CAG CONSULTANTS

London Employment Sites Database 2021

Final Report

INFORMING POSITIVE CHANGE

Greater London Authority

London Employment Sites Database 2021

Final Report

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1 Introduction

1.1 The London Employment Sites Database

CAG Consultants were commissioned by the Greater London Authority (GLA) to produce the London Employment Sites Database (LESD) 2021. The LESD is a database that records recently completed employment developments and those in the pipeline in London to produce an estimate of London's additional employment capacity.

The LESD brings together information from numerous sources into one comprehensive database in a standardised and user-friendly format. Some of the major information sources include the London Development Database, development plan documents, the industry press such as Property Week and consultations with London boroughs.

The database is site specific and for each site it provides information on:

- the precise location of the development site
- the scale of completed/proposed/planned development by employment use (floorspace, site size, estimated employment capacity)
- the timescale of the development.

The LESD forms part of the evidence base that underpins mayoral policy documents, such as the London Plan and the Mayor's Transport Strategy, and provides an inputs into the GLA's employment projections for London. It is also a tool for analysing the balance between supply and demand of floorspace for employment at the borough level and informs estimates of future employment capacity in London's Opportunity Areas.

The chapters in this report cover:

- the method and data sources used to compile the LESD 2021
- the employment density and plot ratio assumptions used to derive employment capacity estimates
- sensitivity tests around the central assumptions
- summary results of the LESD 2021.

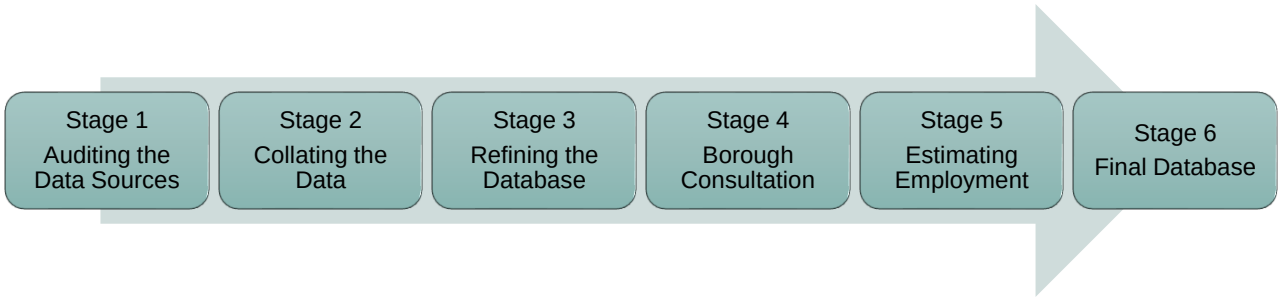
2 Method

2.1 Approach

This chapter sets out the method used to produce the LESD 2021. The method, which has been developed and evolved over successive iterations[1], ensures there is a clear and transparent audit trail and that the data is verified and cross-checked against information from numerous sources.

The method and stages of work are summarised in Figure 2.1 below. Below the figure we describe each stage of the method in more detail.

Figure 2.1 - Producing the LESD



Stage one: auditing the data sources

The LESD 2021 draws on four initial data sources:

- the LESD 2017[2] (which pulled together data from a number of sources)
- the Planning London Data Hub (PLDH)[3] – the initial data dates from March 2001 with subsequent updates gathered through the borough consultation process
- Local plan site allocations
- Brownfield Land Registers

These four information sources are combined to produce the initial draft database. In addition, secondary data sources, such as property press publications like Property Week and CoStar are reviewed for recent data on major schemes.

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[1] London Employment Sites Database 2012, https://lep.london/sites/default/files/documents/publication/London%20Employment%20Sites%20Database%202012%20Final%20Report%20%28March%202013%29.pdf
London Employment Sites Database 2009, https://www.london.gov.uk/sites/default/files/gla_migrate_files_destination/tech-paper1-final.pdf
London Employment Sites Database 2006. https://www.london.gov.uk/sites/default/files/gla_migrate_files_destination/archives/mayor-economic_unit-docs-ep-technical-paper-2.pdf

[2] London Employment Sites Database 2017 https://www.london.gov.uk/sites/default/files/lesd_final_report_may-2016.pdf

[3] https://www.london.gov.uk/what-we-do/planning/digital-planning/planning-london-datahub

At this stage we expect there to be considerable overlaps between the sites, for example, where there are records of multiple planning applications on a single site or where a site is both allocated and included in the Brownfield Land Register.

Stage two: collating the data

In stage two, data is extracted from the different sources and compiled into a single database with a standardised format. The database combines comprehensive information from each data source regarding the identity of a site, location (each site is input with associated GIS boundary data), existing use, proposed use and potential employment capacity.

To ensure that we have a clear and transparent process, we use a strict system of monitoring what goes in, what stays in and what is left out. Each site is given a unique ID number when it is identified from the various sources. This ID number will remain the same regardless of how many sites are removed due to reasons such as overlaps, duplicates, completed sites etc. Accompanying the ID number is a source name and source reference.

The GIS site boundary data is used to populate the geographic fields (set out below) for all sites, enabling policy analysis at a variety of spatial levels.

Table 2.1 sets out the principal data fields used in the LESD. The database contains both pre and post-2020 use class references. Most of the data was gathered from pre-2020 use class sources and hence this has been the primary definition and has been used throughout this report. Post-2020 use classes have been mapped from pre-2020 definitions.

By the end of stage two we have the raw LESD.

Table 2.1 LESD data fields

Database Identifiers	
LESD Unique ID	Data Source Unique ID
Data Source	
Site Data	
Borough	Post Code
Planning Authority	Easting
Site Name	Northing
Site Address	Polygon
Planning Status	
Site/Project Status	Completion date
Planning Status	Final time site will come forward
Other Planning Info (old)	Description
Planning app/permission number	
Floorspace	
Floorspace (sq m) by pre-2020 Use Class	Floorspace (sq m) by post-2020 Use Class
Site Area	Housing Units (if known)
Geographies	
Local Authority	MoTiON Transport Zone
Sub Region	Public Transport Accessibility Level
Ward	Strategic Area for Regeneration
Opportunity Area	Strategic Industrial Location
Town Centre	Locally Significant Industrial Site
High Street	Conservation Area
Article 4	Green Belt
LTS Transport Zone	Metropolitan Open Land
Central Activities Zone (CAZ)/North Isle of Dogs (NIoD)	
Jobs	
Jobs by pre-2020 Use Class	Jobs by post-2020 Use Class
Total Jobs	

Stage three: refining the data

The raw database of potential sites is then refined through GIS to identify and remove non-employment and duplicate sites, deal with overlapping sites and expired sites.

Refining the database follows a sequential process:

1. remove non-employment sites[4]
2. delete small sites
3. calculate the net change in floorspace
4. transfer the database to GIS
5. identify and remove duplicate sites
6. identify overlapping sites.

The end of stage three results in the first draft of the LESD. This draft includes provisional employment estimates (jobs), and is sent to the boroughs for consultation.

Stage four: borough consultation

Each borough is consulted on a database extract from the draft LESD that contains the sites in their borough. The consultation process includes the London Legacy Development Corporation and the Old Oak and Park Royal Development Corporation as the responsible local planning authorities for their respective areas.

This consultation provides an opportunity to review the quality and accuracy of site data and helps to gain an understanding of the local realities regarding probabilities of sites coming forward, the expected change of use, any new employment sites coming forward and the strategic planning context.

Following initial comments from boroughs and identification of errors, omissions and amendments, a second draft database extract was sent to each borough for confirmation (or further amendment). On completion of the borough validation, the borough database extracts are merged into a single London-wide database.

Stage five: estimating employment

The principal output of the LESD is an estimate of the employment capacity of each site. Where available from a specific development proposal we use the estimate provided (subject to tests for plausibility against benchmark data). In most cases, however, the estimate is derived from applying employment density rations to floorspace data. The employment density ratios used for the LESD 2021 are set out and discussed in the next chapter.

Where only a site area is available, and floorspace data is not available, we apply plot ratio assumptions to derive an estimate of floorspace (to which the employment density assumptions are then applied to estimate the employment capacity of the site). This applies primarily to the longer-term development proposals such as local plan site allocations.

In the absence of any further local intelligence we also apply a standard set of assumptions with regard to the mix of uses on each site. Detail on the plot ratios used and assumptions on employment mix are set out and discussed in the next chapter.

[4] Employment sites on Green Belt and Metropolitan Open Land were also removed if they did not have planning permission or were not in an adopted local plan.

Stage six: final database

The last stage is the production of the final LESD database and accompanying technical report. The database is provided for the sole use of GLA and Transport for London (TfL) as it contains some data that is provided on a confidential basis.

3 Database assumptions

3.1 Introduction

A key output of the LESD is an estimate of London's potential additional employment capacity, which is aggregated from the LESD's site-level data. For most sites in the LESD, the number of jobs generated from the use of the site is not directly available from the original source data. Therefore, a series of assumptions are used to calculate the employment capacity of a site from a given floorspace or site area. These assumptions relate to employment density ratios for different use types, plot ratios, development mix, and timescales at which future developments will be occupied.

We set out the assumptions used for each of these factors and the sources underpinning those assumptions below. There are two principal measures of floorspace referenced in this section. Gross Internal Area (GIA) refers to the entire area inside the external walls of a building and includes corridors, lifts, plant rooms, service accommodation. Net Internal Area (NIA) refers to the net lettable or 'usable' area of offices and retail units[5].

The LESD only records sites where there is a net change in employment floorspace and therefore does not consider the employment capacity of existing employment uses (where no change in use or net change in floorspace is proposed).

3.2 Employment densities

LESD 2021 density assumptions

The default assumptions adopted for the LESD 2021 are summarised in Table 3.1. Densities are expressed in terms of sq m of GIA per worker, where workers follow the workforce jobs definition used by GLA Economics in their employment projections[6].

[5] For further explanation see Employment Density Guide 3rd Edition – Homes & Communities Agency (2015) https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/484133/employment_density_guide_3rd_edition.pdf

[6] London Labour Market Projections 2017 – GLA Economics https://www.london.gov.uk/business-and-economy-publications/london-labour-market-projections-2017

Table 3.1 Default employment density assumptions (sq m GIA per worker) by pre-2020 use class[7]

	CAZ/NIoD	Inner	Outer
A1	17.5	17.5	17.5
A2	16	16	16
A3	17.5	17.5	17.5
A4	17.5	17.5	17.5
A5	17.5	17.5	17.5
B1a	11.3	11.3	11.3
B1b	36	36	36
B1c	36	36	36
B2	36	36	36
B8*	50	50	50
C1 (beds)	2.4	4	4
C2	45	45	45
D1	45	45	45
D2	60	60	60
SG	60	60	60

*Except for data centres and self-storage facilities where a manual override has been applied
Source: CAG

The remainder of this section presents the evidence underpinning these employment density assumptions.

Office employment densities

The most recent large-scale survey of office densities is the British Council for Offices (BCO) 'Office Occupancy: Density and Utilisation' report published in 2018[8]. The survey was undertaken prior to the COVID-19 pandemic; however, we discuss how post-COVID-19 working practices my impact on office employment densities in the subsequent chapter.

The 2018 BCO survey states that the average value for workplace density is 9.6 sq m per desk, compared with 9.9 sq m in 2013. The 2018 BCO sample was, however, biased towards institutional buildings with larger floorplates and the higher density may not hold for smaller premises. The 2013 BCO survey[9] reported a mean density of 10.9 sq m, compared with a lower density for the institutional sample with a mean of 9.9 sq m. The 2013 BCO survey also reported a median value of 10.8 sq m, which demonstrates a good normal distribution.

The BCO surveys between 2013-18 have therefore shown a marginal tightening in density. Evidence from past surveys has also shown this trend in declining floorspace to worker ratios, as set out in the LESD 2017 Report[10]. The report also stated that there is growing evidence that the rate of increase in densities is levelling out due to the physical limitations of buildings. The latest BCO survey would seem to be consistent with this.

[7] The source data pre-dates the 2020 Use Class Order changes. Post-2020 use classes have been mapped from this data (see the appendix for a full mapping).
[8] Office Occupancy: Density and Utilisation – British Council for Offices (2018)
[9] Occupier Density Study 2013 - British Council for Offices (2013)
[10] London Employment Sites Database (2017) – CAG Consultants
https://www.london.gov.uk/sites/default/files/lesd_final_report_may_2017.pdf

The BCO survey uses the metric of 'floorspace per desk'. Our interest, however, is in floorspace per worker, as the data is used to provide estimates of the number of jobs there is capacity to support. The benchmark ratio used by the BCO for converting desks to workers is 1.2 workers per desk[11]. Applying this ratio to 10.8 sq m per desk (the median average from the wider 2013 BCO sample survey) gives an overall ratio of 9.0 sq m NIA per worker.

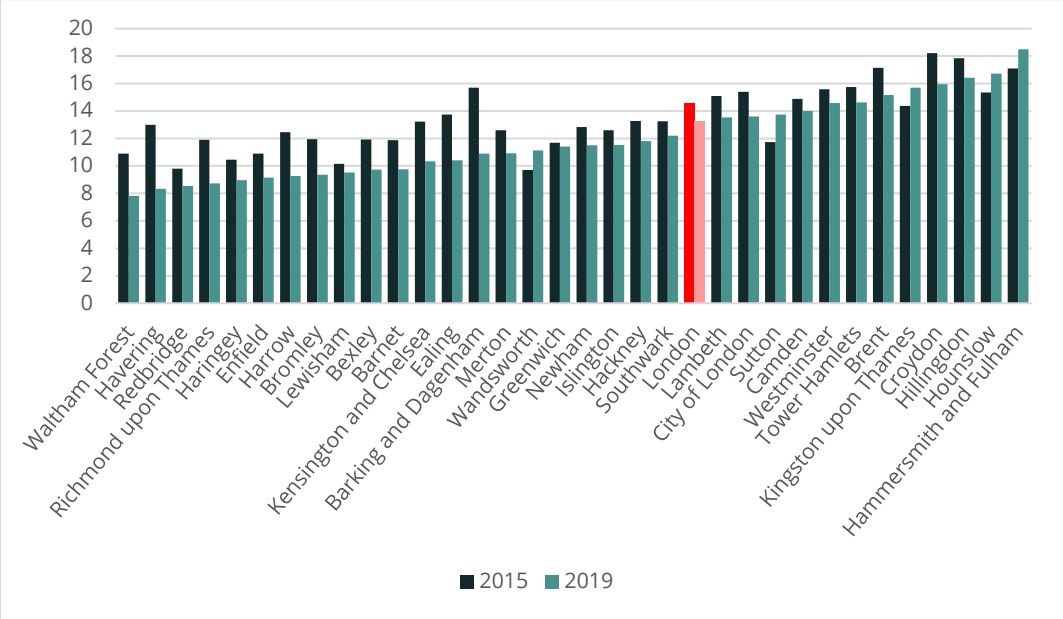
NIA is usually estimated at around 80 per cent of GIA[12], which is the measure more commonly used in planning. Converting from NIA to GIA gives us a ratio of 11.3 sq m GIA per employee, which is the assumption used in the LESD 2021.

It should be noted that this is an average density ratio and past evidence has found that densities are lower in older stock and higher in modern stock configured for contemporary occupational requirements. The 2018 BCO study reported that whilst there is still some variation in density ratios between sectors this differential appears to be narrowing.

Floorspace and Employment Estimates

As a further check on employment density estimates for London, we have compared estimates of employment in office sectors from Business Register Employment Survey (BRES) data, with the office floorspace stock figures published by the Valuations Office Agency (VOA). As illustrated in Figure 3.1 these suggest a tightening in effective densities between 2015 to 2019[13].

Figure 3.1 Floorspace per worker ratios (sq m) for office employment by Borough



Source: VOA/BRES/CAG

[11] Office Occupancy: Density and Utilisation – British Council for Offices (2018)

[12] London Office Policy Review 2012 noted *"…property agents' rule of thumb conversion is that the NIA is typically 15 to 20% smaller than the GIA. We confirm this using evidence from EGI for developments under construction. EGI identifies a total of 71 sites and provides both net and gross floorspace. This evidence shows a net-to-gross ratio of 79%."* The City of London Office Evidence paper March 2011 found a slightly lower net to gross ratio of 73%.

[13] 2019 being the latest pre-covid employment data available.

For London as a whole, this would imply a floorspace to worker ratio of 12.2 sq m if allowance is made for a standard 8% frictional vacancy rate[14]. There were variations of about 1 sq m either side for different sub-regions of London. We would expect the floorspace to worker ratio to be higher than the survey of larger properties undertaken by the BCO study.

In summary, we have chosen to use 11.3 sq m GIA per worker (inclusive of a desk sharing ratio of 1.2) as our employment density assumption for offices across London. This assumption is based on the 2013 BCO survey (as discussed above) and is the same as the one used in the 2017 London Office Policy Review (LOPR). In the absence of compelling evidence of a significant change in office employment density we have maintained the ratio used in the LOPR but set out some sensitivity tests around this central assumption to examine potential changes.

Non-office employment densities

The third edition of the Homes and Communities Agency's (HCA) Employment Density Guidance was published in 2015 and presents density ratios across a large range of employment use types. Although the guidance has been formally withdrawn - and its sources somewhat dated - it is used here in the absence of other evidence relating to employment densities for non-office development. As discussed in the previous section, BCO survey has been used for office development given that it is a more recent and large-scale data source.

The suggested ratios for the major employment categories from the HCA guidance are summarised in Table 3.2 below. The density ratios in the HCA guidance[15] are expressed in terms of sq m per full-time equivalent (FTE) employee. We have also added assumptions to convert from NIA per FTE to GIA per employee.

[14] London Office Policy Review 2017 – Ramidus Consulting and CAG Consultants

[15] This convention was adopted in the 2nd Edition and carried on in the 3rd Edition. The Density Matrix in the 3rd Edition does not explicitly label all the ratios as being in term of FTEs but this approach is used elsewhere in the Guidance

Table 3.2 Employment density ratios from HCA Employment Density Guidance 3rd Edition (2015)

Use Class[16]	Activity	Sq m per FTE	Measure	GIA	% Part-Time[17]	Sq m per employee GIA[18]
B1a	Professional Services	12	NIA	15.0	20%	13.5
B1a	Finance & Insurance	10	NIA	12.5	10%	11.9
B1b	R&D	50	NIA	62.5	10%	59.4
B1c	Light Manufacturing	47	NIA	58.8	10%	55.8
B2	Industrial & Manufacturing	36	GIA	36	10%	34.2
B8	Final Mile[19]	70	GEA	70	20%	63.0
A1	High Street	17.5	NIA	21.9	40%	17.5
A2	Finance & Professional	16	NIA	20.0	40%	16.0
A3	Restaurants & Cafes	17.5	NIA	21.9	40%	17.5
C1	Budget	5	Beds/FTE	5	40%	4.0 Beds/employee
C1	Mid-Scale	3	Beds/FTE	3	40%	2.4 Beds/employee
C1	Upscale	2	Beds/FTE	2	40%	1.6 Beds/employee
C1	Luxury	1	Beds/FTE	1	40%	0.8 Beds/employee
D2	Fitness Centre	65	GIA	65	20%	58.5

Source: HCA Employment Density Guidance 3rd Edition

To convert from floorspace per FTE employee (as used by the HCA guidance) to floorspace per employee requires an adjustment for part-time working, which will depend on which sector is being assessed.

For example, B8/'Final Mile' uses have an employment density of 70 sqm per FTE employee. Using an estimate of 20% of employment being part-time (see Figure 3.2 below for the proportion of part-time employment by sector) reduces this ratio from 70 sq m (per FTE employee) to 63 sq m (per employee). In some cases, there is also a need to adjust the HCA

[16] See Appendix 1 for Use Class definitions
[17] CAG assumptions derived from Figure 3.3
[18] Assuming 2 part-time employees = 1 FTE, then the density ratio is multiplied by *((1-(PT/2))/1)*
[19] For B8 uses, the HCA Guidance contains guideline densities for various B8 'sub-sectors'. The 'Final Mile' distribution centre sub-sector is closer to the type of storage and distribution facilities typically found in London than the regional or national distribution sectors also listed, though not full reflective of the range of B8 activity in London.

ratios from NIA to GIA. In the case of A1/'High Street' retail, these two adjustments mean the ratio remains at 17.5 sq m when expressed as GIA per employee.

Figure 3.2 Percentage of part-time employees by sector for London (2018-20)

Source: BRES (2018-20 Employee data)[20]

Industrial

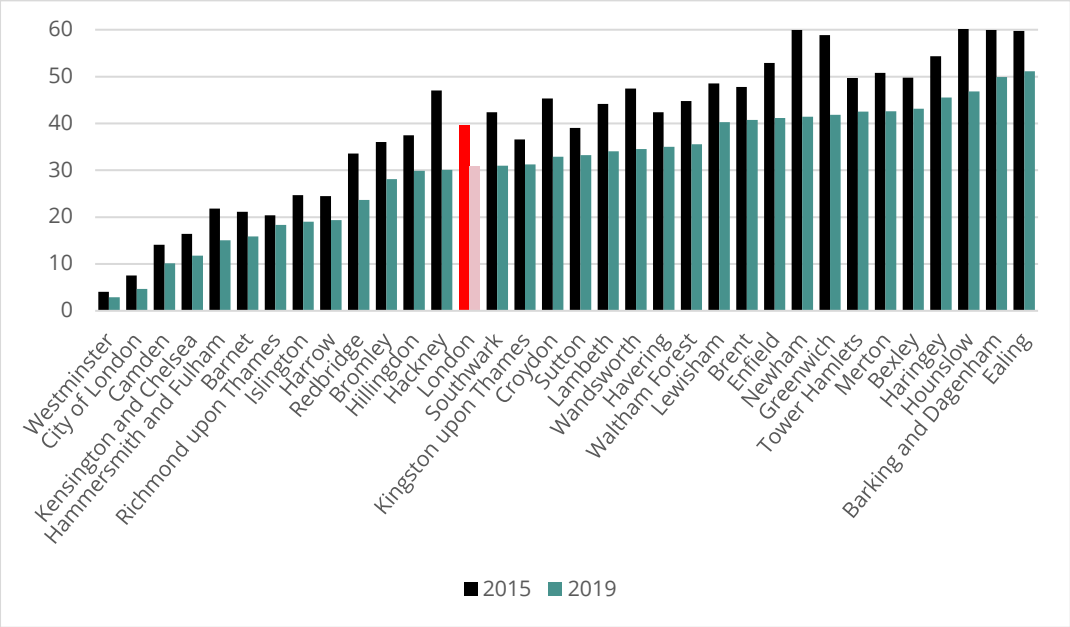
Analysis of data of industrial employment suggests that industrial floorspace is also being more intensively used (see Figure 3.3). The range of activity that takes place in industrial buildings is generally wider than that in office premises and this trend may therefore reflect structural shifts to more service-type activity rather than higher densities for existing activity.

In 2019, the mean average industrial floorspace to worker ratio across London was 30.9 sq m per worker. Industrial floorspace to worker ratios were higher in outer London than inner London or the CAZ, and the median density across all London boroughs was 33.2 sq m per worker.

For the LESD 2021, we have chosen to use the same industrial employment density assumption that was used in the LESD 2017 of 36 sq m per worker. For B8 uses, we have adopted an assumption of 50 sq m per worker except for cases of self-storage facilities or data centres (as discussed below).

[20] Extracted from Nomis 15th November 2021. We have used the mean unweighted average of the three years 2018, 2019, 2020 to smooth any irregular observations

Figure 3.3 Floorspace per worker ratios (sq m) for industrial employment by borough



Source: VOA/BRES/CAG

Data centres and self-storage

Data centres and self-storage facilities have been classified as a B8 use class for the purposes of this study, but both have atypically low employment densities compared to other B8 uses. The 2020 Self Storage Annual Report notes that, *'self storage stores themselves do not employ many people with even the largest stores having on average only 3 full time staff.'*[21] The report also states that the average size of a self-storage storage is 2,400 sq m, which would imply an employment density of 800 sq m per worker.

Data centres typically employ something between 20-50 employees in on-site operation and maintenance 24 hours a day seven days a week. Some data centres are co-located with other company activity, which may lead to more employment on-site.

Where a site has a B8 element identified for self-storage or data centre use we have applied bespoke employment density assumptions rather than the default B8 assumption.

C and D-Class uses

For D class uses, the HCA Guidance contains specific guideline densities for some D2 uses such as fitness centres and cinemas, as well as a wide density range for the broader category of 'visitor & cultural attractions'. The HCA Guidance does not contain guideline densities for D1 uses, such as hospitals or universities, or employment generating spaces that do not have a clear or identifiable relationship between floorspace and employment levels.

Overall, for both C and D use classes, we are guided by the employment density ratios in the HCA guidance, however we have tried to gather local intelligence wherever possible to inform the employment estimate for a given development.

[21] Self Storage Annual Industry Report 2020 – Self Storage Association UK (2020)

3.3 Plot ratios and development mix

Plot ratios

Where we do not have information about the proposed floorspace to be developed on a particular site, we use plot ratio assumptions to estimate the floorspace. A plot ratio is a measure of the total quantity of floorspace developed on a given site area. This might be expressed in terms of sq m per hectare (ha) or as a ratio of floorspace to site area (both measured in sq m). For example, 5,000 sq m of floorspace developed on a site of 0.5 ha would have a plot ratio of 10,000 sq m per ha, or 1:1 expressed as a ratio in terms of floorspace to site area.

To inform estimates of plot ratios for London we carried out some analysis of plot ratios for recent completions (since 2013) and proposed development in the pipeline from the LDD. We have analysed current LDD data based on new build developments where non-residential site areas are available. The results are summarised in Table 3.4 below. For the purpose of this analysis, the 'central' boroughs have been defined as the City of London and Westminster. There are not sufficient observations to meaningfully split the B2 use class data into averages for inner and outer London.

The B8 data excludes developments that were solely self-storage or data centres.

As this analysis is based on borough-level data, the inner London average will include both CAZ and non-CAZ developments. We would therefore expect it to over-estimate the ratio for the non-CAZ inner London area.

Table 3.3 LDD plot ratios (sq m per ha)

	Mean				Median
	Central	Inner	Outer	London	London
B1	53,000	15,000	9,000	34,000	19,000
B2		3.000	4,500	4,500	7,000
B8	8,000	6,500	5,500	6,000	8,000

Source: LDD/CAG

Work for the GLA on industrial land use[22] found a plot ratio of 65% of industrial uses and 95% for non-industrial uses giving an overall average of 69%.

The plot ratios adopted as the default assumptions for the LESD 2021 are summarised in Table 3.4 below.

[22] London Industrial Land Supply and Economy Study (2015) – AECOM
https://www.london.gov.uk/sites/default/files/industria_land_supply_and_economy2015.pdf

Table 3.4 Plot ratio assumptions (sq m per ha)

	CAZ/NIoD	Inner	Outer
B1	53,000	15,000	9,000
B2	8,000	6,000	6,000
B8	8,000	6,000	6,000
Other	8,000	6,000	6,000

Plot ratios have tended to be relatively stable over time for given use types and character areas. The principal scope for increasing plot ratios is through increasing densification of existing areas, which means changing the characteristics of an area as well as making more efficient use of individual sites.

Development mix

The plot ratio assumptions set out above assume, as a minimum, that there is some information on the development type proposed (e.g. offices, industrial, retail etc). Where there is no information as to the proposed development mix - and the site is allocated or proposed for mixed-use development - a set of assumptions is needed.

With mixed-use schemes we try to extract as much information as possible from the local authority about the anticipated or preferred distribution of activity by use type, as any assumptions are potentially subject to a wide margin of error. During the consultation phase with the local planning authorities, sites calculated from mixed-use assumptions were highlighted as a priority for checking.

Where we do not have more detailed information for the site, we use two-stage process to determine the development mix. First, we estimate the proportion of a mixed-use site allocated to employment uses. Using evidence from the LDD, the LESD 2012 found that:

- in CAZ and inner London, on average 12 per cent of a mixed-use site area goes to employment uses;
- in outer London a slightly larger proportion of the mixed-use site (15 per cent) is allocated to employment uses.

For the proportion of the site estimated as being in employment use, we then need to estimate the distribution of the site between different employment uses. Research for the LESD 2009[23] found that 63 per cent of non-residential development in the CAZ and inner London was office development, reducing to 41 per cent in outer London. A-class uses accounted for 18 per cent of development in the CAZ and inner London, and 15 per cent in outer London. Industrial development accounted for four per cent of development in the CAZ and inner London, and six per cent in outer London. 'Other' uses accounted for 15 per cent in the CAZ and inner London, and 38 per cent in outer London.

[23] London Employment Sites Database (2009) – Roger Tym & Partners

Based on this analysis and observation of trends in mixed-use development since that date, we have adopted the default assumptions shown in Table 3.5 for mixed-use sites in the LESD 2021.

Table 3.5 Site Mix Assumptions for Mixed-use Sites

	CAZ	Inner	Outer
% Employment	50%	10%	10%
of which:			
B1	75%	50%	50%
B2		5%	5%
B8	5%	5%	5%
A1	10%	20%	20%
Other	10%	20%	20%

Source: CAG

We apply the default assumptions described above in the absence of any site-specific information. Consultation with boroughs was important in establishing if the resultant employment capacities estimates were appropriate or if site-specific information was available.

3.4 Forecast completion year

Some uses of the LESD require an understanding of when employment development capacity will be realised and occupied (for example, the GLA's employment projections and TfL's transport models both produce forecasts to five-year intervals).

Where information is available from local planning authorities on an estimated completion date, it is used. In the absence of site-specific information on completion dates, we estimate the date a development is occupied from its planning status. Table 3.6 sets out the assumptions used for the LESD 2021.

Table 3.6 Date at which development assumed occupied

Planning Status	Forecast Year for Inclusion in Capacity
Completed in 2019 or later	2021
Started	2026
Full/Detailed Planning Permission	2026
Outline Planning Permission	2026
Application	2031
Allocated	2036
Sites with no planning status	2041

Source: CAG

4 Sensitivity tests

4.1 Employment densities

Changes in working practices and technologies over a sustained period have resulted in more intense use of office floorspace. However, post-COVID-19, there is greater uncertainty about the longer-term future trend and consequently, how much physical employment capacity London needs to plan for.

Post-COVID-19 employment densities

As firms re-think the use of workspace post-COVID-19, there are two working practices that could operate in opposite directions on employment densities:

- The greater use of homeworking and flexible working which reduces the amount of space needed to accommodate the workforce

- The potential continued emphasis on social distancing, hygiene and sanitation in the shorter term (more space per worker), and changes to workspace layouts that better facilitate hybrid working in the longer term (more space given to amenity/meeting space rather than desk space)

Flexible working

Flexible working and homeworking has been a feature of parts of the economy for many years following the widespread adoption of cloud computing. However, during the COVID-19 pandemic many more firms adopted such practices and some have suggested that '…there has been a permanent mindset shift around how work can be organised.'[24]

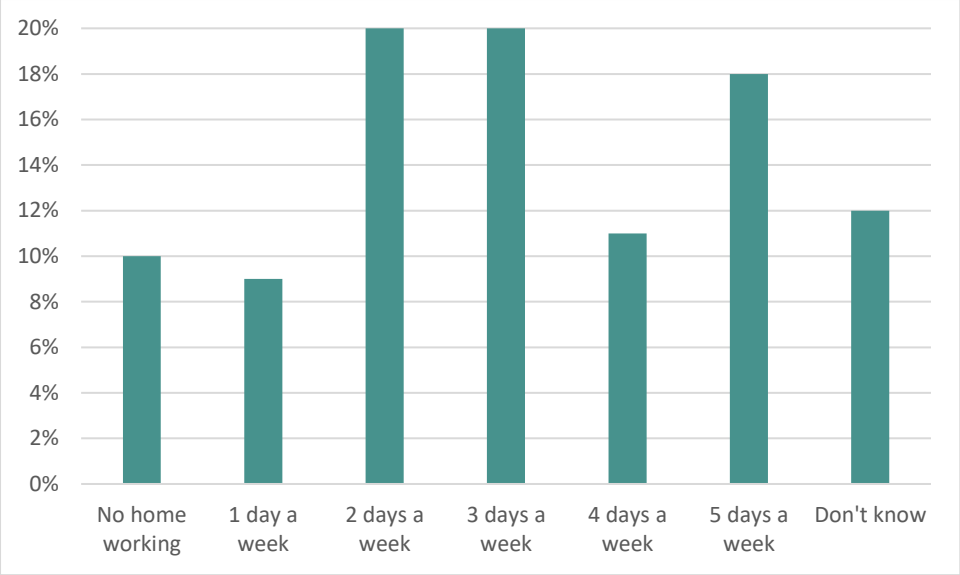
In response to this potential longer-term shift, some workplace surveys have investigated the value of in-person working. These found that being able to collaborate and socialise with colleagues in person[25,26]; the development of company culture[27]; and professional development, especially for younger workers, are much valued aspects of in-person working. As a result, many commentators predict a more hybrid form of working[28,29], with the time spent between office working and working from home varying with organisational culture and type of activity.

Cushman and Wakefield - using data from the United States - examined a number of surveys on the adoption of remote working and found a range of between one and a half to three days of office working a week to be the expected outcome[30]. The London Chamber of Commerce and

[24] Work After Lockdown: No Going Back – University of Southampton, Half the Sky, Institute for Employment Studies, ESRC March 2022
[25] Colliers Worldwide Workplace Survey April 2020
[26] The post-COVID workplace – Condeco 2020
[27] The Office of the Future- Peldon Rose October 2020
[28] Colliers Worldwide Workplace Survey April 2020
[29] Workplace Ecosystems of the Future – Cushman & Wakefield 2020
[30] Workplace Ecosystems of the Future – Cushman & Wakefield 2020

Industry[31] (LCCI) carried out a survey of business leaders in London on future expectations for homeworking (see Figure 4.1 below). For businesses where working from home is an option, and who were primarily office-based before the pandemic, 78 per cent expect employees to work from home at least once a week in the future. Only 10 per cent of the surveyed businesses did not expect working from home in normal circumstances.

Figure 4.1 Expected number of days per week working from home once return to normal



It should be noted that the utilisation of office floorspace will not only be affected by the number of days per week that employees work from home but also how those days are distributed amongst employees.

Social distancing and changes to office environments

Unlike flexible working, social distancing was a phenomenon wholly introduced as a result of COVID-19. At this stage it is hard to be certain how enduring its impact will be but some commentators have noted that there will be much more focus on the way offices are used: "*Occupiers will consult their design team first, explain the types of tasks that they are expecting employees to carry out and the occupancy rate based on how frequently they are expecting employees to come to the office. This will produce a result that is different for every business. Occupiers will be going into the leasing market with a more focused and developed sense of what they want from their space.*"[32]

The 2018 BCO study noted that workspace occupancy studies from over the past decade had shown that on desks were occupied on average just over 60 per cent through the core working day, which has led to organisations seeking to encourage desk sharing to make better use of expensive assets. Hybrid working may impact on the amount of time a workspace is occupied. If time spent in the office has more (or less) of a focus on spending time at your desk, this may

[31] https://www.londonchamber.co.uk/news/press-releases/polling-gives-further-insight-into-the-pandemic%E2%80%99s/
[32] The Future of Real Estate – Withers

have a resultant impact on whether the previously observed trend of falling office employment densities further.

Conclusions

Whilst it is too early to state for certain what the long-term impact of the COVID-19 pandemic will be on the demand for office space, the greater use of flexible working is likely to be a structural shift. The impact of greater levels of working from home may be an increase in the effective employment density (number of workers per square metre of floorspace) and therefore a reduction in the demand for office floorspace. In the context of the LESD, this would result in an increase of the employment capacity identified.

But offsetting this is the impact of social distancing and new types of working that will require more space. We have modelled these two effects as broadly balancing each other out and will continue to monitor these (and other) trends ahead of the next LESD.

In terms of sensitivity tests, we have modelled two alternatives around the central assumption:

- Increased density of 20% to 9 sq m per worker increases capacity to accommodate office jobs through wider adoption of working from home. Alternatively considered as an increase in the desk-sharing ratio from 1.2 to 1.5

- Lower density of 20% to 13.5 sq m reduces capacity to accommodate office jobs through wider adoption of social distancing measures and new types of working that require more space.

5 Results

5.1 Additional employment capacity

This chapter presents a series of summary tables setting out the additional employment capacity in London identified by the LESD 2021.

Total employment

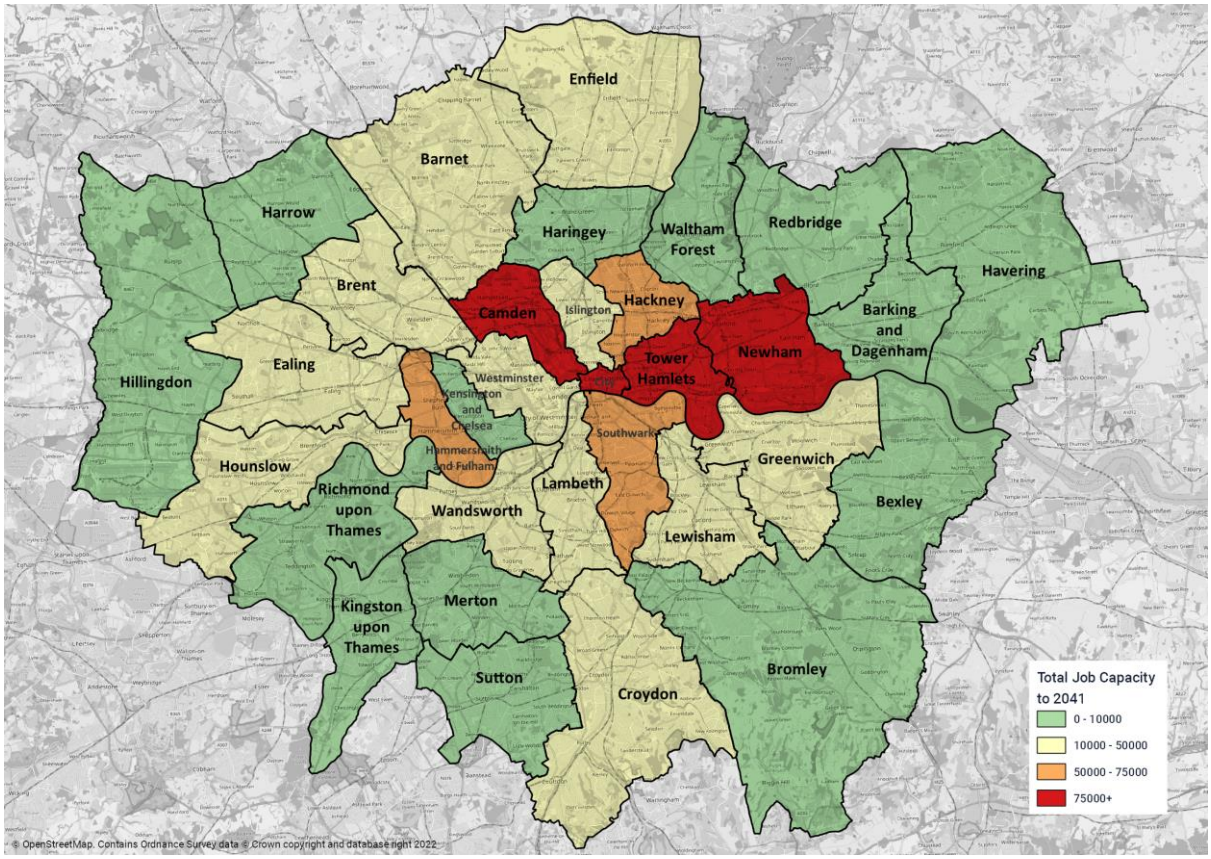
Table 5.1 summarises the results for all employment use classes by borough. Development capacity to accommodate just under one million additional jobs has been identified for the period up to 2041. 60 per cent of this capacity is estimated to come on stream between 2021-2026. Further capacity is likely to be identified over the longer term. On the other hand, it should be noted that not all currently identified capacity may be realised.

Tower Hamlets, City of London and Newham account for 35 per cent of the identified capacity, with just over 350,000 jobs. The capacity identified for the City is more immediate and more advanced in the planning pipeline. Given the development cycles in the City we would anticipate additional development for 2031 and beyond to be identified at a later date.

Camden, Southwark, Hammersmith & Fulham and Hackney each have identified capacity for between 50,000-80,000 jobs, or between five to eight per cent of the London total.

Figure 5.1 shows the distribution of employment capacity by borough.

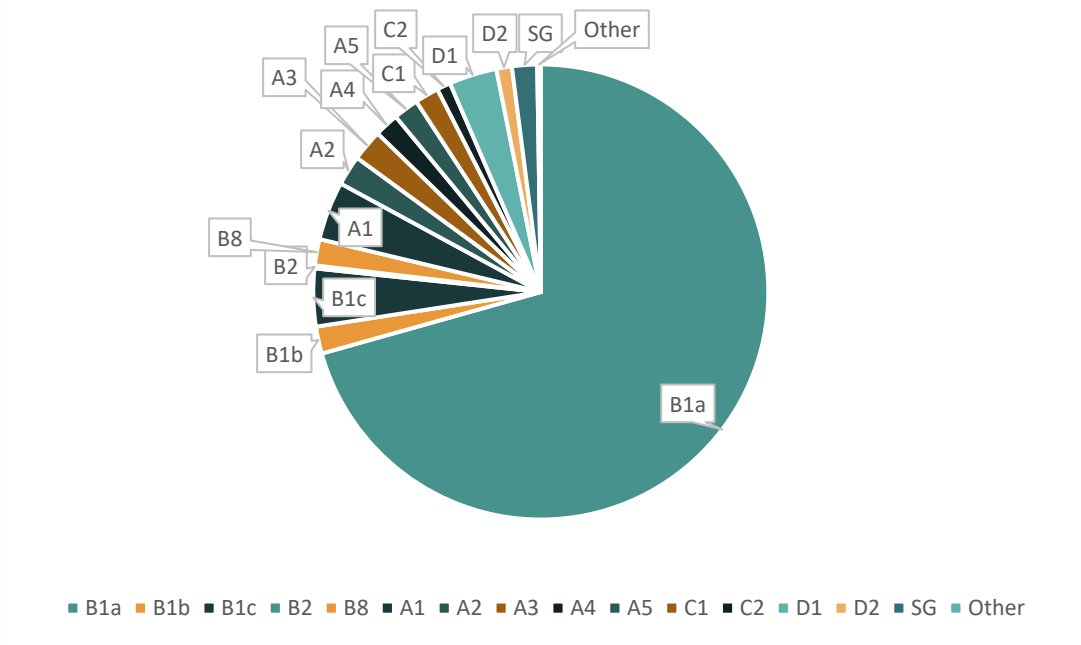
Figure 5.1 LESD employment capacity to 2041 by borough



Employment by Type

The largest single component of capacity for additional employment is in the B1a office use class. This accounts for just over 70 per cent of all identified capacity in terms of jobs. Other B-class industrial uses could accommodate an additional 80,000 jobs. A-class uses could accommodate 120,000 jobs.

Figure 5.2 Employment capacity by use class



Source: LESD 2021

Development capacity to accommodate an additional 700,000 jobs in office employment has been identified for the period up to 2041 (Table 5.2). Half of this capacity is in Tower Hamlets, the City and Camden.

Table 5.1 Additional employment capacity by borough/planning authority – all use classes

	2021	2026	2031	2036	2041	Total
Barking and Dagenham	0	6,200	200	0	0	6,400
Barnet	1,000	12,800	4,800	4,500	0	23,100
Bexley	500	5,100	0	0	0	5,600
Brent	3,500	14,100	600	500	5,800	24,400
Bromley	200	3,000	700	0	0	4,000
Camden	14,700	51,200	0	12,900	0	78,800
City of London	43,000	48,200	20,400	0	0	111,600
Croydon	-300	27,700	900	0	0	28,400
Ealing	4,200	15,300	2,900	800	5,600	28,700
Enfield	300	2,500	0	6,600	1,600	11,000
Greenwich	8,100	9,700	0	21,500	4,100	43,500
Hackney	5,100	40,500	200	6,400	0	52,200
Hammersmith and Fulham	6,600	24,100	300	3,400	20,900	55,200
Haringey	400	700	0	2,100	0	3,200
Harrow	-3,700	2,200	0	1,300	0	-100
Havering	100	2,100	0	0	0	2,200
Hillingdon	2,500	1,500	0	100	0	4,100
Hounslow	300	4,100	-700	10,400	0	14,100
Islington	6,100	12,700	0	27,000	0	45,900
Kensington and Chelsea	1,700	6,000	0	1,400	0	9,100
Kingston upon Thames	500	4,300	0	600	0	5,400
Lambeth	900	20,900	100	0	0	21,900
Lewisham	-200	11,300	0	1,300	0	12,300
Merton	500	400	0	0	0	900
Newham	20,200	46,900	0	2,200	20,100	89,500
Redbridge	800	1,500	200	0	0	2,400
Richmond upon Thames	-1,200	1,200	1,100	0	0	1,100
Southwark	3,500	34,500	19,300	16,700	0	74,000
Sutton	0	3,700	400	0	0	4,000
Tower Hamlets	1,900	135,100	200	14,100	0	151,400
Waltham Forest	200	600	0	8,400	0	9,200
Wandsworth	200	34,600	0	100	3,000	37,900
Westminster	5,300	23,000	0	0	0	28,300
London Total	**127,100**	**607,900**	**51,600**	**142,200**	**61,100**	**990,000**
LLDC	*12,500*	*19,100*	*0*	*0*	*0*	*31,500*
OPDC	*2,000*	*3,800*	*3,100*	*800*	*30,200*	*39,900*

Source: LESD 2021. Totals may not sum due to rounding

Table 5.2 Additional office employment capacity by borough/local planning authority

	2021	2026	2031	2036	2041	Total
Barking and Dagenham	0	1,600	0	0	0	1,700
Barnet	1,200	3,700	4,700	4,500	0	14,100
Bexley	100	900	0	0	0	1,000
Brent	300	9,500	400	-100	700	10,900
Bromley	0	1,000	300	0	0	1,300
Camden	14,300	46,700	0	11,800	0	72,700
City of London	41,800	45,100	20,900	0	0	107,800
Croydon	0	20,600	700	0	0	21,400
Ealing	400	6,100	400	100	800	7,800
Enfield	0	600	0	1,900	1,200	3,700
Greenwich	4,300	3,500	0	13,100	600	21,500
Hackney	4,800	39,100	200	5,300	0	49,300
Hammersmith and Fulham	3,000	21,200	100	0	3,200	27,400
Haringey	400	-300	0	1,000	0	1,200
Harrow	-3,600	-500	0	1,000	0	-3,000
Havering	0	1,000	0	0	0	1,000
Hillingdon	100	2,500	0	0	0	2,600
Hounslow	-100	-2,500	-600	7,800	0	4,600
Islington	4,500	11,500	0	24,700	0	40,700
Kensington and Chelsea	1,100	4,800	0	1,200	0	7,100
Kingston upon Thames	100	4,800	0	500	0	5,400
Lambeth	300	17,700	0	0	0	18,000
Lewisham	0	3,700	0	1,100	0	4,700
Merton	200	500	0	0	0	700
Newham	12,700	14,400	-100	800	2,900	30,700
Redbridge	300	200	0	0	0	600
Richmond upon Thames	-1,200	800	500	0	0	100
Southwark	2,500	25,800	19,200	3,600	0	51,100
Sutton	-500	1,000	0	0	0	500
Tower Hamlets	1,800	126,900	200	12,800	0	141,600
Waltham Forest	100	200	0	4,000	0	4,400
Wandsworth	200	23,500	0	200	500	24,400
Westminster	3,400	19,100	0	0	0	22,600
London Total	**92,500**	**454,700**	**47,100**	**95,400**	**9,900**	**699,600**
LLDC	*11,500*	*10,900*	*0*	*0*	*0*	*22,500*
OPDC	*0*	*800*	*400*	*100*	*4,600*	*6,000*

Source: LESD 2021. Totals may not sum due to rounding

Table 5.3 Additional industrial employment capacity by borough/local planning authority

	B1b	B1c	B2	B8
Barking and Dagenham	0	100	900	700
Barnet	0	0	900	600
Bexley	100	1,100	400	600
Brent	200	3,000	500	500
Bromley	0	0	0	400
Camden	0	400	0	0
City of London	0	0	0	0
Croydon	0	-400	0	100
Ealing	700	4,000	800	700
Enfield	100	2,000	1,800	400
Greenwich	900	1,400	1,200	1,100
Hackney	0	200	-100	-400
Hammersmith and Fulham	1,200	1,500	1,400	1,000
Haringey	0	800	0	0
Harrow	200	600	-300	200
Havering	0	0	400	-100
Hillingdon	0	800	-1,800	1,100
Hounslow	0	500	1,800	4,600
Islington	100	200	300	-100
Kensington and Chelsea	0	1,100	0	0
Kingston upon Thames	0	0	100	200
Lambeth	0	0	0	-300
Lewisham	100	1,900	900	-100
Merton	0	0	0	0
Newham	3,100	3,400	3,100	2,500
Redbridge	0	700	0	0
Richmond upon Thames	0	0	0	0
Southwark	400	11,100	400	-200
Sutton	200	1,200	700	300
Tower Hamlets	11,500	1,100	-11,300	400
Waltham Forest	0	1,300	200	1,900
Wandsworth	100	1,200	100	2,300
Westminster	0	0	0	300
London Total	**19,200**	**39,100**	**2,100**	**18,600**
LLDC	*11,800*	*500*	*-11,500*	*-500*
OPDC	*1,600*	*4,800*	*2,000*	*1,700*

Source: LESD 2021. Totals may not sum due to rounding

Table 5.4 Additional A-class employment capacity by borough/local planning authority

	A1	A2	A3	A4	A5
Barking and Dagenham	1,600	0	0	0	0
Barnet	1,000	900	900	800	800
Bexley	400	400	300	300	300
Brent	1,500	500	400	400	1,400
Bromley	1,200	0	300	0	0
Camden	1,400	800	400	200	100
City of London	-700	-100	1,400	0	100
Croydon	-4,700	2,400	2,200	1,800	1,800
Ealing	2,900	1,700	1,600	1,600	1,500
Enfield	1,000	300	300	300	300
Greenwich	6,200	900	1,200	1,200	800
Hackney	1,500	200	200	100	100
Hammersmith and Fulham	5,700	2,800	3,000	2,600	2,600
Haringey	400	200	200	200	0
Harrow	300	0	100	-100	0
Havering	700	0	0	0	0
Hillingdon	0	0	0	0	0
Hounslow	700	0	0	0	0
Islington	3,400	0	600	100	0
Kensington and Chelsea	400	0	0	0	0
Kingston upon Thames	-300	0	0	-400	0
Lambeth	100	200	200	200	200
Lewisham	2,600	-100	400	100	100
Merton	0	0	0	0	0
Newham	6,700	6,200	5,900	5,700	5,500
Redbridge	700	0	0	0	0
Richmond upon Thames	600	0	0	0	0
Southwark	3,000	900	800	800	800
Sutton	100	0	0	0	0
Tower Hamlets	1,000	800	800	500	700
Waltham Forest	1,000	0	0	0	0
Wandsworth	1,300	2,200	1,000	900	800
Westminster	-600	0	0	0	0
London Total	**41,100**	**21,200**	**22,300**	**17,200**	**17,900**
LLDC	*1,400*	*500*	*600*	*400*	*100*
OPDC	*3,500*	*3,700*	*3,400*	*3,400*	*3,400*

Source: LESD 2021. Totals may not sum due to rounding

Table 5.5 Additional 'Other' employment capacity by borough/local planning authority

	C1	C2	D1	D2	SG	Other
Barking and Dagenham	200	0	1,100	100	0	0
Barnet	0	1,400	1,100	400	0	100
Bexley	100	100	100	100	400	0
Brent	200	300	800	500	3,100	300
Bromley	0	100	600	100	0	0
Camden	900	0	1,700	100	0	100
City of London	700	700	100	0	1,600	0
Croydon	200	0	1,400	200	2,100	0
Ealing	1,200	600	1,300	700	1,500	100
Enfield	100	100	100	100	100	200
Greenwich	300	300	2,600	600	2,700	600
Hackney	700	0	400	0	100	200
Hammersmith and Fulham	400	1,200	2,500	1,400	500	0
Haringey	100	0	200	0	0	0
Harrow	0	600	400	200	700	100
Havering	100	0	200	0	0	0
Hillingdon	400	0	800	100	0	0
Hounslow	500	0	400	500	400	0
Islington	200	0	100	200	-100	100
Kensington and Chelsea	0	0	300	100	0	0
Kingston upon Thames	0	100	400	0	-100	100
Lambeth	2,200	200	700	200	0	0
Lewisham	1,100	0	600	100	0	0
Merton	100	0	100	100	-200	0
Newham	1,600	2,100	8,200	1,900	2,900	0
Redbridge	0	0	200	0	100	0
Richmond upon Thames	0	0	300	0	0	0
Southwark	600	300	1,800	2,000	200	0
Sutton	100	500	300	0	100	0
Tower Hamlets	1,800	100	1,400	200	600	100
Waltham Forest	0	0	0	0	0	300
Wandsworth	600	100	1,400	500	900	0
Westminster	2,800	700	2,300	300	0	0
London Total	**17,000**	**9,700**	**33,900**	**11,000**	**17,800**	**2,500**
LLDC	*400*	*0*	*5,000*	*0*	*500*	*0*
OPDC	*800*	*1,500*	*1,300*	*1,000*	*1,500*	*0*

Source: LESD 2021. Totals may not sum due to rounding

5.2 Opportunity Areas

According to the LESD 2021 the employment capacity associated with the Opportunity Areas is 700,000 jobs. This is 71 per cent of the total employment capacity in the LESD 2021 for London as a whole.

The employment capacity identified for the Opportunity Areas shown in Table 5.6 below are indicative. Further detailed development capacity work (such as through Opportunity Area Planning Frameworks or Development Plan documents) is needed to confirm the scope of potential employment growth in these areas, as set out in London Plan Policy SD1 part B5.

Table 5.6 Indicative additional employment capacity by Opportunity Area

	2021	2026	2031	2036	2041	Total
Bexley Riverside	400	1,700	0	0	0	2,000
Bromley	0	2,500	0	0	0	2,500
Canada Water	1,000	18,900	0	0	0	19,800
Charlton Riverside	100	300	0	4,100	0	4,500
City Fringe/ Tech City	6,400	57,600	200	11,500	0	75,700
Clapham Junction	0	1,100	0	0	0	1,100
Colindale/Burnt Oak	1,000	100	0	0	0	1,100
Cricklewood/Brent Cross	0	13,100	4,500	4,500	0	22,100
Croydon	0	26,700	0	0	0	26,800
Deptford Creek / Greenwich Riverside	0	3,400	0	-200	0	3,200
Earls Court and West Kensington	0	10,500	0	0	0	10,500
Elephant & Castle	200	3,000	3,900	0	0	7,100
Euston	1,500	16,500	0	0	0	18,000
Great West Corridor	-100	-100	0	8,400	0	8,100
Greenwich Peninsula	3,000	6,300	0	8,000	0	17,300
Harrow & Wealdstone	-2,300	1,700	0	900	0	300
Hayes	300	1,000	0	0	0	1,400
Heathrow	2,500	3,200	-700	1,100	0	6,200
Ilford	0	600	100	0	0	700
Isle of Dogs	1,400	114,000	200	10,300	0	125,900
Kensal Canalside	0	0	0	1,400	0	1,400
King's Cross	8,200	23,800	0	800	0	32,800
Kingston	300	2,300	0	300	0	3,000
London Bridge Bankside	1,900	4,900	15,300	0	0	22,100
London Riverside	100	4,800	200	0	0	5,200
New Cross / Lewisham / Catford	0	7,600	0	1,400	0	9,000
New Southgate	0	-2,400	0	0	0	-2,400
Old Kent Road	0	4,700	0	8,400	0	13,100
Old Oak & Park Royal	2,000	3,800	3,100	800	30,200	39,900
Olympic Legacy	12,400	19,400	-400	3,200	0	34,700
Paddington	200	7,500	0	0	0	7,700
Poplar Riverside	200	3,300	0	400	0	3,900
Romford	0	700	0	0	0	700
Royal Docks and Beckton Waterfront	8,500	30,100	0	1,600	20,100	60,300
Southall	1,000	4,400	0	0	0	5,400
Sutton	0*	0*	0	0	0	0*
Thamesmead & Abbey Wood	300	3,700	0	3,500	4,100	11,700
Tottenham Court Road	3,100	3,300	0	2,300	0	8,700
Upper Lea Valley	300	3,100	0	8,800	1,600	13,800
Vauxhall, Nine Elms & Battersea	800	34,800	0	100	0	35,800
Victoria	-200	200	0	0	0	0
Waterloo	0	14,100	0	0	0	14,100
Wembley	400	12,100	400	0	100	13,100
White City	6,000	1,400	0	2,200	0	9,600
Wimbledon/Colliers Wood/South Wimbledon	0	200	0	0	0	300
Wood Green	400	-700	0	1,000	0	700
Woolwich	0	1,100	0	1,600	0	2,800
OA Total	**61,000**	**470,500**	**27,100**	**86,500**	**56,100**	**701,200**

*Employment capacity to be confirmed following detailed development capacity work

5.3 Potential loss of stock

In many parts of London, commercial floorspace has been lost through Permitted Development Rights (PDR), particularly through conversion from office uses to residential use. PDR could result in the additional capacity identified by the LESD 2021 being reduced, but the scale at which this might occur is difficult to estimate and therefore has not been accounted for in the LESD 2021. Past rates of net change in employment floorspace due to PDR may not be a reliable guide for future behaviour as, for example, it may be that the easier to convert premises have already been converted and hence the rate of attrition will moderate.

The introduction of the new E use class from September 2020 also gives greater flexibility to move between uses for certain categories of employment and may have implications for employment capacity forecasts where significantly different employment density ratios may apply.

Whilst both PDR and the new flexible E-class may suggest a downside to the LESD 2021's estimates of additional employment capacity, there is also the possibility that employment capacity could be gained. The LESD's estimates of additional employment capacity are only derived from new floorspace. It is also possible that additional capacity can be created through more intensive use of existing stock.

These factors have not been modelled in this iteration of the LESD but are caveats to bear in mind when considering the outputs of LESD 2021 outlined above.

Appendix

Tables on Sensitivity Tests and 2020 Use Class

Table A.1 Additional Office Employment Capacity Higher Density Scenario

	2021	2026	2031	2036	2041	Total
Barking and Dagenham	0	2,000	0	0	0	2,000
Barnet	1,500	3,500	4,800	4,500	0	14,300
Bexley	100	1,100	0	0	0	1,200
Brent	400	12,000	500	-100	900	13,700
Bromley	0	1,300	400	0	0	1,600
Camden	17,900	55,900	0	14,800	0	88,700
City of London	52,500	56,700	26,200	0	0	135,400
Croydon	0	25,900	900	0	0	26,800
Ealing	500	7,000	500	200	900	9,100
Enfield	0	700	0	2,100	1,200	4,100
Greenwich	5,400	4,400	0	16,300	800	26,800
Hackney	6,000	48,500	200	6,700	0	61,400
Hammersmith and Fulham	3,700	26,600	100	0	3,800	34,300
Haringey	600	-400	0	1,300	0	1,500
Harrow	-4,500	-600	0	1,300	0	-3,800
Havering	0	1,100	0	0	0	1,100
Hillingdon	100	3,100	0	100	0	3,300
Hounslow	-100	-3,200	-700	9,800	0	5,700
Islington	5,700	14,400	0	31,000	0	51,200
Kensington and Chelsea	1,400	6,100	0	1,500	0	8,900
Kingston upon Thames	200	5,400	0	600	0	6,100
Lambeth	400	22,200	0	0	0	22,600
Lewisham	-100	4,600	0	1,400	0	5,900
Merton	300	600	0	0	0	900
Newham	15,800	17,400	-100	1,000	3,500	37,700
Redbridge	400	300	0	0	0	800
Richmond upon Thames	-1,600	1,000	700	0	0	100
Southwark	3,100	32,100	19,200	3,800	0	58,300
Sutton	-600	1,200	0	0	0	600
Tower Hamlets	2,200	159,000	200	16,000	0	177,500
Waltham Forest	100	300	0	5,000	0	5,500
Wandsworth	300	29,500	0	300	600	30,600
Westminster	4,300	24,000	0	0	0	28,300
London Total	**116,100**	**563,700**	**53,100**	**117,500**	**11,700**	**862,100**
LLDC	*14,400*	*12,400*	*0*	*0*	*0*	*26,900*
OPDC	*0*	*900*	*500*	*100*	*5,400*	*7,100*

LESD 2021. Totals may not sum due to rounding

Table A.2 Additional Office Employment Capacity Lower Density Scenario

	2021	2026	2031	2036	2041	Total
Barking and Dagenham	0	1,400	0	0	0	1,400
Barnet	1,000	3,900	4,700	4,500	0	14,000
Bexley	100	700	0	0	0	800
Brent	300	8,000	300	-100	600	9,200
Bromley	0	800	200	0	0	1,100
Camden	11,900	40,700	0	9,900	0	62,500
City of London	35,000	37,800	17,500	0	0	90,200
Croydon	0	17,300	600	0	0	17,900
Ealing	300	5,500	400	100	700	7,000
Enfield	0	500	0	1,700	1,200	3,400
Greenwich	3,600	2,900	0	11,100	600	18,100
Hackney	4,000	33,100	200	4,500	0	41,700
Hammersmith and Fulham	2,500	17,700	100	0	2,700	23,000
Haringey	400	-200	0	900	0	1,000
Harrow	-3,000	-400	0	900	0	-2,500
Havering	0	1,000	0	0	0	1,000
Hillingdon	100	2,100	0	0	0	2,200
Hounslow	-100	-2,100	-500	6,500	0	3,800
Islington	3,800	9,600	0	20,700	0	34,100
Kensington and Chelsea	900	4,000	0	1,000	0	5,900
Kingston upon Thames	100	4,500	0	400	0	5,000
Lambeth	300	14,800	0	0	0	15,100
Lewisham	0	3,100	0	900	0	4,000
Merton	200	400	0	0	0	600
Newham	10,700	12,400	-100	700	2,500	26,200
Redbridge	300	200	0	0	0	500
Richmond upon Thames	-1,000	700	400	0	0	100
Southwark	2,100	21,800	19,200	3,400	0	46,500
Sutton	-400	800	0	0	0	400
Tower Hamlets	1,500	106,400	200	10,700	0	118,700
Waltham Forest	100	200	0	3,400	0	3,600
Wandsworth	200	19,700	0	200	400	20,400
Westminster	2,900	16,000	0	0	0	18,900
London Total	**77,500**	**385,200**	**43,300**	**81,300**	**8,700**	**595,900**
LLDC	*9,700*	*10,000*	*0*	*0*	*0*	*19,600*
OPDC	*0*	*800*	*400*	*100*	*3,900*	*5,200*

LESD 2021. Totals may not sum due to rounding

Table A.3 Additional Employment Capacity 2020 Use Class – Class E

	E(a)	E(b)	E(c)	E(g)(i)	E(g)(ii)	E(g)(iii)
Barking and Dagenham	1,600	0	0	1,700	0	100
Barnet	1,000	900	900	14,100	0	0
Bexley	400	300	400	1,000	100	1,100
Brent	1,500	400	500	10,900	200	3,000
Bromley	1,200	300	0	1,300	0	0
Camden	1,400	400	800	72,700	0	400
City of London	-700	1,400	-100	107,800	0	0
Croydon	-4,700	2,200	2,400	21,400	0	-400
Ealing	2,900	1,600	1,700	7,800	700	4,000
Enfield	1,000	300	300	3,700	100	2,000
Greenwich	6,200	1,200	900	21,500	900	1,400
Hackney	1,500	200	200	49,300	0	200
Hammersmith and Fulham	5,700	3,000	2,800	27,400	1,200	1,500
Haringey	400	200	200	1,200	0	800
Harrow	300	100	0	-3,000	200	600
Havering	700	0	0	1,000	0	0
Hillingdon	0	0	0	2,600	0	800
Hounslow	700	0	0	4,600	0	500
Islington	3,400	600	0	40,700	100	200
Kensington and Chelsea	400	0	0	7,100	0	1,100
Kingston upon Thames	-300	0	0	5,400	0	0
Lambeth	100	200	200	18,000	0	0
Lewisham	2,600	400	-100	4,700	100	1,900
Merton	0	0	0	700	0	0
Newham	6,700	5,900	6,200	30,700	3,100	3,400
Redbridge	700	0	0	600	0	700
Richmond upon Thames	600	0	0	100	0	0
Southwark	3,000	800	900	51,100	400	11,100
Sutton	100	0	0	500	200	1,200
Tower Hamlets	1,000	800	800	141,600	11,500	1,100
Waltham Forest	1,000	0	0	4,400	0	1,300
Wandsworth	1,300	1,000	2,200	24,400	100	1,200
Westminster	-600	0	0	22,600	0	0
London Total	**41,100**	**22,300**	**21,200**	**699,600**	**19,200**	**39,100**
LLDC	*1,400*	*600*	*500*	*22,500*	*11,800*	*500*
OPDC	*3,500*	*3,400*	*3,700*	*6,000*	*1,600*	*4,800*

LESD 2021. Totals may not sum due to rounding

Table A.4 Additional Employment Capacity 2020 Use Class – Non E Class

	B2	B8	C1	C2	All Other
Barking and Dagenham	900	700	200	0	1,200
Barnet	900	600	0	1,400	3,200
Bexley	400	600	100	100	1,200
Brent	500	500	200	300	6,500
Bromley	0	400	0	100	700
Camden	0	0	900	0	2,200
City of London	0	0	700	700	1,800
Croydon	0	100	200	0	7,300
Ealing	800	700	1,200	600	6,700
Enfield	1,800	400	100	100	1,100
Greenwich	1,200	1,100	300	300	8,500
Hackney	-100	-400	700	0	900
Hammersmith and Fulham	1,400	1,000	400	1,200	9,600
Haringey	0	0	100	0	400
Harrow	-300	200	0	600	1,300
Havering	400	-100	100	0	200
Hillingdon	-1,800	1,100	400	0	900
Hounslow	1,800	4,600	500	0	1,300
Islington	300	-100	200	0	400
Kensington and Chelsea	0	0	0	0	400
Kingston upon Thames	100	200	0	100	0
Lambeth	0	-300	2,200	200	1,300
Lewisham	900	-100	1,100	0	900
Merton	0	0	100	0	0
Newham	3,100	2,500	1,600	2,100	24,200
Redbridge	0	0	0	0	300
Richmond upon Thames	0	0	0	0	300
Southwark	400	-200	600	300	5,600
Sutton	700	300	100	500	400
Tower Hamlets	-11,300	400	1,800	100	3,500
Waltham Forest	200	1,900	0	0	300
Wandsworth	100	2,300	600	100	4,500
Westminster	0	300	2,800	700	2,600
London Total	**2,100**	**18,600**	**17,000**	**9,700**	**100,300**
LLDC	*-11,500*	*-500*	*400*	*0*	*6,000*
OPDC	*2,000*	*1,700*	*800*	*1,500*	*10,600*

LESD 2021. Totals may not sum due to rounding

Table A.5 Use Class Mapping

Pre 2020 Use Class	2020 Use Class
B1a	E(g)(i)
B1b	E(g)(ii)
B1c	E(g)(iii)
B2	B2
B8	B8
A1	E(a)
A2	E(c)
A3	E(b)
C1	C1
C2	C2
A3, A4, D1, D2, SG	All Other

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