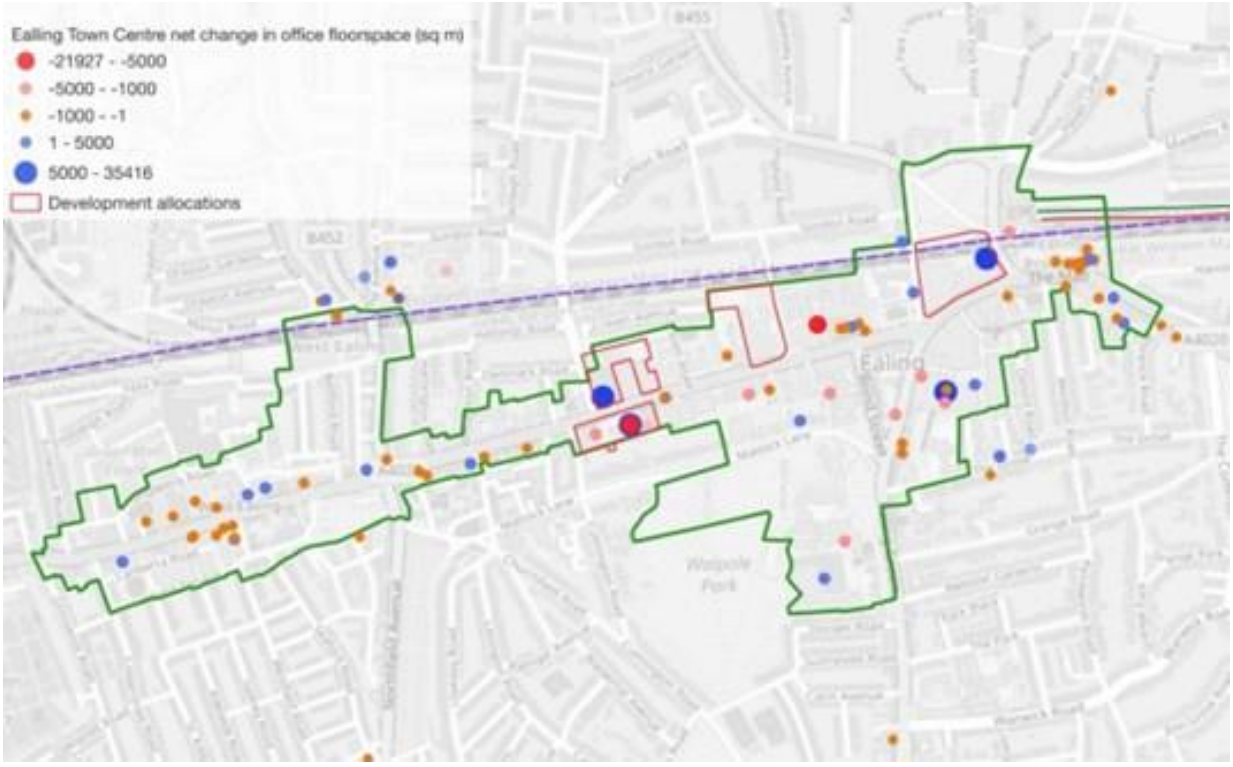


Source: LB Ealing, GLA

The overall result for the borough is a net loss of just over 63,000 sq m of office space since 2015. The pattern of that loss was fairly typical of patterns seen around the country since Permitted Development rules were relaxed in 2013, and this was maintained until very recently, when stock began to see gains, with the potential for much more significant growth. This is very largely accounted for in Ealing town centre.

Ealing town centre (Figure 3.9) shows the typical attrition of small offices, but including the more substantial loss of the town hall to hotel use. It should be noted that the Town Hall was in some disrepair and was not fit for purpose, so this is in effect redundant space being put back into economic use, rather than a true loss of stock. However, there are significant additions to stock that, if all implemented would see Ealing town centre's stock increased by more than 51,000 sq m. This would be a significant increase.

Figure 3.9 All Ealing town centre developments, net change in floorspace



Source: LB Ealing, GLA

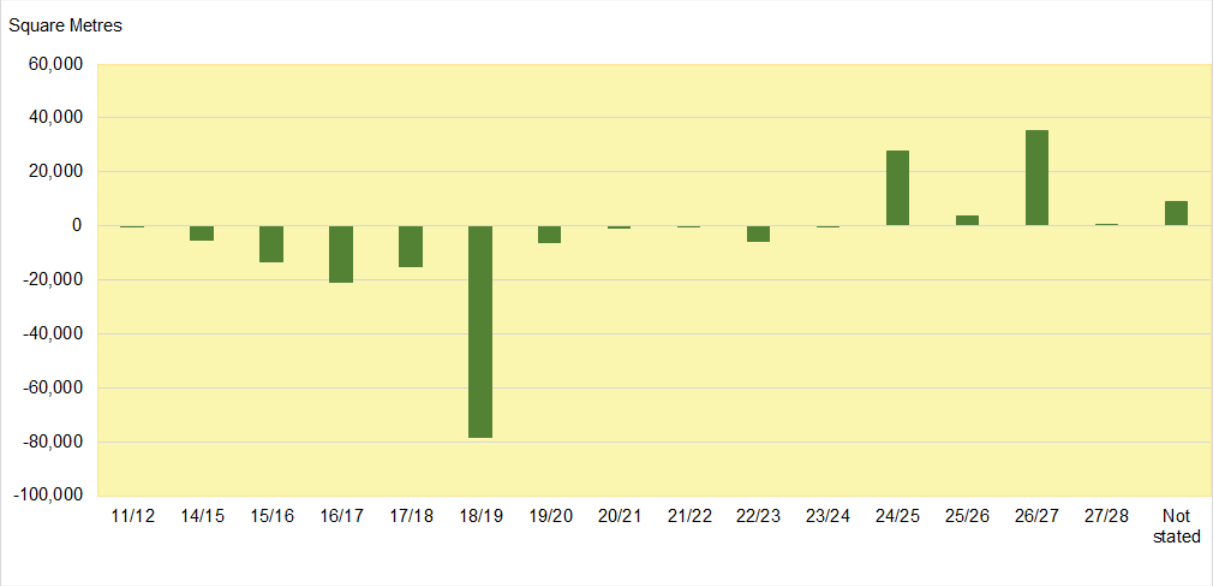
Turning to the change in the stock of space, borough-wide data exhibit a pattern that is repeated in many parts of the country, and which was evident in some areas even before Permitted Development Rights were extended (Figure 3.10). A gradual net loss of stock, punctuated by larger losses. In the case of Ealing, the larger loss was a manifestation of for large schemes: the former Glaxo HQ complex, The Kellog Tower, Westgate House on Western Avenue and West World, which was a change to B2 and B8 rather than to housing.

The pattern changes in the post-pandemic period and stock starts to be added, but there is still an overall net loss since 2015 of just over 63,000 sq m, if all schemes are implemented.

Turning to Ealing town centre (Figure 3.11), that it too suffered consistent loss before and during the pandemic only to see a series of application offer the prospect of a significant increase in – and upgrade to – office stock. As noted much of this has yet to be implemented and even after the reduction of office content in the proposed Exchange Plaza development, noted above, this is something of a statement of faith in the Town Centre by the development community.

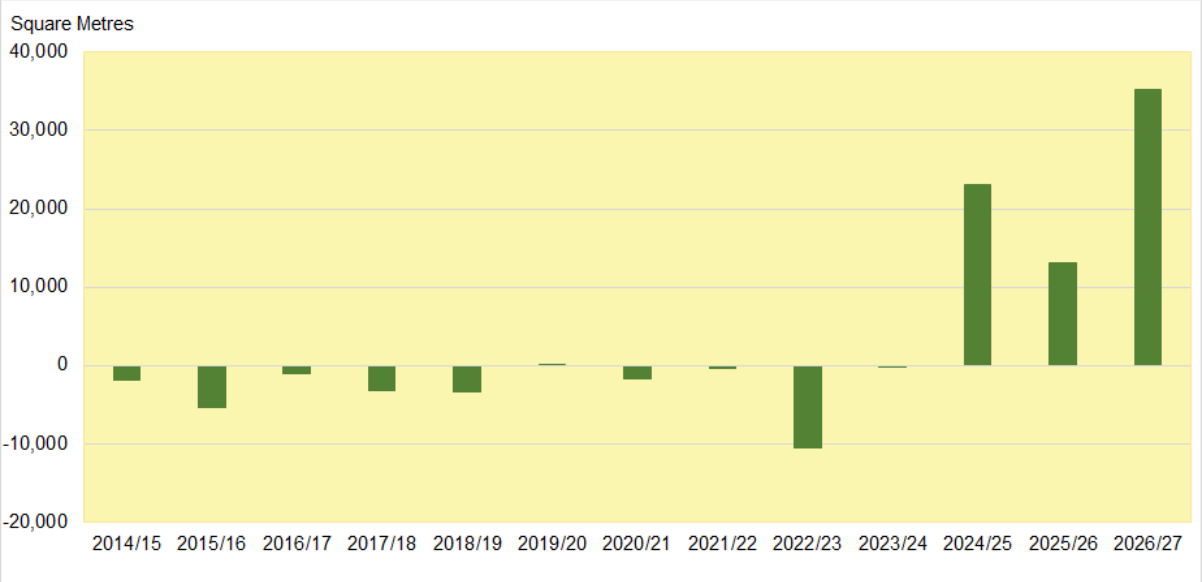
It is worth comparing Ealing town centre with Acton (Figure 3.12), a smaller centre, which has continued to see loss of stock. Significantly, some of this has been on LSISs – a phenomenon seen elsewhere in London, with LSIS sites proving difficult to defend.

Figure 3.10 Ealing borough developments, net change in office floorspace [5]



Source: LB Ealing

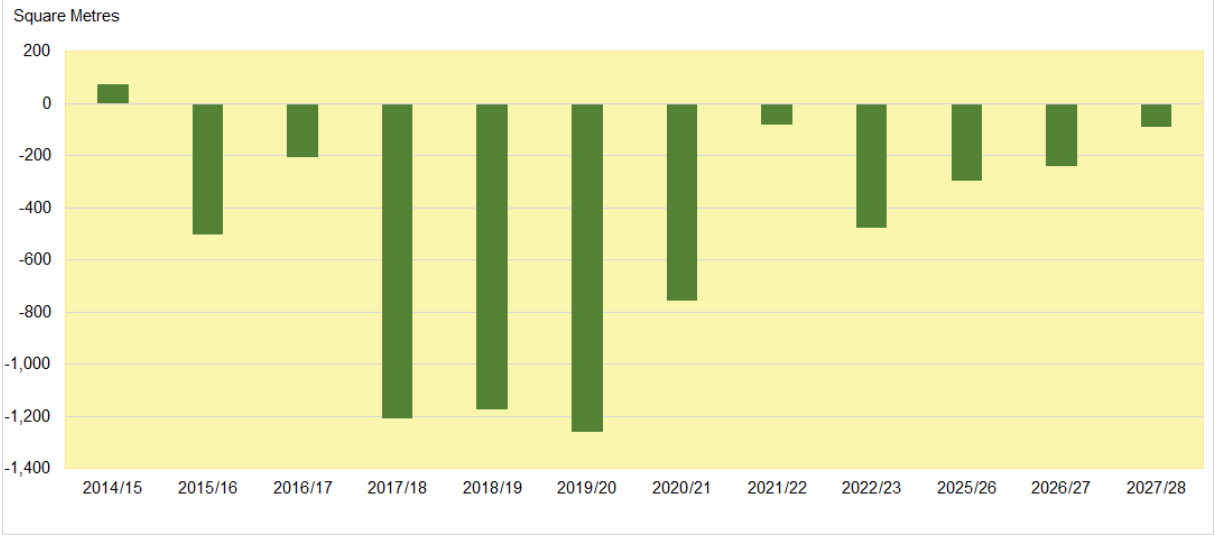
Figure 3.11 Ealing town centre developments, net change in office floorspace



Source: LB Ealing

[5] Data from Ealing Borough Council. Completion date is based on the date a scheme is expected to leave the planning system, which can also happen when a consent lapses, so should be viewed as indicative only. Lapsed or superseded consents are not included.

Figure 3.12 Net change in office stock –Acton



Source: LB Ealing

3.5 Prior Approvals

Figure 3.13 shows loss of office stock to Prior Approvals, and shows much the same pattern as overall losses until the large consents in Ealing town centre were granted, with the heaviest losses seen between 2016 and 2018. It is possible that the slowdown in the rate of loss reflects the fact that most stock eligible to be lost via this route has already been lost, but as noted above, losses in LSIS areas around Acton should be a source of concern.

Figure 3.13 Office losses to Prior Approvals, Ealing borough

Estimated completion	Net change in floorspace (sq m)
2014/15	-3,390
2015/16	-5,258
2016/17	-18,609
2017/18	-16,545
2018/19	-5,683
2019/20	-598
2020/21	-3,308
2021/22	-1,950
2022/23	-2,894
2024/25	0
2025/26	0
2026/27	-421
2027/28	0
Total	**-58,656**

Source: LB Ealing,

In is notable that Ealing town centre has lost relatively little to Prior Approvals (Figure 3.14, with just over 4,800 sq m of space lost – a relatively modest proportion, with the greatest number of individual schemes being smaller units, typically office above shops being turned into flats.

Figure 3.14 Office loss to Prior Approvals, Ealing town centre

Estimated completion	Net change in floorspace (sq m)
2015/16	-62
2017/18	-1,033
2018/19	-795
2019/20	-85
2021/22	-526
2022/23	-1,979
2026/27	-373
Total	**-4,853**

Source: LB Ealing

Loss to hotels

By contrast, Ealing town centre has lost more than 9,000 sq m to hotel uses, some 77% of the total loss to hotels in the borough. Given the number of hotels this is not too surprising, but a note of caution is that 6,000 sq m of this is at the old Town Hall, and still to be implemented, although it is expected. As noted above, this was redundant and unfit space rather than true loss of office stock, However, the fact that Ealing town centre is attractive to hotel operators is significant, presenting both opportunities and challenges.

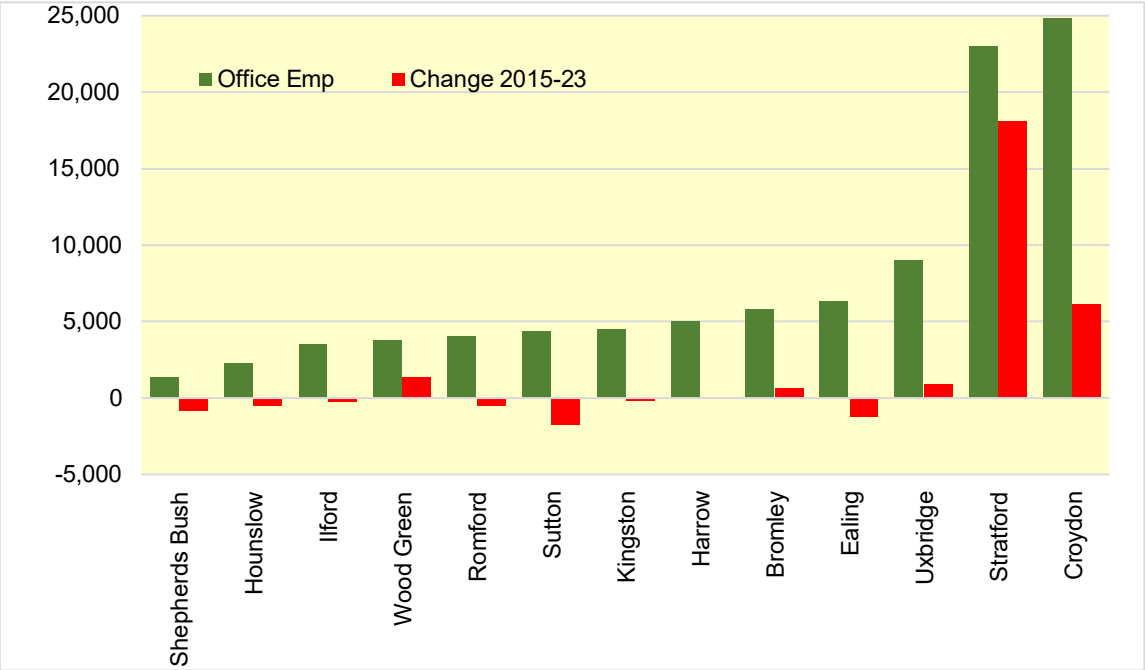
3.6 Comparative analysis

Ealing is one of 13 Metropolitan Town Centres categorised as such in the London Plan. Ealing is the fourth largest office employment centre with an estimate of just over 6,000 office jobs[6]. Most MTCs have similar levels of office employment at around 4,000-5,000 jobs. The two largest centres are Croydon and Stratford (Figure 3.15). Croydon is a long-established major office centre and has just under 25,000 office jobs. Stratford has been more recently developed on the back of the Olympic Park redevelopment and has seen a big increase in office employment in recent years with new office development under the London Legacy Development Corporation. Croydon has also seen positive growth in recent years.

In contrast the majority of other MTCs have seen a reduction in office employment between 2015-23. Ealing had the second largest numerical decline with loss of 1,200 jobs, a decline of around 16%.

[6] Estimates are based on best fit LSOA boundaries and best fit SIC categories as per definitions used in the *London Office Policy Review*

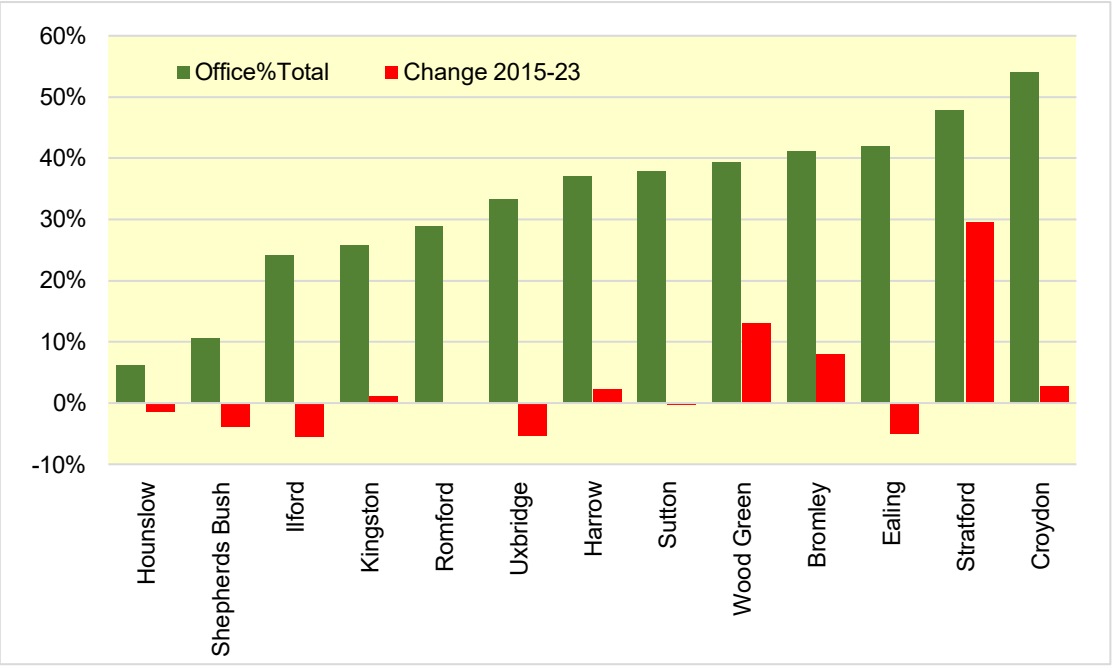
Figure 3.15 Office employment, MTCs, 2015-2023



Source: BRES/CAG

Office employment as a percentage of total town centre employment is estimated to be around 42% in Ealing (Figure 3.16). It is higher only in Stratford and Croydon. But office employment as a share of total town centre employment has been declining in Ealing.

Figure 3.16 Office employment as % of total employment

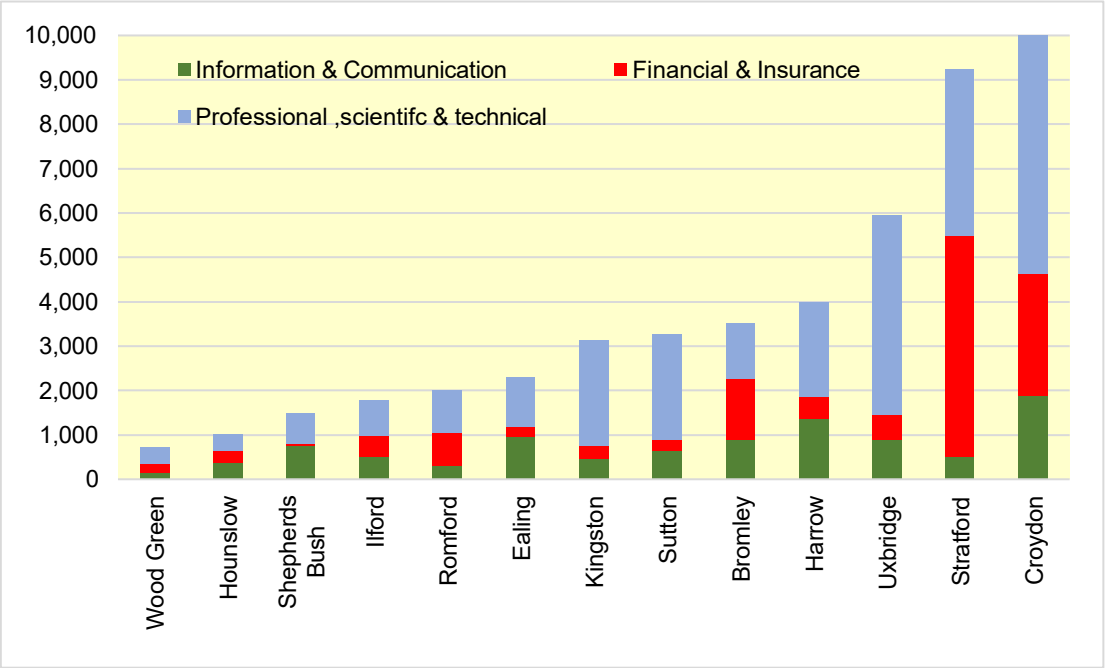


Source: BRES/CAG

Public administration is the largest single employment sector in Ealing Town Centre, accounting for around 20% of all jobs. It plays a similar significant role in many of the other MTCs. In five of the thirteen it is the largest employment sector.

If we look at employment in just the core higher value office sectors that Ealing might wish to attract, then these are comparatively under-represented in Ealing Town Centre (Figure 3.17). In addition to Stratford and Croydon, Uxbridge also has a much higher representation in the professional, scientific and technical services sector.

Figure 3.17 Employment in core high value office sectors



Source: BRES/CAG

Whilst useful for benchmarking purposes, the other Metropolitan Town Centres are not really competitor locations to Ealing as an office centre. The one exception would be Uxbridge, which along with White City, Chiswick and Hammersmith, probably form the principal direct competition to Ealing as an office location.

4.0 Drivers and opportunities

This section examines key drivers of growth to assess their implications for the Ealing MTC office economy, and where there might be gaps or opportunities. We will look at the local implications of broad demographic and global drivers such as changing working practices, new population and technology changes.

4.1 Drivers of change in real estate

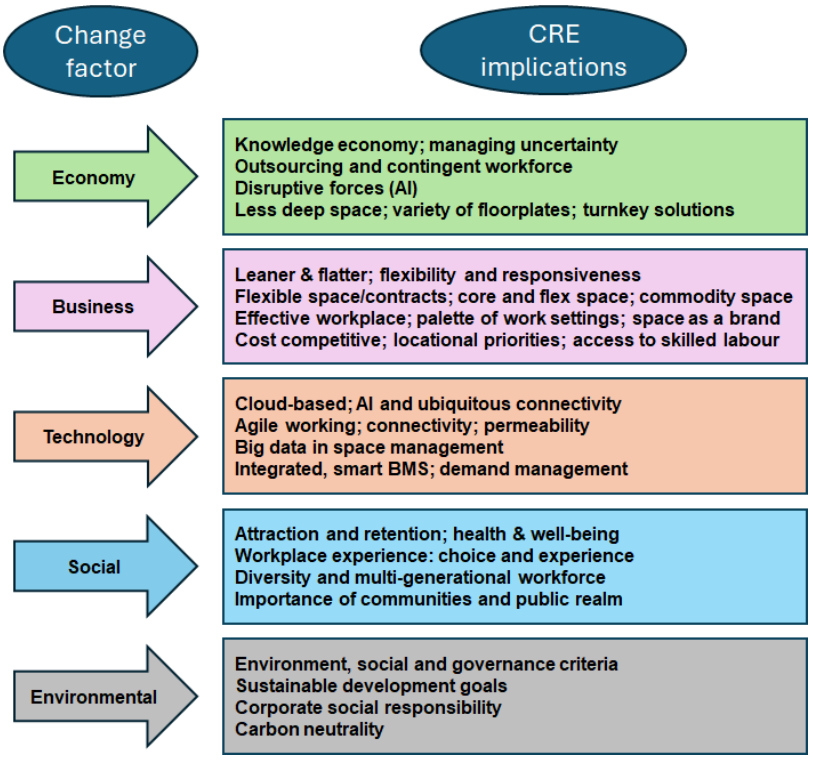
We have seen elsewhere in this report that office floorspace in Ealing has been in decline over recent years, and this is not an Ealing-specific issue. More importantly it is a symptom of widespread change in the office sector, which is seeing changed priorities in terms of workplace, buildings and location. As a result, the decline in stock is structural in character, rather than cyclical, which means that the changes have a long-term impact.

Hybrid: here to stay! In March 2020 the real estate industry was brought to a grinding halt by the Covid-19 pandemic. Suddenly, lockdowns ensured that most people were working from home and the office sector experienced a brief existential crisis: if we can all work from home, then why do we need offices?

Five years on from the onset of the pandemic, we have still not seen a full return to the office, suggesting two long-term outcomes: first, very few workers will go fully remote (working entirely from home) and, secondly, fewer people will be returning to the office five days a week, nine-to-five. Within these two extremes, and despite a small number of blue chips mandating a five-day-a-week return, it seems that hybrid working is here to stay.

Figure 4.1 illustrates shows the impact of five generic drivers of change (economic, business, technological, social and environmental) on the commercial real estate market.

Figure 4.1 Drivers of change and real estate implications



Occupier businesses have been undergoing a maelstrom of change for two decades and more, largely driven by the technological revolution. Radical social changes, new workstyles, the need to attract and retain high cost staff and so on are having a major impact on how buildings are delivered and managed. And with AI emerging, there is likely to be further transformative change ahead. New companies are emerging with new products; existing companies are reinventing their systems, processes and products, and all companies are adapting quickly to rapidly shifting market, social and environmental demands. At the same time our engagement with work is changing: expectations and aspirations for work are very different today than even in the recent past.

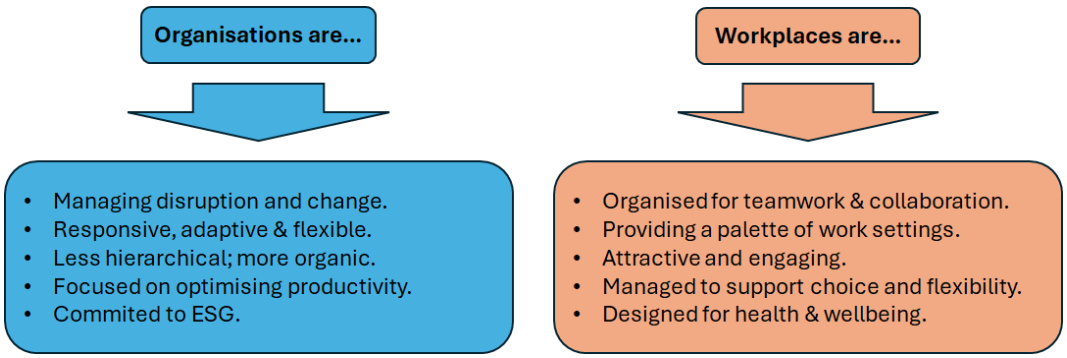
Corporate priorities

While the pandemic brought 'workstyles' to public attention, it is important to recognise that the pandemic boosted trends rather than created them (for example, agile working has been practiced for many years). Changing corporate structures, the need for flexibility and the need to attract and retain skilled people have been altering the nature of demand for space for many years. All of which have led to widespread changes in the role of the office.

The modern office is a hive of activity; people moving around, meeting, collaborating and exchanging. The role of the office is increasingly acknowledged as enabling people to interact and collaborate; it is expected to provide a wider range of settings in which individuals and groups can work in more dynamic ways compared with much of the more solitary work of the past, and the office is becoming less a place to go to work on a set of prescribed tasks, and more somewhere to visit and interact with colleagues.

As technology is transforming work, so the operational environments of businesses are having to respond. In the 'old' model workers tended to receive security, benefits and a regular salary 'for life', while employers in return received a stable workforce in which they could invest. However, the 'old model' is now being redefined, and Figure 4.2 summarises the main features of the 'new' model.

Figure 4.2 Changing organisations, changing work



Collectively, these features of corporate change are altering the traditional bedrock of demand: this once comprised of large, relatively unchanging and predictable 'corporate islands' that were mainly process-based and which could plan ahead with a comparatively high degree of certainty.

Instead, occupiers today operate within short-term planning horizons, responding to an ever-changing economic landscape and seeking to maximize their flexibility to adapt. The power of networks, involving collaborative production and multi-disciplinary skills, is coming to be realised. More commoditised and non-core activities are being undertaken by

specialists; more work is being undertaken collaboratively, and more work is being undertaken by small companies.

Knowledge workers are, by definition, more footloose and more demanding. They are able to exercise choice over where and when they work; they are less tied to a long-term employer, and they are more demanding of the workplace. There is, for example, evidence that people entering the workplace today are more likely to make their selection based on the ethics of their potential employer. One apparent outcome of the pandemic has been the so-called 'flight to quality'. This is where employers seek top quality space, at least in part, to attract and retain the high-quality, well-paid workers.

Workplace priorities

The trends described have led to a shifting profile of workplace priorities. Tomorrow's workplace will focus on *workplace experience*, in which the workplace becomes a hub for the organisation; and its qualities in terms of design and services offered will assist in recruitment and retention, it will be a tool to improve productivity and wellbeing, and will provide the setting for interaction, collaboration and innovation.

The future office will provide a blend of business and domestic design features in a pleasant, welcoming atmosphere in which to collaborate, socialise and learn. The workplace will be greener and healthier and will provide an experience rather than simply a static backdrop to work. A richer palette of work settings, tailored to individual requirements and available 'on demand', will be provided in a highly connected environment, with a far more sophisticated, or smarter, building management regime. It will provide settings where colleagues can meet to collaborate and share knowledge.

The workplace will be designed and managed with an emphasis on the need to attract and retain skilled workers, and to enable them to be productive while in the office, by providing supportive work environments with suitable work settings and opportunities for meeting and collaboration. Employee-centric design will enhance wellbeing by prioritising natural lighting, biophilic design, wellness zones and fitness areas as well as through ergonomic features such as adjustable desks, seating, and workstations tailored to individual needs.

A workplace fitout that facilitates choice, support and wellbeing is an important recruitment tool. Office design will continue to evolve, working towards more hospitable, supportive and experiential places than ever before. A key element in achieving this will be an adaptable fitout, with physical design and floor plans that allow spaces to be configured and reconfigured to meet the changing needs of a more collaborative and social workforce.

Workplace design and management is increasingly allowing occupiers to continuously adapt to changing economic and market circumstances. The workplace should also deliver experience and amenities, while embracing the opportunities of agile working, allowing organisations to both attract the right talent and manage their real estate with increased flexibility and adaptability. Emerging office needs focus consistently on addressing the following issues.

- Less space, used more efficiently, and more effectively.
- Space being a medium for expressing corporate culture and values.
- Evolving workstyles and a diverse and discerning workforce.
- Design for continuous adaptability and diverse usage patterns.
- Activity-based workspaces providing for collaboration, concentration, communication, creativity, confidentiality and contemplation.

- Use of shared spaces as a means to facilitate collaboration.
- Provision of amenities and services (food, wellbeing, events etc.).
- Creating and managing memorable experiences to attract talent.

There is a critical link between employee well-being and organisational success. Workplace strategies must prioritise employee well-being by fostering a supportive and inclusive work environment, which entails incorporating mind-friendly design principles and implementing policies and practices that promote work-life balance, mental health support, and opportunities for social connection. Creating workplaces where people can connect for mentoring, peer-to-peer learning, and social events is critical. By prioritising employee well-being, organisations can enhance engagement, productivity and retention, and ultimately drive long-term success.

Building and locational priorities

As corporate organisations discard their ‘corporate island’ approach in favour of a more agile, networked approach, buildings will become ‘less generic’ and less single purpose; they will instead provide choice and flexibility. They will become less ‘anonymous’ and more ‘permeable’.

Office design will increasingly be about simpler, ‘loose fit’ buildings. Centralised computing power and thin client terminals have already begun to cede to cloud-based technology; with smart phones, laptops and tablets, together with wireless technology such as 5G and Wi-Fi, removing all the physical limitations of the past. The technology has left the building: people now connect with each other, rather than with a physical space. As a result, shallower floorplates, lower structural heights, natural ventilation and natural light will all grow in importance. And as the office ‘hardware’ declines in importance, so the fitout and ‘software’ (management, services, concierge) will assume ever greater import.

There remains very little evidence of a deconcentration of business from city centres. Indeed there is plentiful anecdotal evidence of concentration as businesses seek to maximise the benefits of locating in an area that is supported by transport connectivity, cafes and restaurants, cultural and leisure opportunities, open and green spaces in which to relax.

Being part of a business ecosystem is also important in terms of access to a suitable labour pool and recruitment. Initiatives like "Destination City" in London illustrate the shift towards creating vibrant, multi-functional urban spaces. Key features include permeability, blurring the lines between private and public spaces; and mixed-use development, combining offices, housing and cultural spaces within the same areas to create 24/7 activity hubs.

4.2 Emerging property market trends

The previous section outlined key changes in the office sector in terms of changing working styles, the response to the pandemic and emerging priorities for workplaces and buildings. Here we place these change in the broader setting of emerging property market trends and the specific consequences and opportunities for Ealing MTC.

Permitted development rights For over twenty years there has been very little new investment in office stock in outer London. When changes to PDR were introduced in 2013, there was a rush to convert ageing and unwanted office stock to residential use. This initial rush has slowed, but the impact has been extensive. Some boroughs have lost upwards of 20-30% of their office stock. As we have seen, Ealing has undergone a similar trend.

Local, London or regional? By far the greatest proportion of future demand will come from local businesses. Some will move into the MTC from a small radius, but generally speaking, spatial policy should be looking to nurture and retain companies rather than expect major inward movement.

Inner vs Outer London There is a diminishing number of large office employers in Outer London. With one or two notable exceptions, for example Chiswick, Croydon and Hounslow, large office employers have been in retreat. This is partly driven by technology reducing the demand for large back office functions and partly driven y the growing demand to find highly skilled labour in the central area.

Town centres The challenge is to maintain and improve the design quality of high streets, while reintroducing a wider range of uses. High streets will have to provide for work, including business centres, offices, light industry, studios and so forth. They must offer a range of food and beverage outlets, culture and leisure and health and wellbeing. They must provide genuinely mixed-use buildings and restore the role of community functions such as open space, meeting places, leisure centres, places of worship, markets and public transport hubs.

Sustainability agenda The imposition of Energy Performance Certificates is leading to the early obsolescence of a lot of office stock. An EPC rates the energy efficiency of a property, according to energy consumption, CO_2 emissions, and potential improvements to enhance efficiency. Buildings are rated A to F, and the UK government is proposing that all rental properties need to achieve a minimum EPC rating of C by 2030. Already buildings rated F & G cannot be leased or sold unless improved.

Mixed Use Given the need to rejuvenate high streets and town centres, there is an opportunity to create spaces for a broader mix of activities.

Small, steady-state financial and professional businesses There are many small and medium sized businesses providing professional and financial services both to private and corporate sector clients. Such businesses require a good quality office offering, but in units of between 500 and 1,000 sq m, rather than 10,000 sq m. Such companies might grow incrementally, but many remain in 'steady state' for many years. Such business look for small lets in secondary space or higher value licences in managed space.

Micro business offering professional services In today's economy, the entry price for a new business is little more than the cost of a laptop. Large numbers of people are choosing 'to do their own thing' and setting up businesses to sell advisory services. Increasingly such businesses look for space in serviced offices and managed offices and co-working spaces. Many such businesses simply require either shared space or a small number of enclosed rooms in a larger managed setting.

Start-ups and scale-ups There will likely be an element of demand that involves start-up companies and scale-up companies that have explicit growth plans. Such firms require flexibility in the physical and contractual nature of their accommodation. Sometimes such businesses can be associated with HE institutions (eg Imperial College).

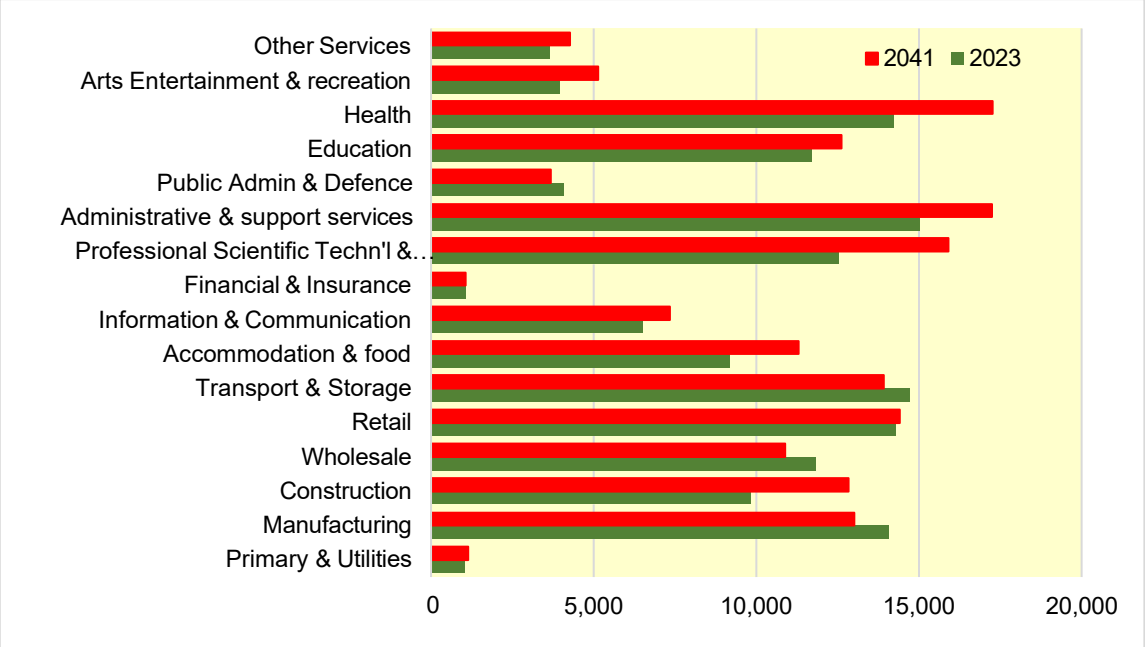
4.3 Employment forecasts

One method for forecasting the level of office demand is to derive it from sectoral employment projections. We have derived a sector forecast at borough level for Ealing that is consistent with the GLA's sector forecast for London as a whole and the GLA's projection of employment totals at borough level. [7]

Over the period 2023-41 the GLA projections are for employment in Ealing to increase by 14,400 jobs, or 9.8%.

The largest increases in numerical terms are expected to be in Professional Scientific Technical and Real Estate, Health and Construction. Each of these sectors are projected to grow by more than 3,000 jobs. Increase of more than 2,000 jobs are projected in Accommodation and Food Services and in Administrative and Support Service. Figure 4.3 shows the projections by sector.

Figure 4.3 Employment forecasts, by sector , Ealing, 2023-2041



The Standard Industrial Classification (SIC) is a hierarchical classification of activities into sectors. At the most disaggregated activity level (5-digit SIC) we classify activities as to whether they are likely to occupy office or industrial floorspace – or neither. This provides a finer grained representation of the economic structure of the Ealing economy by use class type. Applying this to the GLA-based forecast by sector we project the future change in employment by office occupiers.

For the period 2023-41 office employment in Ealing Borough is projected to increase by 4,200 jobs from 27,800 to 32,000.

[7] '2022 interim employment projections by sector' and '2022 interim employment projections by borough' – GLA Economics (October 2022)

To this projected change in jobs, we then apply a standard employment density ratio to project a demand for office floorspace. Using a ratio of 11.3 sq m per worker this generates a demand for a net additional 47,900 sq m of office floorspace.

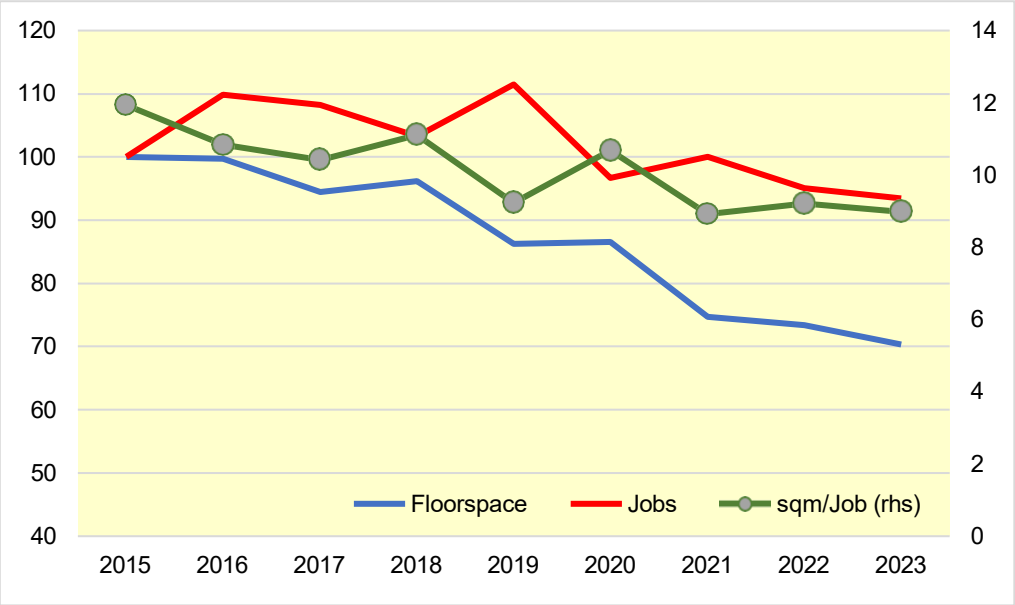
Quantitative econometric projections are a top-down and mechanistic method. Whilst much local data is incorporated into these projections, they need to be sense checked against local intelligence on the Ealing economy. Comparison with past trends in office floorspace stock shows that it has been declining at an average of 11,500 sq m per annum over the past ten years (2013-23). If that rate of loss were continued going forward then most of Ealing's office floorspace stock will have disappeared by 2041.

Such contradictory trends are problematic for spatial planning.

There is little doubt that the 'office sector', however that is defined, has experienced unprecedented turbulence over the past decade. First with the impact of digital technology and then with the effect of the pandemic, work and workstyles have been evolving rapidly. And premises requirements have been changing also as a result.

As can be seen from Figure 4.4, Ealing has seen office floorspace decline much more steeply than office employment. Offices are being occupied more intensively and differently.

Figure 4.4 Floorspace and jobs, and density, Ealing, 2015-2023 (2015 = 100)



In this context, the notion of addressing a "*demand for a net additional 47,900 sq m of office floorspace by 2041*" is a little simplistic. The danger of such a headline is that it encourages the notion that if developers provide that much new space, then the problem is solved. But of course, there needs to be a more sensitive response.

4.4 Key sector review

This section reviews opportunity sectors or activities that have some potential for driving growth in demand for office space on Ealing MTC. Drawing from the policy review of the previous chapter, we have identified a number of sectors that could be expected to occupy office space and are supported in policy terms. Below we review each of these sectors to

identify overall demand, significant trends in technologies and whether they would be expected to generate demand for the town centre.

Financial, Professional and Business services together with Information & Communications comprise London's key office sectors. In the Government's Green Paper *Invest 2035:* the UK's *Modern Industrial Strategy* [8] they are disaggregated into Digital and Technologies, Financial Services and Professional and Business Services.

Digital and Technology

Key strengths of the London tech sector as identified in the report are as follows.

- The London tech sector is nationally significant.
- The productivity of digital tech in London is high.
- The sector is growing fast.
- London is the top city in the world for foreign direct investment from overseas tech companies.
- London is the best place in Europe for tech companies to raise venture capital.
- London is home to 45 of the UK's 70 tech unicorns.
- There is a supportive start-up environment.
- London has expertise in commercialising tech R&D.
- There are significant and emerging clusters of tech activity across London, and tech has been identified as an important driver of borough-level economic growth.
- London has clear strengths in fintech, cyber security and artificial intelligence.

The sector is not currently well represented in Ealing. We have analysed employment data for the sector using two different definitions. In both cases Ealing has around 1% of total London jobs in the sector at either 6,000 on a wider definition or 3,250 using a narrower definition. Whilst the sector has been growing rapidly in London in recent years it has not been growing in Ealing and hence Ealing's share of total jobs in the sector has been falling. Between 2015 and 2023 employment in the sector grew by 35% on the wider definition and by 59% on the narrower definition. Growth in the sector has been overwhelmingly concentrated in the central London boroughs; in particular the City of London, but also Camden, Hackney, Islington and Westminster, with employment in some of these boroughs more than doubling.

Financial Services

Financial services account for just 0.8% of all jobs in Ealing compared with nearly 8% for London as a whole. Jobs in the sector have also been declining, falling by -20% between 2015 and 2023, during which time they increased by 23% for London as a whole.

Financial services is of high value, but specialised and tightly clustered. Without a significant presence in the sector is unlikely that Ealing will be an attractive option for companies in this sector.

[8] https://www.gov.uk/government/consultations/invest-2035-the-uks-modern-industrial-strategy/invest-2035-the-uks-modern-industrial-strategy

Professional and Business Services

The professional, scientific & technical services sector has 8,500 employee jobs in Ealing borough 6.6% of total employee jobs. That compares to 14.6% of employee jobs in London as a whole. The sector whilst growing rapidly at the London level has been declining in Ealing. Between 2015 and 2023 jobs in the sector in Ealing fell by -15% compared to a 25% increase at the London level.

There are estimated to be just over 1,000 jobs in the sector located in the MTC, but this figure has also been declining.

This is a major sector for the London economy and will continue to grow. Ealing should be able to pick up some share of the sector's growth. The employment forecasts set out in section 4.4 show projected growth of 3,300 jobs for Ealing between 2023 and 2041.

Creative and Digital

The Department for Culture, Media and Sport defined the creative industries as those industries which "*have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property*". It classified into nine sub-sectors as follows:

- advertising and marketing;
- architecture;
- crafts;
- design: product, graphic and fashion design;
- film, TV, video, radio and photography;
- IT, software and computer services;
- publishing;
- museums, galleries and libraries and
- music, performing and visual arts.

In total they were estimated to account for 5.2% of UK GVA or £124bn in 2023. In employment terms there were estimated to create 2.4m jobs in the UK in 2023–24, accounting for 7% of all jobs in the UK. [9]

The Government's Green Paper *Invest 2035: The UK's modern industrial strategy* noted that the creative industries had been selected as one of the eight priority sectors because it is an area where the UK is already "*world-leading" and because the sector is "expected to grow worldwide, creating further growth opportunities*", for instance in digital trade. [10]

London accounts for just over half (50.8%) of UK GVA in the creative industries and accounts for 29% of jobs. Key strengths of the London cultural and creative industries reported as follows.

- London's creative and cultural industries are economically significant for the city and for the UK as a whole.

[9] Department for Culture, Media and Sport (2024) *Economic Estimates: Employment in DCMS Sectors, July 2023 to June 2024*

[10] House of Lords Briefing Paper (January 2025) *Creative industries: Growth, Jobs and Productivity*

- The creative industries in London are fast-growing.
- London's creative industries are highly productive.
- Research by Nesta points to the strengths of London as a creative cluster across a range of metrics.
- London is home to leading universities and further education institutions specialising in teaching and research in creative subjects.
- Strong and emerging cultural and creative clusters are present across London.
- Important cultural institutions and creative businesses are based in London.
- London has particularly pronounced strengths in film and screen industries, broadcasting, fashion, advertising and design.

Ealing had an estimated 6,000 employee jobs in the creative industries sector in 2023. In addition there are likely to be a number of self-employed workers in this sector though they are less likely to generate demand for commercial space.

Whilst the number of creative industries jobs across London has increased by nearly a third (32.5%) between 2015 and2023, there was actually a small decline (-7.7%) in creative industries jobs in Ealing. Growth in London has been concentrated in the Central Activities Zone (CAZ) boroughs; in particular the City of London, but also Camden, Hackney, Islington and Southwark.

Ealing has a very positive presence in the form of the internationally renowned Ealing Studios, which itself is letting office space, albeit slightly outside the formal town centre boundary.

Even more so than some of the other sectors reviewed here, firms in the creative industries sector are likely to be seeking locations with an interesting ambience, buzz factor and good amenities.

Green and Circular Economy

The Green and Circular Economy sector, and in particular the types of activity identified in the *Green Jobs and Skills in West London* report [11], are predominantly industrial in nature (Figure 4.5). These are well suited to Ealing's overall commercial property strengths but would not be expected to drive demand for town centre office space.

There are some activities within this that would be expected to occupy office space and other parts of the sector may require supporting office ancillary activity.

The *Green Jobs and Skills in West London* report also estimated that there were 31,600 green jobs in West London in 2020. This was expected to double to 64,000 jobs by 2030 and increase to 112,000 by 2050. [12] 'Power', 'Homes and Buildings' and 'Low Carbon Transport' account for the largest share of these jobs.

Ealing was estimated to have 3,800 green jobs in 2020, 2.7% of total jobs in the borough.

[11] WPI Economics & Institute for Employment Studies (2022) *Green Jobs and Skills in West London*
[12] This was the Central Scenario. The Low scenario was 61,000 jobs at 2050 and the High scenario was 210,000 at 2050.

Figure 4.5 Green and Circular Economy jobs, West London and Ealing

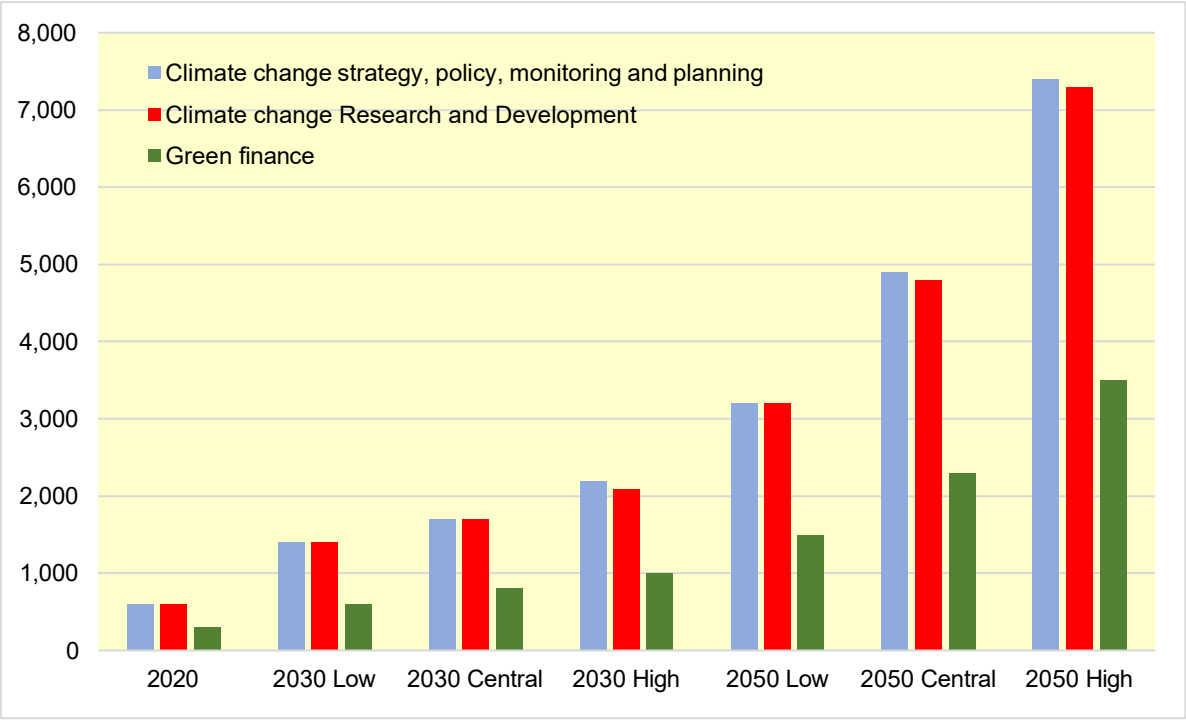
Sector	Definition	Number of jobs West London (000s)	Number of jobs Ealing (000s)
Climate change strategy, policy, monitoring and planning	Including public, private and NGO sector strategy and policy, outreach to citizens, environmental monitoring and use of planning system to achieve net zero	640	70
Climate change Research and Development	Including private sector, academic and public research	630	70
Green finance	Structured financial activity that's been created to ensure a better environmental outcome	300	<50

Source: WPI, 2022

Within the definitions used in the report *Green Jobs and Skills in West London* report there are three categories of activity that might be expected to occupy office premises.

Figure 4.6 shows projections for growth in those sectors at the West London level. On the Central Scenario the number of office jobs in green sectors grows from 1,500 in 2020 to 4,200 in 2030 and 12,000 by 2050. A similar rate of growth in Ealing might see demand for something like an additional 200 jobs in the sector by 2030.

Figure 4.6 Growth in Green and Circular Economy jobs, 2020-2050



London which is a globally dominant financial services centre and is growing its expertise and market size in green finance as this is a recognised growth sector. The *Green Jobs and Skills in West London* report estimated that there were 50,700 jobs in green finance in

London, representing just over half of all green jobs in the capital. [13] The same report estimated that this would grow to 387,000 jobs in green finance by 2050. Green finance jobs, however, are liable to cluster around areas of existing financial services strengths in the City of London and fringe areas.

Life sciences

The UK life science sector has proven resilient in recent years despite many economic challenges and has outperformed many other sectors. Investment has been concentrated in what is referred to as the Golden Triangle of Cambridge, Oxford and London. Demand is driven in part by an aging population.

A report on the sector by Carter Jonas [14] categorised the UK life science industry as being made up of a number of different sectors.

- Core Biopharma – involved in developing and / or producing their own pharmaceutical products.
- Biopharma Service and Supply Chain – offering goods and services to Core Biopharma businesses.
- Core Med Tech – developing and producing Med Tech products.
- Med Tech Service and Supply Chain – offering services to Core Med Tech businesses.
- Digital Health – making products for both hospitals and consumers, Artificial Intelligence, Machine Learning and Natural Language Processing.
- Genomics – an interdisciplinary field focusing on the study of the human genome and the application of resulting knowledge to human health.

The Evidence Base for *London's Local Industrial Strategy* identified a number of key strengths of the London life sciences sector.

- The life sciences sector has a significant footprint in London.
- The London life sciences sector constitutes a significant proportion of the sector in the UK.
- London is a part of the 'Golden Triangle' of London, Oxford and Cambridge.
- Strong and emerging life sciences clusters are present across London.
- Three of the UK's six Academic Health Science Centres (AHSCs) are based in London.
- Major research centres and funders are based in London.
- London has clear strengths in genomics, advanced therapies, digital health, AI in healthcare and neuroscience.

Whilst life sciences are driving demand in office locations elsewhere, for example at Canary Wharf, there seems little prospect at this stage of laboratory space being developed in

[13] WPI Economics & Institute for Employment Studies (2022) *Op cit*
[14] Carter Jonas (2023) *Life Sciences Research Report* Autumn 2023

Ealing Town Centre. But there may be some potential demand for ancillary office space to support the wider sector.

Imperial College London has announced a £150m investment to develop a 9.6 acre site in Old Oak to drive the development of the WestTech Corridor. Imperial has identified a need for flexible and affordable follow-on space to enable innovators to stay and scale in West London. These spaces will enable prototyping, pilot manufacturing, Good Manufacturing Practice and advanced manufacturing for innovators in areas such as CleanTech, BioTech and MedTech in the WestTech Corridor.

Education

Higher Education has emerged as a significant occupier of office space in recent years and this phenomenon has been witnessed in Ealing town centre with the University of West London occupying premises that were formerly used as offices. It is not only in Ealing that this is happening. For example. there are education occupiers in Canary Wharf office buildings and the University of Portsmouth has developed a new campus building in Walthamstow Town Centre.

The sector is also a major economic driver. The total economic impact of the UK HE sector's activities in the UK in 2021-22 was estimated at £265bn, with London accounting for £61bn of this total. [15]

London is the biggest international student city in the world and higher education is a major employer with around 100,000 people employed in the sector in London.

Summary

This review of target growth sectors identified from the policy review has not revealed any obvious sector around which to focus.

This does not mean that in the longer term a cluster opportunity might not emerge. If for example, one large occupier decided to locate in Ealing, then this could provide an opportunity to focus a strategy around that. But for now, the demand opportunities are likely to be from local SMEs seeking space across a range of activities including creative and digital, segments of the green and circular economy, supporting services of life sciences and professional and business services. There is also evidence of demand from the higher education sector.

Existing, local business and new start-ups and scale-ups are likely to be the predominant source of demand. Being able to rapidly access key markets across London adds to Ealing's attractiveness as an office location and should enhance productivity for local businesses.

[15] London Economics (2024) *The Economic Impact of Higher Education Teaching, Research, and Innovation* Report for Universities UK (August 2024)

5.0 Options development

As the worst effects of the pandemic ease, and as people and business return to town centres, so there is an opportunity to reimagine high streets and town centres, putting them back at the heart of their wider communities and economies. The high street will not return to the *status quo ante* – either in terms of the pandemic or online shopping – and it is therefore clear that they cannot rely on retail activity alone to support growth. Instead, tomorrow's high street will bring together homes and workplaces, public services and community spaces, and public realm and green spaces. Businesses, communities and local government need to come together and create vibrant, attractive and liveable places where people want to live, work and visit.

This general conclusion is as true in Ealing as it is anywhere else. The key question for this report is the role that nurturing commercial activity in Ealing MTC can play in its wider growth ambitions.

Ealing MTC should seek to diversify land use activities through repurposing empty retail spaces for housing, co-working spaces, leisure, healthcare, and education; as well as promoting the night-time economy by nurturing bars, restaurants, cinemas, and cultural venues to attract people beyond shopping hours.

As we have seen elsewhere in this report, work and workstyles are continuing to evolve, which offers an opportunity to reconsider Ealing's role as an office location. This will involve addressing the more general trends in Outer London office provision, the sources of demand in terms of local, London and regional, and the role of the town centre in supporting office activity.

5.1 Ealing as a business location

Various policy reports and research findings have suggested that Ealing's economy is not as strong as its location to the west of London, close to Heathrow Airport and with a relatively prosperous and well-educated population, might suggest. Its recent increased connectivity via the new Elizabeth Line has yet to have any measurable impact. As a result policy documents have recommended the need to focus on high growth sectors, to enhance training and education, to invest in public realm, to attract new business and to support entrepreneurs.

Our own policy review highlights several factors that shape Ealing's potential for office sector growth.

- **Strategic location and connectivity** The arrival of the Elizabeth Line enhances Ealing's connectivity, making it more attractive for office investments. Ealing Broadway, in particular, is positioned as a key economic driver with potential for growth in office-based employment.

- **Economic and sectoral focus** While Ealing's economic strategies emphasise industrial land use and high-growth sectors like creative industries and life sciences, these sectors could indirectly boost demand for office spaces, especially for knowledge-intensive and creative businesses.

- **Affordable workspace initiatives** Policies promoting affordable workspaces aim to support small businesses and startups, which could diversify the office market and attract a broader range of tenants.

- **Sustainability and quality emphasis** on sustainable and high-quality office developments aligns with London's net-zero targets, potentially increasing the appeal of Ealing's office spaces to environmentally conscious businesses.

- **Challenges and opportunities** Ealing faces challenges like housing affordability and economic disparities, which could impact workforce availability. However, targeted strategies to improve job quality and economic resilience may create a more stable environment for office sector growth.

As an example, the *Town Regeneration Framework* set three objectives: to deliver affordable workspace for start-up businesses and grow-on space to retain employers; to support a wide range of businesses to enable clustering and build the ecosystem of knowledge based economy work and financial and professional services in the borough, and to work with the BIDs to deliver business support to small businesses. Our work here suggests these objectives remain important.

Such objectives were also reinforced by the *London Growth Plan* which highlighted the importance of the shift towards hybrid and flexible working patterns; the need for sustainable and high quality offices; the need for affordable workspace to support local economies, and of the need to support innovation and technology, including providing spaces that can accommodate the needs of tech companies and startups, which are expected to drive future growth. The *Growth Plan* highlighted Ealing as one of the significant commercial office clusters in outer London in need of nurturing to support economic growth and create job opportunities closer to home for Londoners.

The Centre for London's *West London's Growth Potential* report highlighted the growth of Ealing's office corridor as a key component of the borough's economic development strategy, and the importance of bringing well-paid jobs to Ealing through the revival of local shopping parades, the growth of the office corridor, and the increased productivity of industrial estates.

Yet despite such priorities, Ealing has experienced a 63,000 sq m shrinkage of its office stock since 2015. While this is not atypical in the context of PDR, it does emphasise the scale of the challenge to growing office activity in the MTC. The more positive news is that employment forecasts suggest that, for the period 2023-41, office employment in Ealing borough is expected to grow by 4,200 jobs from 27,800 to 32,000. When this is converted to demand for office floorspace, it suggests a net additional demand for 47,900 sq m of office floorspace. Given past trends and current context it seems unlikely that the market will deliver this level of floorspace but, as a minimum, the Council should seek to maintain the stock of office floorspace in the MTC at current levels and plan to accommodate additional office floorspace in the town centre when market conditions permit.

Office demand

The *London Growth Plan* highlights Ealing as significant commercial office cluster in outer London, with an office cluster which plays an important role in the local economy and offers opportunities for growth and development. The plan emphasises the importance of nurturing such clusters to support economic growth and create job opportunities closer to home for Londoners.

But despite such ambitions, we have seen in this report how large corporate occupiers are very few in number today across the whole of outer London, including Ealing. This is a symptom of a structural shift in demand – in other words it is unlikely to reverse. It might be

the case that Ealing is lucky and attracts a large occupier, but all the data suggests that a spatial strategy should not be built on this.

Furthermore, our analysis of jobs and sectors suggests that Ealing is underrepresented in some key growth sectors. Critically, as we saw in the previous section, Ealing is under strength in digital and technology, financial services, professional and business services and creative and digital services. This manifests itself in the town centre and the borough as lacking a 'business image'.

To address both of these points, at least in part, it will be important to ensure a steady flow of new, good quality space coming to market that is capable of satisfying mid-sized companies requiring, say, 1,000 sq m to 3,000 sq m. In this way Ealing might be able to nurture a 'home grown' market. Demand for new office space is likely to be satisfied within multi-let buildings rather than sole lets., with floors capable of sub-division into three to four separate units.

As well as mid-sized companies, there is a potential demand stream from small companies. This does not necessarily mean start-up companies with an explicit growth strategy, but simply small companies that are likely to remain so. For example, many professional services firms and creative business employ 10-30 people and in today's economy, such companies demand quality space. Such firms often look to the 'managed space' market to satisfy their accommodation needs, in which they can benefit from shared services and a sense of being part of a business community.

The smallest sub-set of occupiers comprises micro-businesses employing less than, say, five people. Today such business either look towards the serviced/co-working office market or the secondary office market for solutions.

It is important of LB Ealing to nurture an office market that caters for all levels of demand. For example, it is important to have a supply of 'grow on' space, to allow smaller businesses to grow their companies without having to leave the local area to find suitable premises.

Affordability

The profile of demand described above mainly comprises companies looking for good quality space. There will also be demand from companies looking to satisfy their accommodation needs via more affordable solutions. There are generally two ways in which space is more affordable: it is either off pitch or it is of demonstrably lower quality. In terms of nurturing a balanced economy this sub-group of demand is as important as that which requires high quality, new space.

The implication here is that the Borough should look to protect a reservoir of existing space that can respond to the affordability question, otherwise rents will continue to rise in the face of competition from residential uses.

In a similar light, not all office occupiers are looking for traditional space. Many look for 'quirky' space in historic buildings.

It is important to recognise the importance of some 'industrial' space in accommodating lower-margin service based activities with office environments. As the *Industrious Ealing* report noted, there is a need to intensify industrial land use to protect space and to enhance the quality of jobs. This also has relevance to office employment in more affordable space. Indeed, the *OPDC and LB Ealing Affordable Workspace Study* highlighted the importance of providing affordable workspace in town centres, and the need for flexible approaches to

delivering affordable workspace, including utilising existing buildings and ensuring that new developments include a proportion of affordable space.

Non-corporate office demand

The nature of work is changing and there are more organisations seeking office space as a result, including higher education, creative businesses and life sciences. Universities in particular are beginning to play a role in commercial property in city economies. Universities frequently own large estates in cities and improving city economies and amenities is an important part of attracting students to attend universities at the start of their adult life and of their careers. Increasing the returns on university assets and improving the appeal of city centres are motivating universities to work together with city councils in order to provide new city centre office space.

Public realm

A key requirement of modern businesses is to be located in a place where the public realm is of a good quality. Public Realm Improvements should be prioritised with consideration given to pedestrianisation of town centre areas to improve walkability and reduce traffic, and planting to expand green areas with trees, plans, seating and so on. Such measure all help to give business a reason for locating locally.

5.2 Accommodating today's occupiers

The message from much of the foregoing is that while Ealing MTC might attract one or two large corporate occupiers, such demand is only part of the overall demand profile. Figure 5.1 shows how a generic range of drivers are affecting all levels of demand (from corporate to start-up) which also share attractors (such as the need for flexibility and access to skills), but which migrate towards different real estate products. The key point here is that modern town centres, such as Ealing, need to provide a range of workplace products, not just the typical corporate office.

Figure 5.1 A growing array of accommodation needs

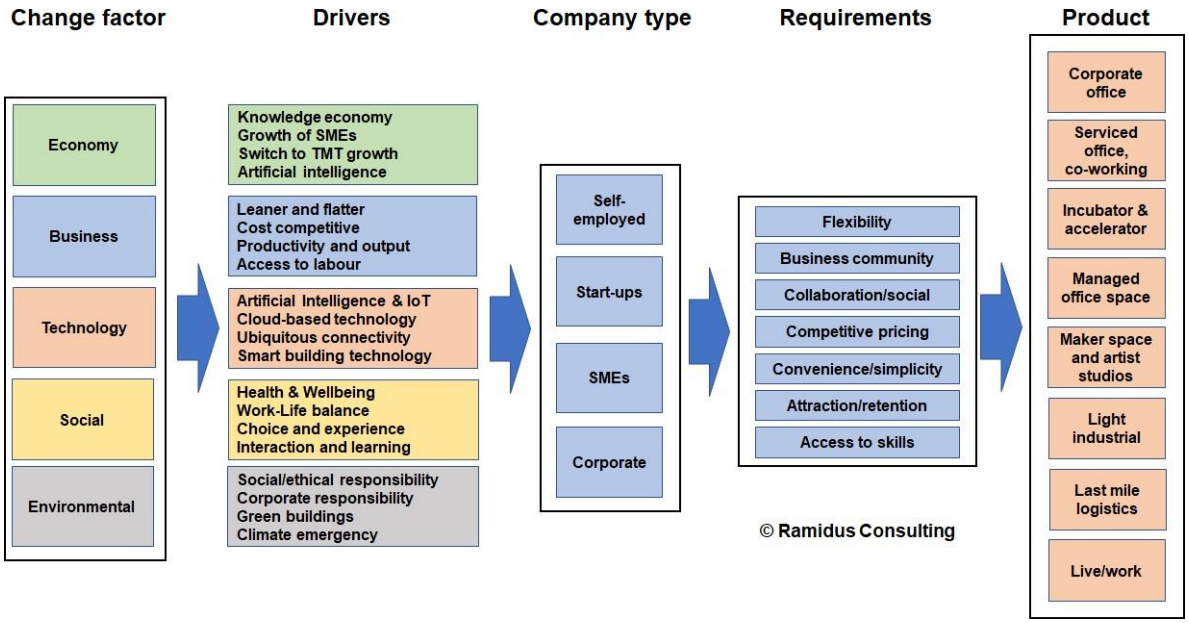


Figure 5.2 shows how each of the 'property products' is differentiated in terms of locational characteristics and design features.

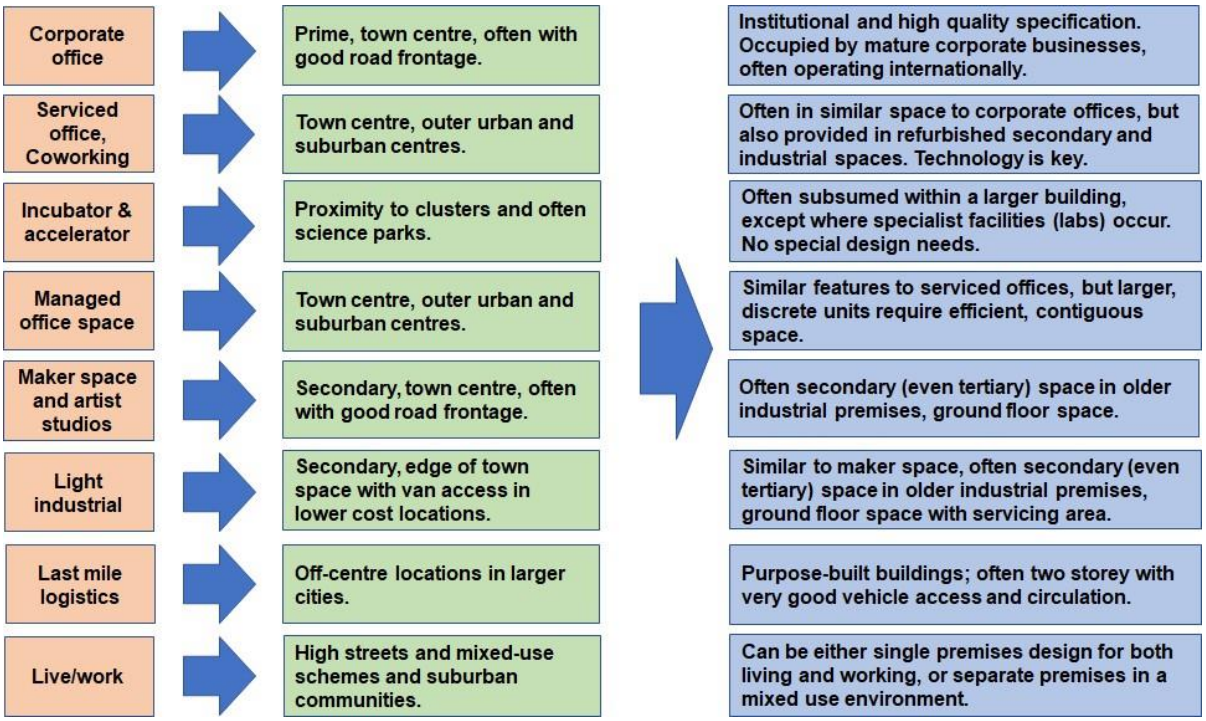
Serviced offices and co-working spaces smaller companies are increasingly demanding higher quality space on flexible terms. Consequently, the demand for flexible space has been rising in outer London centres such as Ealing.

Co-working spaces typically cater for to start-up enterprises, and offer workstations on flexible six-monthly licences. Business support, networking events and access to investors or other start-up support are include in the workspace package. The provision of such space allows small companies to live and work in the same community, avoiding the commute to the central area. Managed office space is more in demand from larger companies of 10-50 people.

Artist studios provide workspaces for creative and artistic enterprises. Spaces are usually offered as 'shell and core', but with utilities and services to support creative activities. Facilities can be made available for 'heavier' processes.

Managed maker spaces offer workshops, shared workbench space, equipment and machinery, typically to members involved in design, prototyping or production activities. Equipment offered ranges from digital design facilities to wood/metal workshop space. Workspaces are managed by on-site staff and typically offer shared reception, kitchen and meeting facilities classes and training on-site for regular users.

Figure 5.2 Locational and premises features



Light industrial workspaces are perhaps the most common format and can include a hugely broad range of activities, including light industrial, workshop, studio and co-working. Production processes can involve 'dirty' and 'noisy' activities. Railway arches are often used.

Artists and makers In addition to demand for 'standard' office accommodation, there is growing demand from businesses involved in creative and productive activities. Such firms are almost universally small in scale, but they can be low density (more square feet per person than in an office). Artist studio and workshops are two good examples.

The demand profile described suggests that units in demand will range from a few hundred square metres up to 1,000 sq m. This implies the need for a range of premises types, most of which will be multi-let. Businesses require good quality premises, but not what the market generally refers to as 'prime' space. Pricing is a key factor as most locally-derived demand will not be seeking to pay prime rents. Some businesses, as shown, require secondary and even tertiary space (arguably such space is sometimes more important than prime space) and it is important for spatial policy to protect and nurture such space as well as encourage new-build.

5.3 Site-specific options

There are four main development allocations in the MTC that have office development as an acceptable component.

- 05EA – Perceval House
- 01EA – Broadway Connection
- 08EA – Craven House. Exchange Plaza
- 07EA – CP House

Perceval House is the main office location for Ealing Borough Council and, although it has consent for a development that could provide a net addition to office stock of 17,249 gross sq m, our understanding is that this is unlikely to proceed.

Broadway Connection is the primary site in the MTC, identified as significant in the Mayor of London's *London Growth Plan*, and is consented for a 35,416 gross sq m of offices within an office-led mixed-use scheme.

CP House has consent for 29,747 gross sq m with a net addition of around 23,000 gross sq m. However, this consent was due to lapse in March 2025 and, at the time of writing, it is unclear how development might proceed. CP House is somewhat in flux, but the development should as a minimum involve no net loss of office space and, new space should be flexible and configured for a variety of different occupiers. Ancillary uses that support office activities could also be encouraged.

Exchange Plaza is consented for 7,683 gross sq m within a student housing-led mixed use scheme, but it is noteworthy that this consent replaces an earlier one that was for a 24,188 gross sq m scheme with a net addition 16,618 sq m. The new consent more or less replicates the office space on the now-demolished office building on the site.

Other sites

54 The Broadway is a newly refurbished office building at the front of the Ealing Broadway Shopping Centre, currently on the market, but not seeming to attract interest. **International House** in on the same frontage along High Street and is stripped out, but not fitted out. This is a challenge and could set realistic expectations of what rents are attainable for good quality space and needs to be monitored.

The other area of note is, of course, **The Green and, in particular, Ealing Studios**, an icon of British film production. At the time of writing the Studio was completing its own development of new offices and production space which will deliver 7,632 gross sq m of new space, a net addition of 4,605 gross sq m as well as a new sound stage, with co-working space and meeting facilities. This is a significant upgrade to the studio area, and at the very least should have clear wayfinding from Ealing Broadway station. An opportunity may exist to build on the creative industries heritage of the area with a creative avenue from The Broadway to The Green.

West Ealing is an area, rather than a site, that extends roughly from St Leonard's Road to the boundary of the MTC. It is characterised by a sharp reduction in building scale and overall density, with small food outlets and stores that might often be seen in retail parks. There is visual evidence of significant loss of space over shops to Prior Approvals. The small scale of most buildings makes office space challenging to defend, and the best approach might be a strong placemaking approach to give the area a distinct identity.

Site overview

The site with the greatest potential to provide both a focal point for the town centre and create a gateway from Ealing Broadway station as part of placemaking and improved wayfinding is Broadway Connection. However, it is notable that no pre-lets have been secured, and a project of this scale is highly unlikely to proceed without at least a partial forward letting. Should there be no pre-lets then it seems likely that the developer will seek to scale back and reconfigure the office element of the scheme.

Should this happen, a revised scheme would still need to provide employment space, and priority should be given to other uses that support the attractiveness of office space, be it recreational or post-work economy, informal and managed meeting space – including possibly conference space – as well managed workspace targetted at the highly educated local workforce. The public realm should be clear and inviting with strong wayfinding and clear points of focus.

Given the student housing-led nature of the scheme, it will not be surprising if at least part of the office content will be used for student related activity. This has been seen elsewhere in London and the Council could usefully engage with the developers to establish whether a specialist flexible a workspace operator – either commercial or from the charity-led artist workspace sector could help bring the scheme forward. The latter much prefer to be involved at the earliest stage of development and have moved far beyond their "meanwhile use" routes to preferring modern space of at least 2,000 sq m net.

5.4 Towards a spatial strategy

Although Ealing Town Centre is generally busy and in good order, it is fair to say that it is somewhat lacking in identity and lacks an established core of commercial activity on any scale. The Ealing Connection seeks to address this, but will require a significant pre-let to go ahead. Should it not secure such a deal, then it is likely that the scheme will have to be revisited and revised. This would be an opportunity to take a wider view of the mix of employment space in the town centre.

Some general principles of such a wider view might include the following.

- Resident population can be deleterious to the nighttime economy. Other than student accommodation, residential should not be the default. There are plenty of places for the Borough to meet its housing targets.

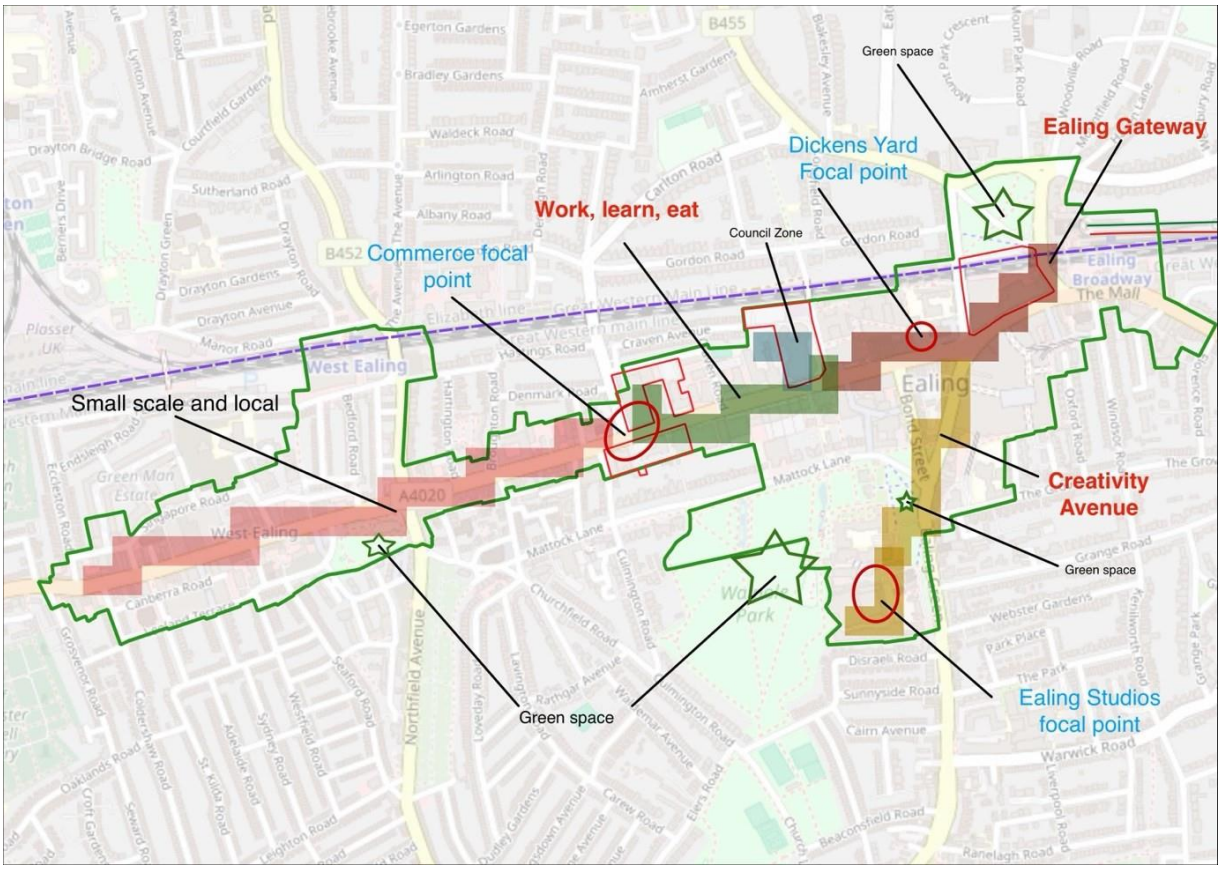
- Uses that support a business economy should be welcomed, from conference space to gyms to coworking spaces.
- Some areas of the town centre would benefit for more “street scene”, whether via busking pitches, pop-up events and markets or active art installations.
- The town centre may require activity management and direction.

There is an opportunity to create a Town Centre space with flows to points of focus, as illustrated in Figure 5.3.

Ealing Gateway (Connection) is the ‘welcome’ to Ealing that currently lacks placemaking and wayfinding. There is scope for intensification and an opportunity to use it to open up the MTC. There should be a mix of office types, including E(g)(iii) (formerly B1c, which artist studios have shown can be excellent neighbours).

There could be good signposting through to Dicken’s Yard, which at the moment is a somewhat “windswept plaza” in character but has the potential to be an active focus of fun, diverting ‘breakout’ activity.

Figure 5.3 An indicative map of potential Ealing Town Centre zones



The route from **The Broadway to The Green and Ealing Studios** is a little rundown in appearance. And there could be an opportunity to create a Creativity Avenue towards Ealing Studios – enjoy The Green or larger Walpole Park for daytime breakouts for workers.

Moving further along The Broadway, past the Council office is the area **to learn, work, eat and play.** This is where the main office buildings are found, with three universities as well as

commercial space. The area does not have a strong focal point, and there may an opportunity to create this. A radical option might be to provide a new campus for the universities and free up there existing buildings for development or refurbishment to upgrade the overall stock in the MTC.

All of the areas described above have potential access to green space and this is something that does not only benefit householders (for whom its value is well recorded) but also the local workforce. **Wayfinding to green space** to enhance their visibility would be welcome by workers looking for a peaceful lunch or just a break from the office environment.

Heading on into **West Ealing** the street scene is on a smaller scale and evidently of a more local character. However, in spatial planning terms, it should be treated as complementary to more metropolitan area around the shopping centre. Placemaking should be based on an identity that is rooted in the local and small scale service businesses, where the emphasis is often on suitable and affordable space. Prior Approvals are very challenging to defend here, and direct provision may be worth considering.

This may be a way to bring forward the allocated sites (9EA – 14EA), which are proposed for mainly residential-led or retail development. There is an opportunity to use Section 106 negotiations to provide small workspace, which the Council or an approved operator could then manage for the benefit of local SMEs. As with Ealing Town Centre itself, the opportunity to improve wayfinding and identity could also be incorporated. Section 106 provision can also be used to offset the attritional loss of small offices in West Ealing. Other sites near West Ealing station (15EA and 16EA) appear to have already been developed largely for residential, with retail reprovision.

6.0 Strategy development

Ealing's *Jobs Skills and Strategy 2024-2029* prioritises high growth sectors, a skilled local workforce, creating a 'great place to do business', and nurturing a dynamic and entrepreneurial economy. The office economy has a key role in helping the Borough to meet these objectives.

The data show that Ealing MTC's socio-economic profile is already very strong with a high representation of knowledge economy jobs and with a comparatively high proportion of professional occupations, managers and senior officials as well as associated professional and technical roles. The data further show a remarkable 63.1% of the population with Level 4 qualifications or above.

However, despite this positive socio-economic profile, office employment as a proportion of all employment in Ealing fell between 2015 and 2023 (in contrast to Bromley, Croydon, Harrow, Stratford and Wood Green). Further, employment in core high value office sectors in Ealing is smaller than in Bromley, Croydon, Harrow, Kingston, Stratford, Sutton and Uxbridge; and office stock has been shrinking.

Superficially, Ealing MTC is well-placed in terms of the skills and aptitude of is residents, but is failing to attract office employers to keep jobs in the town centre.

6.1 Overall Findings

Our research has identified key challenges and opportunities for revitalising its office and economic sectors, emphasising the importance of a strategic approach. Before moving on to the strategy development we summarise the key findings.

Office market

- Ealing's office space has suffered significant losses due to Permitted Development Rights and changes in work patterns post-COVID. However, there is projected demand for 47,900 sq m of additional office space by 2041.
- Future demand is likely to come from local SMEs, start-ups and knowledge-intensive industries, rather than large corporate occupiers.
- There is a need for diverse office offerings, including high-quality new spaces, affordable workspaces and unconventional options like managed workspaces and creative studios.

Growth potential

- Ealing's strategic location has been reinforced with the Elizabeth Line, which makes it well-positioned to attract investment and enhance its role as a regional office cluster.
- Sectors like professional services, creative industries and life sciences offer particular opportunities for growth, though they are currently underrepresented in Ealing.

Balancing growth and policy objectives

- Emphasis should be placed on developing a mixed-use town centre with office, residential and community uses to promote a vibrant 24/7 environment.

- Growth will require a blend of protecting existing (more affordable) office spaces to cater to diverse demands and encouraging sustainable, high-quality new developments.

Placemaking and public realm

- Ealing town centre has a good range of town centre uses, including a strong night time economy; vacancy rates do not appear to be high.

- However, further improving the public realm is key to creating a business-friendly environment, as well as encouraging increased dwell time and spending in the town centre. This might include pedestrianisation, planting with seating, enhancing green spaces, and better wayfinding.

- Areas of particular focus include Ealing Gateway, Dickens Yard and the route to Ealing Studios, with an opportunity to create a distinct "Creative Avenue."

Site specific insights

- Key sites like Broadway Connection and CP House have potential for office-led developments. However, these will require pre-lets or revised strategies to proceed.

- The proposed developments need to align with Ealing's broader economic strategy, supporting not just jobs but also amenities that attract businesses.

Challenges and priorities

- Limited success in leveraging the potential of high-growth sectors like technology and creative industries, compared to central London.

- Ensuring the right mix of uses, vibrant streetscapes, and business-supportive initiatives is critical for the town centre's success.

EMTC has a future as a mixed-use, knowledge-based economy hub, but this requires concerted planning, investment and nurturing of its existing strengths while overcoming challenges. The offer will need to be diverse to accommodate a range of occupier needs.

- **Protecting as well as creating** Much older stock is appropriate for smaller and less demanding occupiers

- **Large and small** There will be demand from a range of occupier sizes, and the local market must be able to create an ecosystem of opportunities. It is particularly important to cater for the needs of small businesses with small units of space (say, less than 5,000 sq ft).

- **High and low specification** Some occupiers will demand very high quality space, but for others, their demands on premises are light touch. Lower specification, affordable space is critical for many businesses.

- **Leased as well as flex** Today's market requires more than traditional developer leases with a range of options available for flexible space, including serviced, managed and co-working space. It is important to provide a mix of pure office space, studios, workshops and shared spaces.

- **A wide range of activities** Offices today can accommodate a wide range of activities, not just ‘pure office’.

The need to protect existing space and maintain affordable space will be placed under pressure by the requirements of various environmental requirements. Most notable among these are the demands of Minimum Energy Efficient Standards. From April 2023 it became unlawful to lease or sell office premises with an EPC rating of E or below. This minimum requirement will be lifted to C by 2027 and to B by 2030. Given that buildings falling outside the minimum requirements can be neither leased nor sold, the overall impact is a rise in obsolescence in the built stock.

To strengthen Ealing's office market potential, we recommend focusing on three key areas: strategic planning, placemaking, and fostering business growth.

6.2 Strategy framework

The overall goal of the strategy is:

> *to maintain Ealing’s role as a regionally significant office cluster and source of high-quality jobs.*

We believe this is a realistic goal but will require a different type of office market offer than the town centre has had historically. We have developed a strategy that is not dependent on things beyond the Council’s control. Should the Broadway Connection scheme be developed as currently consented this will substantially alter the perception of Ealing Broadway as an office centre. But the approach set out below does rely on delivery of that scheme.

Some overarching principles

In developing a strategy, there are overarching principles, some relating to all town centres and some specifically to Ealing Town Centre that can guide thinking. These are summarised below.

- Town centres are multi-purpose venues and maintaining vitality depends on a mix of uses.
- Town centres – and especially metropolitan town centres – are active both day and night, and this needs to be considered when bringing in a resident population.
- Offices typically provide high value jobs in terms of GVA.
- Small offices, and especially offices above shops, are very difficult to defend from Prior Approvals for residential conversion.
- Since the pandemic, office-based businesses have been in a state of some flux, with uncertainty about the persistence of hybrid work patterns.
- With this in mind, some existing proposals reflect pre-Pandemic thinking, and are likely to be reviewed by developers.
- Ealing has a well-educated local population and is over-represented in information and communications jobs.
- All together these ideas suggest that strategic planning should resist being excessively prescriptive, while seeking to maintain diversity of uses in the town centre.

To help achieve the strategy goal identified above, we have set out six broad strategy themes under each of which we have set out more detailed strategy objectives. These are summarised below.

Enhance the office offering

- **Diverse office spaces** Encourage a mix of high-quality, flexible spaces for mid-sized firms, managed/co-working spaces for SMEs, and creative studios for niche industries like digital and creative businesses.
- **Affordable workspace** Protect older office stock to cater to cost-sensitive businesses, especially startups and local enterprises.
- **Flexible space** As well as affordable space, the Borough could encourage flexible space operators to establish a range of facilities in the MTC.
- **Repurpose space** Convert underused spaces (e.g., above shops) into small office units, artist studios, or hybrid workspaces to increase the supply of employment space.

Strengthen sectoral opportunities

- **Target high-growth sectors** Attract businesses in creative industries, professional services, green economy, and life sciences by marketing Ealing's affordability and Elizabeth Line connectivity.
- **Anchor institutions** Leverage the presence of institutions like Ealing Studios and higher education facilities to grow clusters in creative industries and educational services.
- **Support local SMEs** Provide financial incentives, business incubation programmes, and affordable leases to retain local businesses and startups within Ealing.

Promote mixed-use and community integration

- **Mixed-use developments** Prioritise development projects with office-led schemes that integrate retail, leisure, and community spaces. This fosters vibrant, multi-functional environments.
- **Flexible policies** Use policies like "affordable workspace quotas" to ensure new developments contribute to the business ecosystem without pricing out smaller companies.
- **Flexible space** Encourage workspace operators to establish flexible space operations in the MTC.

Improve public realm and connectivity

- **Wayfinding and placemaking** Develop visually appealing, well-connected corridors (e.g., from Broadway to The Green) with clear signage, public art, and pedestrian-friendly streets.
- **Green and open spaces** Create inviting breakout areas with access to parks or plazas to boost the appeal of Ealing for businesses and employees alike.

- **Transport links** Strengthen bus, cycling, and pedestrian routes to ensure seamless movement across Ealing and beyond.

Activate key development sites

- **Catalyse flagship projects**: Focus on progressing pivotal schemes like the Broadway Connection to create a strong hub for office activity.

- **Encourage pre-let agreements** Collaborate with developers to secure tenants ahead of construction, ensuring project feasibility and generating confidence in the market.

- **Foster collaboration** Work with affordable workspace providers or creative industry organisations to offer unique solutions for attracting tenants to key sites.

Raise Ealing's business profile

- **Marketing and branding** Reposition Ealing as a dynamic business hub in West London, highlighting its Elizabeth Line links, diverse spaces, and opportunities for growth.

- **Events and networking** Host business fairs, creative showcases, and entrepreneurial workshops to foster a sense of community and make Ealing attractive to innovative firms.

- **Digital promotion** Create an online portal showcasing available office spaces, development opportunities, and Ealing's unique business advantages.

6.3 Priority Actions

The range of actions set out above will help to revitalise Ealing's office market, enhance its appeal to businesses across sectors, and foster a sustainable, knowledge-driven economy. Some of these actions may already be in place, or planned. Forming part of a wider strategy for the future of the town centre office market will serve to underline their strategic importance.

Not all the actions set out above can be taken forward at once so we have identified one priority action under each of the themes to focus on in the initial stages of the strategy.

Affordable workspace

With new office development currently not viable, maintaining existing stock is vital if the town centre's role is not to be further undermined. As shown at Figure 3.8 earlier much of Ealing's loss of office floorspace has also occurred outside the town centre including on former industrial sites. Many of the premises are likely to have been lower grade office stock meeting a need for those businesses seeking lower costs space. There is thus an opportunity to provide a supply of affordable market space in a sustainable town centre location. It is not viable, anywhere, to develop new space at the same rent as secondary or tertiary space and this type of affordable space can rarely be re-provided in a new mixed use scheme.

However, it is not so simple as to maintain all such space. Some may fail to meet the Minimum Energy Efficient Standards referred to above. Such premises will require costly refurbishment which may in itself not be viable in its own right.

And the offer of lower cost lower quality accommodation must not be seen to undermine the higher quality stock. Too much cheap space may drive down rents and further erode the viability of the existing office offer. It would be advantageous try and zone the older affordable premises in one area of the town centre to avoid detracting from the higher quality stock either in rental or market terms.

Newer affordable workspace, effectively subsidised workspace of the type delivered through policy agreements can be introduced in different zones, including through mixed-use schemes. This should be delivered through specialist workspace operators brought in at the start as part of any S106 or similar agreement.

Support local SMEs

We believe the majority of town centre office demand, at least in the early phases is likely to come from local SMEs. Hence strengthening this base through forms of business support will help drive demand for offices.

Ealing Council currently offers a number of business support activities. A range of resources, including training, workshops and business planning support are available through Grow London Local. The action would be to target existing support activities at companies that would generate demand for Ealing Town Centre office space.

The University of West London provide a range of support facilities for Ealing businesses and could be one support partner in this. Support services provided by UWL range from graduate internship programmes, knowledge transfer partnerships and specialist facilities and venues.

Promoting a vibrant and supportive business community through regular networking events, business fairs, and collaborative platforms where SMEs can share experiences, resources, and opportunities will provide mutually reinforcing support. The West London Chamber of Commerce is one potential partner for such activity. A strong business community fosters collaboration, innovation, and mutual support, which can further enhance the attractiveness of Ealing Town Centre as a thriving business hub.

Mixed-use developments

Mixed-use developments offer a range of benefits that can significantly contribute to the viability and vibrancy of office spaces within town centres. By integrating residential, commercial, and office spaces, these developments create a dynamic environment that attracts a diverse range of occupants. The presence of residential units ensures a steady flow of people and activity, which can support local businesses and services, making the area more attractive to potential office tenants.

Additionally, mixed-use developments can enhance the overall quality of life for residents and workers alike. The proximity of amenities such as shops, restaurants, and recreational facilities means that employees have easy access to services and leisure activities, which can improve job satisfaction and productivity. This, in turn, can make office spaces within mixed-use developments more desirable and competitive.

Furthermore, these developments can contribute to the sustainability goals of the town centre by promoting the efficient use of land and resources. The combination of different uses within a single development can reduce the need for extensive commuting, lower carbon emissions, and encourage the use of public transportation. This aligns with broader

environmental objectives and can enhance the reputation of the town centre as a forward-thinking and sustainable location for businesses.

The flexibility demonstrated by the Council in granting planning permissions for mixed-use developments, as seen with Exchange Plaza, illustrates the potential for such projects to facilitate the creation of new office floorspace. By leveraging the demand for Purpose Built Student Accommodation, the Council has successfully enabled the development of office spaces that might otherwise have been unviable. This approach not only addresses the needs of a particular community but also ensures the long-term sustainability and attractiveness of the town centre as a business hub.

Wayfinding and placemaking

Approaching the town centre from Ealing Broadway station does not present a very clear or inspiring welcome.

Walking routes to the main office destinations can be improved, and wayfinding can be enhanced to provide a more welcoming and efficient journey for visitors and employees. Improving the walking routes to the main office destinations is critical for fostering a positive first impression of Ealing Town Centre.

Several strategies can be considered to enhance the walking routes and wayfinding. First, clear and consistent signage should be installed to direct pedestrians from Ealing Broadway station to key office locations and landmarks. This signage should be visually appealing, easy to read, and strategically placed at regular intervals along the walking routes.

Secondly, the pathways themselves should be well-maintained and accessible. This includes ensuring smooth pavements, adequate lighting, and the removal of any obstacles that might impede the flow of pedestrian traffic. Landscaping elements such as trees, flower beds, and seating areas can further enhance the attractiveness of the routes, making the walk more pleasant and inviting.

In addition to signage and pathway improvements, digital wayfinding options can be explored. Interactive maps and apps that provide real-time navigation and information about local amenities can be made available to visitors and employees, helping them to navigate the town centre with ease.

Furthermore, creating visual landmarks and points of interest along the walking routes can make the journey more engaging. Public art installations, historical markers, and informative displays can add character to the town centre and reinforce its identity as a vibrant and culturally rich location.

Significantly improving the walking experience for visitors and employees, will contribute to the overall appeal and functionality of the town centre as an office location.

Catalyse flagship projects

We have noted how the Broadway Connection proposal could have a game-changing impact on the perception of Ealing as an office location. Whilst there is little prospect of it being implemented in the short-term, the outstanding consent still has four years to run and the property market may be in a different point in the cycle at that stage.

Whilst the Council can do little to influence wider conditions, it can prepare to make the site more investable through the types of placemaking initiatives outlined above. It can look to integrate the site better with its surrounding area which is the gateway to the town.

On this and other sites, the Council should continue to work closely with developers to bring forward development proposals, looking to be flexible where the scheme contributes to the wider strategic goal. For key developments it should consider the potential for incentives if needed to overcome viability gaps.

Marketing and branding

This is already well underway in the Council with Ealing Council and Opportunity London due to launch Ealing's new investment prospectus at the UK's Real Estate Investment and Infrastructure Forum in May. To maximise the impact of these efforts, the council should establish a recognisable and cohesive brand for Ealing that highlights its unique attributes and advantages as an office location. This brand identity should be consistently communicated across all marketing and promotional materials to create a strong and memorable impression.

Ealing does not have a very clear identity of what it is as an office location. A key element in developing this brand identity will be to emphasise the strategic location of Ealing, with its excellent transport links and proximity to central London. But we have seen that this is not sufficient as Ealing can be easily by-passed for other locations. Given our expectation that most demand will be local, at least in the short term, then this should be the target audience for the marketing.

The appeal will be to business owners that live in or know Ealing and understand its rich history, diverse community, and dynamic arts and entertainment options. Ealing should position itself as a desirable and stimulating place to work, attracting businesses and professionals who value both productivity and quality of life. We have noted how the local workforce is very well qualified.

Collaborative events and initiatives with local businesses, networking events, business forums, and cultural festivals will help showcase Ealing as a thriving hub of activity and innovation.

In the medium term the branding image can be developed to appeal to a wider external market, but in the short term we would recommend the branding is targeted at those with an existing knowledge of an interest in Ealing.

The West London Chamber of Commerce would be a potential partner for such a marketing strategy which called also be linked to the SME business support project outlined above.

6.4 Development management

In order to further strengthen policies aimed at preventing the loss of office floorspace LB Ealing could adopt a combination of policy enhancements, enforcement mechanisms, and proactive planning tools. Examples of approaches that could be used include:

- Use of an Article 4 Direction – this would need to be very limited in area terms and targeted.

- Identify and protect Office Priority Areas similar to the approach adopted in Islington and Hackney, with application of stricter change-of-use criteria in these zones. The Hackney policy is provided as an example in the Appendix.

- Use Section 106 and CIL to fund or subsidise workspace provision.

- Strengthen viability and marketing requirements. There are examples of detailed approaches adopted by other local authorities that set minimum marketing standards (e.g., professional agents, online and offline platforms, realistic pricing) and mandate detailed marketing logs, including inquiries, viewings, and feedback.

- Ensure the premises are marketed for a range of uses and sizes for which there is known to be demand and require independent viability assessments.

- Incentivise office refurbishment and intensification for upgrading outdated office stock.

Appendix: Protecting and Promoting employment floorspace

Hackney

LP27 Protecting and Promoting Office Floorspace in the Borough

New office floorspace

A. New development involving the provision of new office (B1a) floorspace must comprise well designed, high quality buildings and floorspace that is flexible / adaptable to accommodate a range of unit sizes and types with good natural light, suitable for sub-division and configuration for new uses and activities, including for occupation by small or independent commercial enterprises.

B. All applications incorporating new office floorspace should include a marketing strategy which demonstrates the design and layout of the proposed floorspace is of a high quality, is flexible and meets the needs of likely end users.

Priority Office Areas (POAs)

C. New development within designated POAs will be permitted where it is employment-led and where B1 use class is the primary use in line with the below thresholds, subject to viability.

i. Within the Future Shoreditch AAP (Shoreditch POA and part of the Wenlock POA) - at least 60% of the floorspace across the area as a whole is B1 employment floorspace.

ii. In the Dalston POA and remainder of the Wenlock POA – at least 60% of the overall new floorspace on a site is B1 use class.

iii. In remaining POAs - at least 50% of the overall new floorspace on a site is B1 use class.

D. Retail, hotel, community, leisure, residential development in POAs will be permitted where all of the following criteria are met.

i. The development forms part of an employment-led, mixed-use scheme including conversion schemes meeting the thresholds identified in Ci. and ii. above.

ii. Proposals must be appropriate to the characteristics and functioning of the site and will not compromise the on-going operations of businesses in the POA.

iii. Proposals must satisfy the requirements of Policies including; other employment policies, Policy LP8 (Social and Community Infrastructure), Policy LP25 (Visitor Accommodation) Policy LP32.

iv. Residential uses are not provided at ground floor level.

E. The change of use of ground floor commercial uses to residential use will not be permitted.

F. Proposals solely for residential use will not be permitted in POAs.

G. Existing industrial uses and low cost employment floorspace in POAs must be re-provided in line with Policy LP29 Affordable workspace and Low Cost Employment Floorspace.

Retention of office floorspace

H. Development involving the net loss of B1a office floorspace in the POAs will not be permitted.

I. Development involving the net loss of B1 office floorspace outside of POAs will only be permitted where all of the following criteria are met.

i. Robust marketing evidence is submitted which demonstrates that there has been no demand for the existing or vacant land and floorspace for its current or former use, and the possibility of retaining, reusing or redeveloping it for similar or alternative smaller or more flexible units for employment generating use, or other alternative employment generating use has been fully explored.

ii. Any new employment use provides a range of higher quality, more flexible floorspace and preferably a higher density employment than the previous.

iii. It is demonstrated that the new commercial floorspace being provided has a strong likelihood of being occupied through the submission of a detailed marketing strategy.