

DRAFT

Waverley's Thriving and Green Economy

Our Economic Development Strategy

January 2024



Waverley
BOROUGH COUNCIL

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Foreword

Our borough is one of the best places in the country to locate a business. We offer the connectivity, infrastructure and talent associated with our more ‘urban’ neighbours set within stunning open countryside scattered with picturesque market towns and villages, and with excellent transport links to the South East, including London, Brighton, and Portsmouth.

We are also highly dynamic and proactive. We understand that to thrive we need to work closely with our local businesses and continue to invest in sustainable and inclusive development and infrastructure across the borough. We work collaboratively with our private and public sector partners and are making high-impact investments across Waverley ranging from high street acquisitions to the Brightwells Yard regeneration scheme in Farnham and supporting delivery of the new Dunsfold Park Garden Village near Cranleigh.

We are on a mission to attract more sustainable businesses and entrepreneurs to live and work in Waverley. We offer the work life balance that many people are looking for with high quality housing, excellent educational establishments, access to outstanding green spaces, with a strong council commitment to protecting and enhancing our environment.

Our new emerging local development plan will seek to accommodate energy efficient and exceptional residential and commercial sites across the borough supported by high-speed digital infrastructure and a low carbon, resource efficient and socially inclusive economy.

This *Economic Development Strategy and Action Plan*, which I am delighted to introduce, will help us to make these necessary changes. It will enable us to harness our economic strengths and opportunities, while also addressing any weaknesses and threats. It also demonstrates that we are ‘pro-business’ and have a clear, ambitious and deliverable plan to make our borough more attractive to investors.

We are also determined that our future economy will be forward thinking and bold – we want it to be environmentally sustainable, productive and inclusive. Drawing inspiration from cutting-edge concepts like Kate Raworth’s *Doughnut Economics*, we understand that there are environmental and social limits to growth so have put sustainability and equity at the heart of this strategy.

We look forward to collaborating with colleagues and partners on this important work and I am certain that together we can create positive outcomes for our residents, our economy, and our environment.

Cllr Liz Townsend BEM

Portfolio Holder Planning, Regeneration and Economic Development

Waverley Borough Council



1 How Do We Define 'Economic Development'?

Economic development is traditionally defined as a broad set of activities that bring local partners together to generate wealth and improve livelihoods by stimulating the economy of an area through the use of resources, powers, and influence.

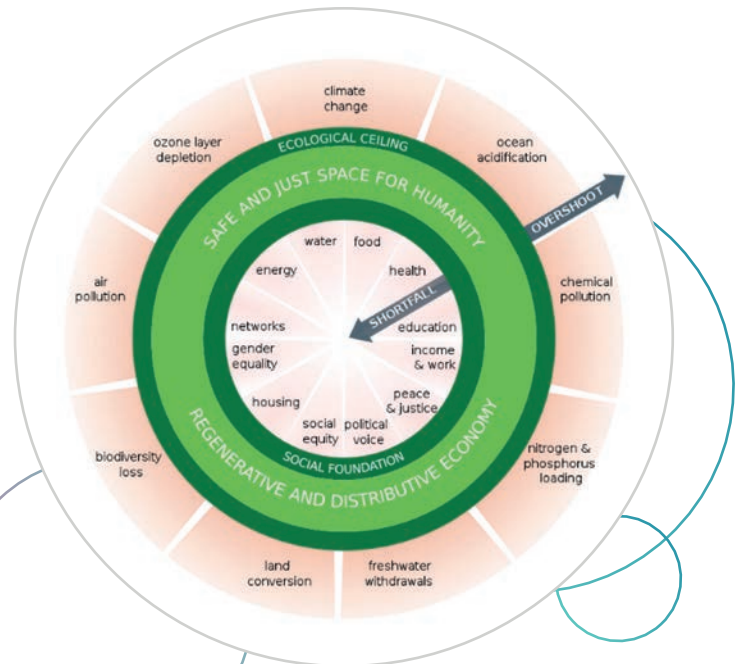
There are a range of metrics to track economic development, but it has typically been measured using Gross Value Added (GVA) which refers to the value generated in an area by businesses and organisations engaged in the production of goods and services and Gross Domestic Product (GDP) which is used to measure the size of a country's economy.

We recognise that economic growth does not always translate to improved livelihoods for *all*, and can lead to unintended economic, social and environmental consequences. For example, some of the most economically productive towns and cities across the country suffer from high levels of inequality, deprivation, congestion and air pollution which are in part linked to their economic success.

This tension has led to the rise in alternative approaches in economic development. One of most influential of these is *'Doughnut Economics'* which is an approach to economic development pioneered by Kate Raworth. This seeks to create a sustainable and just economic system for the 21st century based on the idea that the economy should not be measured *solely* by GDP metrics, but also by its ability to meet the needs of all people while staying within the ecological boundaries of the planet.

The approach is represented by a doughnut-shaped model, which shows the minimum and maximum social and ecological thresholds that a thriving society should not fall below or exceed. The inner circle represents the minimum social foundation, which includes basic needs such as food, water, housing, and healthcare. The outer circle represents ecological limits of the planet, such as biodiversity loss, climate change, and pollution. The goal is to create a sustainable economy that operates within the space between the two rings, in the *"safe and just space for humanity"*. In practical terms, doughnut economics encourages a shift from a traditional growth-based economic model to one that places equal credence on the wellbeing of people and the planet. This can be achieved by implementing policies that promote social justice, environmental sustainability, and economic democracy.

We consider these principles as fundamental to our definition of economic development, and have sought to reflect these throughout this document.



2 Our Ambition

This document sets out our ten-year *Economic Development Strategy* for Waverley. 'We' are the businesses, anchor institutions and organisations that have a stake in our local economy and have been involved in the creation of this plan.

Following detailed analysis of our economic position, and extensive and wide-ranging discussions between partners, we have agreed that our collective ambition is to drive more businesses to our borough by promoting it as one of the best rural areas in the South East to locate and expand a small or startup enterprise.

We recognise that as a society we face major challenges around climate change, environmental degradation, and inequality alongside population growth. We want to ensure that our economy does not exacerbate and wherever possible tackles these issues.

We will work closely with our partners to achieve our ambition and have captured this in our vision for our future economy:

OUR VISION

*We will work proactively together to attract small and start-up businesses to locate in Waverley to help stimulate a more **thriving** and **green** local economy.*

Through our active and meaningful interventions our economy will be more environmentally sustainable, productive and inclusive than ever before.

We will embed our vision in the way that we work across our organisation and in how we work with our partners. We aim to build on upon the borough's existing strengths which already place Waverley in a strong, competitive position:

- We have a Council with a Corporate Strategy that outlines a strong commitment and a history of delivering for our residents, our businesses, and our environment.

- Rather than a single city focus, we have four main historic and picturesque settlements with high quality housing and vibrant high streets that spread economic development opportunities throughout the borough.
- We have access to some of the highest-quality natural assets in the country including extensive areas designated as National Landscape in recognition of their outstanding natural beauty.
- Our resident workforce is exceptionally talented and highly skilled, and we are home to an affluent customer base.
- We benefit from having a diverse and outstanding range of cultural, creative and leisure assets attracting both residents and high visitor numbers.
- Our location is strategically positioned at the centre of the South East Region with easy access to London and major transport routes.
- We benefit from a range of exceptional educational organisations including the thriving and innovative University for Creative Arts, and the University of Surrey is also in close proximity.
- We have the highest proportion of residents in professional, scientific, and technical occupations. compared to neighbouring boroughs.
- We have a thriving rural economy covering a broad range of sectors including agriculture, manufacturing, construction, and defence.

We want to be recognised for doing things 'differently' and for trying new approaches to deliver positive, sustainable economic development and thriving communities.

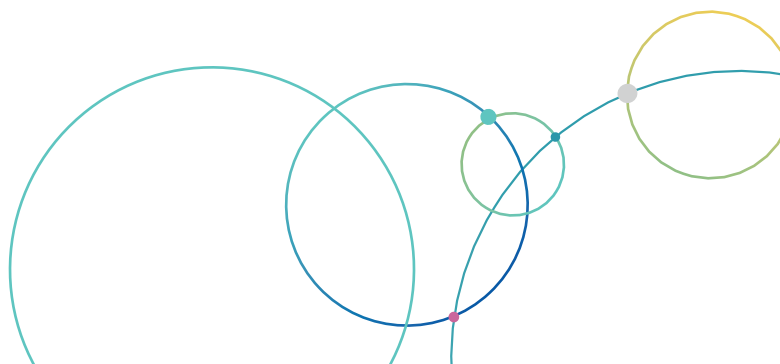
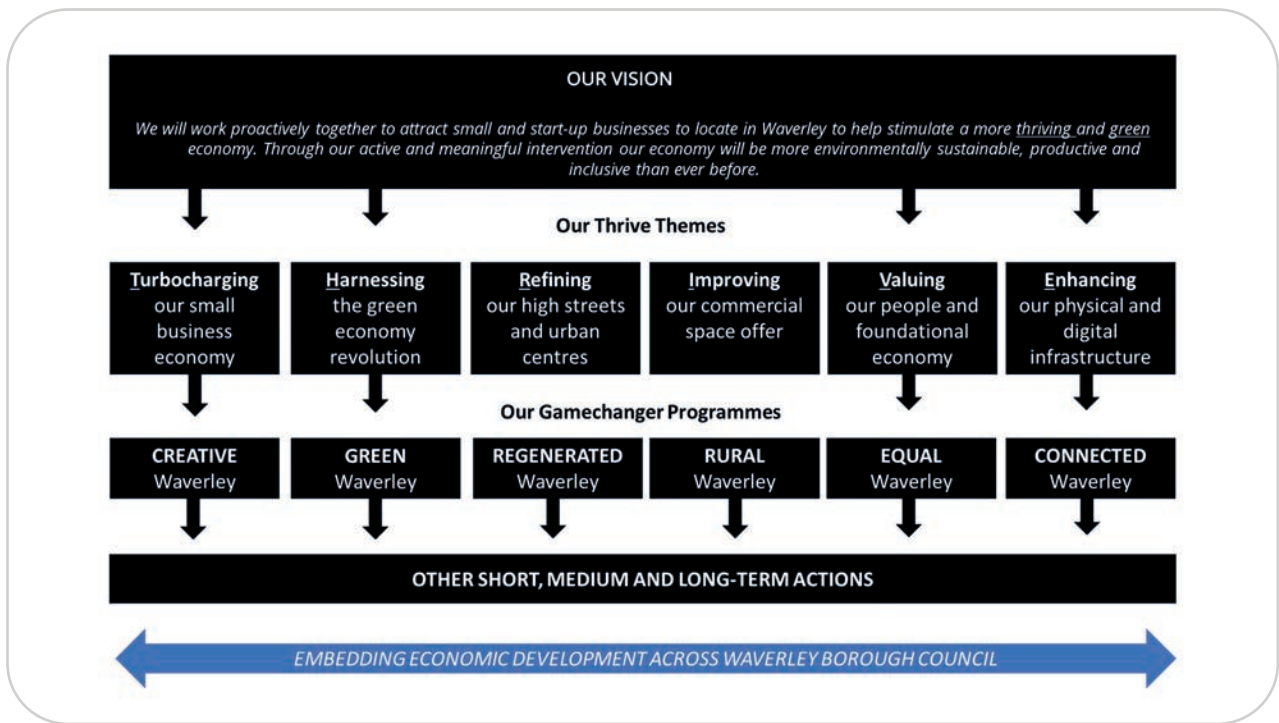


Figure 1.1 Our Strategy Structure



3 Our Delivery Strategy

To deliver our vision we will focus on six **THRIVE** themes which will harness the borough’s unique qualities and draw upon the principles of *Doughnut Economics*. These themes reflect our ambition to deliver positive economic, social and environmental outcomes for our borough:

3.1 Thrive Themes

This provides an outline of the Thrive themes which are covered later in more detail in this document.

- **Turbocharging** our small business economy: Supporting existing business to prosper and attracting small business and start-ups to our borough.
- **Harnessing** the green economy revolution: Mitigating the environmental impacts of existing businesses and stimulating the growth of our low-carbon economy.
- **Refining** our high streets and urban centres: Supporting our town centres to evolve and remain resilient in the face of significant macro-economic pressures.

- **Improving** our commercial space offer: Reversing our decrease in commercial floorspace and enhancing our offer to attract sustainable, modern and productive businesses.
- **Valuing** our people and foundational economy: Ensuring all our residents can benefit from our economic success and supporting sectors that underpin our day-to-day needs.
- **Enhancing** our physical and digital infrastructure: Enhancing infrastructure to improve the attractiveness of our borough to businesses and residents.

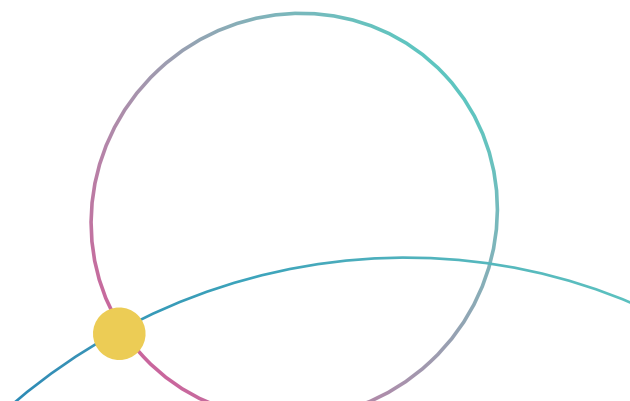
Some of these themes capture work we are already focusing on, but we have also defined one new gamechanger programme per theme that we believe will make a significant difference to our economy. These highly ambitious programmes are supported by an Action Plan and reflect our determination to be greener, bolder and more impactful than we have been in the past.

3.2 Gamechanger Programmes

Linked to each of our six THRIVE Themes are six new Gamechanger Programmes which are outlined below and covered in more detail in Section x:

- **Green Waverley:** Positioning Waverley as the go to place for “green” businesses. This programme supports our business base to become one of the greenest and most environmentally sustainable in the country. It will involve signposting businesses in our area to grant and loan funding to enable investment in training, tools, equipment, materials and retrofitting activities that help dramatically improve their long-term environmental performance. We will work to build a green peer to peer network which will nurture a green cluster and offer consultancy vouchers to businesses to provide them with access to specialist and tailored support that will help them decarbonise their operations and improve the environmental sustainability of their supply chains.
 - Links to ‘*Harnessing the green economy revolution*’ theme.
- **Creative Waverley:** This programme will elevate our already strong creative and cultural sector so our borough becomes one of the most prominent clusters of this type of activity in the county. Centred around Farnham, the focus will be on activating underutilised public assets and retail units to create a new network of workshops and makerspaces that encourage creative entrepreneurialism and attract inward investment.
 - Links to the ‘*Turbocharging our small business economy*’ theme.
- **Regenerated Waverley:** This programme will involve working with town and parish councils to develop highly ambitious Place Strategies for our Godalming, Farnham, Haslemere and Cranleigh centres. Each plan will identify short, medium and long-term interventions to improve the economic, social and environmental functioning of each centre.
 - Links to the ‘*Refining our high streets and urban centres*’ theme.

- **Rural Waverley:** This programme focuses on re-invigorating and re-imagining our rural areas as places where small clusters of sensitive and sustainable business activity can thrive, including food production and land based businesses. It will involve the protection and retention of existing rural employment space in accordance with planning policy, whilst encouraging the appropriate delivery of high quality rural business hubs. Drawing on inspiration from Flimwell Park (East Sussex), Snape Maltings (Suffolk) and Hethel Innovation Centre (Norfolk) this will provide high-quality office, workshop and customer-facing space for businesses that prefer to be in rural areas.
 - Links to the ‘*Improving our commercial space offer*’ theme.
- **Equal Waverley:** This programme will focus on providing our residents with access to the training skills, and opportunities they need to benefit from a thriving green economy. It will involve working with local partners to actively support unemployed residents, focusing on individualised 1-1 coaching to help them enter the labour market. The focus will be on supporting them to become ‘job ready’, whilst helping to reduce the ‘barriers’ some face in accessing employment –primarily relating to training, transport, uniforms and equipment.
 - Links to the ‘*Valuing our people and foundational economy*’ theme.
- **Connected Waverley:** This programme will support our area to become one of the most digitally connected rural areas in the country. This is critical to building thriving businesses and communities. It will involve the delivery of a package of complementary interventions in collaboration with key partner organisations to enhance both the speed and reliability of digital connectivity across the borough.
 - Links to the ‘*Enhancing our physical and digital infrastructure*’ theme.



4 Turbocharging Our Small Business Economy

4.1 Why is action needed?

We have an important economy made up of around 8,000 businesses employing 52,000 people, but unlike some of our neighbours and most other parts of the South East we have experienced a loss of around -3,000 jobs over the past five years putting us at risk of becoming a 'dormitory borough' ¹ which can suffer from:

- Lower day-time expenditure in town centres from employees, customers and clients.
- High traffic, congestion and air pollution at peak times as people have to travel further afield.
- Increasing inequality as those unable or unwilling to commute are more likely to be 'left behind'.
- Greater reliance on global supply chains and the environmental degradation this creates.
- Fewer options and opportunities for social mobility.
- Less resilience to economic shocks due to a lack of economic diversity.
- A lack of vibrancy and interest – the essence of successful 'places'.

- Lower levels of social capital and weaker civil society.
- Brain drain of young educated people to places with 'better' jobs.
- Smaller business rate bases to support local services.

This decline in employment has been driven by the contraction of our private sector, most notably within the Professional, Scientific and Technical and Business Administration sectors. This is a concern as our Gross Value Added (GVA) has historically been lower than many of our neighbours in both absolute and relational terms, and job losses across our private sector have compounded this:

- Our absolute GVA is £3.3bn which is less than many of our neighbours, including Horsham (£3.4bn), Chichester (£3.4bn), the Mole Valley (£4bn), Guildford (£5.3bn) and Rushmoor (£6.2bn).
- Our relational GVA, measured by GVA per capita, is £31k versus £32k in Rushmoor, £37k in Guildford and £41k in the Mole Valley. ²

Figure 4.1: Waverley's Employment by Sector (2020) - Source: ONS Business Register and Employment Survey (2020)

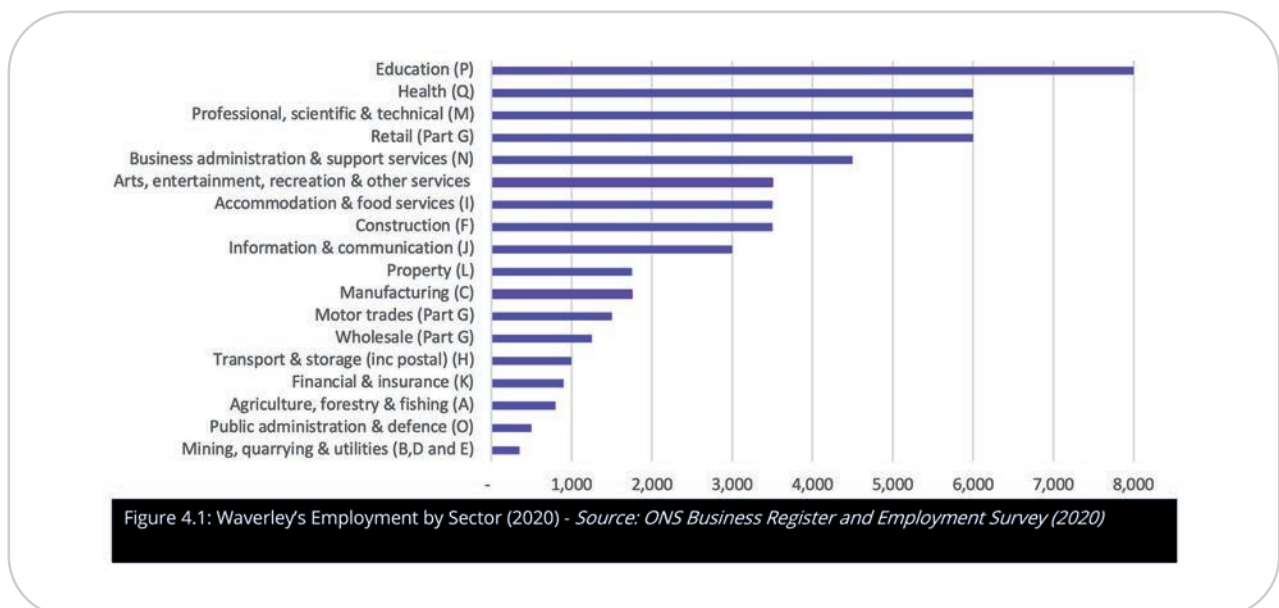


Figure 4.1: Waverley's Employment by Sector (2020) - Source: ONS Business Register and Employment Survey (2020)

¹ ONS Business Register and Employment Survey (2020).

² ONS UK Small Area Gross Value Added (GVA) Estimates (2020).

These figures also link to our sector mix which is overly reliant on service-based sectors that meet the day-to-day needs of our residents. While these are essential to the functioning of our urban and rural settlements, they are not as productive as knowledge and production-based industries and provide fewer well-paid jobs for local people.

We have also seen a year-on-year decline in business births over the past five years representing a shift in our entrepreneurial position. In three of the last five years, we have experienced more business deaths than births which is reflected in our five-year business survival rate which is lower than nearly all our neighbours ³.

4.2 How will we respond?

We will respond to this by focusing our energies on supporting entrepreneurs and micro and small enterprises (MSEs) to relocate and/or set up locally. We are focusing on this group because over 98% of our businesses fit these criteria and because our borough is exceptionally well-placed to host and attract businesses of this scale. Smaller businesses are also often more environmentally sustainable, as they tend to have local supply chains and are more likely to employ local people.

Within this group we will focus on businesses that have a growth mindset and undertake knowledge or production-based activities – this is because they will provide ‘good’ jobs for our residents. Sectors that present the greatest opportunities for our future economic success include the Digital, Creative, Professional, Health, Manufacturing and Construction sectors as they are growing and/or already have some presence locally. The Low Carbon sector also presents opportunities and this is addressed in the next theme on the Green Industrial Revolution.

We will work together to create both local and regional clusters of businesses in these sectors to boost productivity and generate agglomeration effects. Those that also present a regional opportunity, and will therefore benefit from additional targeted support from Surrey

County Council, include niche sub-sectors such as Video Gaming, Immersive Technology, Professional Services, Health, Film and Television Production.

To do this, we will work together to create a new ‘place brand’ for Waverley based on our unique selling points. We will use this to actively market our borough to entrepreneurs, small businesses and investors in our priority sectors. Using existing platforms as a basis (e.g. Invest in Surrey) we will undertake proactive inward investment promotion to communicate our ‘place brand’ and direct interested parties to local opportunities.

We will also work tirelessly to make sure that businesses and entrepreneurs that locate and/or start up in our borough are (a) aware of the different types of support provided by our partners, and (b) can access responsive and targeted support programmes commissioned by us. This will involve even closer engagement with the business community to raise awareness and build new connections between officers and businesses.

4.3 What is our gamechanger programme?

We will develop a programme (‘Creative Waverley’) to elevate our strong creative and cultural sector so our borough becomes one of the most prominent clusters of this type of activity in the county. Centred around Farnham, the focus will be on activating underutilised public assets and retail units to create a new network of workshops and makerspaces that encourage creative entrepreneurialism and attract inward investment. This network will wrap in complementary business support and acceleration programmes for creative and cultural businesses to boost entrepreneurialism and business survival across the sector.

This programme will be undertaken in close partnership with the University for the Creative Arts (UCA) as they are globally renowned for their research in this area and because they have ambitions to deliver complementary cutting-edge facilities in our area, including a new Video Games

³ ONS Business Demography (2020).

Incubator Centre. We will also work with Farnham Maltings and Farnham Town Council to identify spaces specifically for makers to strengthen and enhance the area's status as a World Craft Town, and to build on the new Incubator Space coming forward at Farnham Maltings.

We will also liaise with and feed into UCA and Surrey County Council's emerging Createch Cluster ambitions. Working collectively will raise the scale of ambition of our borough projects and initiatives and support inward investment and grant funding applications.

4.4 What other actions will we pursue?

We will pursue a wide range of other short, medium and long-term actions that align with our mission and context as identified in our Action Plan. Three high-impact examples include:

- Work with Guildford Borough Council to undertake an audit of the business support offer provided by both boroughs and use this as a basis to co-commission targeted services for businesses within our priority sectors.

- Engage with other boroughs that have implemented similar programmes to explore any lessons learned from their experience.
- Work with partners to create a new 'place brand' capturing Waverley's Unique Selling Points for businesses, entrepreneurs and other investors. Once created, explore options to market Waverley as one of the best rural areas in the South East to locate a small business or to set up a new enterprise.
- Our options range from placing advertisements in sector-specific publications to targeted social media campaigns.
- Actively signpost businesses in priority sectors to the support programmes already offered by the University for the Creative Arts, Surrey Chamber of Commerce, Surrey County Council and others, and help them to unlock the opportunities these present.
- Examples include the University for the Creative Arts Innovation Hub (UCAiHUB) and government's Innovate UK.

4.4.1 Our Indicators of Success

Indicator	Baseline Position	Five Year Target	Ten Year Target
Number of Jobs	52,000 (2021) ⁴	55,000	60,000
Number of Businesses	8,000 (2021) ⁵	9,000	10,000
Number of Business Births P/A	800 (2020) ⁶	1,000	1,200
GVA Per Capita	£31k (2020) ⁷	£35k	£40k

⁴ ONS Business Register and Employment Survey (2021).

⁵ ONS Business Register and Employment Survey (2021).

⁶ ONS Business Demography (2020).

⁷ ONS UK Small Area Gross Value Added (GVA) Estimates (2020).



5 Harnessing the Green Industrial Revolution

As a Council we declared a Climate Emergency in September 2019 and committed the organisation to become a carbon neutral council by 2030. Global temperatures are increasing which is having significant economic, social, and environmental impacts from the global to local level. Our borough specifically is facing challenges related to wildfires, heatwaves, droughts and flooding. We have published the *Waverley Climate Change and Sustainability Strategy (2020-2030)* and *Waverley Carbon Neutrality Action Plan (2020-2030)* which set out the actions we will take to mitigate and adapt to these challenges locally.

From an economic development perspective, we need to make our economy cleaner and greener than ever before. On one hand, we need to work with businesses in our area to reduce their environmental impacts by supporting them

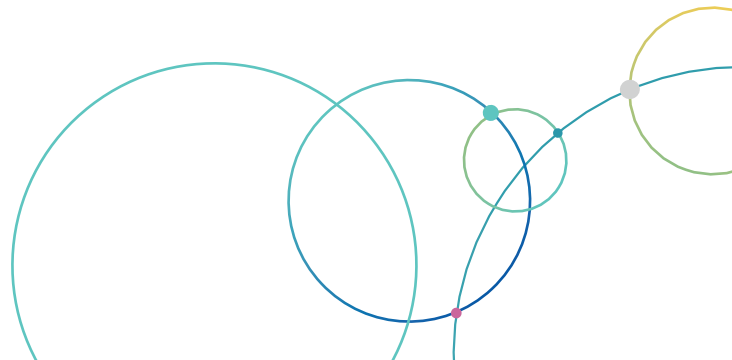
to adopt new practices and technologies that reduce emissions. This is because economic activity in our borough, excluding transport, currently contributes over 50kt of carbon dioxide (CO₂) to the atmosphere each year ⁸.

On the other hand, we need to grasp opportunities presented by emerging low carbon sectors as these have the potential to not only provide 'good' jobs but also tackle the climate crisis. Recent evidence indicates that the country's low carbon economy could grow by +11% per annum between 2015-2030, which is four times faster than the rest of the economy is expected to grow ⁹.

The Government identify the following sectors as presenting the main opportunities for a Green Industrial Revolution ¹⁰:

Sector	New Jobs Created	By Year
offshore wind	60,000	2030
low carbon hydrogen	8,000	2030
delivering new and advanced nuclear power	10,000	per each new nuclear plant
zero emission vehicles	40,000	2030
green public transport/active travel	3,000	2025
jet zero and green ships	5,200	2030
greener buildings	50,000	2030
carbon capture, usage and storage	50,000	2030
flood defences	20,000	2027
Green finance	'hundreds of thousands'	2030

⁸ Waverley Climate Change and Sustainability Strategy (2020-2030).
⁹ Enterprise M3 Strategic Economic Plan (2018-2030).
¹⁰ HM Government 10 Point Plan for a Green Industrial Revolution (2020).



Given our geographical characteristics and current sector mix, some of these do not present major opportunities for our borough, however, those opportunities related to greener buildings, public transport and active travel would appear the most accessible.

The major challenge to unlocking these opportunities locally, however, is that our population does not currently have the appropriate skills to support a green transition as highlighted in Enterprise M3's *Local Skills Report and Action Plan (2022)*. The skills we require range from heat pump and solar panel installers through to machine learning experts and data analysts. This is a national issue as the figures below illustrate:

- The Government project that construction sector will need 350,000 people to be re-trained or trained to retrofit buildings.
- Make UK estimate that a large proportion of the 1.2m additional jobs expected to be created in the manufacturing sector by 2050 will require green skills.
- The Chartered Institute of Waste Management estimate that the sector will require 300,000 new employees with green skills and 150,000 to be reskilled.



5.1 How will we respond?

We will respond to this context by putting core principles at the forefront of our approach. We understand that there are environmental and social limits to growth and will act responsibly, reflecting the principles underpinning the theory of doughnut economics.

We will achieve this by mitigating the environmental impacts of existing economic activity in our borough - this will involve directing our existing and new businesses to national, regional and local services that will support them to decarbonise their operations and supply chains. We will work together to identify and fill any gaps in the offer, particularly in relation to funding and advice, and to ensure as many businesses as possible in our borough are supported to improve their environmental performance.

We will also harness the opportunities presented by the Green Industrial Revolution by supporting businesses undertaking low carbon activities to set up, grow and scale within our borough. This will again involve directing businesses to support offered by partners, but we will also work with Guildford Borough Council to directly provide intensive support for businesses in green sectors. We will prioritise businesses undertaking activities related to sustainable food production, greener buildings, sustainable travel and renewable energy as we believe that they present strong opportunities for our borough.

To complement this, we will all use our role as an anchor institution to bring forward projects that deliver net zero ambitions *and* support the development of our green economy. As set out below, we will collectively use our spending power to create the demand needed to support these sectors to thrive locally and create a short, medium and long-term pipeline of green work across the district.

Focus On: Waverley Borough's Council's Sustainability Investments

- Delivering energy efficiency improvements to all council assets and leisure centres.
- Bringing forward the new Cranleigh Leisure Centre to a Passivhaus standard.
- Introducing new Electric Vehicle charging points, particularly in council-owned car parks.
- Developing and implementing the local cycling and walking infrastructure plans (LCWIP) for a network of routes across Waverley.
- Delivering new solar panels on council-owned car parks.
- Investigating and implementing renewable and community energy projects, including the potential for micro-hydro electricity generation on rivers.
- Ensuring that all new council homes are carbon neutral in operation.
- Working with partners to facilitate the retrofitting of our housing stock to be carbon neutral in operation.
- Reviewing the council's waste contract to explore opportunities to reduce emissions.

To ensure these projects deliver positive local economic impacts we will continue to ensure our newly agreed procurement practices encourage expenditure with local businesses and/or organisations that employ local people. We will undertake proactive supplier development programmes as part of this, to help local businesses better understand the type of green services we collectively require over the next few years and how to access the training they require to provide these. This will involve providing new webpages, similar to those provided for Greater Manchester, to signpost businesses to the different options available to them.

To support this activity we will also work with our training providers (e.g. Waverley Training Services, Godalming College, University for the Creative Arts etc) to highlight the need to offer the right courses and programmes to support our economic transition. This will involve ensuring the availability of training targeted at the next generation of green talent, but also offering courses that allow businesses to 'grow their own' and upskill members of their existing workforce. This will be undertaken closely with our supplier development programmes to make sure businesses have the skills we need locally to deliver sustainable projects coming forward.



5.2 What is our gamechanger programme?

We will create a new programme ('Green Waverley') to help our business base to become one of the greenest and most environmentally sustainable in the South East. At its core this will position Waverley as the go to place for green business - this will involve building a peer-to-peer green network and signposting to grant and loan funding for businesses in our area to invest in tools, equipment, materials and retrofitting activities that help dramatically improve their long-term environmental performance. Investments will range from fitting buildings with solar panels to purchasing environmentally friendly vehicle fleets.

We will also offer consultancy vouchers to businesses to provide them with access to specialist and tailored support that will help them decarbonise their operations and improve the environmental sustainability of their supply chains. This will help businesses fundamentally change how they operate by putting environmental considerations at their heart. As part of this we will encourage and link up our business base with the B-Corp movement, and ensure our consultancy offer supports as many businesses as possible to become accredited B-corps through changing the way they do business.

5.3 What other actions will we pursue?

We will pursue a wide range of other short, medium and long-term actions that align with our

mission and context as identified in our Action Plan. Four high-impact examples include:

- Work with Guildford Borough Council to develop an incentive scheme to encourage businesses focused on green buildings, sustainable travel and/or renewable energy to locate in the area. This could involve incentives around Business Rates, loans and grants to enable a 'soft landing', alongside targeted support as provided via the gamechanger programme.
- Develop a costed long-term pipeline of green infrastructure investments that the council and its partners expect to procure over the short and medium-term and run sessions with local providers to inform them about future opportunities.
 - This should provide businesses with more confidence and certainty to invest in training and equipment that enables them to provide low-carbon services.
- Support Waverley's businesses to re-skill and up-skill their employees with relevant green skills.
 - This could involve directing local businesses to relevant courses provided by local skills providers; Collaborating with Waverley Training Services, Godalming College, University for the Creative Arts and other local providers to ensure that they provide the right range of courses to support learners of all ages to develop the skills they need to participate in the low carbon economy.
 - This will involve undertaking an audit of the existing offer alongside analysis of local skills demand.

5.3.1 Our Indicators of Success

Indicator	Baseline Position	Five Year Target	Ten Year Target
Number of low-carbon businesses	N/A	250	500
Number of businesses accessing grant and loan funding to improve their long-term environmental performance	N/A	500	1000

6 Refining Our High Streets

6.1 Why is action needed?

We have four valued and historic urban centres that are anchored by a wide range of retail, leisure, cultural, and heritage assets:

Farnham was granted the acclaimed World Craft Town status in 2020. A thriving and historic market town located in the Surrey Hills and well known for its attractive Georgian streets, it is home to the University for the Creative Arts, Farnham Maltings centre for creativity, as well as the Craft Study Centre and The New Ashgate gallery. The town has a museum located in an elegant Georgian town house, as well as a magnificent deer park and castle. It is home to both world-renowned craft artists and to the next generation of emerging makers with craft continuing to sit at the heart of Farnham's distinctiveness.

Godalming is an ancient and picturesque market and coaching town situated on the River Wey with waterside meadows and a busy wharf popular with canal boats. Originally the heart of a thriving woollen industry, the town attracts many visitors to its historic centre, with independent shops, a weekly market and attractive architecture. It is home to Waverley Borough Council's headquarters, the Godalming Museum which celebrates the work of garden designer Gertrude Jekyll and one of its most famous landmarks is 'The Pepperpot' a distinctive octagonal building that was Godalming's old town hall. It was the first town in the world to have a public electricity supply.

Haslemere, situated on the borders of Hampshire and West Sussex, is an historic market town located in the Surrey Hills National Landscape with attractive timbered and tilehung houses and cottages. Its popular educational museum

has an extensive collection of natural history specimens and human history artefacts. Swan Barn Farm, a quiet retreat of woodland and pasture is only 30 seconds from Haslemere High Street and is located on the route of the 64 mile Serpent Trail. It is also colloquially known as the 'Gateway to the South Downs'.

Cranleigh, often claimed to be the largest village in England is set at the foot of the Surrey Hills and has a distinctive line of Norway maple trees which line an extensive common that extends along the majority of the busy High Street. It is home to a thriving arts centre which hosts a packed timetable of film and live events as well as exhibitions. Built in the 15th century, the old, listed part of the Village Community Hospital was the first cottage hospital in England.

Over the last decade, urban centres similar to ours have faced macro-economic challenges such as the growth in online shopping, the popularity of out-of-town retail, and disproportionately high Business Rates. While our town centres continue to perform relatively well, these shifts have had impacts as demonstrated by the loss of the majority of high street banks and vacant properties within our main centres. Our retail vacancy rates currently sit at ¹¹:

- Farnham 4%.
- Godalming 8%.
- Haslemere 6%.
- Cranleigh 10%.



¹¹ Waverley Borough Council, Vacancy Rate Counts (2023).

This is well below the current national vacancy average of 13.8%. To sustain our competitive position, we need to support our urban centres to continue evolving in line with emerging trends that present opportunities for town centres. Five prominent trends we will remain cognisant of include:

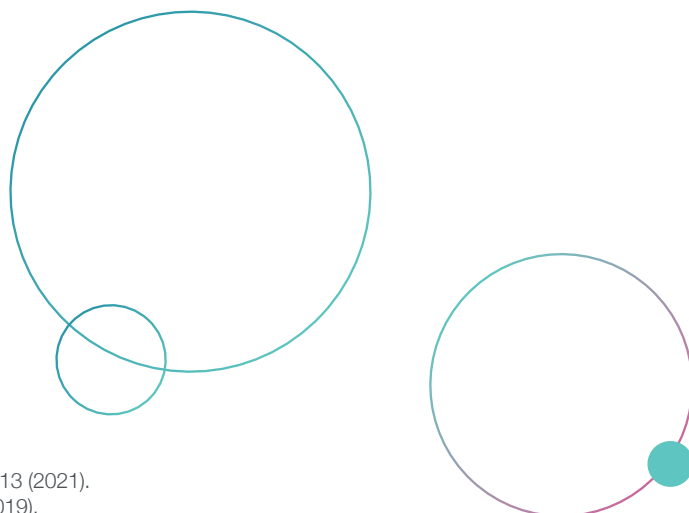
1. **Increasing expenditure on 'self':** Over the last decade consumer habits have shifted from buying products to spending money on personal services. Analysis from the Local Data Company (2021) shows that since 2013 the top ten high street growth sectors in terms of net store openings all offer services or experiences rather than physical products (Barbers, Beauty Salons, Vaping Stores, Cafes, Nail Salons, Restaurants/Bars, Coffee Shops, Pizza Takeaway, Hair/Beauty Salons and Health Clubs) ¹². These all offer services that are not readily available online making them more resilient to the digital shift.
2. **Rising demand for leisure activities:** The past five years has seen a significant growth in the leisure sector which now accounts for over 14% of consumer spending ¹³. This was originally underpinned by the growth in casual and family friendly dining, but as this has declined other more experiential activities have come to the fore. Some, such as the growth in boutique cinemas and bowling alleys offer a wider dining experience than the more traditional offer. One of the most prominent opportunity sectors is competitive socialising which is characterised by games and activities for adults (e.g. urban mini golf, escape rooms, virtual reality and video gaming).
3. **Higher demand for independents:** Many 'clone' chain retailers have been retreating from high streets at pace. This is, in part, driven by failures and insolvencies but also a 'retreat to profit' by businesses that have withdrawn from marginal locations. The space being vacated by chain retailers is, however, being filled by independent businesses which appear to be in higher demand. Data from Experian shows that in 2020 the number of chain stores fell by -3% but the number of independents increased by +1%. This trend

has been happening in recent years but accelerated during the COVID-19 pandemic, and this is reflected by the comparative success of town centres that have more independent businesses and are considered more 'authentic'.

4. **Increasing consumer conscientiousness:** Consumers are increasingly reporting that they want to buy local products and that they care about the sustainability and ethical credentials of businesses they buy from. In a 2021 consumer survey, Deloitte found that 57% of respondents were more likely to spend money at businesses that offer locally produced goods and/or are independent. In a similar survey they also found that 1 in 3 consumers had stopped purchasing certain brands or products due to ethical or sustainability concerns. This is influencing the retail market as existing retailers have started to adapt (e.g. H&M's Garment Collection Programme), ethical brands grow in popularity (e.g. Patagonia) and new concepts enter the market (e.g. ReTuna, the world's first sustainable shopping mall).
5. **Rising remote working:** COVID-19 had a significant impact on footfall in town centres. While this has started to recover there is a clear opportunity to capitalise on the growth in people working from or close to home following the pandemic. Remote workers are typically looking for interesting places to work (from coffee shops to co-working spaces), places to eat, meet and socialise and services to fulfil their day-to-day needs.

¹² Local Data Company, Top Ten Growing and Declining Retail Since 2013 (2021).

¹³ Savills, Competitive Socialising and Emerging Concepts in Leisure (2019).



Our urban centres are responding relatively well to these trends versus other town centres across the country, but also have other challenges that need to be addressed to increase their attractiveness to consumers. While each settlement has its own unique identity, there are shared challenges including a lack of public transport, workforce availability and high house prices. However, there are also shared opportunities presented by a more active evening economy and the visitor economy.

Addressing these challenges and increasing the resilience of our town centres is important from an economic development perspective as our high streets support a wide range of jobs, and because businesses tell us that improving our offer will attract more inward investment and workers to the area. We also know that our urban centres have comparatively little other employment and residential space mixed in with our retail offer, which is limiting footfall, expenditure and vibrancy during the working week.

6.2 What is our gamechanger programme?

We understand the challenges our urban centres face and have already started delivering projects that support their rejuvenation. These range from Business Improvement Districts (BIDs) in Farnham, Godalming and Cranleigh to regeneration schemes across the borough utilising our assets and land.

We do need a more concerted and strategic approach to delivering urban regeneration and to achieve this, we will develop a programme ('Regenerated Waverley') that will support town and parish councils, together with their business communities, to develop action-oriented plans for Farnham, Godalming, Haslemere and Cranleigh - we suggest calling these *'Place Strategies'*. We will develop a borough-wide framework that partners can use to structure these, focused on the identification of short, medium and long-term interventions to enhance the economic, social and environmental functioning of each centre.

There are many examples across the country which provide guidelines for action, transformative interventions and access public sector funding. Examples include:

- Sevenoaks District Council produced a single *District Town Centres Strategy* in 2022 which incorporated visual and action-oriented plans for its main urban settlements of Sevenoaks, Swanley, Edenbridge, Westerham and New Ash Green.
- Breckland Council supported town councils to produce separate *Market Town Delivery Plans* in 2022 for Swaffham, Dereham, Watton, Thetford and Attleborough as part of their *Future Breckland* programme. This is accompanied by an investment prospectus which ties all the documents together and makes a clear case for investing public sector funding into the projects identified.
- Fenland District Council produced Economic Masterplans as part of its *Growing Fenlands Programme* in 2020 for Chatteris, March, Whittlesey and Wisbech. Since publication they have been successful in securing over £30m of public sector funding for town centre projects across the district.



Based on the consultation undertaken as part of this strategy we envisage that these documents will focus on a range of themes that will help our urban centres adapt to the changing economic backdrop. These include, but are not limited to:

- Diversifying the high street offer.
- Introducing contemporary workspace.
- Enhancing active movement and tackling congestion.
- Improving public realm and air pollution.
- Activating high streets and public places.
- Providing housing on and next to the high street.
- Introducing measures to encourage and support sustainable and active travel.

These documents can build on and complement a wide range of place-specific strategies and action plans that have been developed by partners, including the *Farnham Infrastructure Programme* (Surrey County Council, Waverley Borough Council, Farnham Town Council), *Farnham Neighbourhood Plan*, *Godalming and Farncombe Neighbourhood Plan*, *Haslemere Neighbourhood Strategy*, *Cranleigh Neighbourhood Plan*.

6.3 What actions will we pursue?

Below we have identified example actions for each settlement that could be incorporated into these plans based on the consultation undertaken for this strategy. These can be expanded upon and explored in more detail as part of emerging *Place Strategies*. Our key partners in this will be the Town and Parish Councils.

6.3.1 Farnham Place Strategy

- Work with Surrey County Council to drive forward priority initiatives identified in the *Farnham Infrastructure Programme*, most notably major infrastructure investments focused on reducing traffic in the town centre.
- Work with the University for the Creative Arts, Farnham Maltings and the World Craft Town initiative to promote their work and to identify opportunities to open new workshops and makerspaces. This will be undertaken partly as part of the gamechanger programme identified in the 'Turbocharging Our Small Business Economy' theme.
- Continue to work with the Business Improvement District (BID) Board to bring forward their business plan for the area.
- Develop a Public Assets Strategy to explore how underutilised assets can be better used to support economic development.



6.3.2 Godalming Place Strategy

- Continue to explore opportunities to create a new Civic Quarter on the site of The Burys, incorporating the delivery of commercial space tailored to target sectors and/or their supply chain.
- Work with Surrey County Council to identify funding and bring forward a new cycling greenway that connects eastern and western areas of the town.
- Renovate and repurpose 69 High Street to provide new high quality retail space and sustainable residential units on the high street.
- Continue to work with the Business Improvement District (BID) Board to bring forward their business plan for the area.

6.3.3 Haslemere Plan Strategy

- Explore opportunities to deliver a mixed-use regeneration scheme on allocated sites within the Local Plan, providing new community facilities, commercial offer and affordable homes.
- Enhance the public realm where the regular markets take place to provide a more attractive and better functioning public space.
- Identify opportunities to make the town centre public realm greener and more pedestrian and cycle friendly.
- Support the Haslemere Community Rail Partnership and encourage them to continue and expand their activities.



6.3.4 Cranleigh Place Strategy

- Provide a new Passivhaus leisure centre in Cranleigh to enhance provision and cater for a growing population. Deliver to carbon neutral operating standards and provide a rounded health and wellbeing offer.
- Continue to work with the Business Improvement District (BID) Board to bring forward their business plan for the area.
- Support Surrey County Council to drive forward the Cranleigh High Street, Highway and Public Realm Enhancement Scheme to help improve key junctions along the high street alongside enhanced public spaces, traffic management and cycling and pedestrian access.
- Continue to Work with Surrey Hills Enterprises CIC and Cranleigh Chamber of Commerce to run a regular Surrey Hills Artisan Market and enable a range of music, art, cultural and creative activities to take place as part of the offer.



7 Improving our Commercial Space Offer

7.1 Why is action needed?

We have some important employment sites across our borough – examples include the Godalming Business Park, Dunsfold Business Park, Littlemead and Manfield Park Industrial Estates (Cranleigh), Farnham Industrial Estate,

Coxbridge Business Park (Farnham), Birtley Court (Bramley) and Tanshire Park, (Elstead).

However, overall we have less commercial space compared to our neighbours ¹⁴ but we also have a high degree of protection for our countryside and a thriving visitor economy.

Council	Office Floorspace
Waverley	1.5m sq ft
Rushmoor	4.5m sq ft
Hart	3.8m sq ft
Guildford	3.6m sq ft
Mole Valley	2.9m sq ft
Horsham	1.7m sq ft.

We also only have 1m sq ft of industrial space which is significantly less than *all* our neighbours ¹⁵. This means we have less capacity for this type of business activity limiting the size, scale, and breadth of our economy.

Compounding this we have seen a decline in our office and industrial floorspace over time. Between 2010 and 2022 we have lost 100,000 sq ft (6%) of office floorspace and 70,000 sq ft (6%) of industrial floorspace ¹⁶, which is a worse picture than most of our neighbouring authorities, many of whom have seen gains ¹⁷:

Borough	Gain / loss office floorspace	Gain/ loss industrial floorspace
Guildford	+5%	+9%
Chichester	+4%	+14%
Rushmoor	-1%	+5.5%
East Hampshire	+2%	0%
Horsham	-1.6%	+5.5%
Mole Valley	-3%	-7.5%
Waverley	-6%	-6%

¹⁴ CoStar (2023).

¹⁵ Ibid.

¹⁶ Ibid.

¹⁷ Ibid.

Much of the traditional commercial space we have lost has been converted to housing, including the loss of Hewitts Industrial Estate (Cranleigh), Weyburn Works (Elstead), Belsize Court (Godalming) and Craven House (Godalming). Substantial areas of land around our employment sites have also been used for medium and large-scale housing developments preventing the future expansion of key employment sites in Farnham, Cranleigh and Godalming.

The nature of our existing commercial space offer could also better meet the changing demands of businesses in our priority growth sectors. Since the COVID-19 pandemic, and the rise in hybrid working, office-type occupiers are increasingly demanding high-quality and flexible space close to public transport nodes and vibrant urban centres. Industrial occupiers are also seeking flexible space particularly with high sustainability credentials given the increasing importance of environmental concerns to their customer base. Our commercial stock does not align with this:

- 100% of our office floorspace is classified as 'low-to-medium quality'.
- 95% of our industrial floorspace is classified as 'low-to-medium quality'.
- 88% of our office floorspace was built pre 1980s.
- 43% of our industrial floorspace was built before the 1980s ¹⁸.

We also lack highly-flexible and lower-cost business space directly targeted at the entrepreneurs and smaller businesses we are looking to support through this strategy – this is likely to be influencing our declining levels of enterprise and our low business survival rates as these spaces allow businesses to scale up and down depending on their financial performance, and they also often offer wraparound business support services. These types of spaces are also often also used by hybrid, remote workers and freelancers looking to work 'closer to home' – we have more of these than ever following the COVID-19 pandemic.

¹⁸ Ibid.

Many rural boroughs like ours have these flexible spaces in their town centres and rural settlements – examples include Flimwell Park in East Sussex, Snape Maltings in Suffolk, Hethel Innovation Centre in Norfolk, The Maidstone Business Terrace in Kent and Bordon Innovation Centre in Hampshire. These not only provide commercial space but also drive visitor numbers.

7.2 How will we respond?

We will respond to this by seeking to use our own sites and assets to provide the commercial space that businesses and, increasingly hybrid and remote workers, need. This will involve reviewing our existing landholdings and exploring whether they can be intensified or redeveloped to deliver more floorspace.

We will also explore options to better use council-owned employment land to support economic development, which will involve undertaking detailed feasibility, capacity and masterplan studies to explore possibilities for intensification.

It will also involve actively delivering appropriate mixed-use regeneration schemes that incorporate the commercial space that businesses in our priority sectors require. This includes exploring further emerging plans on Waverley Borough Council's sites in Godalming to provide a new Civic Quarter and affordable housing in the heart of the town centre.



Aligned to this we will consider how our existing assets could be better used to deliver greater economic output. We will explore whether opportunities exist to partially or fully repurpose any of our assets to provide space for high potential businesses, freelancers and remote workers. We will encourage our partners, including our town and parish councils, Surrey County Council, as well as our health providers, to do the same.

We will also actively explore opportunities to directly deliver new workspace concepts across the borough that align with the needs of our priority sectors. We will focus on using our existing portfolio of assets to do this, but we will not rule out scoping new opportunities to bring forward innovative workspace in privately owned assets or on privately owned land.

In helping to deliver new commercial space, we will ensure that we will consider concepts beyond 'generic' serviced office or industrial space – we will work carefully with businesses and operators to deliver concepts that align with the needs of our priority sectors ranging from maker spaces and artist studios to gaming and filming. We will also ensure that new space targeted at smaller businesses incorporates wraparound support to boost both entrepreneurship and business survival.

More broadly we will use our collective planning and legislative powers to encourage the right type of uses to come forward in the right places and to better protect the limited employment space that already exists across the borough. Among other things, this will include updating our *Employment Land Review* to reflect the changing macro and micro-economic context and to provide site specific guidance for opportunity sites particularly where guidance does not yet exist.

7.3 What is our gamechanger programme?

We will develop the programme ('Rural Waverley') to re-invigorate and re-imagine our rural areas as places where small clusters of sensitive and sustainable business activity can thrive. It will involve the protection and retention of existing rural employment space through planning policy, a significant step will be to investigate the delivery of a high-profile rural business hub that will be an exemplar for other districts in our county.

Drawing on inspiration from Flimwell Park (East Sussex), Snape Maltings (Suffolk) and Hethel Innovation Centre (Norfolk) this will provide high-quality office, workshop and customer-facing space for businesses that prefer and are more appropriate to operate in rural areas. A mix of start-up and grow-on space will be provided to ensure it caters to and supports the full business lifecycle. A business support offer will also be offered to support businesses to survive and thrive.

This will be a long-term exercise and will need to start with a study to identify which sites and locations would be most suitable for a project of this nature. This will need to be followed by a feasibility study that covers design, costs, viability, operation and delivery considerations.



7.4 What other actions will we pursue?

We will pursue a wide range of other short, medium and long-term actions that align with our vision and context as identified in our Action Plan. High-impact examples include:

- Proactively work with the developers of the Dunsfold Park Garden Village to ensure the right types of commercial space come forward to support the expansion of the existing Business Park and creation of new village centre. There is a separate [Supplementary Planning Document \(SPD\)](#) for this site which states that “Opportunities for signature projects such as a community based business hub with flexible spaces, meeting facilities, business support and excellent IT facilities will be encouraged.”. Detailed master planning and design proposals for the Business Park will be provided going forward. This will involve the review and development of proactive planning policies as part of our new Local Plan to support business growth and retention.
- This could include a mix of office and industrial-type space targeted at businesses of different sizes and types to support the expansion of the existing business park, and

- It could also include retail, hospitality and community uses within the new village centre.
- Review council-owned assets and explore whether any can be used to provide low-cost business space for entrepreneurs, micro-businesses, hybrid workers and remote workers.
- Our town centres and business base would benefit from new accelerator/incubator spaces, incorporating wraparound business support. These could focus on complementary priority sectors that are place specific.
- Explore how council-owned employment sites could be better utilised to meet employment and housing aspirations.
- This will involve undertaking masterplans and feasibility studies for sites that are the most deliverable and offer the greatest capacity for change.
- Advance plans to create a new Civic Quarter on the site of The Burys in Godalming.
- We will carefully consider how commercial space provision can be tailored to priority sectors and/or their supply chain to drive productivity growth.

7.4.1 Our Indicators of Success

Indicator	Baseline Position	Five Year Target	Ten Year Target
Quantum of office floorspace	1,533,000 sq ft ¹⁹ (2023)	TBC ²⁰	TBC
Quantum of industrial floorspace	1,000,000 sq ft ²¹ (2023)	TBC	TBC
Proportion of ‘high quality’ office floorspace	0% ²² (2023)	20%	30%
Proportion of ‘high quality’ of industrial floorspace	5% ²³ (2023)	20%	30%
Number of flexible and start-up workspaces in town centres	6	8	10

¹⁹ CoStar (2023).

²⁰ Targets for office and industrial to be agreed following an update to the Employment Land Review.

²¹ Ibid.

²² Ibid.

²³ Ibid.

8 Valuing Our People and Foundational Economy

8.1 Why is action needed?

Our borough is home to 130,000²⁴ residents, many of whom are highly qualified and have high-wage occupations:

- Average resident earnings are c£47,000 which is significantly higher than the national average of £33,000²⁵.
- 54% of our residents have a degree-level qualification which is higher than the national average of 44%²⁶.
- 20% of our population are classified as Managers, Directors and/or Senior Officials which is double the national average²⁷.

While this is advantageous for attracting businesses and entrepreneurs in knowledge-based sectors, it does create challenges for employers that provide the goods and services we rely on to meet our day-to-day needs and support our quality of life (e.g. environment, health, food, housing, energy, leisure, construction, tourism and retail). This is because in comparison there is a comparatively small pool of people to take roles in these 'foundational' sectors.

This is particularly acute to the south of our borough which has fewer public transport connections to towns and villages in neighbouring areas and is further impacted by the high cost of accommodation in our borough – house prices are 16.5x higher than average workplace earnings, which is more than any of our neighbouring boroughs and most others across the country²⁸.

Our relative prosperity also hides the fact that we have pockets of deprivation across the borough. As the map below shows we have a small number of areas that are classified as 'more deprived' than other parts of the country based on the Office for National Statistics'

Indices of Multiple Deprivation (2019) – these are mainly to the south of Godalming, the north of Farnham and the east of Cranleigh. The drivers of deprivation in these areas relate to access to housing and education, highlighting the need for more affordable housing and enhanced public transport connectivity.

While our employment figures are strong, it is worth noting that we have 1,500 residents that are unemployed and 14,900 who are economically inactive for a range of different reasons²⁹. Not all these people will want or be able to participate in the workforce but there is a clear opportunity to support the economy better by linking those that do with economic opportunities in the borough.

As an important employer and part of our foundational economy, the Tourism sector generates around £200m in economic value each year. Visitors are attracted by our historic market towns and picturesque villages set in beautiful and accessible countryside with many miles of public rights of way. We have a wide range of visitor assets including the Surrey Hills National Landscape, Frensham Ponds, Winkworth Arboretum, the Sculpture Park, Farnham Park and Castle, Ramster Gardens, Museums in Farnham, Godalming and Haslemere, as well as a range of National Trust properties and land and attractions including Birdworld, GoApe, Farnham Maltings, Farncombe Boathouse and Cranleigh Arts.

Since 2020, the tourism sector has dealt with the pandemic and the cost of living crisis. In response to this households have been changing their spending habits, and businesses have seen huge rises in energy costs and higher borrowing rates.



²⁴ ONS Census (2021).

²⁵ ONS Annual Survey of Hours and Earnings (2022).

²⁶ ONS Annual Population Survey (2021).

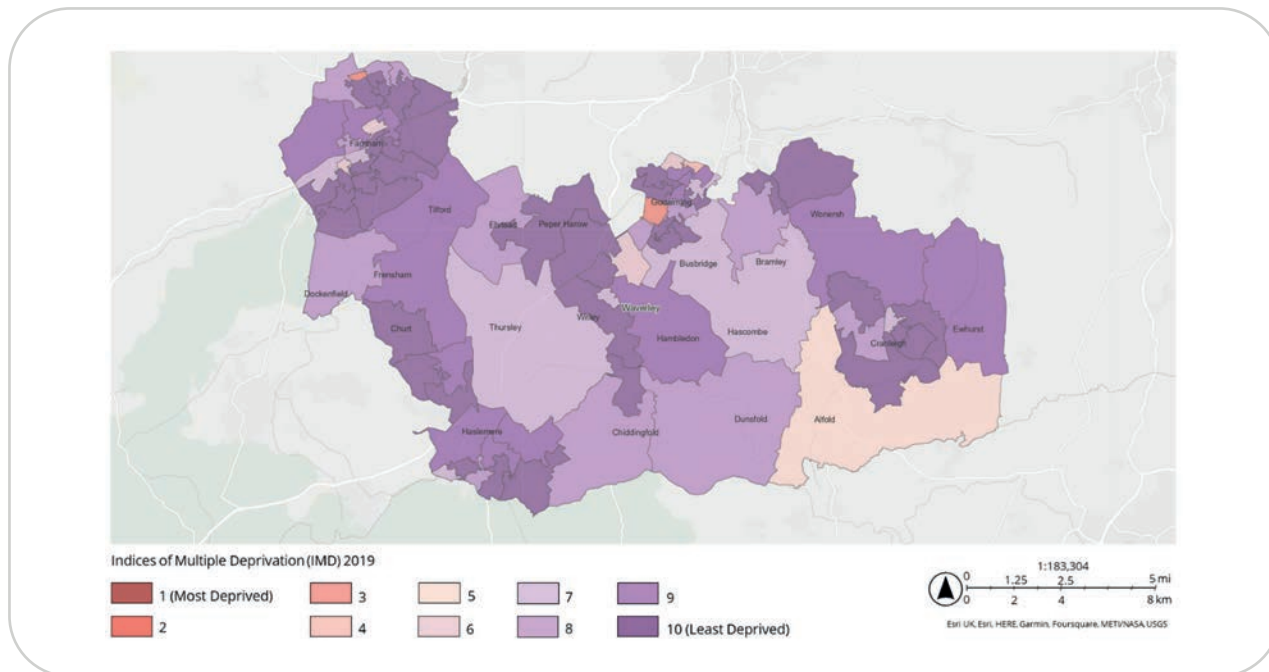
²⁷ Ibid.

²⁸ ONS House Price to Workplace-Based Earning Ratio (2021).

²⁹ ONS NOMIS (2023).

Figure 2.2: Indices of Multiple Deprivation

Source: ONS Indices of Multiple Deprivation (2019)



8.2 How will we respond?

We will respond to this context by helping to build a fairer and more inclusive economy in line with principles from Kate Raworth’s *Doughnut Economics*. We want to tackle inequality and ensure all our residents have opportunities to achieve at least the [real living wage](#).

We will achieve this by working closely with our disadvantaged, unemployed and economically inactive residents (including students) to make sure they have the right skills and experience to access employment opportunities in our borough, particularly within our ‘foundational’ sectors which are struggling to recruit.

We will also work with foundational employers, alongside other sectors, to encourage them to pay their staff a wage that reflects the cost of living in our borough. As an organisation that is already committed to paying the Real Living Wage (for outside London) we will champion the creation of a real living wage charter to ensure more people working in our borough are paid enough to support their financial, mental, and physical wellbeing.

Alongside this, we will also work closely with

partners to provide affordable housing to meet the needs of our residents and to make sure our ‘foundational’ economy has access to the talent it needs into the future. We will achieve this through the direct provision of social housing where possible, but also through our planning policies and negotiations which set high standards for securing affordable housing as part of new developments. This will start with the publication of our updated *Waverley Affordable Housing Supplementary Planning Document* (2022) which outlines clear expectations for the provision of affordable housing across the borough.

We will also continue to provide a wide range of community and support services to our most deprived communities to enhance their wellbeing and social mobility. Where new funds become available, we will prioritise these areas for interventions that tackle deprivation and help build social capital.

Focus On: Our Visitor Economy

Our ambition is to support our tourism assets and help them to thrive by improving access to a qualified workforce and boosting visitor numbers. We will achieve this through a set of targeted actions:

1. **Enhancing Destination Marketing:** We will continue to use our Waverley business website, as well as Visit Surrey and Visit South East England to promote our visitor economy and investigate what other channels and marketing materials we can use to promote both visitor attractions and hospitality venues through initiatives like our 'Taste of Waverley' produce map.
2. **Investigating New Initiatives:** We will investigate new initiatives, like the popular 'Restaurant Week' in Newcastle to raise the profile of dining opportunities across the borough.
3. **Improving Provision for Overnight Stays:** We will explore with our partners how we can help to improve the number of visitor overnight stays and how we can address the lack of visitor accommodation in both our urban and rural areas as outlined in the Surrey Hotels Future (2015) study.
4. **Supporting and Connecting Local Organisations:** We will continue our support of place specific organisations, including the Business Improvement Districts (BIDs) Boards in Farnham, Godalming and Cranleigh, that promote and support initiatives, events and visitor attractions in their areas and will actively seek opportunities to connect these across the borough to maximise their reach and impact.
5. **Developing New Partnerships:** We will identify and work with partners to scope out and create a new Local Visitor Economy Partnership for the borough to better support businesses and attractions that participate in the visitor economy.
6. **Promoting our Borough through Film:** Our borough is an exceptionally popular destination for filming and has been the backdrop to a wide range of blockbusters from Harry Potter to the Mummy. This brings significant direct economic value to the borough through expenditure with local businesses, but also helps to put our assets 'on the map' attracting tourists and visitors. We will therefore continue to market the borough to filmmakers through our 'Film Waverley' and offer best-in-class support to those looking to use our assets for their productions.



8.3 What is our gamechanger programme?

We will develop a programme ('Equal Waverley') to ensure our residents have the skills and opportunities they need to benefit from our thriving economy. Drawing inspiration from Westminster City Council's Westminster Employment Service, this will involve actively targeting unemployed people and providing individualised 1-1 coaching to help them enter the labour market. Working with our partners and stakeholders, the focus will be on supporting them to become 'job ready' through the provision of intensive training, work experience placements, CV workshops and interview practice among other things.

To take this one step further we will also investigate what 'barriers' unemployed people face in accessing employment – these primarily relate to the cost of training, transport, uniforms, and equipment. We will explore together with local partners what packages can be put in place to remove these and what support we can provide. This is particularly pertinent in the more rural areas of our borough which are remote and have been poorly connected.

8.4 What other actions will we pursue?

We will pursue a wide range of other short, medium and long-term actions that align with our

mission and context as identified in our Action Plan. Four high-impact examples include:

- Undertake a comprehensive review and audit of Waverley Training Service to ensure it continues to meet the needs of local people, employers and our priority sectors as identified in the 'Turbocharging our Small Business Economy' theme.
 - This could involve the creation of new online courses to reduce the need for people to travel.
- Continue to directly deliver homes that meet the needs of residents of all incomes across the borough as set out in our *Build More, Build Better, Build for Life: Affordable Homes Strategy (2022-2025)*.
 - In line with this we will bring forward 400 new affordable homes by 2025 and investigate more opportunities to deliver genuinely affordable homes on council-owned land.
- Use Shared Prosperity Funding to support a range of community initiatives targeted at those most in need across the borough including those supporting children and young adults and targeting health and wellbeing services.
 - This could involve the creation of wellbeing hubs in Farnham, Godalming, Haslemere and Cranleigh and the expansion of the Godalming Youth Service model.

8.4.1 Our Indicators of Success

Indicator	Baseline Position	Five Year Target	Ten Year Target
Number of neighbourhoods in the top 50% most deprived in the country	4 ³⁰	2	0
Number of unemployed people	1,500 ³¹	1,100	800
Businesses signed up to Waverley Living Wage Accreditation	N/A	300	600

³⁰ ONS Indices of Multiple Deprivation (2019).

³¹ ONS NOMIS (2023).

9 Enhancing Our Physical and Digital Infrastructure

9.1 Why is action needed?

We have a range of infrastructure constraints that impact the performance of our economy - they slow down businesses from undertaking their day-to-day activities and/or reduce the attractiveness of our borough for inward investment.

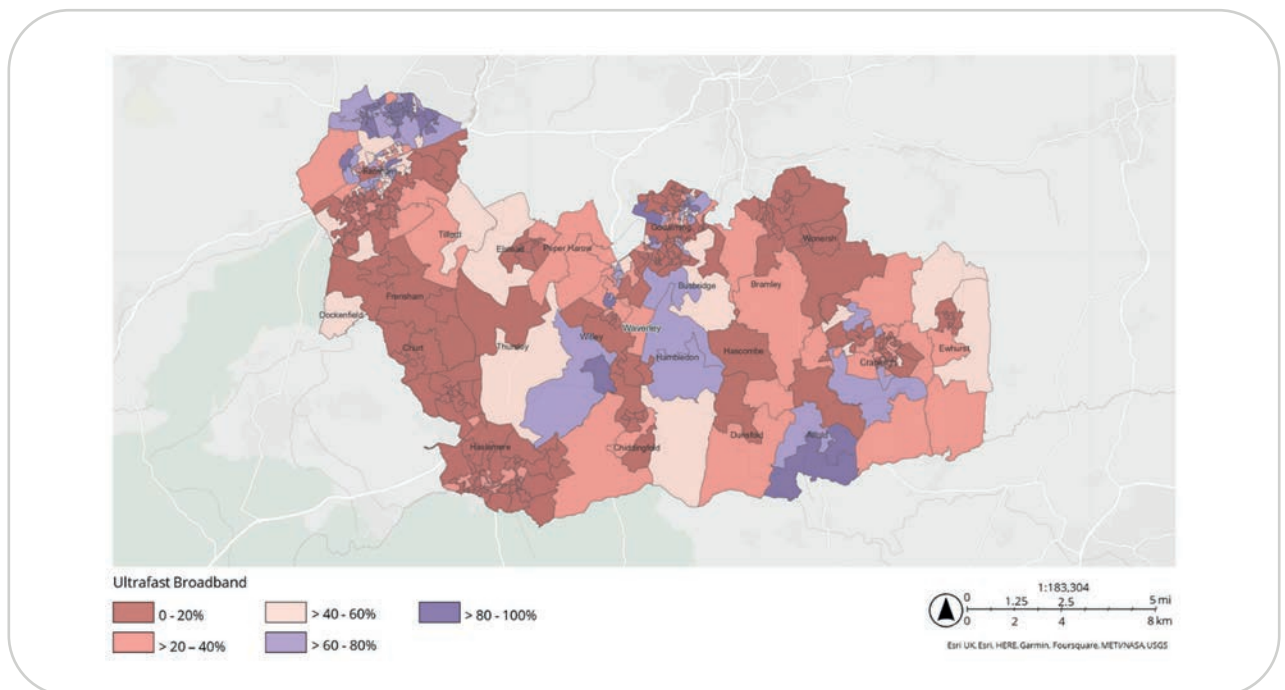
Digital connectivity is one of our biggest issues given its increasing importance for nearly all urban and rural businesses, as well as the growing number of remote and hybrid workers living in our borough. As the map below shows many parts of our borough are not able to access Ultrafast Broadband speeds (>100 Mbps), which is the minimum many businesses and workers now expect given the recent advent

of Gigabit Broadband (>1000 Mbps). Around 51% of our properties are connected to Ultrafast Broadband which is lower than many of our neighbours – Horsham, (53%), East Hampshire, (53%), Mole Valley, (65%), Guildford, (71%), Hart (71%) and Rushmoor (85%)³².

A lack of fast broadband speeds is an issue in both our rural and urban areas, many of which also suffer from poor 4G and 5G mobile connectivity. This impacts the ability of aspiring entrepreneurs to set up businesses in these locations and for workers in knowledge-based industries to work remotely. If we are to compete, attract businesses to the area and remain relevant in the future we need to address these gaps in provision as quickly as possible.

Figure 4.3: Proportion of Households with Ultrafast Broadband Connectivity (2021)

Source: Ofcom, Connected Nations 2021



³² Ofcom, Connected Nations (2021).

Alongside this we have other physical infrastructure challenges that are impacting our economy. These include:

- Public Transport:** We benefit from six train stations which provide direct services to central London and the south coast. The majority of the borough's road network consists of mainly rural roads with the A3 and A31 being our major routes. We have limited public transport options and east to west links which makes it difficult for people to travel between the main urban centres within our borough sustainably and encourages people to use private cars. It also means that people without a car find it difficult to access economic opportunities or to visit places where they might want to spend time and money.
- Active Travel:** We have a fragmented and disjointed cycle network which makes active travel unattractive to workers, residents and visitors. While we have a small number of dedicated cycle tracks, these are limited and isolated – they do not provide seamless connectivity between our towns and villages. While improvements have been made in recent years, we could do much more to capitalise on the growth in cycling post-COVID to promote active lifestyles, help ease congestion and improve air quality.

- Flooding:** Parts of our borough are highly vulnerable to flooding including areas of Farnham, Elstead, Godalming, Cranleigh, Chiddingfold, and Bramley among others. This is significant as some of these locations have high population densities and are include prime employment locations. With climate change this flood risk is predicted to become more acute over time and it is important that we continue to work with partners to provide appropriate flood alleviation and adaption measures to plan for flood resilient places over the long-term.
- Utilities:** Our research shows that the borough's water, sewerage and electricity infrastructure is ageing and has limited capacity to meet growing demand – interruptions in water supply and sewage overflows have been a particular challenge in recent years impacted by both population growth and climate change. Investigating these challenges will form part of the evidence base for the new Local Plan currently being undertaken.



9.2 How will we respond?

The council is embarking on the production of a new Local Plan that will set out a vision and objectives for the borough, and policies to deliver these over the next 20 years. One of the aims of the plan is to identify the infrastructure requirements of our borough that are essential to support increased housing provision, economic growth and mitigation of climate change, and to create thriving and sustainable communities.

The golden thread running through all our infrastructure decision-making will be to help build a thriving economy that is environmentally sustainable. We will prioritise infrastructure investments that encourage people to act, consume, travel and produce in a more sustainable way to reduce air pollution and tackle climate change.

One of our major focus areas will be improving our digital connectivity. Digital infrastructure is now recognised as the fourth utility, given its importance to modern life and the connectivity it provides to services and markets. The coronavirus pandemic has only served to reinforce the importance of digital connectivity for our residents and businesses. We know that improving our digital connectivity, especially in rural areas in the borough, will bring a multitude of benefits to small businesses and enterprises, as well as hybrid workers.



9.3 What is our gamechanger programme?

We will develop a programme ('Connected Waverley') to help our area become one of the most digitally connected rural areas in the country work. Access to public funding for delivery will be dependent on local areas having a clear plan to reduce and remove barriers to deployment and adoption of best practice. We know that delivery of infrastructure will require major effort from a wide range of local, regional and national partners and we are committed to working positively together to deliver the best outcomes for our borough and economy.

Working with Guildford Borough Council we will use the Local Government Authorities (LGA's) *Digital Connectivity Toolkit* to identify actions that will enhance both broadband and mobile connectivity.

This requires:

1. Mapping current levels of digital connectivity using data from Ofcom and other sources.
2. Undertaking engagement with businesses and residents to understand their lived experience in terms of digital connectivity.
3. Undertaking an Open Market Review to identify where new digital infrastructure is going to be delivered over the short and medium-term.
4. Pinpointing priority areas and 'not spots' where intervention is going to be required to enhance connectivity.
5. Agreeing and actioning specific interventions to enhance connectivity in priority locations.



One of the most impactful and ambitious activities will involve working with Surrey County Council and other partners to drive forward regional investment in a Gigabit Fibre Spine that is planned to run through both Farnham and Godalming. To seize the opportunity for businesses and residents outside these areas we will develop our own strategy and delivery plan to create spurs from the Fibre Spine to increase gigabit coverage.

Other elements of the Connected Waverley gamechanger programme will include:

- Pooling businesses in rural areas together and support them to access the National Gigabit Voucher Scheme. The scheme is offered by the Government to provide the finance that groups of rural businesses and residents need to access gigabit connectivity.
- Work with partners to make it easier and more cost effective for broadband providers to enhance connectivity across the borough. This could include a streamlined process for securing wayleaves on council owned land.
- Investigate opportunities to use the public realm (e.g. lampposts, toilet blocks, public assets, street furniture etc) in our historic

urban and village centres to provide wireless small cell networks without needing to dig up roads. This would help to introduce rapid and reliable connectivity to businesses and residents living in and close to our centres without significant disruption. It will require working with Surrey County Council given their ownership of much street furniture and assets who have recently entered into a non-exclusive agreement with Freshwave to bring forward this technology across the county.

- Explore opportunities to work with the University of Surrey to experiment and test their emerging mobile technology within our borough. Waverley and Guildford can be the testbed for new developments from their world-leading 5G/6G Innovation Centre, particularly in our rural 'not spot' areas.
- Lobby Government to use some of its Shared Rural Network Funding to address rural 'not spots' across the district.
- Work with Surrey County Council to ensure that less advantaged communities can access social tariffs.



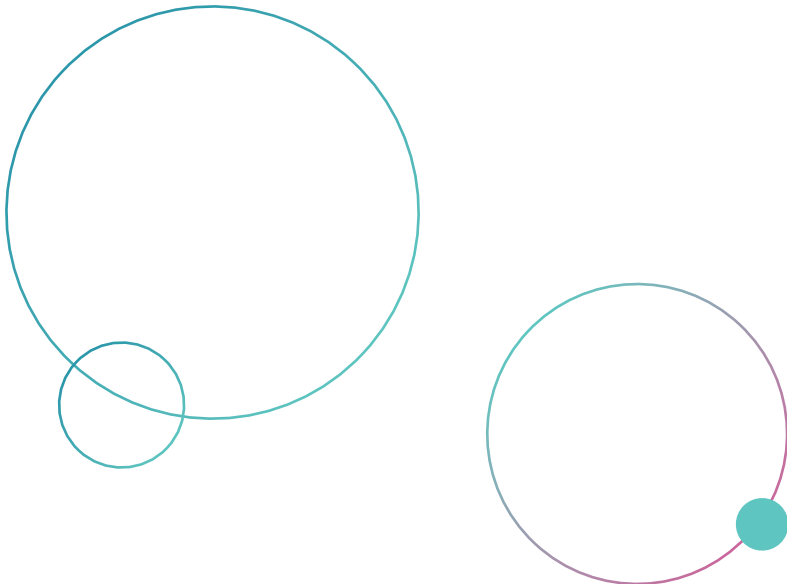
9.4 What other actions will we pursue?

We will pursue a wide range of other short, medium and long-term actions that align with the 'Connected Waverley' Gamechanger programme and overarching Strategy vision. High-impact examples include:

- Explore opportunities for renewable and community power generation projects. For each opportunity we will have to consider a range of factors including appropriate locations, business models, energy sources, governance structures and funding sources.
- Work with Surrey County Council and National Highways to bring forward new active travel schemes across the borough, and capture these in our emerging Local Cycling and Walking Infrastructure Plan (LCWIP). We will use Shared Prosperity Funding to bring forward a pilot cycling scheme in Godalming that can act as a demonstrator for future investments.
- Work positively with Surrey County Council and National Highways to identify and bring forward new highway schemes that reduce congestion, creative attractive streetscapes and improve travel reliability across the borough. This includes the already-identified *Cranleigh High Street Highway and Public Realm Enhancement Scheme* which will improve key junctions along Cranleigh High Street alongside enhanced public spaces, traffic management, cycling and pedestrian access. It also includes the *Farnham Infrastructure Programme* which has an ambition to deliver attractive, well-integrated, future focused and high-quality infrastructure for Farnham that enables a more connected and vibrant town.

9.4.1 Our Indicators of Success

Indicator	Baseline Position	Five Year Target	Ten Year Target
Proportion of households connected to gigabit broadband	49%	75%	95%
Km of new dedicated cycleway	N/A	20km	80km



10 Delivering a Step Change

10.1 Delivery Principles

This Economic Development Strategy articulates our new economic vision for Waverley and the steps that we are going to take to foster a green, creative and sustainable economy, harnessing the existing strengths of the borough and capturing opportunities to enhance these further.

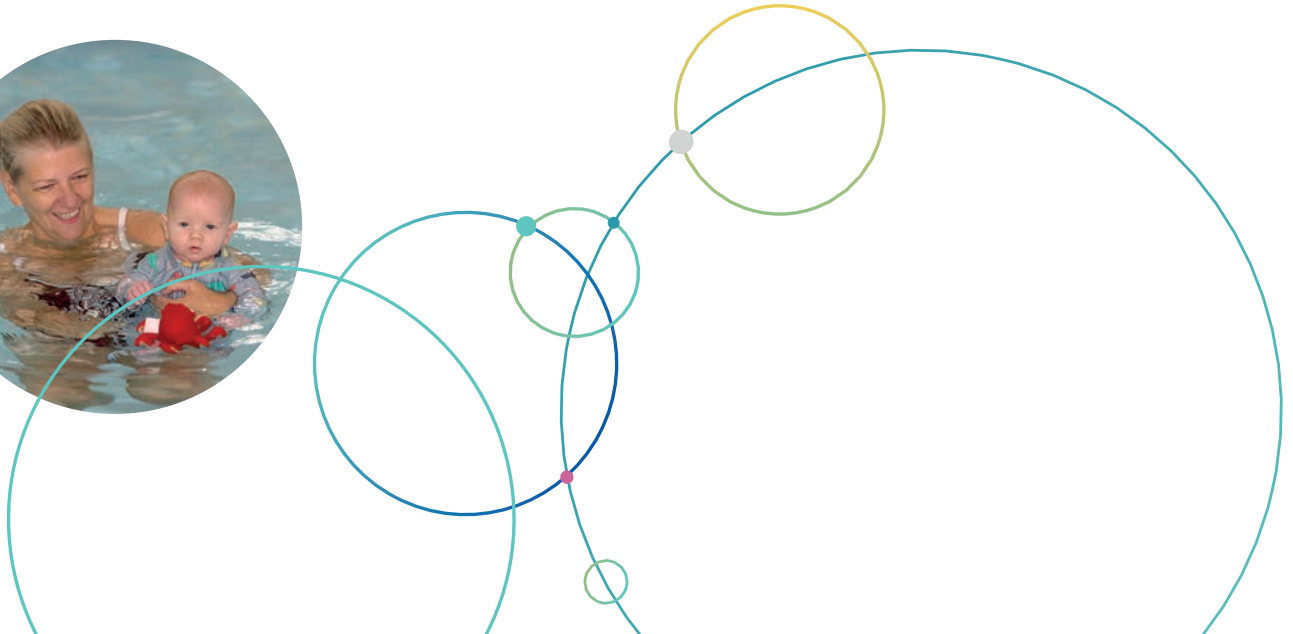
The Strategy is designed to be flexible so we can respond to the changing economic, social and environmental landscape, and recognises that delivery of the gamechanger programmes will be incremental. The accompanying Action Plan identifies specific short, medium and long-term measures under each of the six programmes and considers which organisation or organisations are best placed to help Waverley to drive each forward.

The borough benefits from strong existing local stakeholder groups and partnerships and it is this collaborative working - drawing on the expertise, efforts and resources of different organisations - that will be crucial in the successful delivery of parts of this strategy.

We recognise that this strategy comes at a difficult time. The public sector has fewer resources than ever before and COVID-19, Brexit, the cost-of-living crisis and other macro-economic factors are having fundamental impacts on local businesses and residents.

However, we cannot adopt a business as usual approach if our businesses and our communities are to thrive. We therefore need to be innovative and agile in all that we do – this involves acting:

- **Progressively:** We will ensure that we deliver for everyone in our borough and provide direct support to our most disadvantaged communities.
- **Sustainably:** We will put environmental considerations at the heart of our decision making to ensure that economic growth does not come at the expense of our natural environment.
- **Collaboratively:** We will work collegiately with partners to respond to economic challenges and opportunities identified.
- **Determinedly:** We will hold ourselves, our partners and other actors in our borough to account in delivering positive economic, social and environmental outcomes.
- **Innovatively:** We will experiment with innovative project ideas and explore alternative approaches to leverage funding.
- **Rapidly:** We will deliver change at pace and will continuously review projects to ensure they respond to ever-changing needs.



10.2 Delivery Groups

The main part of this strategy will be delivered by Waverley Borough Council through its assets, projects and procurement. At all stages appropriate collaboration with Guildford Borough Council and Surrey County Council will be explored.

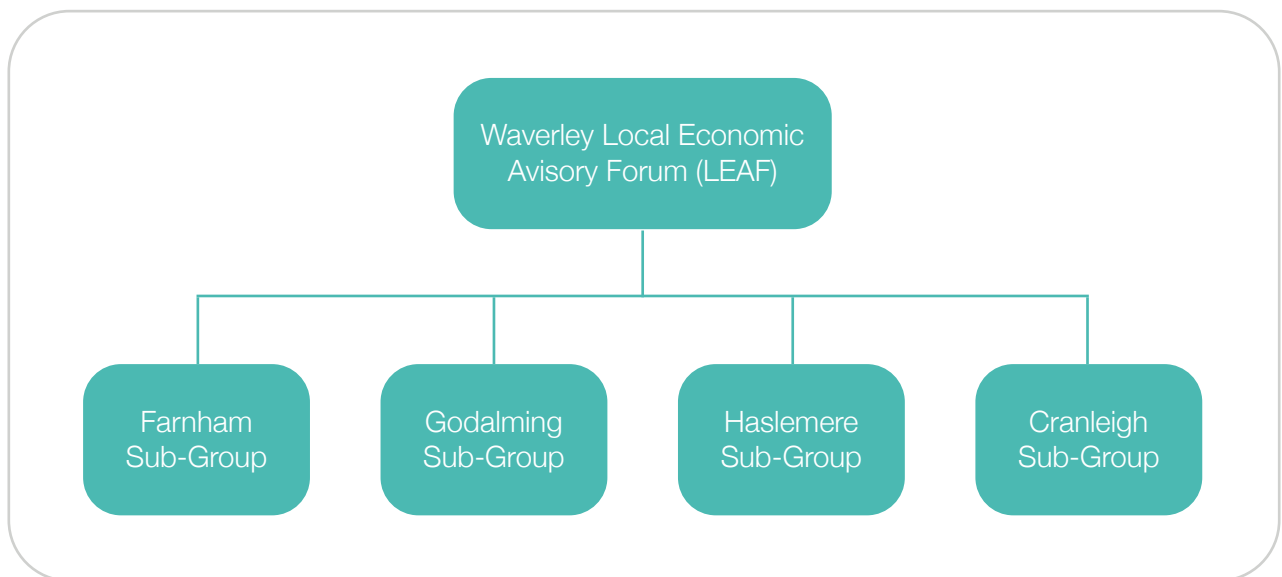
We will continue to engage with our current and important partnership groups, however we recognise that to deliver our strategy the current format will need to change and become more focused. These include:

- Surrey Chamber of Commerce.
- Haslemere Chamber of Trade & Commerce.
- Godalming Chamber of Commerce.
- Cranleigh Chamber of Commerce.
- Farnham Chamber of Commerce.
- Haslemere Town Council.
- Godalming Town Council.
- Cranleigh Parish Council.
- Business Improvement Districts (BIDs) in Godalming, Farnham and Cranleigh.

- Farnham Town Council.
- Visit Surrey.
- Commercial Agents.
- Surrey County Council Economy and Growth Team.
- National Farmers Union.
- IncuHive.
- LEAF (Local Economic Advisory Forum)
- NHS

We intend to widen the scope of the Local Economic Advisory Forum (LEAF) and invite key partners from major economic development partners (i.e. Surrey County Council, who have a leading role in delivering skills, transport, infrastructure and other economic development initiatives, University for the Creative Arts, Surrey Hills National Landscape Board) alongside local business representatives to assist in delivering selected parts of this strategy. The LEAF would then receive input from each of the major settlement-specific sub-groups.

Figure 4.1 Proposed Delivery Groups



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We think the LEAF should work as a multi-sector partnership that engages with and provides a more consistent voice for our business community, while also collaborating to help stimulate a more thriving economy for Waverley. The group should start with the Shared Prosperity Fund programme, as originally intended, but should expand to include a broader economic development focus.

As part of this evolution, it will be important to agree a clear set of 'functions' for the LEAF to ensure that it is focused on delivery - while these need to be agreed by representatives, we think that areas for consideration should include:

1. Engaging widely with the business community and ensuring their needs and concerns are understood by anchor institutions.
2. Reviewing public sector funding opportunities and agreeing which projects should be put forward for bids.
3. Identifying new opportunities or major concerns and agreeing positive and collaborative ways forward.
4. Reviewing and inputting into businesses cases for economic development projects coming forward locally.
5. Regularly reviewing and monitoring Waverley's economic position and competitiveness.
6. Monitoring and discussing the progress of this *Economic Development Strategy and Action Plan*, and agreeing priority actions to focus on at the start of each financial year.
7. Agreeing tweaks and updates that need to be made to this *Economic Development Strategy and Action Plan* every two years.
8. Developing new ideas and actions to consider in response to a changing macro-economic context.

Beneath this we suggest that settlement-specific groups are created which will include stakeholder representatives from each place (i.e. town councils, BIDs, chambers of commerce, education institutions, businesses etc). We do not have capacity to lead these groups but hope that the BIDs, town councils or parish councils will form specific 'Economic Development Forum' sub-groups to provide an open forum for stakeholders to discuss challenges facing their settlements, while also being as solution and action oriented as possible. The council will play a role in facilitating the establishment of these groups.

The first step for all groups, including the LEAF, will be to create or revise their Terms of Reference to reflect this *Economic Development Strategy and Action Plan* and, if members agree, the objectives set out in this chapter. While Waverley Borough Council and other anchor institutions will support these groups to convene, for example by organising dates, venues and agendas, it is our strong belief that they should be predominantly business-led to maximise buy-in and engagement from participants.



10.3 The Role of Waverley Borough Council

Alongside playing a convening role for these delivery groups, Waverley Borough Council will continue to play a pivotal role in shaping Waverley's economy by coordinating change, using the various levers it has to deliver this. We will be ultimately accountable for ensuring that as many as possible of the commitments set out in this document are delivered where resource can be identified.

We will adopt a "One Council" approach to delivering sustainable economic development, embedding the vision of this Strategy in our day-to-day work and ensuring that it forms a core part of the council's function. At the strategic level, we will use our planning powers to create an enabling environment that is responsive to the ambitions of this strategy and the borough's economic, social and environmental context. At the project level, we will directly deliver many of the interventions set out in this document. Project managers will work with partners to scope out and define projects, generate wider interest, leverage funding and bring them to fruition.

Our Assets and Property team will also use this strategy to deliver positive change, particularly in our town centres, on our industrial land and for our office assets which are distributed across the borough. We recognise the potential and power this gives us to deliver significant economic benefits.

We will also use our resources to strengthen our relationships with our key partners and support them where appropriate to deliver their initiatives, particularly where they focus on providing place-based solutions. This may be through project management support, external funding, political support or advice. Officers will also signpost stakeholders to funding opportunities.

The Executive and senior management team will spearhead this strategy and work with members and officers to ensure that principles set out in this document are adopted by other departments in their service specific strategies, plans and practices. We will ensure that:

- Procurement activity provides targeted and meaningful support to local progressive enterprises to access public sector tendering opportunities and increase social value.
- Housing uses local contractors wherever possible to build, manage and retrofit our council housing portfolio.
- Assets and Property delivers positive change in our town and village centres, on our industrial sites and across our office assets including providing more affordable housing and commercial space for our target sectors.
- Planning Policy drives sustainable residential and commercial development through the Local Plan alongside the allocation of land for other uses including renewable energy production, whilst protecting the environment and enhancing biodiversity.



10.4 Delivery Funding

Where possible Waverley Borough Council will use its resources to bring actions identified in this document forward, but this is not realistic for some given the scale, breadth, and complexity of interventions identified. We will therefore work collectively to bring forward initiatives, while also seeking to secure funding from private sector developers, via S106 agreements and CIL monies, and from other public sector bodies.

The current public sector funding landscape for economic development is ever-changing, and generally oriented towards less prosperous parts of the country, but examples of recent funding sources that could be considered include:

- The UK Shared Prosperity Fund (prioritises investment in community, place, businesses and skills).
- The Rural England Prosperity Fund (dedicated funding for businesses and community initiatives in rural areas).
- Brownfield Land Release Fund (targeted at council-owned brownfield sites where viability issues have previously prevented development).
- Community Ownership Fund (focuses on supporting community groups to take ownership of assets and amenities at risk of being lost).
- Affordable Homes Programme (grant funding to support the capital costs of developing affordable housing for rent or sale).

We will continuously review the funding sources available to support the delivery of this strategy as the options available will invariably change over the short, medium and long-term. We will ensure that our officers actively monitor and oversee funding opportunities which may be an option for our borough, many of which require adhering to an extremely tight timeline.

Beyond this we will use this document, and our other strategic documents, to engage with and lobby Central Government departments to secure funding over the medium and longer-term for our most important interventions. We will collectively develop an engagement

and awareness raising programme to ensure the borough is in the best place possible to secure future funding. Important Government departments we will engage with include, but are not limited to:

- Department for Levelling Up Housing and Communities – Focus on development sites, public realm, movement, non-physical interventions and high street diversification interventions.
- Department for Transport – Focus on movement.
- Department for Business and Trade – Focus on movement.
- Department for Education – Focus on education and skills.
- Homes England – Focus on development sites, public realm, movement, non-physical interventions and high street diversification interventions, plus affordable homes delivery.
- Historic England – Focus on development sites and protection of town centre heritage.
- Natural England – Focus on public space.
- Environment Agency – Focus on flooding.
- National Lottery – Focus on non-physical interventions and high street diversification interventions.

We will also explore innovative funding mechanisms that could be used to bring forward schemes in our area. For example, we will research and consider the opportunities that Place Based Impact Investment could provide our borough over the medium and long-term. As set out in the Government's *Scaling Up Institutional Investment for Place Based Impact: White Paper* (2021), this refers to:

“Investments made with the intention to yield appropriate risk-adjusted financial returns as well as positive local impact, with a focus on addressing the needs of specific places to enhance local economic resilience, prosperity and sustainable development”.

For us, this would essentially involve working with our pension fund provider (i.e. Surrey Pension Fund), as well as institutional impact investors, to direct patient capital to local projects that could deliver a long-term return. Projects identified in this document that could benefit from this approach include the re-development of The Bury's and *69 High Street Scheme* in Godalming.

We believe that our pension funds could work much harder for our area, and provide significant opportunities, because as set out in the *White Paper* (2021):

- Only six Local Government Pension Scheme (LGPS) scheme currently make place-based investments. Greater Manchester has taken a lead on this and has committed to spending 5% of its capital locally.
- Only 1% of Local Government pension funds are invested in place-based impact investment sectors (i.e. housing, SME finance, clean energy, infrastructure and regeneration) in the UK.
- The average sector allocation by LGPS funds is £10m which means investments could be of a proportionate size.

We also know that Surrey Pension Fund are committed to responsible investing, as set out in its *Responsible Investment Policies*, so they should be open to a discussion about how our investments could be better used to deliver local impact.

10.5 Delivery Metrics

A robust and focused approach to tracking impact and performance will be a crucial part of delivering this strategy. This is because what is measured dictates what is done - if the wrong thing is measured, we will do the wrong thing, if something is not measured it may be ignored or neglected. Getting our approach right will allow us to:

- Ensure we balance economic, social and environmental concerns.
- Understand the evolution of our economy at an uncertain time.

- Assess the collective impact of delivery.
- Learn lessons for future intervention.
- Celebrate achievements and success.
- Tailor delivery to maximise impact and value.
- Support case making to leverage funding.

Given this strategy focuses on six thematic areas, we will focus on a range of key indicators that help us track how well we are addressing the 'blockers' or 'barriers' to our economic success. If we can move the dial on these, in line with the targets identified earlier in this report, we are confident that we can harness our opportunities and avoid becoming a 'dormitory' borough.

Some of these indicators will be factored into our collective business plans, project plans and Key Performance Indicators and will be considered on an annual basis by the council's Executive.

It is important to note, however, that given the long-term nature of many aspirations and interventions identified in this strategy, it will be important to take a long-term view to measuring 'success'. Appendix 2 outlines the key measures that will be used for monitoring the borough's economy and providing a comprehensive overview. This will also provide our economic baseline at the time the strategy is adopted.

Over the next ten years the indicators identified will be therefore used to shape decisions around future projects and interventions that emerge over time. Those that contribute most significantly to the economic, social and environmental ambitions identified will be prioritised and taken forward.



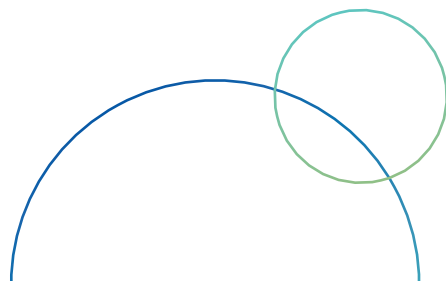
10.5.1 Table 4.1: Our Indicators of Success

Indicator	Baseline Position	Five Year Target	Ten Year Target	Data Source
Number of Jobs	52,000 (2021)	55,000	60,000	ONS
Number of Businesses	8,000 (2021)	9,000	10,000	ONS
Number of Business Births P/A	800 (2020)	1,000	1,200	ONS
GVA Per Capita	£31k (2020)	£35k	£40k	ONS
Number of low-carbon businesses	N/A	250	500	KMatrix
Number of businesses accessing grant and loan funding to improve their long-term environmental performance	N/A	500	1000	Waverley Borough Council
Quantum of office floorspace	1,533,000 sq ft (2023)	TBC ³³	TBC	CoStar
Quantum of industrial floorspace	1,000,000 sq ft (2023)	TBC	TBC	CoStar
Proportion of 'high quality' office floorspace	0% (2023)	20%	30%	CoStar
Proportion of 'high quality' of industrial floorspace	5% (2023)	20%	30%	CoStar
Number of flexible and start-up workspaces in town centres	6	8	10	Waverley Borough Council
Number of neighbourhoods in the top 50% most deprived in the country	4 ³⁴	2	0	ONS
Number of unemployed people	1,500 ³⁵	1,100	800	ONS
Businesses signed up to Waverley Living Wage Accreditation	N/A	300	600	Waverley Borough Council
Proportion of households connected to gigabit broadband	49%	75%	95%	Ofcom
Km of new dedicated cycleway	N/A	20km	80km	Waverley Borough Council / Surrey County Council

³³ Targets for office and industrial to be agreed following an update to the Employment Land Review.

³⁴ ONS Indices of Multiple Deprivation (2019).

³⁵ ONS NOMIS, 2023.



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