



Final Report Part 2: Future Growth Opportunities

December 2019

Table of Contents

Executive Summary..... i

1 Introduction1

2 Future Growth Opportunities.....5

3 Conclusions..... 13

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Executive Summary

- i. This study is presented in two parts: the first setting out data analysis and a classification of the towns; and the second setting out future growth opportunities. This report is the first part of the study and there is a separate report for the second part of the study.
- ii. The objectives of this study are twofold:
 - To develop a typology of the towns/settlements and the networks that link them together
 - To see a longitudinal analysis of each town's performance, to understand how they have grown

Part 1: Data analysis and town classification

- iii. This is set out in a separate study. This covers: the functional relationships and networks between the towns in the Enterprise M3 area; the characteristics of the towns; historic change in the socio-economic situation of the towns; and a classification of the towns.

Part 2: Future growth opportunities

Strategic designations

- iv. Four towns have been identified as *growth towns* in the Strategic Economic Plan for the Enterprise M3 area – Basingstoke, Guildford, Woking and Farnborough. A further five towns have been designated as *step-up towns* – Staines-upon-Thames, Camberley, Bordon/Lindford/Headley (Whitehill & Borden), Aldershot and Andover. *Step-up* towns are defined as having untapped growth potential.
- v. The Surrey Place Ambition identifies five strategic opportunity areas in the EM3 part of Surrey. These are: Longcross-Staines-Heathrow Corridor; Woking Hub; Guildford Hub; Blackwater Valley (Surrey/Hampshire); and Cranleigh–Dunsfold Corridor.
- vi. A commission of Inquiry has been established to create a vision for Hampshire. This considers north, central and south Hampshire, but does not identify strategically significant towns in the county.

Future population growth

- vii. Data on future population growth is derived from consultations with local authority officers. Population growth is driven by new residential allocations. Towns in which significant growth is expected are: Bordon/Lindford/Headley, Cobham (depending on Local Plan option chosen), Andover, and Romsey. Most other towns for which information was provided are expecting moderate growth in the near future.

Contribution to the SEP and LIS

- viii. Local authority officers were asked about the potential for economic growth in the towns that will contribute to the objectives of the SEP and LIS. Economic growth opportunities have been identified in most of the towns, with a notable opportunity in Bordon/Lindford/Headley where 5,000 new jobs are planned in digital, space and clean technology. Other notable growth opportunities include: town centre and Enterprise Zone growth in Basingstoke; Blackwater/Yateley where growth could be driven by Crossrail Two; potential for further development of the film studios at Shepperton; a town centre masterplan and light rail link to Heathrow from Staines-upon-Thames;

the development of the cultural quarter in Andover; and future growth of the Science Park in Romsey.

- ix. Significant growth is not expected in Tadley, Petersfield, Chertsey and Ashford. Data has not been provided for six towns.

Infrastructure needs

- x. Local authority officers were asked about the infrastructure that is needed to enable future economic growth to take place.
- xi. Many of the towns need investment in roads and transport infrastructure, ranging from walking/cycling paths to new motorway junctions. Other commonly mentioned infrastructure requirements include new or upgraded rail infrastructure; digital connectivity; public transport; flood defences; and town centre regeneration projects.

1 Introduction

- 1.0.1 Hardisty Jones Associates was appointed by Enterprise M3 LEP to undertake a study of 33 of the largest towns in the LEP area.

1.1 Context

- 1.1.1 Enterprise M3 LEP is preparing a Local Industrial Strategy (LIS). The purpose/role of a LIS is to promote productivity by setting out local priorities in cities, towns and rural areas that will help to drive up national productivity.
- 1.1.2 The Enterprise M3 area has relatively high GVA and productivity levels, and its economic geography is characterised by a series of towns rather than a large city or cities. The LEP is seeking to promote 'good growth' in the future, with a challenging economic growth target of 4% per year. To do this, the LEP needs to understand the health of the towns that make up much of the Enterprise M3 area; consider the inter-relationships between the towns; the viability of each individual settlement; and understand the contribution that the towns can make to the ambitious growth target.
- 1.1.3 Spatial development in the Enterprise M3 area is constrained, so there will be a strong emphasis on pushing productivity-led growth. This will be challenging and will need to be approached in an intelligent way, as levels of productivity are already high in the area. High productivity is more typically associated with cities rather than towns, so it is important to understand what is driving the currently high productivity in the Enterprise M3 area (e.g. the sectors that are strong in the local economy, and the relationships to places outside of the Enterprise M3 area), and enhance these factors. This understanding will help to shape future plans for growth and determine how best to support this through pushing productivity even higher.
- 1.1.4 The growth aspirations set out in the Strategic Economic Plan (SEP) for the Enterprise M3 area are based on:
- Encouraging growth and higher density development in towns throughout the Enterprise M3 area, and not just in the north-east
 - More growth in digital and other high value sectors
 - Attracting more 'young urban residents' aged 25 to 34, in particular through improved housing affordability
 - Improving the performance of the towns in the Enterprise M3 area, including more employment growth in the towns
 - Improving productivity, through addressing skills gaps
- 1.1.5 The SEP discusses the need to attract more 'Young Urban Residents' to enable future economic growth, but the challenge of high house prices and poor affordability means that many cannot afford to live here. This affects skill levels in the local workforce, which in-turn affects productivity and economic growth.
- 1.1.6 The SEP identifies the 'growth towns' of Guildford, Woking, Farnborough and Basingstoke; the 'step-up' towns of Staines-upon-Thames, Camberley, Whitehill & Borden, Aldershot and Andover; and the cathedral city of Winchester as particularly important places in the Enterprise M3 area.
- 1.1.7 A number of key sectors are identified in the SEP, in particular the high value sectors of Digital/Data, Defence/Aerospace, Satellite Technology, Business Services and Creative Industries

1.2 Objectives

1.2.1 The objectives of this project are to:

- Develop a typology of the towns/settlements and the networks that link them together
- See a longitudinal analysis of each town's performance, to understand how they have grown in the past

1.2.2 The medium-term viability of the settlements is not covered in the scope of this particular piece of work.

1.3 Approach

1.3.1 The approach to undertaking this work has comprised a number of stages:

- Project initiation, in which the objectives and approach were agreed by the project steering group
- Agreement of the list of 33 towns to be analysed, in consultation with the two County Councils and some of the District Councils
- Defining the functional economic market areas (FEMAs) in the EM3 area
- Data gathering and analysis of the 33 towns
- Consultations with the 13 District Councils in the EM3 area

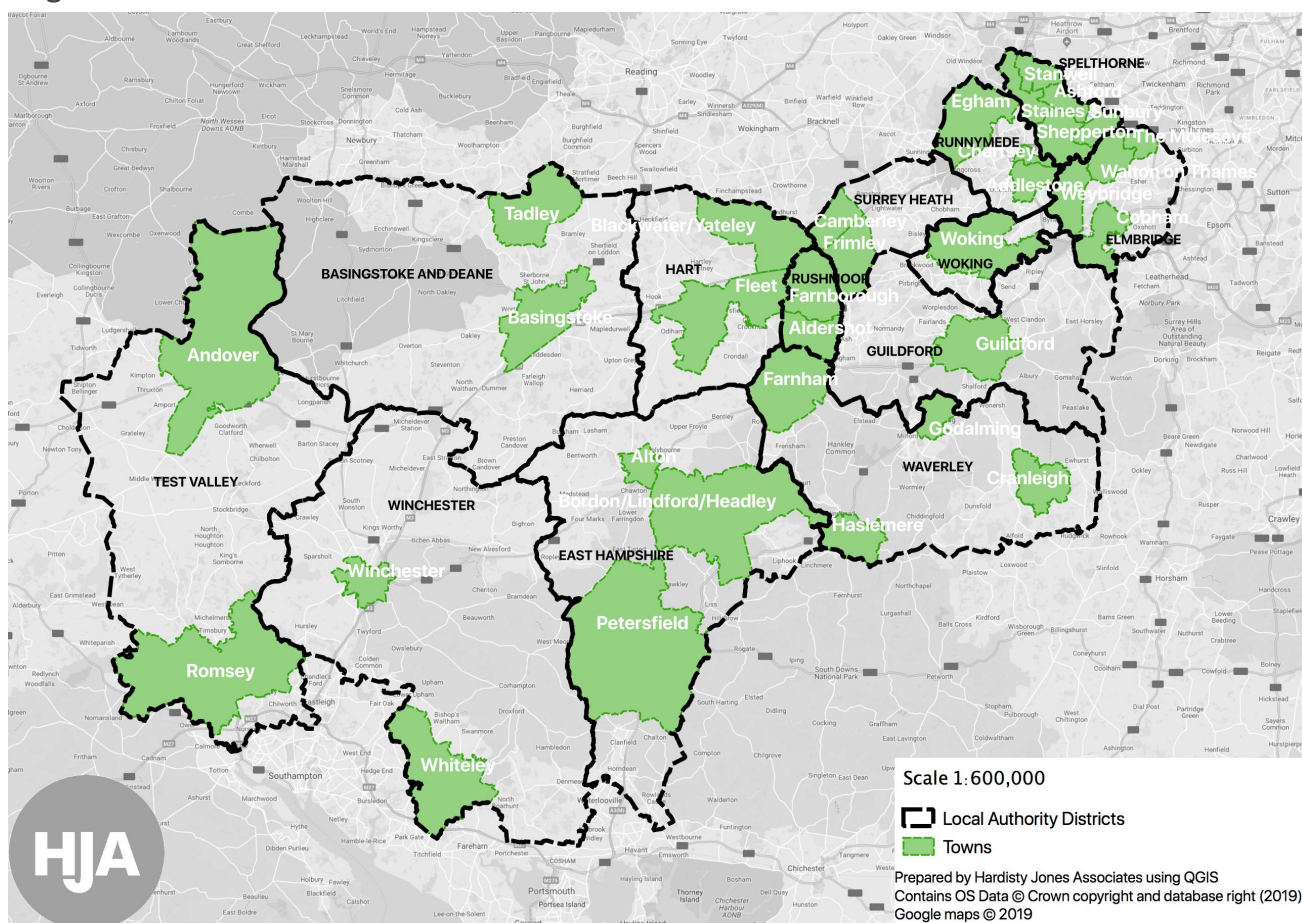
1.4 Defining the towns

1.4.1 The initial choice of 33 towns was undertaken by the Enterprise M3 LEP on a population basis. Towns with populations of 10,000 and more were chosen. The initial definitions were determined by Hampshire County Council on behalf of the LEP. These were then reviewed by Surrey County Council and then revised, with input from a number of District Councils. Some towns removed from the original list, but others added, so that an initial list of 33 towns became a final list of 33 towns.

1.4.2 The towns were defined on the geographical basis of Mid Layer Super Output Areas (MSOAs) because much Government/ONS data is available at the MSA level, and the boundaries of MSAs tend not to be modified frequently, but typically only once during a ten-year Census period. MSA boundaries have been used in preference to ward boundaries as these are modified more frequently, which makes the longitudinal analysis of data more difficult as the boundaries of towns may change.

1.4.3 The 33 towns can be seen in the figure below.

Figure 1.1: Location of the 33 Towns



1.5 Structure of this report

1.5.1 Part 1 of the report (set out in a separate document) is structured around the two main objectives of the study, namely a typology of the 33 towns that have been investigated, and a review of longitudinal change in the towns. A third section has been included, which considers the growth opportunities and prospects for the towns. The chapters that make up the rest of the report are:

- **Chapter 2** which sets out the functional market areas in the Enterprise M3 area. This moves beyond the characteristics of the towns and explores the functional relationships between towns
- **Chapter 3** which sets out the main characteristics of the towns based on the primary and secondary data that has been collected for the study. The towns can be sorted into types in various ways, using the variety of data sources
- **Chapter 4** which carries out longitudinal analysis of the towns, looking at changes in the characteristics over time
- **Chapter 5** sets out analysis on classifying towns in the Enterprise M3 area

1.5.2 Part 2 of the report (set out in this document) comprises:

- **Chapter 2** which considers information about the future growth opportunities for each town
- **Chapter 3** which sets out the conclusions from both parts of the study

1.5.3 There are 14 appendices to this report. Appendices 1 to 13 set out the data profile and consultation information for the towns in each of the 13 Districts in the Enterprise M3 area. Appendix 14 sets

out the data used for the analysis of the functional economic market areas in the Enterprise M3 area.

2 Future Growth Opportunities

- 2.0.1 This chapter sets out data on the future growth opportunities in the 33 towns in the Enterprise M3 LEP area.

2.1 Strategic designations

SEP designations

- 2.1.1 The Strategic Economic Plan (SEP) for the Enterprise M3 LEP area has identified a number of *growth* and *step-up* towns¹. *Growth* towns are those which will drive economic growth in the future, and *step-up* towns are those with untapped potential. They can be seen in the figure below.

Figure 2.1: Growth and Step-Up Towns

Growth Towns	Step-Up Towns
Basingstoke, Basingstoke & Deane	Staines-upon-Thames, Spelthorne
Guildford, Guildford	Camberley, Surrey Heath
Woking, Woking	Bordon/Lindford/Headley, East Hampshire
Farnborough, Rushmoor	[Whitehill and Borden]
	Aldershot, Rushmoor
	Andover, Test Valley

Source: A Strategic Economic Plan for the Enterprise M3 Area 2018 to 2030

Surrey Place Ambition

- 2.1.2 Surrey's local authorities and their strategic partners have come together to set out their ambition for future growth². There are five Strategic Opportunity Areas within the Enterprise M3 area:

- Longcross-Staines-Heathrow Corridor
- Woking Hub
- Guildford Hub
- Blackwater Valley (Hampshire/Surrey)
- Cranleigh–Dunsfold Corridor

- 2.1.3 The Strategic Opportunity Areas are places which can support Surrey's priority industry sectors and improvements to connectivity both within Surrey and with other strategic locations. Transformational projects will be delivered in the Strategic Opportunity Areas in the next three decades.

- 2.1.4 The priority industry sectors for Surrey are Professional & Business Services, Life Sciences, ICT, Aerospace & Defence, 5G, Satellites and Cyber Security.

Vision for Hampshire

- 2.1.5 A commission of inquiry has been established by the County Council to develop a vision for Hampshire in 2050³. Whilst economic analysis which has been prepared for the commission

¹ Enterprise M3 (2018) A Strategic Economic Plan for the Enterprise M3 Area 2018 to 2030

² Surrey Future (2019) Surrey's 2050 Place Ambition

³ Hampshire County Council (2018) Core Evidence Base: Commission of Inquiry - Vision for Hampshire 2050

considers north, central and south Hampshire, and the Districts of Hampshire, it does not consider the role of individual towns within the County.

2.2 Future population growth

2.2.1 This data is collected from consultations with local authority officers.

Figure 2.2: Future Population Growth

Town	District	Future Population Growth
Basingstoke	Basingstoke & Deane	Borough population could grow to 205,000 by 2039, and 235,000 by 2050. Over 65s could make up 25% of the total population by 2050
Tadley	Basingstoke & Deane	Population not expected to rise much, but over 65s expected to increase
Alton	East Hampshire	Steady growth
Bordon/Lindford/Headley	East Hampshire	Exponential growth expected, but no numbers given
Petersfield	East Hampshire	Steady growth
Cobham	Elmbridge	Five growth strategies are currently being explored for Elmbridge. Under each option new development will be focused in the urban areas with densities being optimised. In addition, three of the options consider release of Green Belt at various scales. If an option containing an element of Green Belt release is taken forward, the geographical area of some of our towns will increase. Depending on the option selected, the largest increases could be experienced in Cobham and Walton-on-Thames.
East & West Molesey	Elmbridge	
Walton-on-Thames	Elmbridge	
Weybridge	Elmbridge	
Guildford	Guildford	Some growth. Ageing population.
Blackwater/Yateley	Hart	Modest growth is forecast in the Blackwater and Yateley area over the next ten years.
Fleet	Hart	It will continue to grow at a faster pace than surrounding towns
Addlestone	Runnymede	Major development most likely elsewhere in the District
Chertsey	Runnymede	N/a
Egham	Runnymede	N/a
Aldershot	Rushmoor	Potential for 10% increase in population. Wellesley urban extension
Farnborough	Rushmoor	Potential for 10% increase in population.
Ashford	Spelthorne	Incremental growth, probably at a lower rate than nationally
Shepperton	Spelthorne	Potential for growth, but would need to build in the Greenbelt
Staines-upon-Thames	Spelthorne	1,000+ new homes

Town	District	Future Population Growth
Stanwell	Spelthorne	-
Sunbury	Spelthorne	Few opportunities for significant growth
Camberley	Surrey Heath	With the current and proposed residential developments within Camberley, the population of the town is likely to increase above general trends over the next ten years
Frimley	Surrey Heath	Population and housing growth is expected
Andover	Test Valley	Projected growth of around 10,000 to 60,000 by 2029
Romsey	Test Valley	Projected increase of around 5,000 to 26,000 by 2029
Cranleigh	Waverley	Permission for 2,000 houses on Dunsfold Park, adjacent to Cranleigh which will be the service centre for this. Expecting population to increase in the local area
Farnham	Waverley	The neighbourhood plan suggests 123 houses required per annum, so 1,200 in the next ten years. Likely to be higher. Little political appetite for more growth. May be employment growth, which drives future population growth
Godalming	Waverley	Reasonable growth expected. Fair amount of PDR conversion of offices to residential.
Haslemere	Waverley	No significant growth expected
Whiteley	Winchester	Population growth of 8,000 to reach 29,000 by 2023
Winchester	Winchester	2,000 new homes. Particular growth expected in the older population
Woking	Woking	Future residential development planned, but no numbers given

Source: Local Authority consultations

2.3 Contribution to the SEP and LIS

2.3.1 This data is collected from consultations with local authority officers.

Figure 2.3: Potential Contribution to the SEP and LIS

Town	District	Potential contribution to SEP and LIS
Basingstoke	Basingstoke & Deane	Employment growth in high value sectors targeted in the SEP. Supporting enterprise and innovation in digital and 5G. Training to deliver high skills. Improved connectivity. Regeneration of the town centre, leisure park and Enterprise Zone
Tadley	Basingstoke & Deane	No significant role in future growth
Alton	East Hampshire	Some development of new employment sites. Potential for advanced manufacturing/engineering specialism. Residential development.

Town	District	Potential contribution to SEP and LIS
Bordon/Lindford/Headley	East Hampshire	3,500 new homes, 5,000 new jobs. Growth in digital, space and clean growth
Petersfield	East Hampshire	Unlikely to be a significant growth location
Cobham	Elmbridge	Supportive business environment for start-ups and small businesses with access to co-working spaces and a strong local Chamber of Commerce providing opportunities for new business growth. Leading firms based in the area across ICT, property and agritech
East & West Molesey	Elmbridge	Opportunity to reimagine and transform one of the Borough's strategic employment sites. Range of commercial sites offers the chance to develop a mixed-use, modern flexible employment zone, to develop a range of complementary uses across the park
Walton-on-Thames	Elmbridge	Home to the high-value, high-growth businesses with the likes of Air Products based alongside 50 leading start-ups and 1,000 employees based in growth companies at the Hersham Place Technology Park. The mix of key sectors supporting the LIS include digital, cyber, professional services and aerospace
Weybridge	Elmbridge	Significant employment area with approximately 19,000 jobs and 2,500 businesses across Weybridge. Growth potential to support the SEP and LIS with the intensification of Brooklands Business Park. Home to major international businesses with the likes of Sony, Proctor & Gamble, Amazon Fresh, GSK supported by key business infrastructure such as the Mercedes-Benz World conference facilities, Brooklands Hotel and Brooklands College
Guildford	Guildford	Focus on scale-up businesses in some of the LEP's key sectors
Blackwater/Yateley	Hart	Blackwater is located on the Reading-Guildford line, which will be improved under Crossrail Two. Potential for significant positive impact on the desirability of the Blackwater/Yateley area both in terms of living (and commuting) and working. There is therefore an opportunity to regenerate the centre.
Fleet	Hart	Opportunity to regenerate parts of the town centre. New Garden Village settlement which will look to Fleet for services. No unique role for Fleet

Town	District	Potential contribution to SEP and LIS
Addlestone	Runnymede	Some potential for mixed-use development and improved retail offer
Chertsey	Runnymede	Historic environment means little scope for major growth. Potential to improve quality of retail.
Egham	Runnymede	Egham Gateway - mixed use development scheme. Potential to improve the quality of retail.
Aldershot	Rushmoor	Potential growth in digital and gaming sector. Potential redevelopment of Aldershot FC including hotel which will support Borough conference offer
Farnborough	Rushmoor	High quality office-based activities, aerospace, digital, ICT, potential for conferences
Ashford	Spelthorne	No significant role in future growth
Shepperton	Spelthorne	Potential for further development of Shepperton Studio
Staines-upon-Thames	Spelthorne	Masterplan for the town centre. Light rail link to Heathrow. Tourism and accommodation
Stanwell	Spelthorne	-
Sunbury	Spelthorne	The cluster of high-tech businesses could be developed further and add to the GVA of the EM3 economy
Camberley	Surrey Heath	Camberley is growing, with mixed-use developments. There is projected growth forecasted in the construction and civil engineering, professional scientific and technical activities sectors. The digital sector is a further area of potential growth. A draft policy is also being introduced for Yorktown Business Park to promote the redevelopment of sites and intensification of employment uses
Frimley	Surrey Heath	Frimley is closely aligned with Camberley, forming part of a continuous urban area. The town will contribute to the local economy through forecasted growth in the human health, medical technology and professional, scientific and technical activities sectors
Andover	Test Valley	Vision for growth of a cultural quarter as part of the master planning and regeneration of the town centre. Longer term growth of housing/population and employment.
Romsey	Test Valley	Future growth in the Science Park
Cranleigh	Waverley	Small businesses. Creative and IT – Dunsfold Park. Growth limited by lack of rail station. Proximity to Gatwick
Farnham	Waverley	Arts and cultural focus. University of Creative Arts is run out of Guildford. Strong contribution to the

Town	District	Potential contribution to SEP and LIS
		local economy. Brightwell development – will attract more student spend to stay within Farnham. The Maltings – arts venue. Strong visitor/cultural economy. Craft Town status.
Godalming	Waverley	Gaming is a potential growth area. Charterhouse School attracts international students.
Haslemere	Waverley	No major growth potential
Whiteley	Winchester	Significant growth potential. Extending existing employers Potential new sites – Whiteley and Segensworth. Employment led mixed use development, but transport/congestion problems
Winchester	Winchester	Growth in professional services, digital, creative and tourism
Woking	Woking	Potential growth for knowledge economy businesses, with focus on R&D

Source: Local Authority consultations

2.4 Infrastructure needs

- 2.4.1 Information on the infrastructure investment that is needed to achieve the growth potential of the towns has been collected from consultations with local authority officers.

Figure 2.4: Infrastructure Needs to Achieve Growth Potential

Town	District	Infrastructure needs to achieve growth potential
Basingstoke	Basingstoke & Deane	Road improvements, transport infrastructure, rail to Heathrow, health infrastructure, digital connectivity
Tadley	Basingstoke & Deane	No significant case for investment
Alton	East Hampshire	Roads, including access to employment sites. Town centre regeneration. Visitor accommodation
Bordon/Lindford/Headley	East Hampshire	New roads in place. Rail considered but discounted. Opportunity to increase public transport
Petersfield	East Hampshire	Affordable homes, hotels
Cobham	Elmbridge	Ongoing work to determine infrastructure needs
East & West Molesey	Elmbridge	
Walton-on-Thames	Elmbridge	None identified
Weybridge	Elmbridge	-
Guildford	Guildford	A3 trunk road improvements. Sustainable transport corridor. Slyfield Area regeneration Plan, Ash Rail Bridge, Blackwater Valley Scheme plus Local Plan-related infrastructural improvements e.g. at Blackwell Farm

Town	District	Infrastructure needs to achieve growth potential
Blackwater/Yateley	Hart	Enhanced pedestrian and cycle access from the station to the two. Enhanced public realm along London Road, Blackwater
Fleet	Hart	Enhanced pedestrian and cycle access from the station to the town centre and the leisure centre. Enhanced public realm along the high street.
Addlestone	Runnymede	Improvements to the rail line. Town centre regeneration
Chertsey	Runnymede	Improvements to train link. Flood defence infrastructure could enable the use of more development land
Egham	Runnymede	Sustainable transport - buses and cycle lanes. Flood defence infrastructure
Aldershot	Rushmoor	M3 junctions. Walking and cycling links from Hart to Rushmoor. Town centre infrastructure. A331 connection to Guildford. Hotels
Farnborough	Rushmoor	M3 junctions. Walking and cycling links from Hart to Rushmoor. Town centre infrastructure. A331 connection to Guildford. Hotels: additional hotel capacity at 3*/+ is important to the growth of Farnborough International Conference Centre
Ashford	Spelthorne	Redevelopment of the town centre multi-storey car park. Lower cost rail fares to London
Shepperton	Spelthorne	Road connections to Shepperton Studio
Staines-upon-Thames	Spelthorne	Direct rail link to Heathrow. Hotels. Bridge improvements between Runnymede and Staines. Generally improved public transport
Stanwell	Spelthorne	-
Sunbury	Spelthorne	Improvements to Sunbury Cross roundabout link to M3 would help to ease congestion. Gigabit fibre would make the town more attractive to large businesses
Camberley	Surrey Heath	Improvements to interconnectivity within the Blackwater Valley, building on the successes of the Golden Grid linkages. Highways improvements to the A30 London Road between Camberley town centre and the Meadows Gyratory. Public realm improvements required within the town centre, including for the London Road Block project. Improved rail links with London
Frimley	Surrey Heath	A review of the highways network in Frimley is necessary, as there are several areas of significant peak-time congestion including at the junctions of Lyon Way and the B3411 Frimley

Town	District	Infrastructure needs to achieve growth potential
		Road, the Toshiba Roundabout junction with the B3411 and A325, the Frimley Park Hospital Roundabout, and Frimley High Street. This can impact employers' ability to recruit and retain staff
Andover	Test Valley	Water supply and wastewater treatment. Highways improvement. Improvements to public realm, especially around the railway station
Romsey	Test Valley	Highways improvements, including pedestrian and cycle infrastructure
Cranleigh	Waverley	No train infrastructure, and too expensive to invest in this Bus service not great
Farnham	Waverley	Place-shaping exercise involves pedestrianising part of town centre. Also move major roads out of the centre. Hickleys Corner project. Bids for funding by Christmas Western bypass idea, but need money for this Busses poor east-west
Godalming	Waverley	Nothing major required
Haslemere	Waverley	Nothing major required
Whiteley	Winchester	Improved access from M27 J9
Winchester	Winchester	Transport improvements, including M3 J9; 5G; office space
Woking	Woking	Council led physical regeneration projects taking place. Plans to increase road and rail capacity in the town centre

Source: Local Authority consultations

3 Conclusions

- 3.0.1 The overall objective of this report has been to gather data on the towns of the Enterprise M3 area, including data on longitudinal change, to create a typology of towns which can be used to inform the preparation of the Local Industrial Strategy.

3.1 Functional relationships

- 3.1.1 An initial way of sorting the towns has been through the definition of functional economic market areas within the Enterprise M3 area, that is areas which are functionally consistent. This has done using functional data on travel-to-work, housing market areas and commercial property market areas. Towns within these areas would be expected to have stronger functional relationships with each other than with towns outside each FEMA.
- 3.1.2 Towns can be classified by the functional economic market area that they are within i.e. Outer London/Northern Surrey, Southern Surrey/Eastern Hampshire, Northern Hampshire, Mid Hampshire and Southern Hampshire. The boundaries are not precise and will vary if different individual functions are considered.
- 3.1.3 However, the functional economic market areas are helpful when considering the geography of historic and future growth throughout the EM3 area, which is itself a coherent economic area.

3.2 Characteristics and change over time

- 3.2.1 In this research we have looked at many characteristics of the towns and how some of them have changed over time, including primary and secondary data. The main datasets are based on the size and characteristics of the resident population; the size and characteristics of workplace-based employment including sectoral structure; commuting between places in the Enterprise M3 area; business floorspace; some measures of workforce and employment quality such as the productivity index, wages and qualifications; and the role of each town. In terms of service provision e.g. of retail, hospitals or higher education.
- 3.2.2 The work also looks at dynamism in terms of recent change in population, employment and other indicators, noting that as well as growth, some towns have seen a decline in population and workforce, and sometimes both.
- 3.2.3 Combining and comparing data to develop a typology of towns
- 3.2.4 We have considered the datasets and considered them in order to highlight towns which are distinctive as:
- Both population and employment centres
 - Towns which play a strong role in employment terms
 - Towns which play a strong role as residential and service centres
 - Towns which emerge as economically vibrant places, experiencing growth
- 3.2.5 There are some towns which feature in a number of these categories: Aldershot, Basingstoke, Camberley, Egham, Farnborough, Guildford, Staines-upon-Thames, Whiteley and Winchester. In addition, seven towns are highlighted in one of the above categories: Andover, Ashford, Farnham, Frimley, Romsey, Weybridge and Woking.

3.3 Role in supporting future growth

3.3.1 This analysis builds on the typology of towns which has already been defined for the SEP, and es this. The SEP defines:

- Growth towns – Basingstoke, Farnborough, Guildford and Woking. These are large towns which play an important role in the LEP economy and will continue to accommodate growth in the future
- Step-up towns – Aldershot, Andover, Bordon/Lindley/Headley, Camberley and Staines-upon-Thames. These towns are considered to have as-yet untapped growth potential

3.3.2 The distinctive towns emerging from this analysis include most of the above (with the exception of Bordon/Lindley/Headley which has been defined as a step-up town because of its potential rather than its historic and current potential). However, eight additional distinctive towns are identified in addition to the growth and step-up towns. These are set out in the figure below.

Figure 3.1: Distinctive Towns

Growth Towns	Step-Up Towns	Other Distinctive Towns
Basingstoke	Aldershot	Ashford
Farnborough	Andover	Egham
Guildford	Bordon/Lindford/Headley	Farnham
Woking	Camberley	Frimley
	Staines-upon-Thames	Romsey
		Whiteley
		Weybridge
		Winchester

3.3.3 However, most of the 33 towns considered in this study have a role to play in the future growth of the Enterprise M3 area, which is summarised in the figure below.

Figure 3.2: Contribution to Future Growth

Town	Potential contribution to SEP and LIS
Basingstoke	Employment in high value sectors. Enterprise and innovation in digital and 5G
Tadley	No major change
Alton	New employment sites. Potential for advanced manufacturing and engineering
Bordon/Lindford/Headley	3,500 new homes. 5,000 new jobs, especially in digital, space and clean growth
Petersfield	No major change
Cobham	Potential growth in SEP key sectors. Attractive to FDI
East & West Molesey	Potential growth in SEP key sectors. Redevelopment of existing employment areas
Walton-on-Thames	Potential growth in SEP key sectors
Weybridge	Potential growth in SEP key sectors. Intensification of existing employment sites
Guildford	Scale-up businesses in SEP key sectors

Town	Potential contribution to SEP and LIS
Blackwater/Yateley	Potential benefit from Crossrail 2. Potential regeneration of town centre
Fleet	Opportunity to regenerate parts of the town centre, but no major change in the town. New garden settlement will look to Fleet for services.
Addlestone	Some mixed-use development and improved retail offer
Chertsey	No major change
Egham	Potential mixed-use development
Aldershot	Major regeneration of Town Centre. Potential growth in digital and gaming sector and development of football ground including hotel development
Farnborough	Major regeneration of town centre. Potential growth in aerospace, digital, ICT and conferences
Ashford	No major change
Shepperton	Potential development of Shepperton Studios
Staines-upon-Thames	Town centre masterplan. Light rail link to Heathrow. Growth in tourism and accommodation
Sunbury	Potential growth in high-tech businesses
Camberley	Mixed-use town centre regeneration developments. Forecasted growth in the professional, scientific and technical activities, construction and civil engineering, and digital sectors
Frimley	Forecasted growth in the human health, medical technology, aerospace, and professional, scientific and technical activities sectors
Andover	Potential regeneration of town centre and cultural quarter and housing/employment growth
Romsey	Further growth of Science Park
Cranleigh	Small businesses, especially in creative and IT at Dunsfold Park
Farnham	Arts and cultural focus. Improved cultural and visitor economy
Godalming	Potential for growth in gaming sector
Haslemere	No major change
Whiteley	Increased employment in existing businesses. Potential development of new sites
Winchester	Potential growth in professional services, digital, creative and tourism
Woking	Potential growth in knowledge businesses and R&D