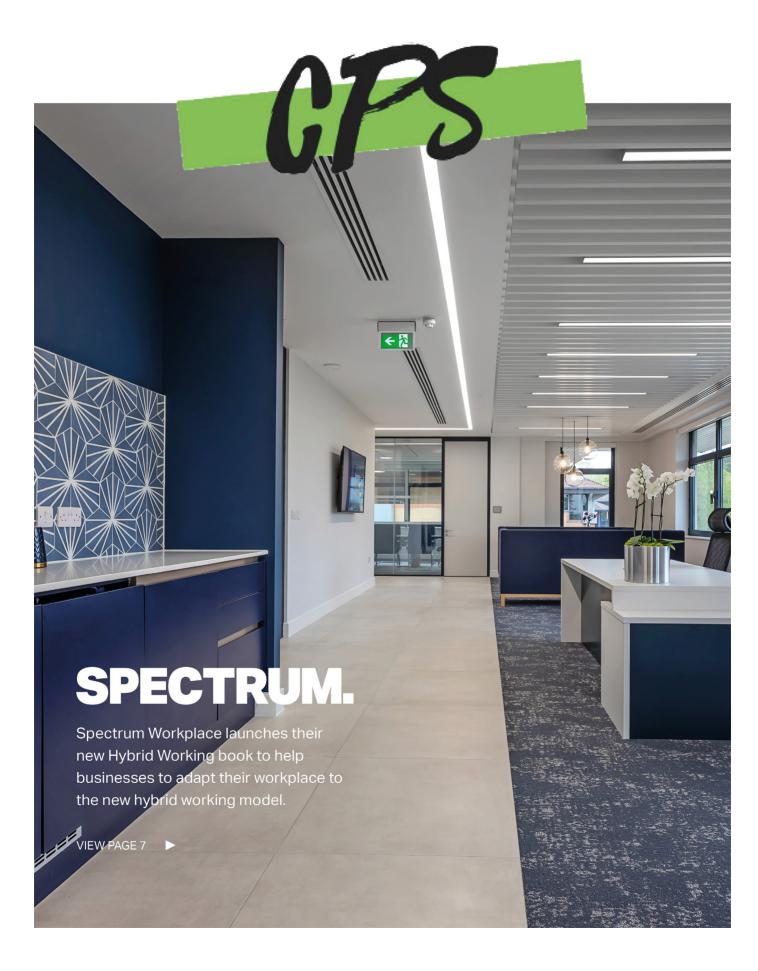
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SOUTH COAST











EXHIBITIONS

Showcasing the best property businesses in the South Coast



CPD

Updates on legislation and property issues



MARKET UPDATE

Updates on legislation and property issues



NETWORKING

For all attendees, ensuring maximum exposure



11TH NOVEMBER 8AM - 5PM



HILTON AT THE AGEAS BOWL, SOUTHAMPTON

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AGENDA - SCPPS:

8.00 - 9.30 - REGISTRATION AND BREAKFAST

9.30 - LANYARD SPONSOR (AMIRI CONSTRUCTION) AND EXHIBITION HALL OPENS

10.15 – 10.30 – FALLOUT FROM THE GRENFELL ENQUIRY ALLAN HILDER, SIMPSON HILDER ASSOCIATES (PANGEA INSURANCE BROKERS)

10.35 – 10.50 – UNLOCKING THE SOUTH REGION PETER TAYLOR, PRESIDENT OF HAMPSHIRE BUSINESS CHAMBERS (PARIS SMITH)

10.55 - 11.10 - RESIDENTIAL/LAND UPDATE JACK TOMPKINS, JLL

11.15 – 11.30 – SUSTAINABLE CITIES PROFESSOR BAHAJ, UNIVERSITY OF SOUTHAMPTON

11.35 - 11.50 - ECONOMY UPDATE FLORENCE HUBERT, BANK OF ENGLAND

12.15 - 13.15 - BREAK FOR LUNCH AND NETWORKING

13.20–13.35 – INTELLIGENT CITIES/ SOUTHERN POLICY – CHRIS COOPER, KNOWNOW INFORMATION LTD

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13.40 – 13.55 – OFFICE MARKET UPDATE NELLA PANG, OMEGA RE

14.00 – 14.15 – OFFICE DESIGN TRENDS WYATT STEEDMAN, SPECTRUM WORKPLACE (MAIN SPONSORS)

14.20 - 14.35 - RETAIL & LEISURE MARKET UPDATE KEVIN MARSH, SAVILLS

14.40 - 14.55 - REFRESHMENT BREAK

15.00 – 15.15 – INDUSTRIAL MARKET UPDATE DAN RAWLINGS, LAMBERT SMITH HAMPTON

15.20 - 15.35 - INVESTMENTS UPDATE RUSSELL MILLER, VAIL WILLIAMS

15.40 - 16.15 - COUNCILS & LEP UPDATES

16.15 - BAR OPEN

17 00 - CLOSE



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INTRODUCTION

Welcome back to the South Coast Commercial Property Show 2021! The main purpose of this event is to bring the key stakeholders together to promote and encourage development and inward investment into the region.

So why is the South Coast a viable location to invest in? Our speakers today will enlighten us with the knowledge in their sector.

Councillor Fitzhenry is a great advocate for creating and pursuing opportunities in Southampton, and encouraging inbound investment.

James Croker, Interim Corporate Engagement Director, FuturePlaces for BCP Council and will update us on The Big Plan

Jayne Sime, Senior Enterprise & Skills Executive from LEP. They provide a single point of access to a variety of funding and support options for businesses in the Solent area.

We are lucky to have Allan Hilder presenting On The Fall out from the Grenfell Enquiry with Michael Piper from Pangea Insurance being able to answer questions on any insurance implications

We are pleased to have Professor AbuBakr Bahaj talk on how we can develop more sustainable cities across the South Coast of England. The research that the University of Southampton is undertaking is an eye opener.

Peter Taylor, the President of Hampshire Chamber of Commerce and Managing Partner at Paris Smith LLP.His extensive experience and passion to drive the South Coast forward makes him the best figure to speak about 'Unlocking the South region'

An Intelligent Smarter South - Chris CooperKnowNow Information Ltd is a Systems Architect and Smart Cities expert and will be presenting on Intelligent Cities & Southern Policy. As quoted by Chris "I design the future!"

Wyatt Steedman, Project Director at Spectrum Workspace, our main sponsors will be speaking about the latest Office Design Trends, with main focus on #hybridworking and how to implement it in your business.

Our Co -sponsor today is 2Teck Limited. Wellbeing, sustainability is high on landlords and occupiers agenda. M&E plays an important role to meet these requirements.

Our lanyard sponsor is Amiri, a southcentral regional Main Contractor carrying out a range of new build, interiors and special works projects within the public and private sectors.

Russell Miller, is the lead partner of Vail Williams newest office in Bournemouth and recently elected Chair of NARA.

Nella Pang MRICS from Omega RE will be presenting on the office market across the South Coast and how it's undergoing an evolution of change.. Many businesses are trying to navigating how much space do they truly need.

Kevin Marsh who is the head of Savills licensed leisure. He has specialised in

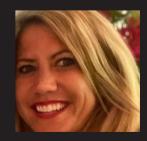
advising clients in the leisure sector, acquiring and disposing of many well known properties in the region. Retail & Leisure has been adversely effected during Covid19 and it will be interesting to hear about the recovery.

Dan Rawlings from Lambert Smith Hampton will be giving an update on the industrial market a booming market. Jack Tompkins, Residential/Land Market Expert Speaker is an integral part of JLL strategic development consulting team and provides independent research led advice on mixed-use development and regeneration projects for landowners, developers and investors.

Jack will be speaking about the role residential will play in regeneration, particularly in town centres along the South Coast Region.

Florence B C Hubert from Bank of England will be giving us Economy Update and sharing insights into the UK Economy and the South Coast region.

I hope you find the show invaluable and look forward to welcoming you back next year



Lucy Richmond

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THANK YOU TO ALL OUR SPONSORS AND EXHIBITORS

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SOUTH COAST





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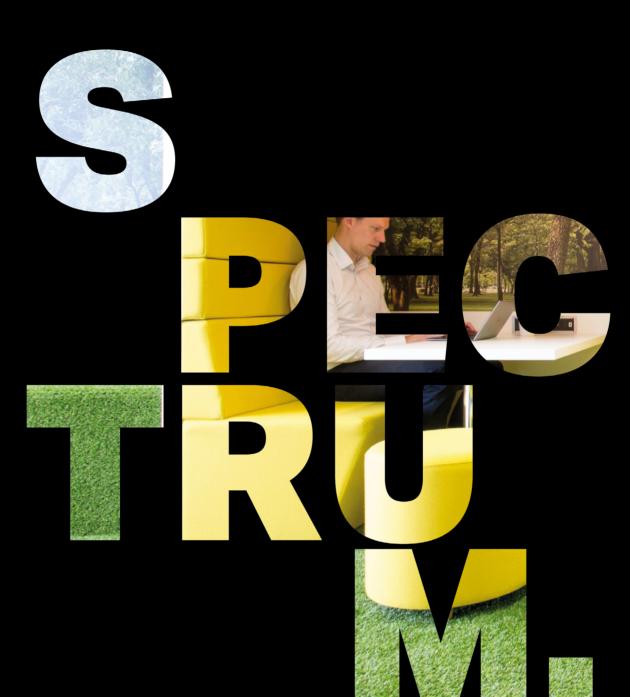
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How do we adapt to new ways of working?

The purpose of the office has shifted since last year. Many people are now fully working from home. Many are fully back in the office. And for others, they've now adopted hybrid working which can offer the best of both worlds.

People like to choose what they want, when they want it. It's why streaming services like Netflix and Spotify are so popular.

The opportunities of hybrid working are an improved work/life balance, downsizing property for financial benefits, removing or reducing the commute, as well as presenting an opportunity to choose where and when to do certain work activities, best suiting the task at hand.

The most successful businesses are those with happy, engaged, and productive workers, so it makes sense to develop a workplace strategy that will look after your most valuable asset: your employees.

Wellbeing

So how do we look after our employees?

Ideally, a workspace provides an environment that prepares employees mentally for a successful day of work as well as supporting their recovery from it. Therefore, it is crucial to adapt the facilities where they work, the equipment they use and the services available to them to fit their needs.

A way this can be done is by using the 5 human senses:

■ **Sight** – colour, form, pattern – distractions.

- **Smell** fragrance, cleanliness, food in canteen, WCs.
- **Hearing** level of sound, voices, masking, mood.
- **Taste** quality of refreshments, air quality.
- **Feel** temperature, materials, ergonomics.

Design

Now the question on everyone's lips is: does my office support new ways of working? If not, how can we adapt it?

Let's start with **spatial design**. The layout is incredibly important. Goes back to when we were cavemen: open plains are action areas, but we still need 'cave' areas to retreat to. Zones for specific tasks such as focused work, small meetings, collaboration areas, phone calls, private spaces, etc.

Biophilia is our innate connection to nature, so this is where it's important to include natural materials like leafy green plants, natural daylight, access to water such as ponds or water features, and any organic material that reminds workers of the outside such as cotton, wood, marble, slate, wool, etc.

Fluidity – movement, where people walk, where the hot desking is located, hot lockers, auto-adjust chairs.

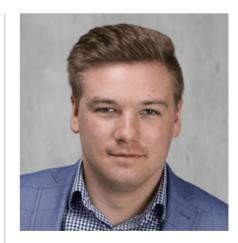
Encourage movement for people to have spontaneous chats – the 'water cooler moment'.

Resimercial is the blend of residential and commercial offices, which means introducing the creature comforts we love in our homes. Lamps, coffee tables, rugs, cushions, modern décor, and the accompanying areas that are not for work but instead socialising and relaxing.

Provide the right environment. Ergonomic chairs, sit stand desks, up to date technology and equipment, comfortable soft seats for relaxing areas, tasty coffee machines or a fridge offering healthy smoothies, quiet soundproofed areas for focusing, spacious and colourful areas for encouraged collaboration.

Summary

To conclude, if work isn't working, if you've got an empty office, or if you don't know where to start: We can help you adapt your workspace to new ways of working.



Wyatt Steedman

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TO LET: 750 TO 4,100 SQ FT



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THE CASE FOR AN INTELLIGENT **SMARTER SOUTH AT SCCPS 2021**

A Smarter South

The South of England has a rich digital heritage, world-class universities and a thriving tech sector. Surely it is smart already? In some respects it is, but in others, it is way behind the pack.

Compared to other regions in the UK, EU and SE Asia the South is behind in a number of key areas that define a smart community.

The first is our slow uptake of fibre to the premises (FTTP) at gigabit speed. This lack of capacity will be a brake on future productivity. But could be fixed just like the Isle of Wight. Any plan for connecting to gigabit fibre has to include our rural communities too. One industry response will be to look forward to widespread 5G coverage. This could be true especially alongside the new devices and apps that use this ultra fast bandwidth. But 5G also requires a fast backhaul data infrastructure. So lets start with a rapid fibre upgrade.

The second is is around how data is being used in terms of delivering outcomes and measuring success. For instance, what digital twins do we have locally and can they talk to each other? Let us start the debate on the outcomes we want our region to be famous for. How do we want our visitor experience managed? How much pollution in our water is acceptable? Successful smart places embrace the Sustainable Development Goals (SDG's). So should the South.

My third missing element is around data governance. A dry topic but ensuring that data is trusted, secure and private is critical to success. Governance is required because smart places will want to use personal data to deliver personalised services, a balance,

therefore, is to give the citizen control of what data is shared for what purpose. Governance ensures all parties play fair. The South can be a leader here, leaning on our world class universities.

Final missing element is creating the collaborative landscape that facilitates new innovation and new opportunity. For smarter places to evolve will require effort from multiple stakeholders. Including the supplier community and 'smart' manufactures; developers and landlords; local councils: as well as consultancies. creatives and marketeers. But this needs a multiplicity of ingredients to come together, from: innovation spaces, business support schemes, funding or a simply having a cluster of like minded folk. Luckily the South has some great projects such as Fawley Waterside and Lennox Point that will help here. But more are required.

In collaboration with the Southern Policy Centre, KnowNow Information are seeking sponsors for a paper that will shape the debate on how our region can adopt a sustainable roadmap in applying digital solutions to everyday challenges and enabling new experiences for our villages, towns and cities.

A roadmap that puts citizens in control of who uses their data; that uses the SDG's as the measure of success. Between us all we can facilitate collaboration to allow new innovation, which creates new opportunities for local talent and enterprise. Now that sounds like an Intelligent Smarter South.

the Intelligent Smarter South, get in touch via LinkedIn or @mobilitycooper



Chris Cooper

Chris is a founder director of KnowNow Information Ltd. KnowNow helps places and communities maximise the value from their data. Chris is also a consultant on standards for smart cities, a Chartered Engineer, a local parish councillor and a rugby referee.



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Specialist services require expert delivery, which is why we created five dedicated divisions. Each division comprises a team of skilled engineers led by a director with years of experience in their relevant fields.

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SOUTH COAST PROPERTY AND CONSTRUCTION CUP TAKING PLACE 5TH MAY 2022

RAF Yacht Club, Port Hamble Marina, Southampton, Hampshire

The morning of the event will start with a breakfast at the marina and an introduction to the event and teams. This will be followed by a safety briefing on board and time spent sail training and team building, covering all aspects of sailing with each person getting the chance to try out various roles. After a race lunch on board the competition will begin - following a set course of windward and leeward legs. You will get to taste the thrill of vacht racing aboard beautiful Beneteau First 40 Racing Yachts. Each yacht carries a professional Skipper & First Mate and can carry teams of x 8 to x 10 max. Open to experienced Sailors and Novices alike.

The Yachts are high-profile yachts with international sailing pedigrees. The skippers include Round the World record holder and Olympic Champions. After racing a prize giving will take place on shore. This will be followed by a hog roast and further chance to network on the beautiful Hamble Marina Village.

The cost is £1,995.00 + vat which includes a Beneteau First 40 Race Yacht; Professional Skipper & First Mate; Dockage; Fuel; Sailing Gear Hire; Catering which includes breakfast, race lunch and post-race prize giving and BBQ/Hog Roast. The yacht can take up to x 10 guests. Branding can be added at an additional cost and guoted separately.

The yachts can carry company livery and offers excellent brand exposure and ultimately brand recall from the memories you create – this can include logo on the bow, flying of a battle flag, spray dodgers and clothing. This will create a spectacular image out on the water and in harbour whilst networking with Industry Peers. The day can be used as an in-house team building event or for corporate hospitality.

To book your boat, email hello@collaboration360.co.uk





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SUSTAINABLE CITIES

Currently more than 50% of the world's population lives in cities and this is projected to rise to 60% by 2030, adding ~1.4 billion more people than today. An increasing number of the world's population is migrating to cities to take advantage of concentrated economic activities and perceived prosperity. In high-income countries today over 78% of the population live in cities and these urban residents are generally the wealthiest and longest-lived citizens. This is in stark contrast to low-income countries where wealth in much lower and the urbanisation rate is projected to rise from 46% to 64% of the population by 2050. Meeting the needs of this changing demographic situation sustainably will be challenging for cities.

Cities impose closer living and working conditions and provide inhabitants optimised infrastructure that supports productivity and drive long term economic growth. However, with the thrust of UN Sustainable Development Goals (SDGs) and the drive to net zero to alleviate climate change, cities will need grow sustainably. This talk will provide a discourse of possible pathways to Sustainable Cities taking into account resource utilisations and infrastructure and how these can be addressed in Solent cities context and beyond.



Professor AbuBakr S Bahaj

Energy and Climate Change Division, Sustainable Energy Research Group (www.energy.soton.ac.uk) University of Southampton, Southampton, SO16 7QF, UK,





ACQUISITION REQUIREMENTS



OUR CLIENTS ARE READY TO MOVE AND LOOKING FOR THE FOLLOWING:

PROPERTY TYPE	SIZE	LOCATION	TENURE
_and for development	0.25 acre	Southampton	Freehold
ndustrial	5,000 - 10,00 sq ft	Portsmouth	U/O
Business unit	2,000 - 4,000 sq ft	Southampton	U/O
Retail / warehouse	3,000- 5,000 sq ft	Southampton	U/O
Retail / warehouse	5,000 - 8,000 sq ft	Southampton	Leasehold
Office	40,000 sq ft	M27	Leasehold
All property types considered	3,000 - 5,000 sq ft	Ryde, Isle of Wight	Leasehold
ndustrial	5,000 - 7,000 sq ft	Bournemouth	U/O
ndustrial	5,000 -7,000 sq ft	Worthing/ Brighton	Leasehold
nvestment	Up to £1.5m	Hampshire / Dorset	Freehold
Office	8,000 - 10,000 sq ft	Fareham/Eastleigh	Leasehold
Office	1,500 - 3,000 sq ft	Outskirts of Southampton	Freehold
Office	25,000 sq ft	M3/M4	Freehold
ndustrial	5,000 - 7,000 sq ft	Stoke on Trent	Leasehold
ndustrial	5,000 - 7,000 sq ft	M1 Milton Keynes/ North London	Leasehold
ndustrial	5,000 - 7,000 sq ft	Weston Super Mare	Leasehold
ndustrial	5,000 - 7,000 sq ft	Swindon	Leasehold





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NOW IS THE TIME!

We are emerging at a fast pace from the pandemic and becoming more accustomed to working in a post Brexit economy. It is time for us to recognise the role which business in the South has to play to build thriving communities both the living generations as well as generations to come. We have a plethora of assets and talent in our region. These provide a strong base from which we can and must seize the strategic opportunities which we have as individual businesses, but importantly collectively for the region and the country.

As President of the Hampshire Chamber of Commerce, I will do my utmost to represent businesses across the county and the wider region. The purpose of the Chamber of Commerce is clear. There are three elements to it. The first is to be the voice of business in the county. The second is to help businesses grow and finally to help them connect.

I want to focus on the first of these – the voice of business. We see and hear a lot from other parts of the nation in which there appears to be a united voice. It reminds

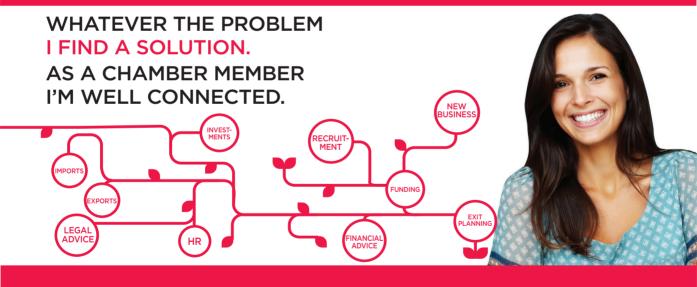
me of one of my passions – singing (probably from my Welsh heritage!) If one were to listen to the constituent parts of a choir individually they can each make an appealing sound individually. However if one brings all those voices together as a complete choir singing the same song in harmony then the sound goes to a different level. It is far more compelling and will be listened to by many more.

We have in our region many strong voices in individual businesses delivering strong communications for their businesses, suppliers, customers and the communities which they serve. But how much more compelling would it be if we could all come together and deliver that shared message under one banner. In doing so we could attract the ear of government and demonstrate to others both in the UK and internationally the opportunity for investment in our region.

As an island nation in a post Brexit economy we must harness all that we have for the greater good, a gateway to the world, the largest multifunctional port in the UK, our transport links, our creative and manufacturing talent and the strength of our educational establishments to name a few. But we also must recognise our need to address the challenges of climate change, levelling up and social mobility. These are not insurmountable hurdles. They are opportunities for us collectively to work together to deliver solutions from which our children and our grandchildren will benefit and thankful for our efforts.

The Hampshire Chamber of Commerce is an accredited Chamber within the British Chambers of Commerce, which is internationally recognised as the voice of business in the country. We have a great opportunity to make a difference to our region. We have a route to local, and national Government and strong relationships with key stakeholders across the region.

As Jimmy James and the Vagabonds sang in the 1970s "Now is the time to set things right. Now is the time we should unite" Do come and join the Hampshire Chamber of Commerce and be part of the united voice of business.



IF IT'S NEW CUSTOMERS YOU'RE AFTER OR THE RIGHT ADVICE TO KEEP YOUR BUSINESS GROWING, BELONGING TO YOUR LOCAL ACCREDITED CHAMBER OF COMMERCE MEANS YOU ARE ALWAYS WELL CONNECTED.

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OFFICE MARKET REVIEW



We challenge you to rephrase that question to "What do you want your office to be?" By doing so, you will be able to start drawing a picture of what does your workspace must have to ensure your business can flourish. As much as we love the Work From Home concept that majority of us had to adapt to, it's also becoming increasingly challenging to sustain this as a long-term solution. We are social animals. We crave human interactions. We thrive to be part of a community and likeminded people. The future look of our office looks different now to what it did prelockdown. We care more about the importance of quality over quantity. Work smarter, not harder. So, what are the key attributes to consider when you're looking for your new home/office? People. Brand. Environment. Location. Flexibility.

When was the last time you asked your team their opinion on where they work? Questions like: What's their drive? What gets them going? The benefits of completing a survey massively outweigh the amount of time it takes to put the survey together. People are your (not so) secret weapon behind your business. Therefore, we have to ensure we give them what they need to keep coming back for more. Successful organisation doesn't happen without great people. An effective talent retention and attraction strategy will help you to hold onto your best team players and recruit new ones as your company grows and develops.

How do you achieve the perfect environment? The short answer is that there is no universal perfect workspace, but there is one that's right for each organisation. We are representing a number of

traditional offices which offers the option to create a bespoke design, tailored to your business and staff needs. Ensure that your workspace is designed to help your people communicate and collaborate effectively. The advantage of a traditional workspace is the ability to create work zones suited to tasks and take in account different personalities. Think private and confidential booths, informal meeting spaces, or communal areas. We've also looked at co-working/flexible workspaces. Southampton's The Old Bond Store team have created a well functioning space, accommodating for introverts AND extroverts. Split across 3 levels – The facilities offer different types of space depending on your needs - 1:1 spaces and private booths for you and your team/clients. Collaborative and community space to generate ideas. Social & Event space for all important business and networking events.

Office branding can be a balancing act, but is so important to focus on how your office represents you and your business. One of the best tips for getting the balance right is to focus on the areas where branding will have the biggest impact. A great example of a clever workplace design that screams 'brand' is Arena Business Centre offices, that are spread across the UK. A serviced office provider, offering flexible workspaces and business facilities for you and your company. As soon as you enter their reception areas, you instantly feel like in a high-quality hotel, with detailed decor and attentive staff. It's a great first touchpoint for any client. There are still many traditional offices that are missing that WOW factor. Serviced offices on the other hand think about interior design right from the start. They can also significantly help with your day to day business management carried

out by the front-of-house staff member.

Location, location. How accessible is your office to you, your team and your customers? The location of a business is not only to attract a customer base but also to attract the right sort of talent to make the business a success. Research has shown that the location of a business is one of its most important factors for success. As commercial real estate advisors we look at your office strategically and as a whole. Location can also influence a business's ability to market itself, the total cost of operation, taxes the business owner has to pay and the regulations they must follow.

We are all aware that running a business can be unpredictable. You may find that the business grows rapidly and that you quickly require bigger premises to support such growth. On the other hand, you may find that things do not go so well, and that you no longer require as much space or wish to terminate the letting in its entirety. Theefore, it is important to retain as much flexibility as possible. We will advise you to negotiate a lease at a specific point (i.e. 3 or 5 year lease) or rolling contract, which allows you to terminate at any given date. If you would like to discuss your specific office options in more details, please contact us on **02382 355799** or email us at hello@omega-re.co.uk.



Nella Pang, Omega RE





Lambert **Smith** Hampton

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Letting of 118,257 sq ft for LaSalle IM to Hermes on 10 year lease.



75,365 sq ft unit sold by M&G to Aberdeen Standard for £16.3m (NIY 3.91%).



A newly refurbished industrial warehouse (25,027 sq ft) let on a 10 year straight term before PC of landlord works.



Letting of 24,000 sq ft on behalf of FI Real



A newly refurbished industrial warehouse unit of 28,152 sq ft let to Cloud Fulfilment.



192, 382 sq ft multi let industrial estate sold by Adanac Business Park Limited to CBRE Global Investors for £43.84m (NIY 4.11%).



74,390 sq ft at Wide Lane, Southampton let on behalf of Aviva Investors to Global E Commerce Experts Ltd on a new 15 year lease.



40,471 sq ft warehouse let on behalf of Store Property Investments Limited to Argos Limited.



Acquisition of 12,000 sq ft on behalf of Mott



E: drawlings@lsh.co.uk













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INDUSTRIAL MARKET REVIEW

2021 is so far another outstanding performance for the South Coast Industrial & logistics market following a strong H1 across all key indicators. Our market statistics and research /analysis that we track quarterly is showing that; availability is decreasing, take up is increasing, enquiries are rising and the investment market remains red hot.

Q3 is renowned for being quieter with the holiday period, and yet we have just witnessed the best Q3 on our records for take up at 594,090 sq ft, where 52 transactions were recorded at an average of 11,425 sq ft per transaction. This is an increase year on year of +28.63%, and +8.38% against the previous quarter. The net result maintains a strong year for the South Coast, which is likely to exceed the 5 year average of just under 1.8m sq ft.

Availability of stock by Q3 2021 has decreased significantly to levels of 2016, now standing at 2,258,685 sq ft, a decrease against the previous quarter of -2.30% and -26.54% year on year. While there are a number of schemes under construction and opportunities in the pipeline, supply is struggling to keep up with demand and we expect this trend to continue.

The result of the supply and demand imbalance has led to increasing headline rents and increasing land values. This is despite the uncertainty of the construction supply chain and rising construction costs, which may hinder and delay much needed new development. Time will tell!

2021 is South Coast's year of the mid to big box with 853,246 sq ft or 55% of total take up being transacted against 19 deals of sizes 20,000 sq ft +. It is encouraging to witness a number of developers proposed speculative developments come

to fruition across the corridor, with many pencilling in 2022 for delivery of much needed stock to the region.

Examples include Salmon Property's scheme of Quest 271, funded by RLAM, a 3 unit warehouse scheme totalling 150,000 sq ft, being developed on the former Newsquest site off Test Lane, Nursling. This is a great example of what was once a bespoke office development, being recycled into industrial and logistics, maintaining its employment use.

Another example is phase II of Adanac North, Nursling, following on from Oceanic Estates successful phase I, which resulted in over 200,000 sq ft being developed and let during 2020, prior to practical completion. Phase II will comprise of 14 industrial and warehouse units totalling 140,000 sq ft, more specifically targeting light industrial occupiers.

The industrial and logistics market has grabbed the headlines in 2021 with various headlines highlighting the lack of warehouses nationally, the disrupted supply chain, increased shipping costs and lack of HGV drivers. With these enormous and disruptive factors, we should be proud that our regional market remains a leading light, not just for the pure volume of take up but its consistency. This ensures the South Coast remains an attractive proposition for continued speculative development, to boost employment and the regional economy.

Dan Rawlings is a Director at Lambert Smith Hampton, operating across the South Coast in the Industrial and Logistics market.



Dan Rawlings LSH

Lambert Smith Hampton

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TWENTY3 TARGETS GREENEST OFFICE CREDENTIALS

CUTTING THE RIBBON: Councillor Daniel Fitzhenry, Leader of Southampton City Council, at Twenty3 Brunswick Place in Southampton city centre. A toppingout ceremony was held at the office building, which is being reconfigured and refurbished from top to bottom by fit-out and refurbishment contractor ITC and with a targeted rating of BREEAM Excellent for sustainability credentials and efficiency. An additional top floor has been added, with office space and a private terrace. Vail Williams and CBRE are joint sole agents of Twenty3, with flexible floorplates available from 12,077 sq ft to 64,422 sq ft. The investment is by the landlord, Fidelity UK Real Estate Fund, a fund operated by Fidelity International, one of the UK's largest investment managers.

TOPPING OUT: Russell Mogridge of Vail Williams and Emma Lockey of CBRE. A topping-out ceremony was held at the Twenty3 Brunswick Place office building in Southampton city centre, which is being reconfigured and refurbished from top to bottom by fit-out and refurbishment contractor ITC and with a targeted rating of BREEAM Excellent for sustainability credentials and efficiency. An additional top floor has been added, with office space and a private terrace. Vail Williams and CBRE are joint sole agents of Twenty3, with flexible floorplates available from 12,077 sq ft to 64,422 sq ft. The investment is by the landlord, Fidelity UK Real Estate Fund, a fund operated by Fidelity International, one of the UK's largest investment managers.

HEIGHTS: A topping-out ceremony at the Twenty3 Brunswick Place office building in Southampton city centre, which is being reconfigured and refurbished from top to bottom by fit-out and refurbishment contractor ITC and with a targeted rating of BREEAM Excellent for sustainability credentials and efficiency. An additional top floor has been added, with office space and a private terrace. Vail Williams and CBRE are joint sole agents of Twenty3, with flexible floorplates available from 12,077 sq ft to 64,422 sq ft. The investment is by the landlord, Fidelity UK Real Estate Fund, a fund operated by Fidelity International, one of the UK's largest investment managers. Pictured from left, Emma Lockey of CBRE, Andrew Lubman of Hampshire County Council, Nick Conway of ITC, Matthew Hill of

Southampton City Council, Councillor Daniel Fitzhenry, Leader of Southampton City Council, Ewan Montgomery of Fidelity UK Real Estate Fundand Russell Mogridge of Vail Williams.

A major milestone in the redevelopment of a city centre office building in Southampton - set to become the most sustainable of its kind in the region - has been reached.

The fourth floor of Twenty3 Brunswick Place, with additional office space and a private roof terrace, has been added as part of a multi-million pound investment.

Officials from Southampton City Council and Hampshire County Council were among guests attending the topping-out ceremony following completion of the highest point of the building.

Twenty3 Brunswick Place, currently being reconfigured and refurbished to the most efficient Grade A standards, will keep running costs low for occupiers and help meet corporate and social responsibility goals.

Property consultancies Vail Williams and CBRE have been appointed by the landlord, Fidelity UK Real Estate Fund, a fund operated by Fidelity International, one of the UK's largest investment managers, to jointly market the premises.

Flexible floorplates are available to let from 12,077 sq ft to 64,422 sq ft.

Set to deliver a BREEAM Excellent rating, with lower emissions due to an excellent energy performance, Twenty3 is on track to open its doors in by the end of 2021.

Russell Mogridge, lead partner in the Office & Industrial agency team at Vail Williams, said: "These iconic offices in Southampton's flourishing business district are already generating enquiries from discerning companies looking for high-quality office space with the greenest credentials currently possible.

"Employees not only expect Grade A work spaces but ones where the carbon footprint is lower – we are seeing a 'flight to quality' as employers coax their staff out of their homes and back to the office, encouraging collaboration and team work.

"Given the additional floorplate, and the focus on BREEAM Excellent certification,

Twenty3 is likely to serve as a template for improved asset performance as Britain maps out a net zero carbon future."

Emma Lockey, Agency & Transaction Advisory Director at CBRE, said: "Office take-up in Southampton is at a 10-year high because there simply isn't enough high-quality stock available. To date, Twenty3 is the only BREEAM Excellent office building in the port city and wider region, hence the appeal."

Interior work at Twenty3 includes the installation of highly efficient cooling and heating systems, along with electric vehicle charging points in the basement car park, cycle storage and shower/ changing facilities.

Fit-out and refurbishment contractor is ITC and the architects are Spratley & Partners.

Attending the topping-out ceremony were representatives from Fidelity UK Real Estate Fund, Vail Williams, CBRE, ITC and Spratley & Partners.

Guests included Councillor Daniel Fitzhenry, Leader of Southampton City Council, Matthew Hill, the city council's Economic Development Manager, and Andrew Lubman, Senior Regeneration and Development Officer at Hampshire County Council.

Councillor Fitzhenry said: "It's great to see projects like this, with pioneering energy efficiency and the considerable upgrading of existing offices helping to get Southampton moving again by generating new employment and revitalised workspace."

As part of the refurbishment, the open reception area will have glass frontage onto Brunswick Place, along with a range of breakout spaces including a business lounge for use by occupiers and guests.

According to industry data, Southampton has a workforce of 132,000 with a median age of 32; just over one-third of the population of 252,520 are aged between 18 and 35.

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INVESTMENT MARKET REVIEW

Russell Miller, a Partner at property consultancy Vail Williams, covering the South Coast, provides an investment market update.

If there is one asset class that has outshone all others during the turbulence of this pandemic era, it is industrial/logistics.

Hardly surprising, given that e-commerce in the UK is HUGE – last year nearly 28% of retail spend was online, driven by lockdowns which accelerated a trend that took off in 2007 with a 3.4%.

The A to Z of goods we are buying on the smartphone or laptop, from armchairs to zips, and every consumer product besides, require last-mile fulfilment in our just-in-time supply chain economy – and online shopping can only grow exponentially as more of us become habitualised to the convenience of electronic ordering.

Industry data shows that major investors regard distribution and logistics as a leading asset class to invest in. Indeed, since the start of the pandemic, the industrial market has consistently outperformed other commercial property sectors, here in the South and throughout the UK.

Investors are looking for decent returns in a near-zero interest rate environment; if they can get a 4% yield on industrial/logistics, by way of example, then that return compares favourably to long-term government gilts or cash in banks losing value due to the corrosive effects of inflation.

It is also evident that investors are prepared to accept very low returns if the rent is guaranteed for a long time.

These same investors are thinking twice about putting money into our

troubled high streets because physical retail, by and large, has migrated online. Shop windows aren't needed because your computer screen is now the virtual shop window.

What the market wants are out-of-town units, with lower rents, all primed for the efficient "shipping" of goods to meet the buying needs of consumers. That is what we are seeing; a seismic shift in how we purchase goods, giving rise to a new breed of industrial and distribution hubs along key transport routes.

Take the 26-unit speculative scheme by Northwood Urban Logistics at Bedrock Park, at Dorset's Ferndown Industrial Park, by the A31, for instance - 9 are light industrial/warehouse and five are larger warehouse/logistics. We know that demand from national and local businesses for these kinds of spaces will be high because other similar stock is hard to come by.

Unsurprisingly, retail warehousing has also benefitted from the online boom.

Nationally, overseas investors have been ploughing money this year into industrial, along with property companies and UK institutions. They know in which direction the weather vane is pointing.

Some of this has been at the expense of the offices sector as well as the high street – hybrid and remote working has challenged traditional assumptions about presenteeism and productivity.

Some industrial stock is far from glitzy but does the yield trick for owners. Earlier this year Vail Williams sold a freehold industrial unit in Dorset for £495,000 on behalf of the landlord, reflecting a net initial yield of just under 5%. The occupier, a tyre company, is on a 15-year full repairing and insuring lease, with a decent rental income for the new owner.



Russell Miller - Vail Williams





"Southampton is the economic powerhouse of the Solent and a city of innovation. Its vibrant mix of residents, students, professionals and visitors creates unique opportunities in the city."



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RETAIL AND LEISURE MARKET REVIEW

Kevin Marsh is a Director of Savills and Head of the Firm's UK wide Licenced Leisure team gives an update on covering pubs, restaurants and the wider hospitality industry.

At the start of the year, we were looking at the innovative ways in which the restaurant and pub sector was adapting to the challenges of enforced trading restrictions changes in consumer behaviour. We saw wet-led pubs teaming up with local takeaway services, creative outdoor dining solutions and even businesses lending their time and facilities to help the local community during lockdown. In most regions the sector has bounced back strongly, with some operators reporting trading levels ahead of 2019. What is clear is that many are reaping the benefits of the past 18 months' innovations.

The use of Apps and QR based online ordering has soared in the hospitality sector as many pubs and restaurants were forced to forgo the usual paper menus in favour of a more Covid-safe technology based approach. This adaptation may have had a directly positive impact on trade, some reporting sales up 20%, but has also allowed operators to capture customer data and improve menu optimization.

The move towards greater alfresco drinking and eating is a positive legacy of Covid creating a more European style experience. Punch Taverns, one of the UK's biggest pub companies pubs invested over £1m on creating or improving outside trading spaces.

The temporary pedestrianisation of town centres to comply with restrictions also created 17,000 extra outside seats for hospitality businesses. The Government has also announced the extension of temporary pavement licences to September 2022.

As lockdown began to lift in June, trade was still typically down 20% on 2019 with some remaining restrictions made it difficult for operators to trade at full capacity. However, since then sales of food and drink have been steadily increasing with studies showing that consumers returned to pubs and restaurants far quicker than in the Summer of 2020.

It's not just consumers who are back spending their money in the sector. Over £1bn of investment has been raised by the likes of JD Wetherspoon, The Restaurant Group and C&C Group - all investing in freehold hospitality property. Investors who had gone quiet during the peak of lockdown have also returned. Confidence in the UK hospitality industry is incredibly strong and attracting wide ranging interest from both domestic and foreign investors. This reflect a wider trend of investment into the UK with bidding for UK firms by foreign investors at a 14 year high. An example of this appetite was illustrated by our sale of a portfolio of 56 Youngs pubs in July 2021 for £53m, proving pre-Covid values have been maintained.

What can we expect to see next for the pub/restaurant sector? At the start of the year the Savills Licensed Leisure team saw historic high levels of enquiries which has steadily continued. In June alone we had almost 900,000 views on Rightmove for our portfolio of Freehold and Leasehold property. With trading adaptations in place, investment and applicant interest at an all-time high, the market is now in a strong position to cement recovery and grow as we head into 2022.



Kevin Marsh, Savills





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RESIDENTIAL MARKET REVIEW

The last time JLL attended the South Coast Property Show, way back in 2019, our focus was on market resilience to threats posed by Brexit. One global pandemic and one 'ovenready' deal later and our focus has shifted from resilience to recovery.

The pandemic has undoubtedly accelerated change across every sector - and with change comes opportunity.

In May 2020, as the housing market re-opened for the first time, I found myself in the unenviable position of having agreed a sale and purchase in a pre-pandemic world. I gazed into the crystal ball of residential property predictions and the picture seemed bleak: The Bank of England had predicted a 16% fall in prices and JLL and Savills predicted that transactions would halve to under 600,000.

Fast forward to May 2021 and average house prices had surged by 9.5% across 943,001 transactions. Very few of us could have predicted just how resilient the residential market would be.

But it has been an altogether easier task to predict market reaction in other sectors. The yin and yang of a flourishing logistics market and a receding retail market is the macrocosm of changing consuming trends - our work-from-home lifestyle added fuel to the already-burning fire that is internet shopping.

And caught in the crossfire of all of this change are our city and town centres. Systematic changes that were anticipated on a 5-10 year horizon have happened in the space of 18 months. Investors, landlords, local authorities, developers and many of us in this room are all yet again gazing into the real estate crystal ball.

What is clear to me, as we'll discuss

today, is that residential will play a seminal role in not only the south-coast's recovery but also in setting our regional identity for the future. We have fantastic market fundamentals that present strength and opportunity to investors and developers.

But we cannot rely upon our strong traditional residential market to do all of the heavy lifting. We can only build as many houses as we can sell - currently circa 200,000, perennially below the national target for 300,000 homes every year. The future, as ever, is in diversity. We need to provide versatile and forward-thinking residential products that cater for forthcoming changes in our demography.

By 2029 it is estimated that 25% of the south coast population (from Bournemouth to Brighton) will be over the age of 65. Attractive, specialist later life housing will help free up family homes and make more efficient use of existing stock. With people living longer, the UK's ageing population is typically under occupying family homes, but appropriate alternatives will encourage right-sizing.

For a number of years we have been discussing the Build to Rent market on the south coast, but it is yet to fledge when compared to London and the big 6. There are now 170,000 BTR homes in the UK, a 12% increase on 2019. That only represents 3% of the UK's ~5 million private rental homes, and it has taken 10 years to get there. Much of the BTR investment to date has disproportionately focused on the premium end of the market. JLL undertook a high-level demographic analysis and found that ~20% of the rental demand in the UK is for a 'premium product'. However, a much larger 60% of demand is for mid-market product and 20% is demand for affordable product (with a lower case "a" - genuine Affordable Housing

demand sits outside our analysis).

We need to leverage the next wave of investment into the sector, targeting, in particular, the wave of ESG impact investors who see affordable (with a lower case "a") purpose build rental accommodation as a big prize in driving a commercial return and providing some true social good. There is a wall of capital seeking this kind of outcome.

The key to our success in the south will be our ability to adapt and build on our strong residential foundation to ensure diversity of product, provider and delivery - focused on our town and city centres.



Jack Tompkins, JII







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BOURNEMOUTH & POOLE

COUNCIL UPDATE

FuturePlaces:

Pioneering regeneration model to drive forward major investment across Bournemouth, Christchurch and Poole



A new placemaking company has been set up to drive forward stewardship-led regeneration in Bournemouth, Christchurch and Poole – the UK's newest city region and globally recognised coastline.

Affordable new homes in vibrant neighbourhoods where local families have good livelihoods and where businesses thrive, are at the centre of a new approach to regeneration being driven forward by FuturePlaces, the council's new urban regeneration company.

14 regeneration sites with a gross development value exceeding £2.8bn, and with the potential to deliver 3500 new homes are being brought forward for investment under a new regeneration model which puts local communities at the centre of future development. Schemes include the south west's largest brownfield regeneration site at Holes Bay, Poole.

Councillor Philip Broadhead, Portfolio holder for Development, Growth and Regeneration, BCP Council, said; "We want the Bournemouth, Christchurch and Poole city region to be world class - one of the best coastal places in which to live, work, invest and play. As part of our Big Plan we are committed to delivering big changes across our whole area, supporting the creation of 13,000 jobs across all sectors of our economy, delivering new homes at the highest quality at all levels of affordability for local residents, and facilitating a thriving environment for our businesses.

"We promised we would move at pace with our Big Plan ambitions and within six months of setting the council's budget - earmarking an additional £1.75million to drive forward regeneration - we formed an urban regeneration company and brought in some of the UK's leading talent in development and placemaking to create the capacity and skillset needed to drive a major regeneration programme.

"We are taking a bold and unique approach to our placemaking role and responsibilities, by making sure we create future places with liveability and quality at the centre. We are determined to deliver economically vibrant but affordable places in neighbourhoods that are safe and attractive and offer a sense of belonging for local communities.

"This means we will see a shift from that exclusive focus of meeting housing numbers towards a qualitative target of delivering great places with homes and infrastructure that are beneficial and healthy for our local communities and the environment.

"By investing significantly in our new model, we are cementing a firm commitment which will provide confidence within the investment market, and give certainty to our local communities that they will be at the centre of positive regeneration."

For further information on the council's urban regeneration company please visit bcpfutureplaces.co.uk

FuturePlaces.



investinsouthampton.co.uk





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SOUTHAMPTON COUNCIL UPDATE

Did you know?

Southampton has been longlisted to the final eight locations in the UK City of Culture 2025 bid.

Winning would significantly boost Southampton's international profile and enhance the city's cultural sector plus, attract visitors and enterprise, boost local business and investment, create new opportunities.

PwC ranks Southampton as the 3rd highest city for 'Good Growth' in the UK 2020

Southampton is a globally recognised international trade gateway and is at the heart of the $\mathfrak{L}2$ billion Solent Freeport proposals.

The Port of Southampton performs a crucial role for UK plc. It is the UK's biggest export port and most efficient container port, with over $\pounds 40$ billion of UK manufactured goods exported from Southampton each year – 90% to destinations outside the EU.

The Port is also Europe's number one cruise port, welcoming on average over 2 million passengers each year and in 2021 a fifth 'green' cruise terminal was opened.

The Southampton International Boat Show typically attracts more than 100,000 visitors annually.

Nearly 2 million passengers pass through Southampton Airport each year and now British Airways is flying to 12 new destinations and delivering on their commitment to improve connectivity for Southampton. The proposed 164 metre runway extension has also recently been approved to enable more international flights in the future.

Southampton has a total student population of 46,000 including 6,500 international students from more than 135 countries.

University of Southampton is a founding member of the Russell Group of research-intensive universities, has worked on prominent COVID-19 research projects.

Southampton has been identified as one of 20 cities' nationally to increase housing targets by 35% to support Government's 300,000 homes per year target.



Focus on delivering future infrastructure with over £100 million secured to transform transportation across the city.

£70 million on Flood Alleviation Schemes, opening up new waterside development opportunities.

Ambitious transport transformation plans to get Southampton moving which includes a 'Southampton Mass Transit System', transforming public transport in Southampton and the wider area.

Investment in infrastructure, skills and innovation to support Southampton's long-term economic growth, low carbon agenda and our plan to restore and renew our city as a safer and more prosperous place.

The emerging Mayflower Quarter masterplan is one of the largest urban regeneration areas in the UK, an investment opportunity placing Southampton on the global stage. The 84-hectare area, extending north from Southampton Central train station to the waterfront, will be a pivotal step in the city becoming an international destination. The development will provide world-class facilities for businesses alongside city centre homes, leisure opportunities and new green spaces on a revitalised waterfront.

Despite the global pandemic, new schemes are coming forward. Over 22 acres of city centre, benefitting from over half a billion pounds of private sector investment, over just three development sites, delivering:

- **2,000** jobs
- 1,750 new city centre homes
- Major public realm and connectivity improvements
- Over 525,000 ft² of new commercial space

A 30% increase in the existing commercial space at these three sites.

The Future - Getting Southampton Moving - investinsouthampton.co.uk



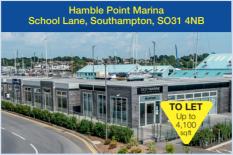




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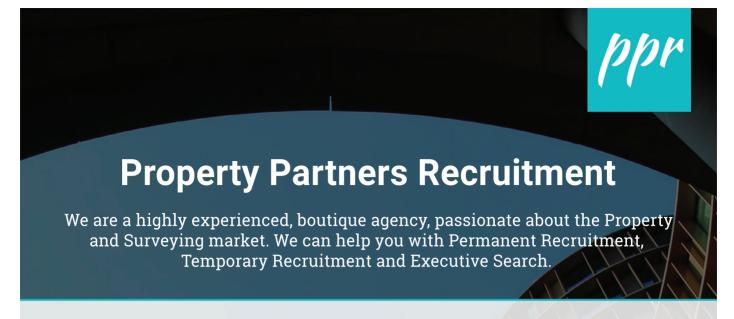


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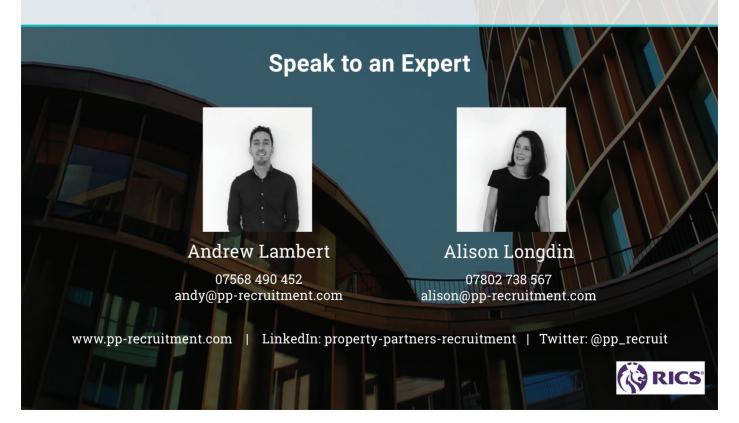
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