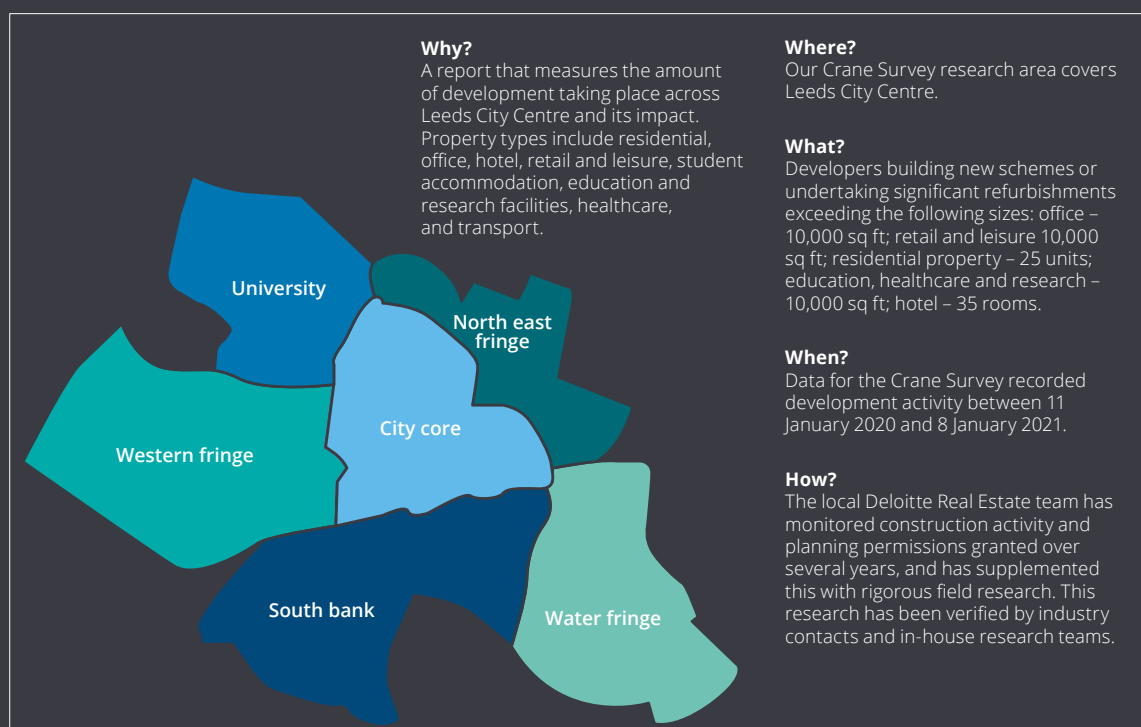




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Foreword



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Despite another year of uncertainty, 2020 has maintained the same number of new starts when compared to 2019. We have seen the second highest quantum of office floorspace delivered in the history of the Leeds Crane Survey, as well as a sustained level of activity in the residential sector. The skyline of Leeds city centre continues to develop with a number of notable schemes under construction and in the pipeline, and so we expect 2021 to be another strong year for construction.

2020 has seen a greater contribution to placemaking and neighbourhood creation, to support the growing residential population. These mixed use developments include complementary improvements by way of investment in new public realm and ground floor retail and leisure whilst delivering new homes. Vastint's Aire Park proposals is a notable example of up-front investment in a new, large public green space. Alongside improved connections to the city centre, extensive public realm and transport improvements are taking place, namely through the 'Connecting Leeds' programme. The programme focuses investment on creating a more pedestrian and cycle friendly environment, whilst also transforming transport for bus users. This focus on improving connectivity within the city centre further supports the growing emphasis on placemaking and neighbourhood creation. The decline of high street retail has accelerated through 2020 and in response it is anticipated that Leeds will see a diversification of its retail core. Much like other regional cities, Leeds

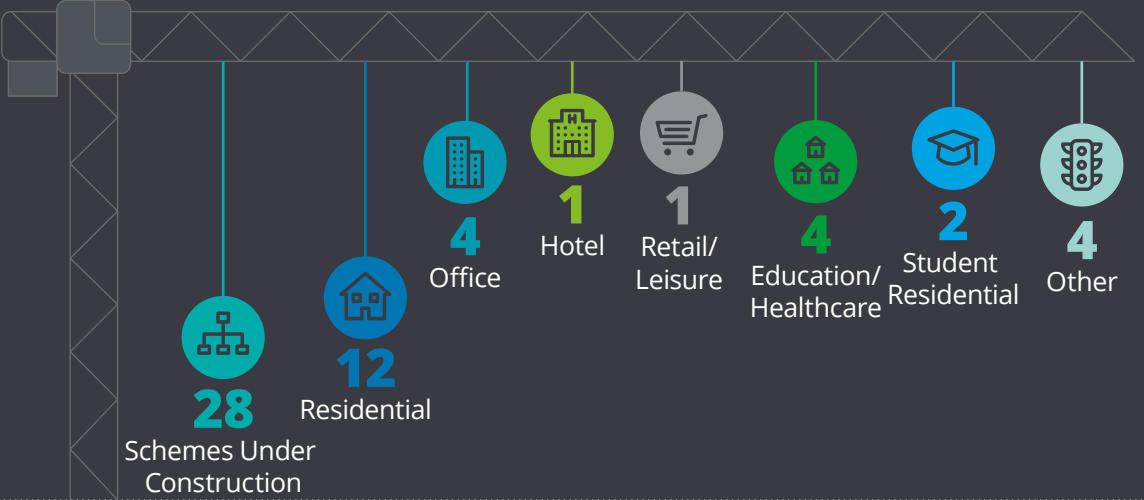
could see large areas of retail floorspace converted to residential and office use with supporting retail maintained at the ground floor to create active frontages and generate vitality. This trend may provide an opportunity to further support the creation of high quality neighbourhoods, whilst delivering the required footfall for retail units. During 2020 we saw significant growth in the creative arts sector with the addition of Leeds Beckett University's new hub for creative education in the city and the completion of the Majestic (the site of the new Channel 4 HQ). This concentration of creative opportunity will help to develop links and connect new creative talent in Leeds, which will allow the creative arts sector to expand further, at pace.

Attracting talent, new business and investment to the city centre is furthered through the substantial investment Leeds Teaching Hospitals NHS Trust is making at Leeds General Infirmary site, within the Leeds Innovation District. Construction on site is anticipated to start in 2021, with this investment set to strengthen the medicine, health and technology industries within Leeds. Despite uncertainty around the future role of the office, with a transition towards more working from home, the office market is responding to changing demands and is seeking to deliver offices with the flexibility to meet new priorities. Office developments under construction are delivering amenity-rich buildings, which inherently recognise the important role they play in supporting well-being and fostering collaboration and innovation. The pipeline will need to ensure that the quality of offices being built in the city centre respond quickly and positively to these developing priorities.

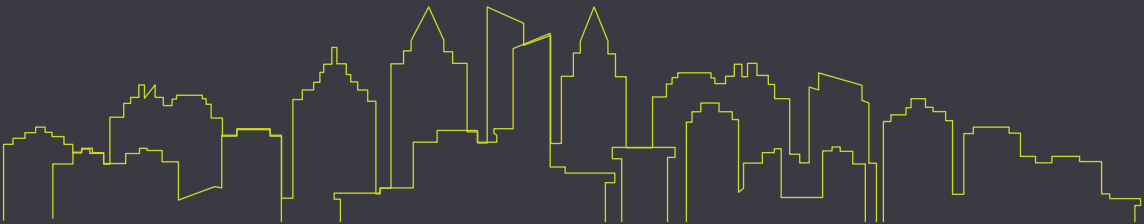
As the COVID-19 pandemic becomes more manageable as the year progresses, we expect the climate change agenda to take prominence as civic and corporate bodies seek to develop further their response. This follows Leeds City Council's declaration of a Climate Change Emergency and its commitment to Leeds carbon neutral by 2030. Leeds most recently has seen construction start at Citu's The Place which will deliver the first net zero carbon commercial building in Leeds, within the Climate Innovation District. Further commitments such as this are expected to follow during 2021 and beyond.

Development snapshot

Sectors under construction – total schemes

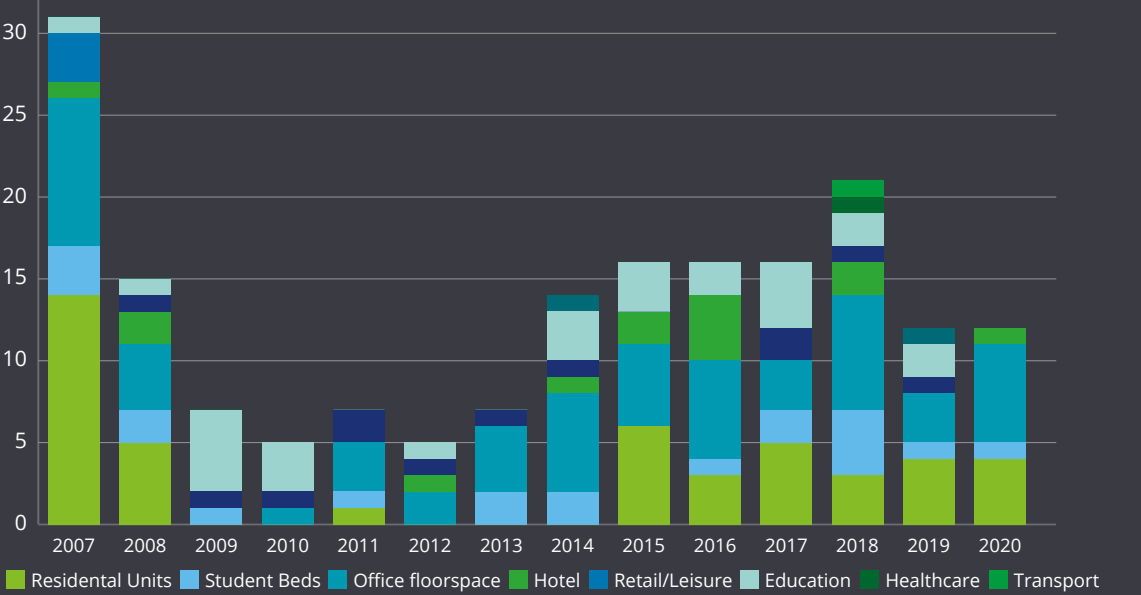


Sectors under construction – new starts



Key findings

New Starts per Year



4 new starts in the office sector, on par with the Leeds Crane Survey average of 4.4 per year.

None of the new start office developments have pre-lets, evidence of confidence in the market.

Residential units under construction:

2,662 units
6% down on 2019 following the completion of 1,211 units.

Office space completed:

667,059 sq ft.

Compared to:

in 2016: **712,960 sq ft.**

in 2007: **515,800 sq ft.**

4 new starts comprising **731 units** – just below crane survey average of 5 new starts.

69% new residential units under construction are for Build to Rent (only a slight reduction on the 78% in 2019)

Delivery of developments contributing to **Leeds Innovation District** by Universities and Hospital Trusts.

Slowing delivery of student accommodation with **1 new start**.

Impact of **COVID-19** on retail core including major store closures.

1 new hotel development has commenced and pipeline remains strong.

Plans for **improvements to cultural offer** anticipated to have long term benefits for growth of Leeds.

Office



Office Sector

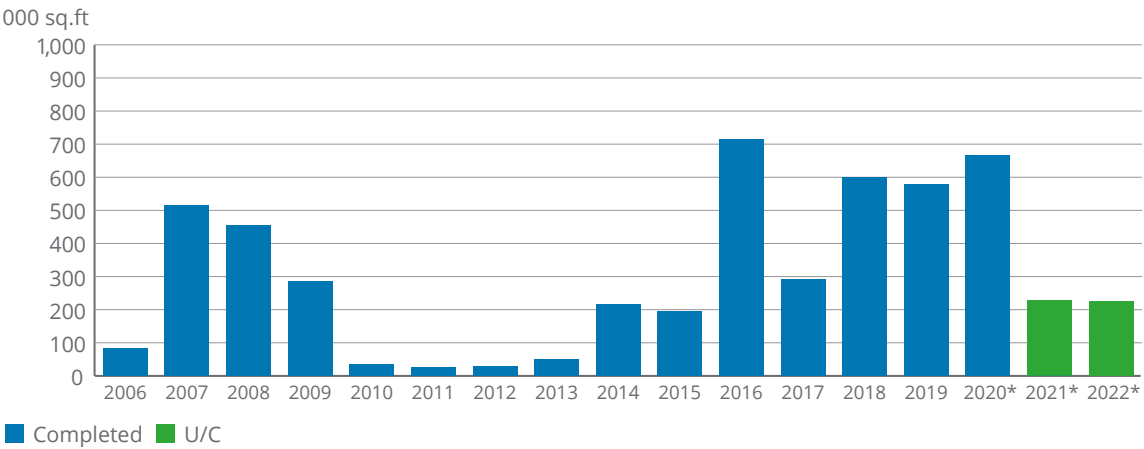
Following three years of above average delivery in the office sector (average annual construction since 2006 is 315,787 sq ft), a further 667,059 sq ft of office floorspace were delivered in 2020.

This is the second highest quantum in the history of the Leeds Crane Survey, exceeded only by 2016, which saw the delivery of approximately 700,000 sq ft.

Completions brought to market during 2020 included the landmark 66,000 sq ft 'Majestic', One Embankment, 2 The Embankment, 1 City Square, 4 Wellington Place, and 7 & 8 Wellington

Place. The new Channel 4 National HQ, including a range of creative, digital and technology departments, will occupy 27,000 sq ft of Majestic. This will act as a catalyst for further growth in Leeds, attracting and retaining young creative talent and marking a significant step forward for the creative arts sector in the city.

Chart 1. Leeds: office development pipeline (sq ft)



*Future year figures are predicted based on current completion dates for under construction projects

There were four new starts in the office sector during 2020, one more than in 2019, and on par with the Leeds Crane Survey average of 4.4 schemes per year. Two of the four new starts are new build developments, with two refurbishments (12 King Street and Wellington House).

Investment in speculative new build commercial space during 2020 indicates confidence in the market and growth prospects for Leeds and the wider region.

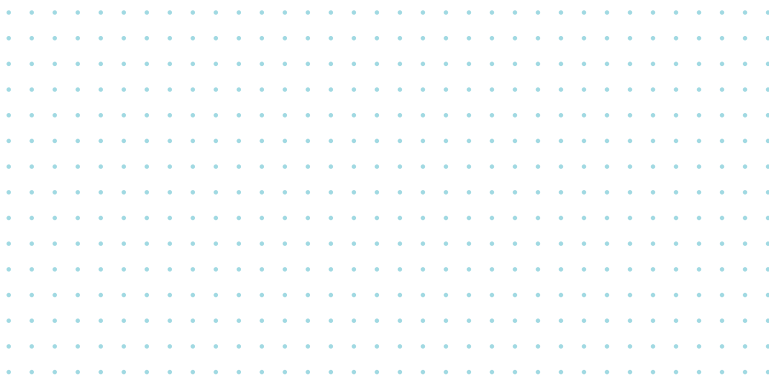
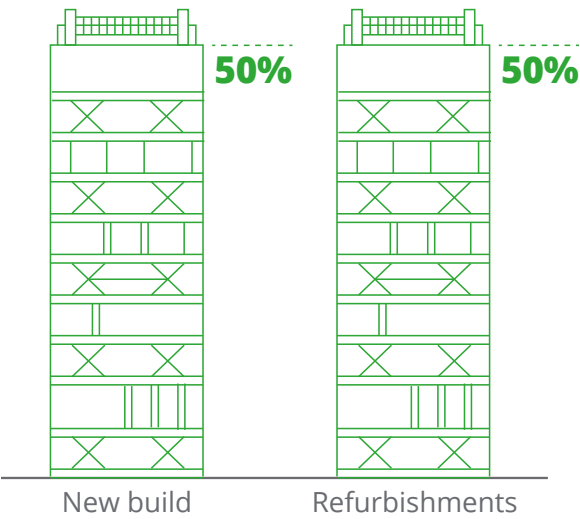


Chart 2. Office new starts



All the new start office developments are being delivered on a speculative basis with no pre-lets agreed, which again indicates confidence in the market. We reported in last year’s Leeds Crane Survey that demand for Grade A office floorspace was outstripping supply and the delivery of speculative office space may be a response to that demand.

Data from the Leeds Office Agents Forum (LOAF) shows a slowdown throughout 2020 in occupier activity with lettings down by 55% last year. Lettings in Q3 and Q4 include Leeds Teaching Hospital NHS Trust taking almost 22,000 sq ft at 2 Park Lane, Knights Solicitors taking 22,000 sq ft at the Majestic, and pensions advisory firm Isio taking over 6,000 sq ft in 34 Boar Lane. LOAF reported that there is still a lack of new-build Grade A supply in both Leeds City Centre and in the out of town market.

New starts in 2020, were predominantly driven by sites where the initial investments had already been made or funding had been secured prior to March 2020.

Whilst the pipeline of new office developments is limited, likely due to the short term impact of COVID-19, construction is expected to commence in 2021 on two office buildings within CEG’s Holbeck Portfolio – Globe Point and One Globe Square – offering 172,454 sq ft between them. This will be a landmark project for the regeneration of South Bank, which will expand Leeds city centre with wholesale mixed use regeneration. Once complete, the office buildings will bring new daytime vibrancy and encourage further development in this important regeneration area.

The long-term impact of COVID-19 and the potential transition to more working from home and its implications on office use and demand is not yet clear. The impact of push and pull factors on the demand for office space, such as IT infrastructure now being in place to facilitate working from home, versus the fact that the office environment can be important for wellbeing, collaboration and innovation, will become clearer when the disruptive effects of COVID-19 have subsided.

The 2020 Leeds Crane Survey predicted that employers and tenants will move away from traditional office models of floorspace with rigid banks of desks, towards a more flexible use of space. We can say with some certainty that this change is happening and has been accelerated as a result of the impact of COVID-19. The Deloitte CFO Survey (Q4 2020) found that CFOs expect homeworking to increase in the longer term, as well as business investment in new technology, which have both come under greater focus during the pandemic¹.

In response, the office developments under construction are all marketed as amenity-rich buildings, with wellbeing and community benefits featuring prominently. Exercise classes and a workplace choir are proposed at Wellington Place and a rooftop with a tennis court. Yoga spaces and space for events, relaxation, exercise and socialising are to be provided at Citu’s ‘The Place’. This trend is expected to continue with yoga classes, business lounges and flexible co-working spaces, proposed at One Globe Square and Globe Point, which are both anticipated to start on site in 2021. While there is some uncertainty around the future role of the office, the market is responding to changing demands and seeking to deliver offices with the flexibility to meet future priorities.

Leeds City Council has declared a climate change emergency and committed to making Leeds carbon neutral by 2030. It aims to reduce the level of greenhouse gas emissions from buildings in the city and promote a low carbon economy. The importance of delivering sustainable offices for the future is evident across all the office buildings under construction, and most obviously at Citu’s ‘The Place’, which will deliver the first net zero carbon commercial building in Leeds, within the Climate Innovation District.

Residential



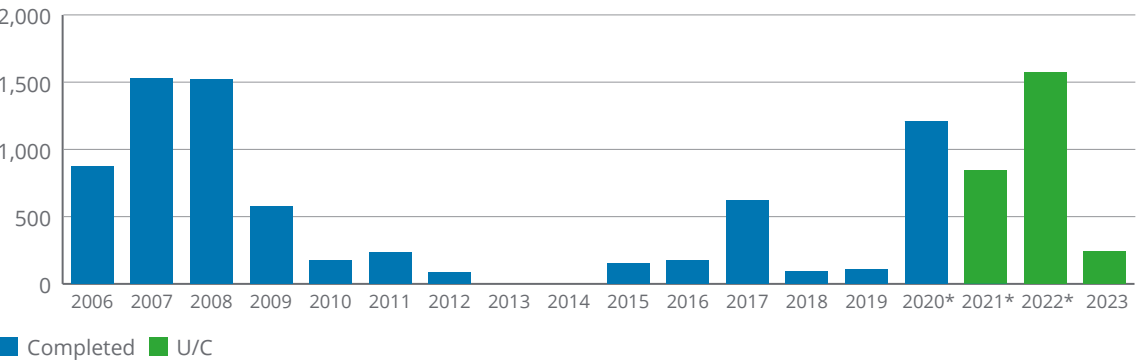
Residential

Four new residential developments commenced construction in 2020, which together will deliver 731 new residential units. This builds on sustained activity in the residential sector over the past few years, following three new starts in 2018 and four in 2019.

There were 2,662 residential units under construction at the end of 2020, compared to 2,832 in 2019. This reduction of 6% is explained largely by the highest volume of residential completions since 2008. Over the past 12 years it has been difficult to encourage new high density residential development in Leeds city centre, but there are early signs of a positive momentum.

The Leeds' Core Strategy annual housing target is 3,247 dwellings across the local authority area. In 2020, the city centre delivered 37% of this target through 1,211 completed units.

Chart 3. Leeds Residential Development Pipeline

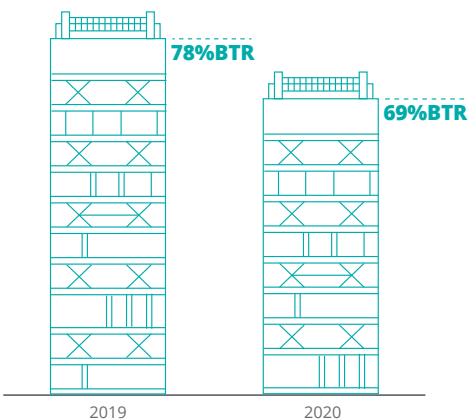


*Future year figures are predicted based on current completion dates for under construction projects

All the new starts are located on sites where construction had stalled following the grant of planning permission, and all are for new-build developments, indicating sustained confidence in delivering residential development.

Three of the four new start developments are for the Build to Rent (BTR) market, and 69% of all new homes under construction are for BTR. This suggests that long-term investment decisions are being made that look beyond the current uncertain economic climate.

Chart 4. Proportion of Build to Rent





Under Construction residential development is located predominantly outside the city core. Four of the 12 residential developments under construction are in the South Bank area of the city centre, four are in the eastern fringe, and three in the western fringe.

The 2020 Crane Survey predicted a shift in focus towards creating communities for city centre living. Several of the residential developments feature improved public realm, new green space and ground floor commercial use in residential buildings, to create activity and vibrancy. This is facilitated by residential developments clustering in fringe locations. New neighbourhoods will emerge from these clusters, which are expected to stimulate further demand for city centre living.

The design of new developments coming forward, and in the pipeline, such as the proposals for the new City Park by Vastint, include up-front investments in placemaking (creating quality places where

people want to live and work). The inclusion of placemaking elements sets a standard to make city centre living more attractive, encourage future high quality residential development, and create a critical mass of attractive residential accommodation.

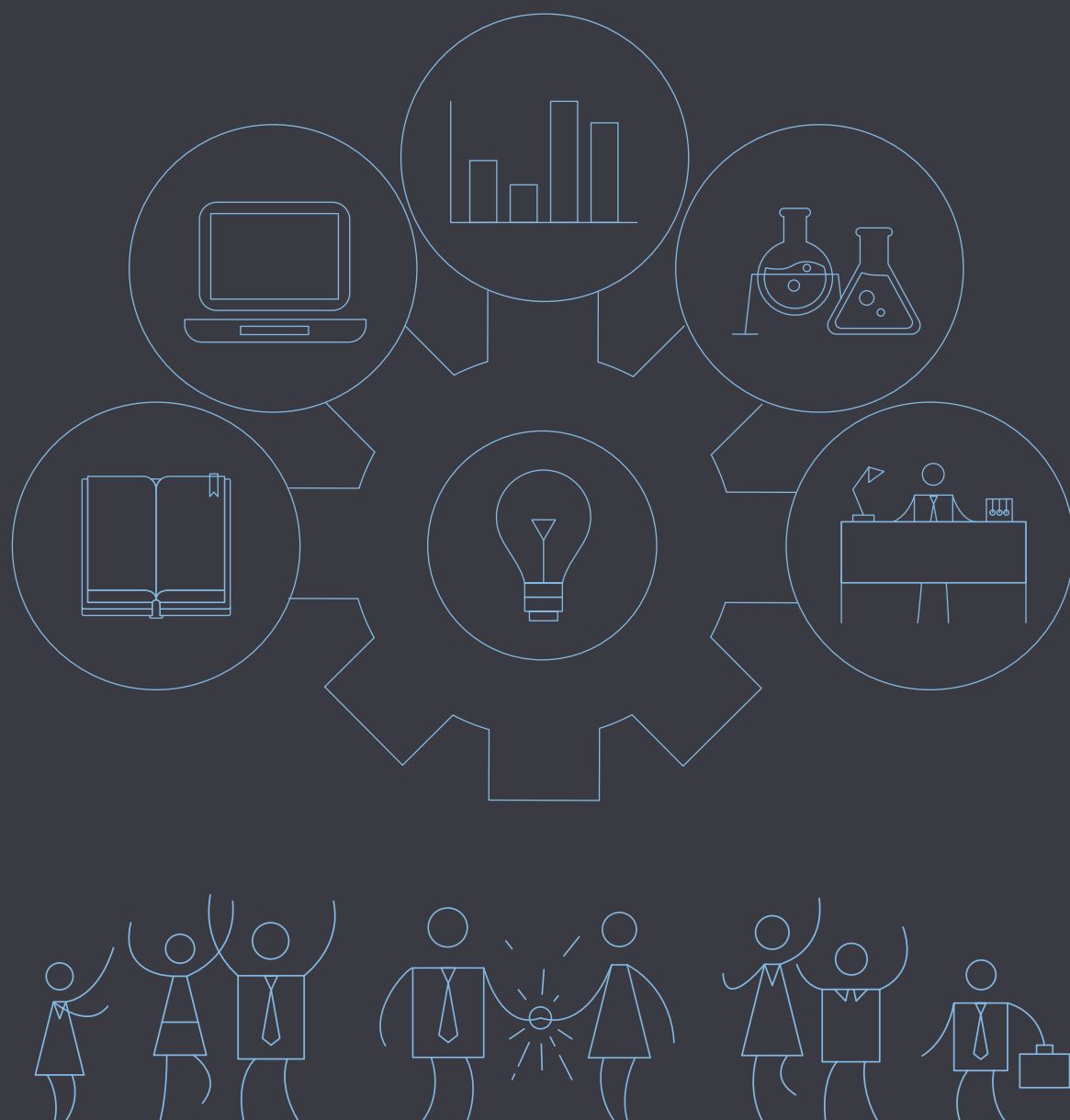
The requirement for people to stay at home for extended periods of time during the COVID-19 pandemic has refocussed attention towards the quality of living spaces in new developments, and ensuring sufficient internal space and access to outdoor space and community facilities.

In response to the accelerating trend towards more home working, we expect new city centre residential development coming through the pipeline to include different types of amenity provision as differentiators in the market, such as communal workspaces and gyms, as well as ensuring there is sufficient 'working from home space' within units.

With a growing city centre population, future development may need to consider the need to provide supporting services such as schools, convenience retail and medical centres. The requirement for services will depend on the demographic groups moving into the city centre. In 2020 there was continuing delivery of family appropriate housing, through larger apartments and town house developments, including the next phase of Citu's Climate Innovation District and Igloo's Ironworks. The city centre also already supports one secondary school, the Ruth Gorse Academy, and there are a number of primary schools within walking or cycling distance from the city centre.

It had been anticipated that further large-scale residential developments might commence in 2020, but these have been delayed into early 2021. Development decisions have been affected by a range of factors, including the uncertainty caused by COVID-19 and the potential impact of Brexit on supply chains during the latter part of 2020. Although developments have been delayed, we expect a number of pipeline developments to commence in early 2021, continuing the pace of residential delivery in the city centre.

Education and Healthcare



Education

Following a record completion of 419,758 sq ft of educational floorspace in 2019, completion levels dropped in 2020 with only 17,577 sq ft completed, as part of the University of Leeds' Clarendon Building. There were no new starts. Consequently, the amount of educational floorspace under construction (almost 466,000 sq ft) remains largely unchanged.

The developments under construction across Higher Education Institutions, are at the University of Leeds and Leeds Beckett University. Construction remains underway on the 156,077 sq ft Creative Arts Building at Leeds Beckett University, which will provide dedicated facilities for fashion, music and the performing arts. This new state-of-the-art building is expected to complete in early 2021.

This new hub for creative education in the city, alongside the completion in 2020 of the Majestic (site of the new Channel 4 HQ) creates an opportunity to develop links and attract, retain and connect new creative talent in Leeds. This opportunity within the creative sector will continue to grow at pace.

The expansion of the creative sector in Leeds is supported by the Whitehall Road Studios, on the former Polestar Petty Printworks site, which is currently under construction. This new TV and film studios development started on site in 2020, following Caddick's refurbishment of the warehouse space in 2019. The conversion of the refurbished space into six studios is expected to complete in Q2 2021.

Across Higher Education Institutions in Leeds, there has been a year-on-year increase in the number of students studying creative arts and design subjects. In the 2018/19 academic year 7,135

students were enrolled on creative arts and design courses, a 54% increase on the 4,630 students enrolled in 2014/15². It is expected that the numbers taking creative arts and design higher education courses will continue to increase over the coming years.

At the University of Leeds, the refurbishment of the Faculty of Biological Sciences and the construction of the 168,993 sq ft Sir William Henry Bragg Building are ongoing. The Bragg Building forms part of the University's plans for developing academic activity within the Schools of Computing and Physics and Astronomy. The University has national prominence in two specific areas of material science: advanced functional materials and soft material; and the construction of the Sir William Henry Bragg Building will help to create an internationally leading platform for research.

At the University of Leeds, upgrades to the Clarendon Building were completed in 2020, delivering 17,577 sq ft of education floorspace, and construction of the 68,609 sq ft Esther Simpson Building continued. Both developments form part of the University's ambitions for the Western Campus and are part of a multi-phase investment in the Leeds University Business School (LUBS) and the School of Law.



● Whitehall Road Studios ● Channel 4 ● Creative Arts Building

These campus development projects reflect the strategic aim of the University of Leeds to secure its place in the UK's top ten research universities. More generally, the University of Leeds maintains its strengths in traditional subjects, for example with more students studying languages and physical sciences than anywhere else in the UK.

The education developments currently under construction are due to complete in early February 2021, and the pipeline is limited beyond this date.

The financial impact of Covid-19 on higher education institutions has been hard hitting, and universities are facing loss of income across a range of sources. Losses are likely from a fall in international student enrolments, lower take up in university-owned student accommodation and reduced cash flow from privately-funded research projects. For the University of Leeds in 2018/19 19% of total income

(£151 million) came from research grants and contracts, and a further 8% (£63 million) came from rental income and catering for conferences.

Healthcare

Demolition began in late 2020 of the Leeds General Infirmary, marking the first stage of the five-year 'Hospitals of the Future' development. This development by Leeds Teaching Hospitals NHS Trust will include a flagship building for adult healthcare and a new children's hospital, and it follows investment and growth in recent years in schemes that support health, science and innovation.

Hospitals of the Future is one of six projects in the first wave of the UK Government's Health Infrastructure Plan (HIP), a national programme of healthcare capital investment. Among its new facilities for adult healthcare, the Leeds building will include expanded critical care services, new state-of-the-art theatres, a high-tech radiology department, a therapies hub and a new facility for endoscopy services³. The new purpose-built Leeds Children's Hospital will, for the first time, bring together services for children, young people, their families and carers⁴.

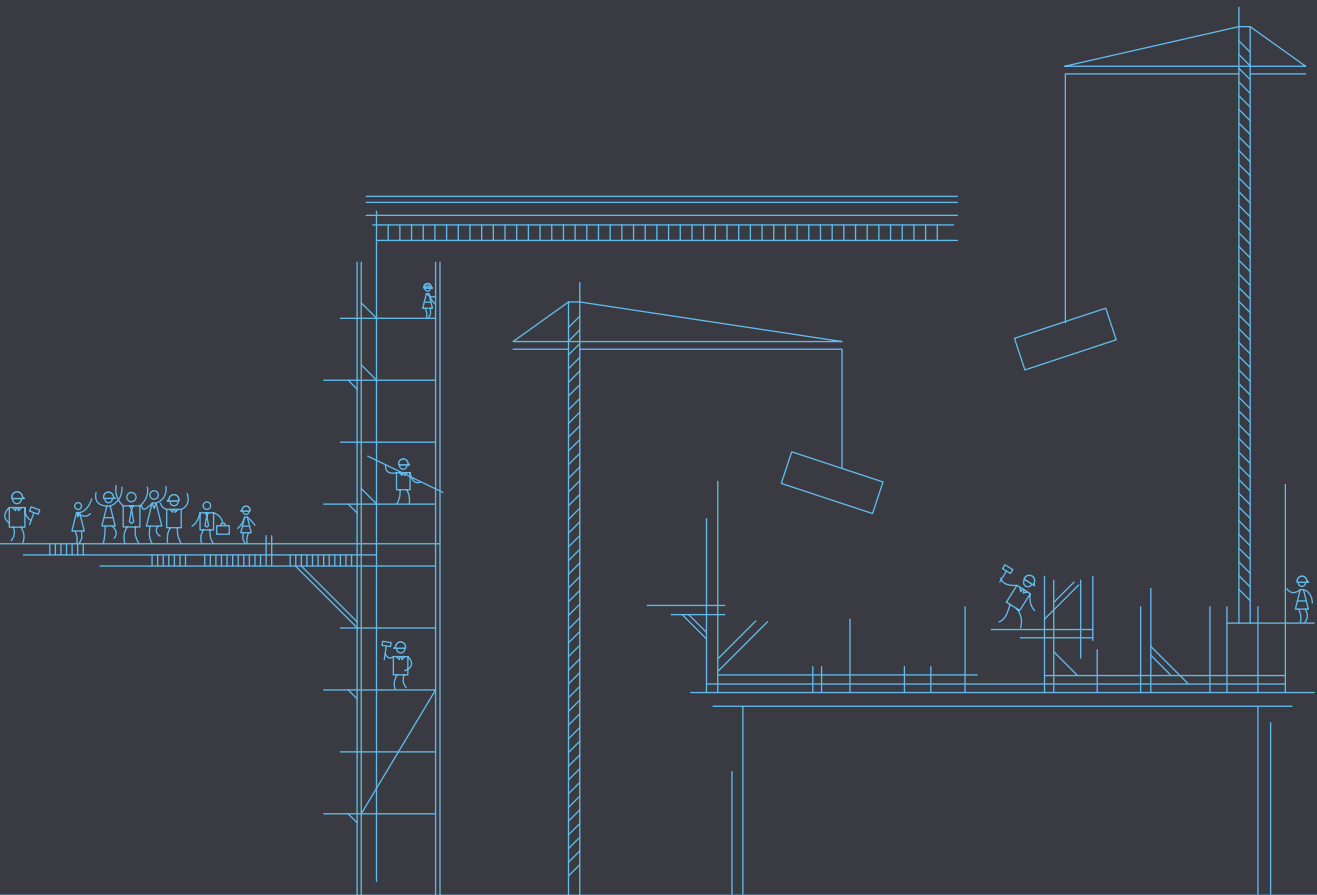
These two new hospital buildings at the Leeds General Infirmary represent a huge investment that will enable the Leeds Teaching Hospitals NHS Trust to offer patients modern healthcare based on the most advanced treatments, technologies, innovation and research.

The city centre's new hospital buildings, together with the refurbishment of the Faculty of Biological Sciences at the

University of Leeds, will also make a valuable contribution to the vision for the Leeds 'Innovation District' and the University's ambitions to grow its research funding, be an internationally-recognised biomedical research centre, and deliver a learning environment that befits a world class School of Medicine and Dentistry.

The strategic collaboration between the Trust, the universities and Leeds City Council seeks to build on existing strong partnerships in medicine, health and technology research to draw new businesses and investment to the Innovation District, creating jobs and income for the city. The Innovation District will form a hub for healthcare talent, industry partnerships, research and training, and is expected to create an additional 3,500 jobs for Leeds and the wider region⁵.

Student Accommodation



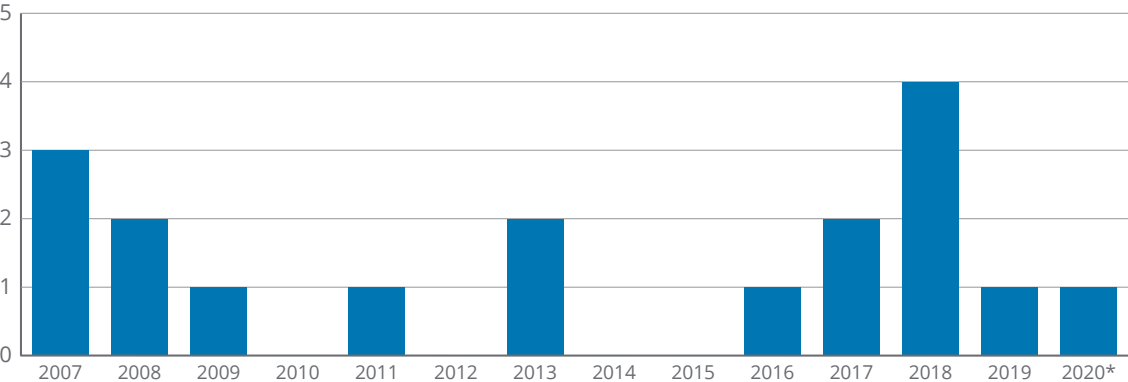
Purpose Built Student Accommodation

There is evidence of a slowdown in construction activity in the student accommodation sector, with only one new start each in the past two years and only 942 bedspaces currently under construction. This follows record activity in the student accommodation sector in 2018 and a record-breaking year in 2019 for bed spaces under construction (2,799 bedspaces).

The Oak House development on Park Lane by Maple Grove Developments and Rushbond Plc was the only new start in the sector during 2020, delivering 188 bedspaces. In addition to Oak House, one

scheme remained under construction (Altus House, formerly Hume House), which is set to deliver 754 bedspaces in Q3 2021.

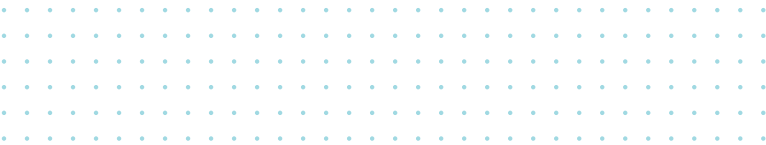
Chart 5. Student accommodation new starts



Historically, student accommodation has been a strong sector for construction in Leeds, with a large amount of student bedspaces delivered since 2016. Whilst there was a reduction in new starts in 2020, and the current pipeline remains limited, this is not unexpected given the large number of bedspaces delivered in 2020 (2,107) and in the context of the uncertainties arising from COVID-19.

Developers are increasingly recognising the likely positive impact on graduate retention of businesses locating in the city, such as Channel 4 and the Department for Work and Pensions. This will lead to a demand for high quality rental accommodation for graduates, who are the predominant target market for BTR development.

Investors are now looking more to the long term, and residential property values in Leeds city centre have been increasing, resulting in the delivery of more BTR and residential units.



Hotels, Retail & Leisure



Hotels

Construction started in 2020 on the Citispace Hotel on Regent Street, which will provide 54 hotel beds when completed. There were no other new starts or hotels under construction.

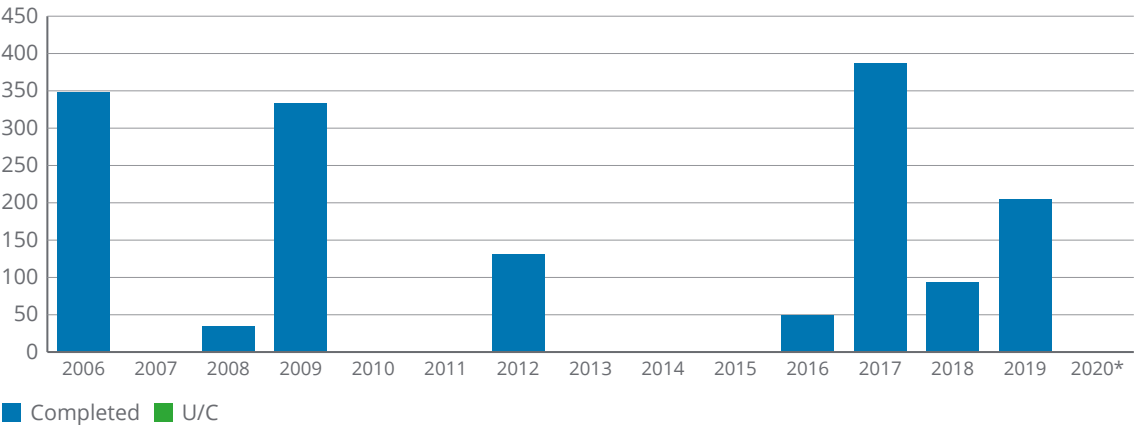
This is unsurprising. Following the initial outbreak of the COVID-19 pandemic, tourism and travel almost came to a standstill during the first half of 2020, causing extensive uncertainty and financial damage to the hospitality industry. Air passenger numbers in the UK dropped by 97% in April 2020 compared to the previous year⁶.

New hotel space continues to be proposed as part of mixed-use development sites, such as the SOYO development by Caddick and the Great George Street development. The creation of a cluster in the north

east of the city centre continues, with the proposed hotel in the later phases of SOYO and the proposed Victoria Gate Hotel by Hammerson, adjacent to the Victoria Gate Car Park – but both are yet to start on site. This will contribute to the emergence of this area of the city as a leisure quarter.

Within the wider city centre, there is outline planning permission for 166 hotel rooms as part of the Great George Street development, which includes Thorsby House and the Leonardo Building; this development opportunity is currently being marketed.

Chart 6. Leeds: hotel development pipeline



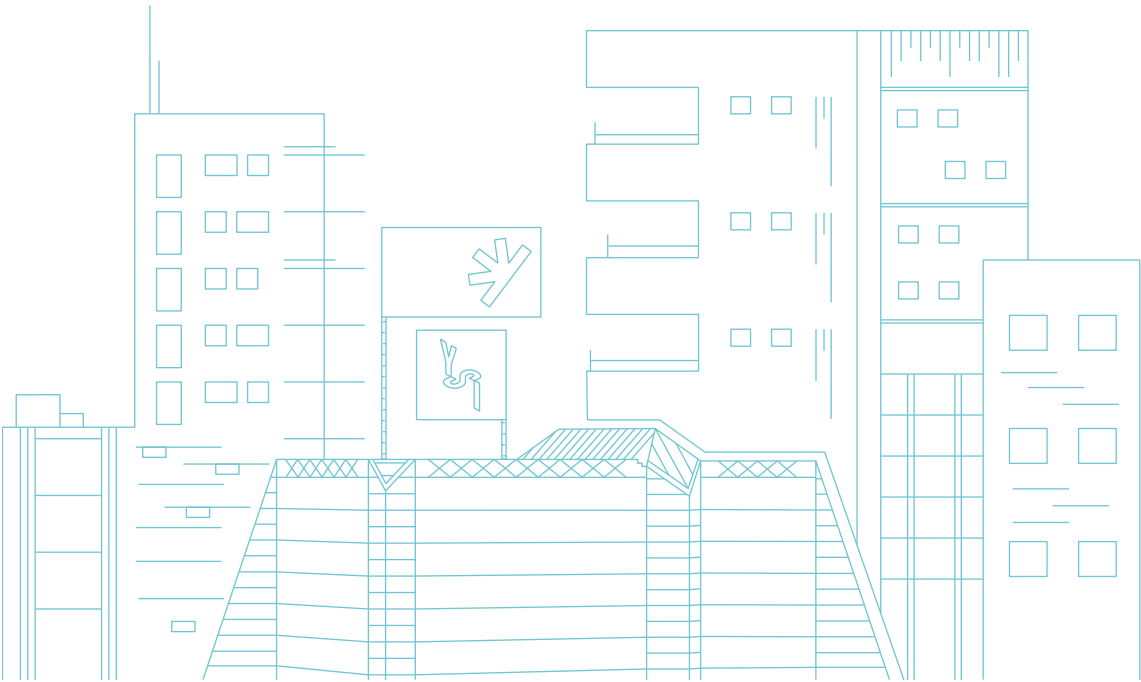
*Future year figures are predicted based on current completion dates for under construction projects

Whilst there is limited construction in the hotel sector, there has been some transactional activity in Leeds city centre, with Belfont Hotels acquiring its first hotel in the UK – the Cosmopolitan Hotel.

The promotion of Leeds United to the Premier League for the 2020-21 season could present an opportunity for the hotel sector to benefit from the visitor economy, with football giving the city some international recognition.

The Premier League attracts visitors from across the UK and internationally, helping to stimulate demand across the hospitality sector. The presence of premiership football should also add to the growing cultural identity of Leeds, helping to put the city on the 'map'. However, any initial footfall and associated revenue that would have been generated by matches in the first half of the season have been lost to the COVID-19 restrictions on attendance at sporting events.

It is expected that the hotel sector will begin to recover in 2021, with visitor confidence growing as the perceived risk declines, and more broadly as the cultural identity of Leeds regains traction.



Retail and Leisure

There were no retail-only new starts in 2020, although some small-scale retail commercial space was delivered on the ground floor of larger residential and commercial buildings.

2020 has been difficult for the leisure and hospitality sectors. When the UK went into lockdown at the end of March 2020 the culture, leisure and hospitality sectors were required to close their doors to the public.

The accommodation and food service activities and the arts entertainment and recreation sectors suffered the biggest impact on turnover and profits, which fell by 79.2% and 71.5% respectively (when compared with normal expectations for the time of year)⁷.

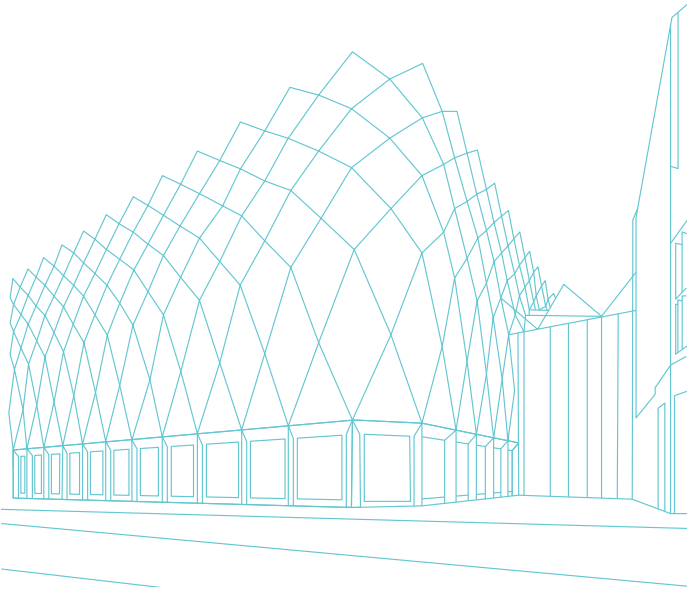
The future of the high street has been under threat for a number of years, and the lockdown periods in 2020 accelerated and intensified pre-existing trends. The retail sector was already under pressure before COVID-19, with several businesses going into administration and sales at large department stores falling.

When lockdown began in March 2020 and consumers were no longer able to shop in store for non-essential goods, the retail sector saw a big shift to online shopping. Despite non-essential stores reopening in June, online sales remained strong in Q3 2020, accounting for 27.5% of all retail spending – 7.4 percentage points higher than in February (pre-lockdown)⁸.

COVID-19 has had a major impact on high streets and city centre retail cores across the country.

In the critical three months in the run-up to Christmas in 2020, in-store retailers facing tough competition from online retailers sought to maintain the familiar shopping experience whilst implementing hygiene and social distancing requirements.

It is expected that this pressure will drive innovation in the sector as retailers look to reinvent the role of the physical store to make it more attractive to customers⁹.



Examples of the challenges facing the retail sector have included the acquisition of House of Fraser in 2018 by Sports Direct, to save jobs. More recently, the announced closure of Debenhams stores in January 2021 and retail group Arcadia entering administration add further uncertainty to the future of retail. For Leeds city centre, these events are likely to affect its central retail core, given the proximity of these high street stores on Briggate and in the Trinity shopping centre.

Despite accelerating the decline of high street retail, the COVID-19 pandemic could present an opportunity to diversify town centres, by introducing new uses that support the creation of high quality neighbourhoods. It is anticipated over the coming years that Leeds, much like other regional cities, could see the conversion of large areas of retail floorspace and department stores into offices or residential use. It seems likely that ground floor retail will still be included as part of future planning, as they have an important role in creating active frontages and generating vitality; and the residential and commercial uses of buildings should deliver the footfall that the retail units will need.

The diversification of the retail core in Leeds city centre will be affected by the announcement in December 2020 that Permitted Development Rights will allow Use Class E to be converted into residential use without the need for planning permission. This announcement followed the changes introduced by the government in September 2020, in which a broad range of uses, including offices, restaurants and shops, were grouped into

one new comprehensive category, Class E. This effectively removes planning controls over uses of property in the retail core. The appropriateness of an Article 4 direction to remove the permitted development rights to protect the vitality and vibrancy of the city centre will need to be considered.

Leisure and Culture

One of the leading cultural assets in Leeds, the Howard Assembly Rooms as part of the Grand Theatre, remains under refurbishment, with the £18 million redevelopment due to be completed in spring 2021.

The Howard Assembly Rooms renovation works include a new entrance and atrium and works to accommodate an increased number of performances alongside a new restaurant and bar.

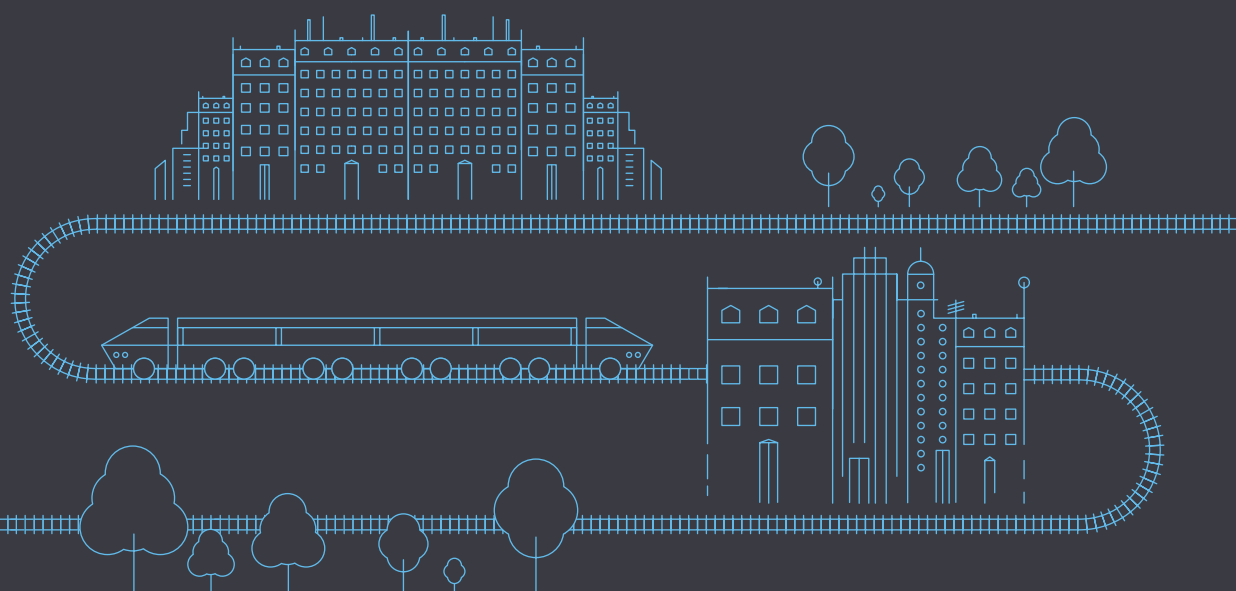
Despite limited construction activity in 2020 in the leisure sector, a number of schemes, particularly in the South Bank area, are providing ground floor spaces for socialising, relaxing and working out. This reflects a growing trend towards small-scale retail and leisure offerings as part of wider mixed-use developments, helping to create a neighbourhood and foster a sense of community.

The Quarry Hill neighbourhood is becoming the cultural quarter of Leeds. The area is now home to the Leeds College of Music, the West Yorkshire Playhouse, Yorkshire Arts and BBC Leeds.

Following its bid to be the European Capital of Culture 2021, Leeds has made a commitment to an investment programme culminating in the 'Leeds 2023' cultural festival.

In 2021, Leeds will host more Rugby League World Cup games than any other city. Hosting games for a major international sporting event will deliver indirect and direct economic growth for the city, by generating economic investment and expenditure, infrastructure legacies and promoting the image of the city and its cultural and sporting profile.

Connectivity and Transport



Connectivity and transport

Over the past decade investment in transport and connectivity infrastructure has struggled to keep pace with activity in other sectors. Despite this 2020 saw the completion of Platform Zero at Leeds Railway Station, and construction work continued on the Connecting Leeds programme, which includes improvements at the Corn Exchange and The Headrow.

Platform Zero and other improvements to Leeds Railway Station in 2020 support preparations for the arrival of HS2, Northern Powerhouse Rail and the forecast growth of rail passengers over the next 20 years. Completed improvements include the renovation of the station concourse and the creation of a large cycle area to promote greater use of sustainable and active travel modes in and out of the city centre. Further improvements to Leeds Railway Station are planned.

Other extensive public realm and transport improvements are also taking shape across the city centre, including the 'Connecting Leeds' programme. This programme, which is being undertaken by Leeds City Council, the West Yorkshire Combined Authority and bus operators, focuses investment on transforming transport for bus users, pedestrians and cyclists. It will include road improvement works in the city centre and the installation of new cycle routes.

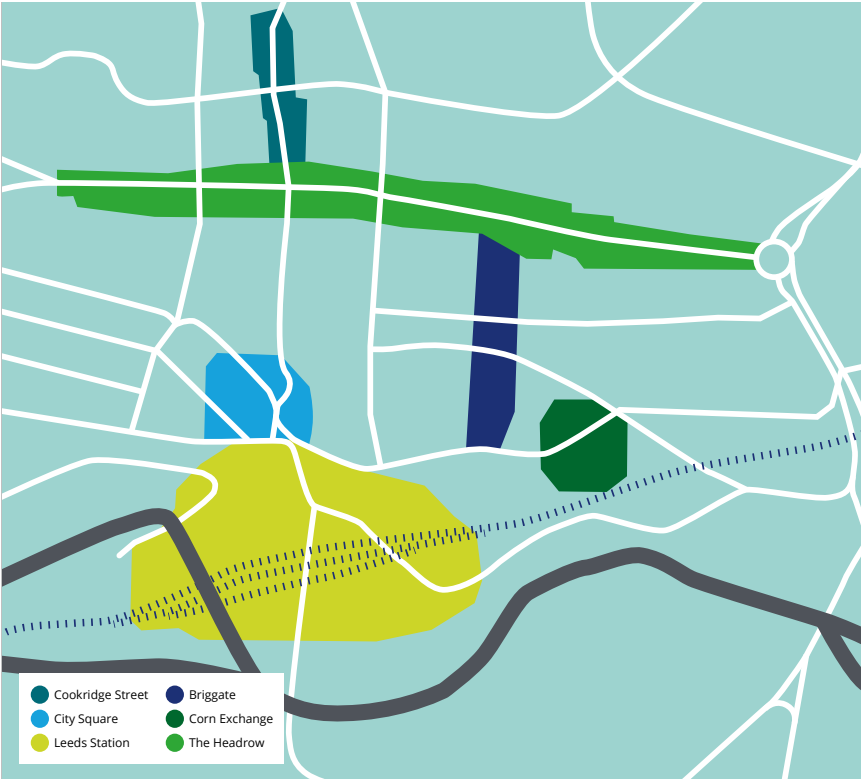
As part of the Connecting Leeds programme, work continued in 2020 on the Headrow Gateway, and public realm enhancements were started at the Corn Exchange. It is also anticipated that as part of this programme it is also anticipated that 2021 will see the pedestrianisation of Cookridge Street and the enhancement of the historic Briggate townscape.

Collectively, the improvements at Leeds Railway Station and the Connecting Leeds programme provide an opportunity to re-imagine City Square, the gateway to the city centre for visitors. The plan is to expand and redesign City Square to create a vibrant pedestrian space. Leeds City Council is currently undertaking a RIBA-led design competition: its Executive Committee approved the design brief in November 2020. Further news from Leeds City Council about the redesign of City Square is expected in 2021.

Leeds City Council is expected to publish its Connecting Leeds Transport Strategy in summer 2021, following a period of public consultation (ending in February). This will coincide with the publication of the West Yorkshire Connectivity Infrastructure Plan in early 2021.

The vision in the current draft of the Connecting Leeds Transport Strategy is the delivery of a mass transit network. This is expected to align with the West Yorkshire Combined Authority (WYCA)'s Connectivity Infrastructure Plan and Mass Transit 2040 Vision. An update on the Connectivity Infrastructure Plan was published for consultation in January 2021 which sets out plans for a new mass transit system for West Yorkshire.

Early feasibility studies and design work are ongoing by WYCA to explore the case for funding a low carbon mass transit system. The aim is to introduce mass transit 'main corridors' alongside HS2 by 2033. More information on the mass transit system is expected during 2021.



Through its various schemes and programmes, the Leeds City Council plans to improve the reliability of bus services and the facilities for cyclists and pedestrians, in the expectation that this will encourage a shift over the medium to long term from private car travel to sustainable and active modes of travel. The improvement works are intended to

address the connectivity and transport challenges facing the city in meeting its ambitions both for growth and to be carbon neutral by 2030, whilst supporting the vision for a well-connected and healthy city.

Endnotes

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6. House of Commons, June 2020 - The impact of the coronavirus pandemic on the aviation sector
7. ONS (2020) Office for National Statistics – Business Impact of Coronavirus (COVID-19) Survey <https://www.ons.gov.uk/businessindustryandtrade/business/businessservices/bulletins/coronavirusandtheeconomicimpactsonteuk/19november2020#businesses-financial-performance>
8. <https://www2.deloitte.com/uk/en/pages/consumer-business/articles/deloitte-consumer-tracker-retail.html>
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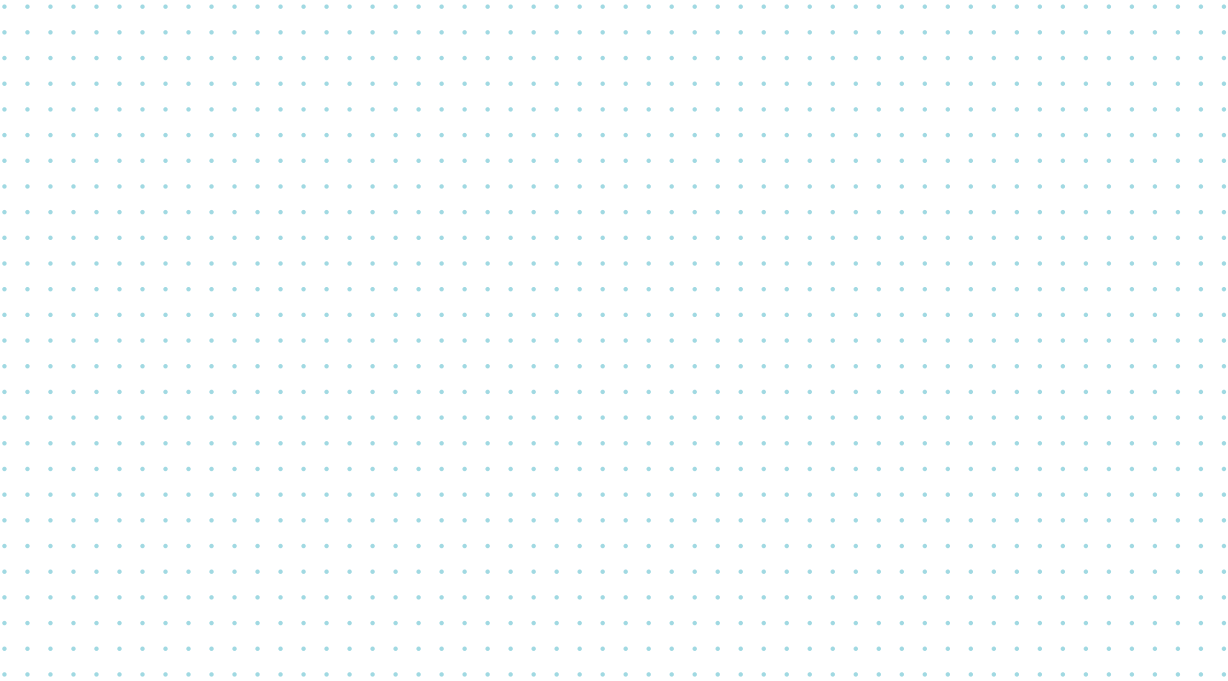
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