

DEFERBION



DERBY: DID YOU KNOW?

Alstom,
Rolls-Royce,
Toyota UK and
JCB employ c.20k
people in Derby.

4,000+
residential units
in pipeline.

2.1m
catchment
population.

Derby has the
highest disposable
income of any city
in the UK.

55,000
students including
a world class
university.

125,000
city workforce.

Highest
workforce
salaries outside of
London.



A GROWING HIGH TECH CITY

Workforce salaries are well **above national average** (highest city outside London) leading to high disposable income.

Derby has the fastest growing economy in the UK, having achieved **23% growth** in Gross Value Added over the last five years.

Top city for foreign direct investment strategy

The largest **high tech economy** in the East Midlands.

11.8% of the workforce are in high tech functions - 4 x national average.

£4bn of investment in the last 10 years and **£2.3bn** of known projects in the pipeline.

Derby City Centre Masterplan2030
4,000 new jobs
£3.5 billion of investment and 1,900 new city centre homes.

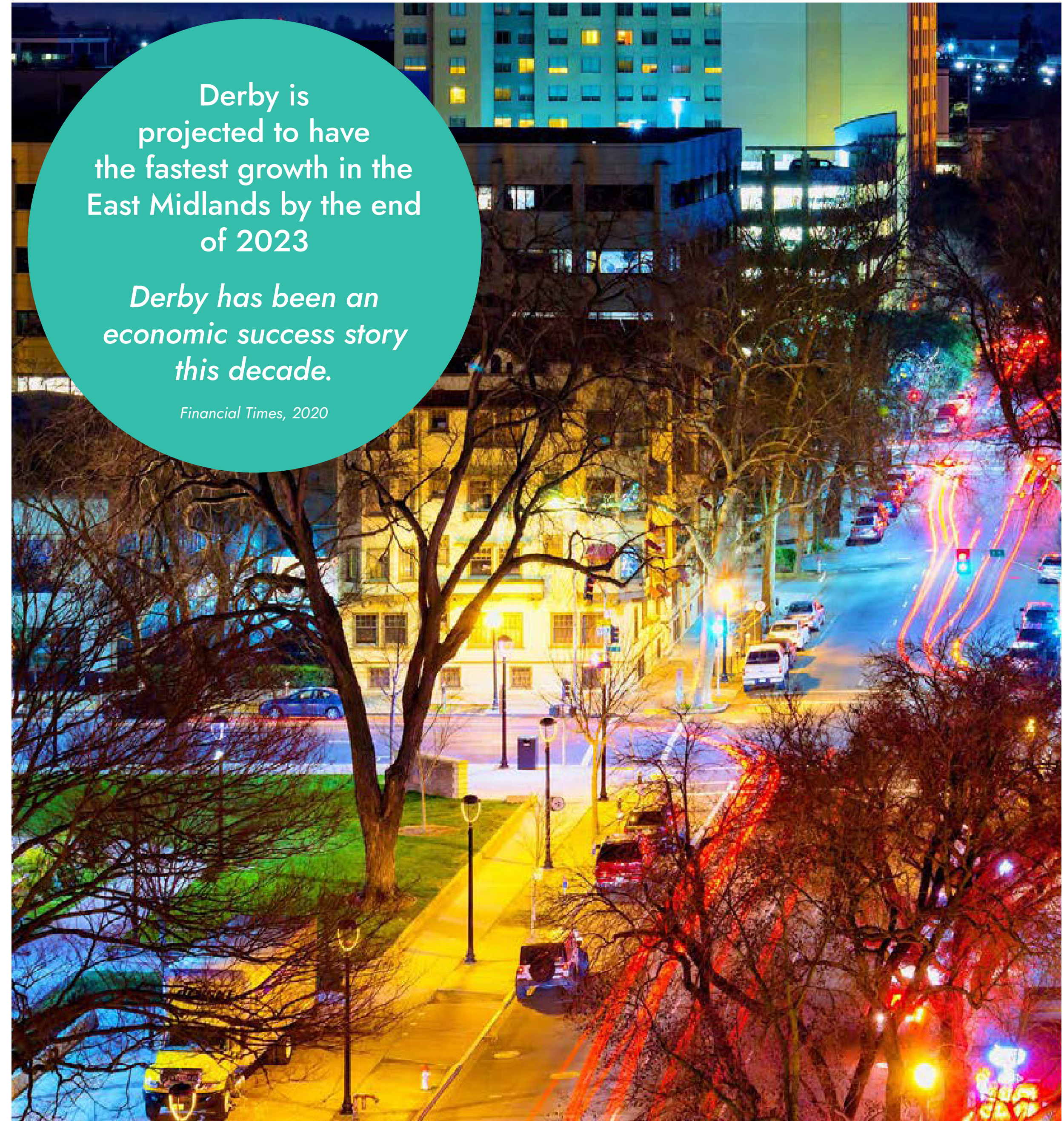
256,800 city population.

UK capital for innovation - inspiring creativity to shape Derby.

Derby is projected to have the fastest growth in the East Midlands by the end of 2023

Derby has been an economic success story this decade.

Financial Times, 2020



MAJOR EMPLOYERS

SEGRO

- High-tech food manufacturing campus.
- Potentially the largest inward investment since Toyota UK.
- Creating up to 5,000 jobs at its £300 million facility.
- Will be a cluster for skills and inward investment.
- Economic benefits to the city - £293.6m GVA per annum from gross direct employment.
- Significant economic benefit to the city and the wider region with gross direct employment wages of £158.2m.
- HelloFresh was the first occupier and opened in Spring 2022 bringing 450 new jobs.



- Rolls Royce's global aerospace and nuclear HQs located in Derby.
- Remains "confident" of its future in Derby.
- Rolls Royce Submarines opened a Nuclear Skills Academy for the first academic year in September 2022. They received over 1,200 applications for 200 places.

ALSTOM

- Alstom's train design and production makes Derby the world's largest rail cluster.
- Employs 2,500 but currently in growth and recruiting another 300.
- Part of significant government investment in rail over next 10 years including a £2.0bn contract with Hitachi to design and build the UK's first HS2 trains.

TOYOTA MANUFACTURING UK

- Employs 3,000 people in Derby.
- Recently completed £250m investment to modernise factory.
- Working in partnership with Suzuki to build their cars at the Derby plant.

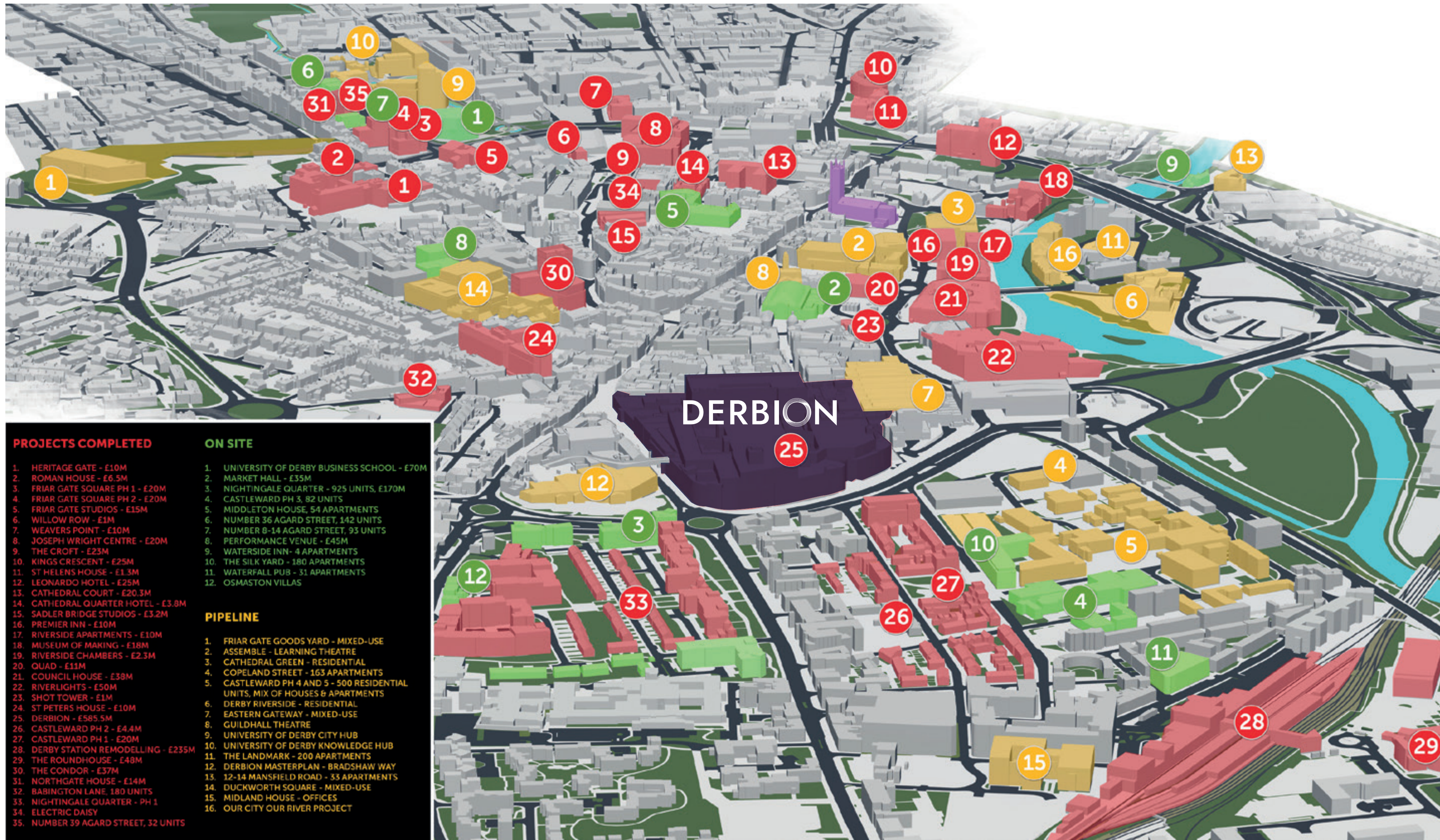
East Midlands Freepoint

- Centrally located freeport with air and rail at its heart.
- Gateway for green growth.
- Will deliver up to 60,000 jobs.
- Will add over £2bn to the UK economy once fully built out.
- Approved by HMG in 2021, East Midlands Freeport is the only inland freeport in the UK.
- Will be a gateway for economic regeneration as well as green growth.

Great British Railways

- As Europe's largest rail hub, Derby chosen as HQ for Great British Railways government department.
- Derby was chosen because of its strong links to the wider network, well-established connections with the industry, supply chain and customers, as well as an extensive local cluster of private sector rail businesses.
- The department will create hundreds of jobs and will bring millions of pounds of investment to the region.

TRANSFORMING THE CITY CENTRE



PROJECTS COMPLETED

1. HERITAGE GATE - £10M
2. ROMAN HOUSE - £6.5M
3. FRIAR GATE SQUARE PH 1 - £20M
4. FRIAR GATE SQUARE PH 2 - £20M
5. FRIAR GATE STUDIOS - £15M
6. WILLOW ROW - £1M
7. WEAVERS POINT - £10M
8. JOSEPH WRIGHT CENTRE - £20M
9. THE CROFT - £23M
10. KINGS CRESCENT - £25M
11. ST HELEN'S HOUSE - £1.3M
12. LEONARDO HOTEL - £25M
13. CATHEDRAL COURT - £20.3M
14. CATHEDRAL QUARTER HOTEL - £3.8M
15. SADLER BRIDGE STUDIOS - £3.2M
16. PREMIER INN - £10M
17. RIVERSIDE APARTMENTS - £10M
18. MUSEUM OF MAKING - £18M
19. RIVERSIDE CHAMBERS - £2.3M
20. QUAD - £11M
21. COUNCIL HOUSE - £38M
22. RIVERLIGHTS - £50M
23. SHOT TOWER - £1M
24. ST PETERS HOUSE - £10M
25. DERBION - £585.5M
26. CASTLEWARD PH 2 - £4.4M
27. CASTLEWARD PH 1 - £20M
28. DERBY STATION REMODELLING - £235M
29. THE ROUNDHOUSE - £48M
30. THE CONDOR - £37M
31. NORTHGATE HOUSE - £14M
32. BABINGTON LANE, 180 UNITS
33. NIGHTINGALE QUARTER - PH 1
34. ELECTRIC DAISY
35. NUMBER 39 AGARD STREET, 32 UNITS

ON SITE

1. UNIVERSITY OF DERBY BUSINESS SCHOOL - £70M
2. MARKET HALL - £35M
3. NIGHTINGALE QUARTER - 925 UNITS, £170M
4. CASTLEWARD PH 3, 82 UNITS
5. MIDDLETON HOUSE, 54 APARTMENTS
6. NUMBER 36 AGARD STREET, 142 UNITS
7. NUMBER 8-14 AGARD STREET, 93 UNITS
8. PERFORMANCE VENUE - £45M
9. WATERSIDE INN - 4 APARTMENTS
10. THE SILK YARD - 180 APARTMENTS
11. WATERFALL PUB - 31 APARTMENTS
12. OSMASTON VILLAS

PIPELINE

1. FRIAR GATE GOODS YARD - MIXED-USE
2. ASSEMBLE - LEARNING THEATRE
3. CATHEDRAL GREEN - RESIDENTIAL
4. COPELAND STREET - 163 APARTMENTS
5. CASTLEWARD PH 4 AND 5 - 500 RESIDENTIAL UNITS, MIX OF HOUSES & APARTMENTS
6. DERBY RIVERSIDE - RESIDENTIAL
7. EASTERN GATEWAY - MIXED-USE
8. GUILDHALL THEATRE
9. UNIVERSITY OF DERBY CITY HUB
10. UNIVERSITY OF DERBY KNOWLEDGE HUB
11. THE LANDMARK - 200 APARTMENTS
12. DERBION MASTERPLAN - BRADSHAW WAY
13. 12-14 MANSFIELD ROAD - 33 APARTMENTS
14. DUCKWORTH SQUARE - MIXED-USE
15. MIDLAND HOUSE - OFFICES
16. OUR CITY OUR RIVER PROJECT

Breathing new life into the heart of our city

In the past 10 years, **£1.4bn** has been invested in Derby city centre, with a further **£594m** in the pipeline.

Key sites around Derbion including Wavers Point (7), Castleward (26 and 27), Nightingale Quarter (33) all completed in the last 2 years.

£370M ADDITIONAL INVESTMENT IN DERBY BY 2025

£200m

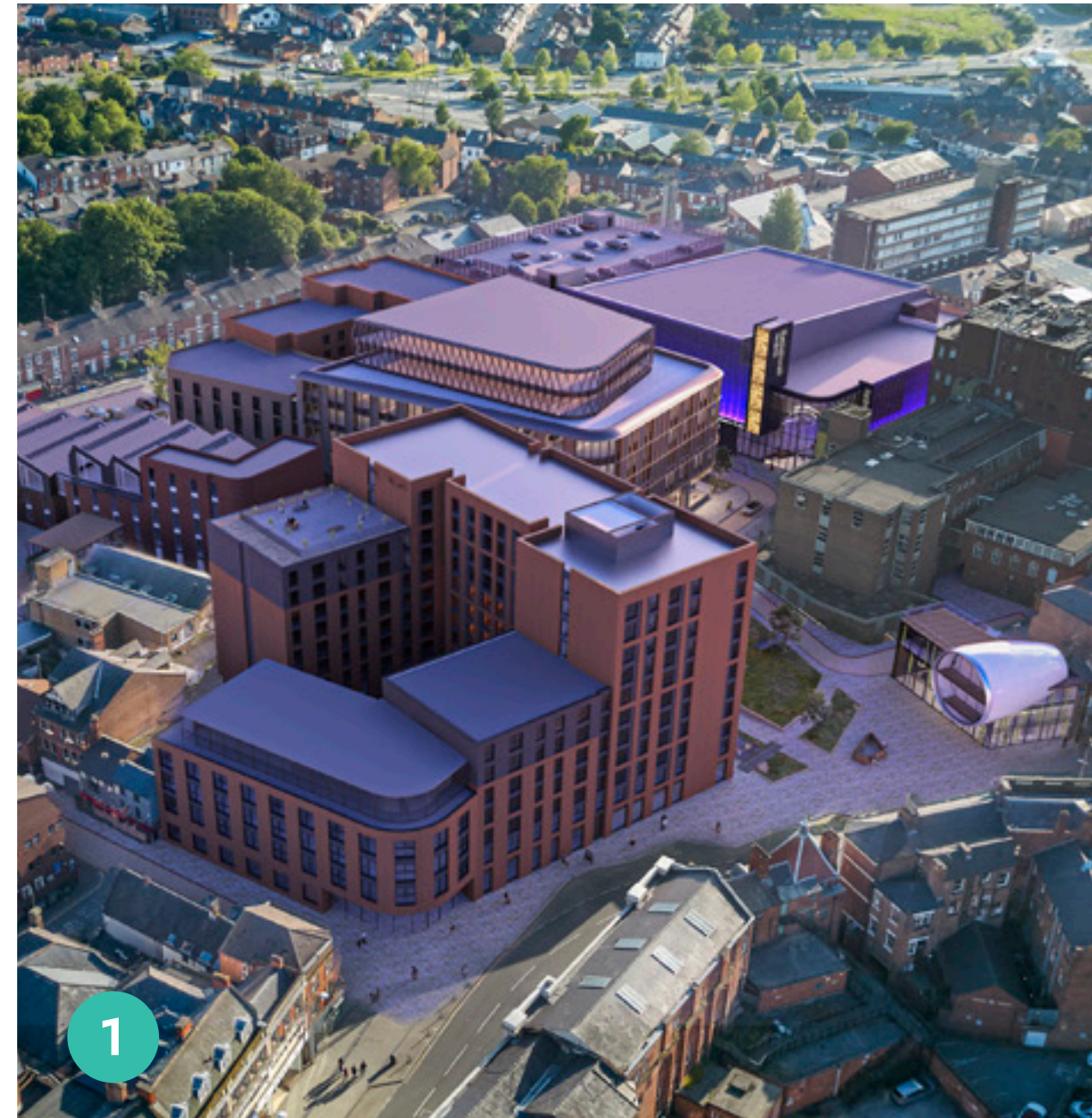
Becketwell mixed development

INCLUDES

259 apartments & 3,500 seater arena

250,000

additional visitors attracted to the city centre per year



- 1 Residential development** for 259 build to rent apartments and will be operated by market leader Grainger plc. First phase on sale and 35% sold.
- 2 £45m arena** is a new 3,500 seater performance venue and will be operated by market leader ASM Global. Completion expected early 2025.
- 3 Friar Gate Goods Yard** to be transformed with 274 houses and apartments, alongside the restoration of a Grade II listed Bonded Warehouse and Engine House into mixed-use facility.
- 4 New £70m Business School** to open Nov 2024 attracting 6000 new students by 2030. New city centre student accommodation in progress with 442 beds completed and a further 236 beds underway.



CITY LIVING

c.4,500
new Derby
residential units for
2023 onwards



1 Nightingale Quarter

£150m

925 residential units, circa 1500 residents

Phase 1 – Complete and occupied 265 units

320 units due to complete later 2023

274 units to be built in future phase



2 Castleward

£100m

978 residential units

Phase 2 – sold out

Phase 3 – went on sale in March 2023 and due to be completed end 2023

Phase 4 - 112 homes to start early 2024



3 Silk Yard – Liversage Street

258 apartments on former car park site

1,2,3 bed & Studio style apartments

Phase 1 – 94 units – construction commencing Q2 2023 (12-15 build period) 35% of the first phase (94 units) have been sold. They have been bought off-plan by a mix of first-time buyers, young professionals, couples, investors and downsizers

Phase 2 – 110 units

Phase 3 – 54 units

WHY DERBION ?

15m+
footfall.

Diverse retail
& leisure offer
across 1.3m sq.ft.
with regional
appeal.

Derbion
shopper is more
likely to be female,
as well as aged
between
25-54.

Derbion
dominates
its core
catchment.

2.2m
catchment in
45 min
drivetime.

2022 CACI
Retail Footprint
**Ranking
of 22.**

59%
of catchment in
the Top 3 Acorn
categories.

2,700
car park spaces
at Derbion.

76%
penetration
across the
catchment.



TRANSFORMING A DESTINATION

In the last two years, Derbion – at the heart of Derby city centre – has delivered a transformational leasing strategy:

- 46 new lettings secured, totalling over 264,000 sq ft
- 10 store refits with over £23.7m invested by retailers
- Major brands opened including Frasers, FLANNELS, TAG Heuer, Jack Wills, River Island, Boux Avenue, Søstrene Grene, Popeyes, Rituals and TUI
- £3.6m invested into F&B offer including £2m into new Food Terrace

FRASERS

sportsdirect.com

USC

Game

Belong

Evans Cycles

Jack Wills
— London · England —
FABULOUSLY BRITISH

FLANNELS

H&M
HOME

Boux
— AVENUE —

TAG
HEUER

SØSTRENE GRENE

R I T
U A L
S . . .

SHOP
@
DERBION

SHOP @ DERBION



SHOP @ DERBION



DERBION BRANDS

M&S
EST. 1884

FRASERS

SPORTS
DIRECT



Sainsbury's

Clarks

MANGO



RiverIsland



FLANNELS

ZARA

Superdry®
極度乾燥(しなさい)



next

NEW
LOOK



ERNEST JONES

ALLSAINTS

Phase
Eight

WHISTLES

HOBBS
LONDON

GOLDSMITHS
SINCE 1778

Superdrug

flying tiger
copenhagen

WHSmith

MATALAN

HOLLAND & BARRETT
we're good for you

SKECHERS



BOSS
HUGO BOSS

TOMMY HILFIFGER



BouX
— AVENUE —

JACK WILLS

VisionExpress
Opticians

POPEYES

B E A R



FIVE
GUYS

wagamama

FRIDAYS



SHOWCASE
CINEMA DE LUX

hollywood bowl



TORTILLA
Real California Burritos & Tacos

Carluccio's





*eat &
play*
@
DERBION

OUR REFRESHED FOOD TERRACE

800 covers
previously 643

90 seats per unit

- Broadened existing offer with exciting new brands catering to aspirational shoppers.
- Continue to cater for the loyal customer.
- Opportunities for more local operators.
- Extend evening trade and connect Eat @ Derbion with the surrounding restaurants, cinema and leisure offer.
- Reduced number of units. Covers increased from 643 (54 seats per unit) to 800 (c.90 seats per unit).
- Additional dining includes...

wagamama

Nando's



BEAR



FIVE GUYS
BURGERS and FRIES

Carluccio's

Our line up...

YANGTZE

GDK

KFC

SUBWAY

HARPERS
British Classics

Our new additions...

POPEYES

TORTILLA
Real California Burritos & Tacos

BURGER & SAUCE

VILLA EXPRESS
MEDITERRANEAN KITCHEN



IMPROVING CONNECTIONS BETWEEN

shop eat play @ DERBION

65,000 sq ft
family entertainment
centre located in
former Eagle Market

30,000 sq ft
new leisure box
development potential

NEW
ACCESS
to Showcase
Cinema de Lux

8
restaurants
and refurbished
Food Terrace









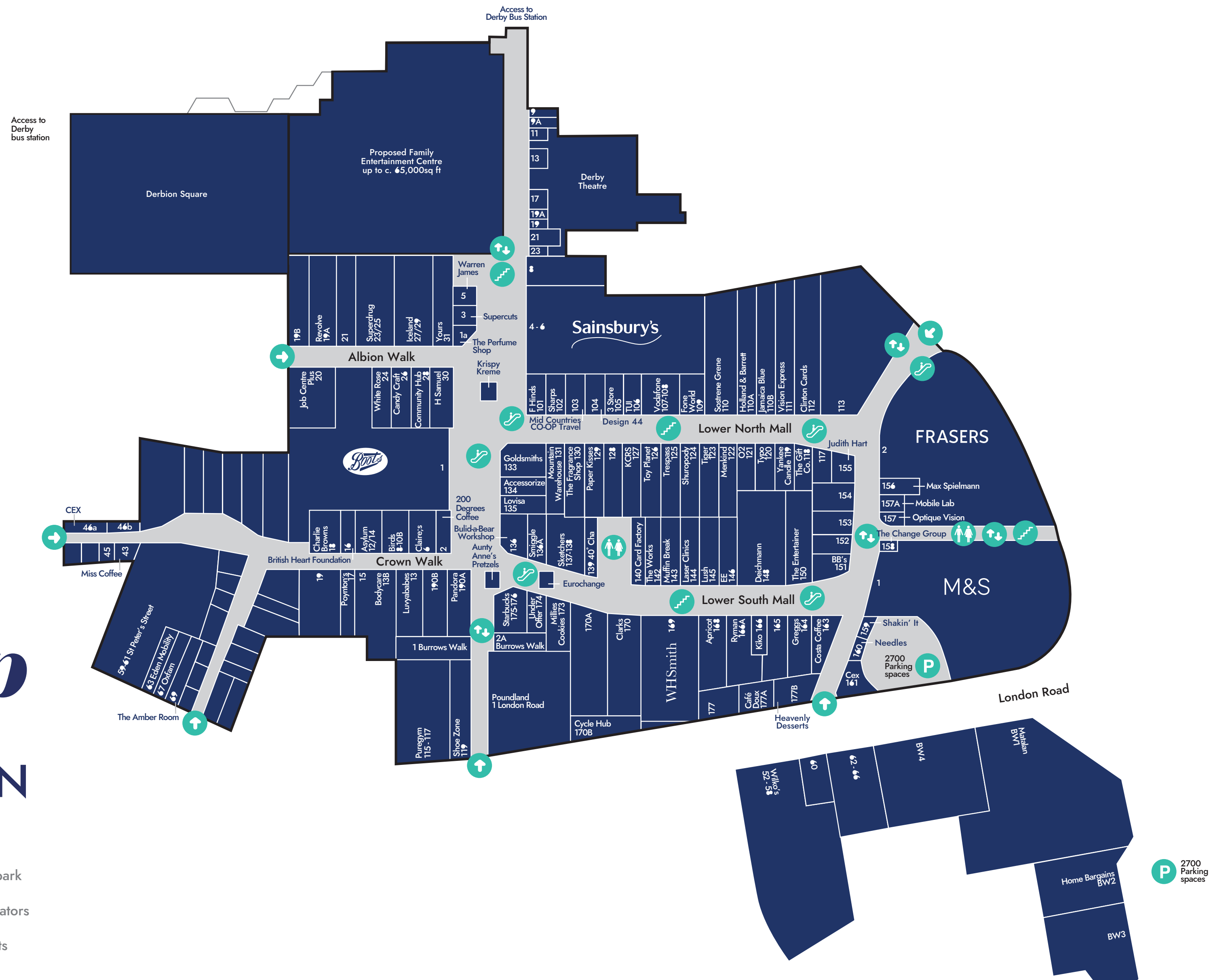
Images show initial first stage representation

LEVEL 1

shop @ DERBION

Key







-  Entrance
-  Lifts
-  Stairs
-  Car park
-  Escalators
-  Toilets



LEVEL 2

shop @ DERBION

Key

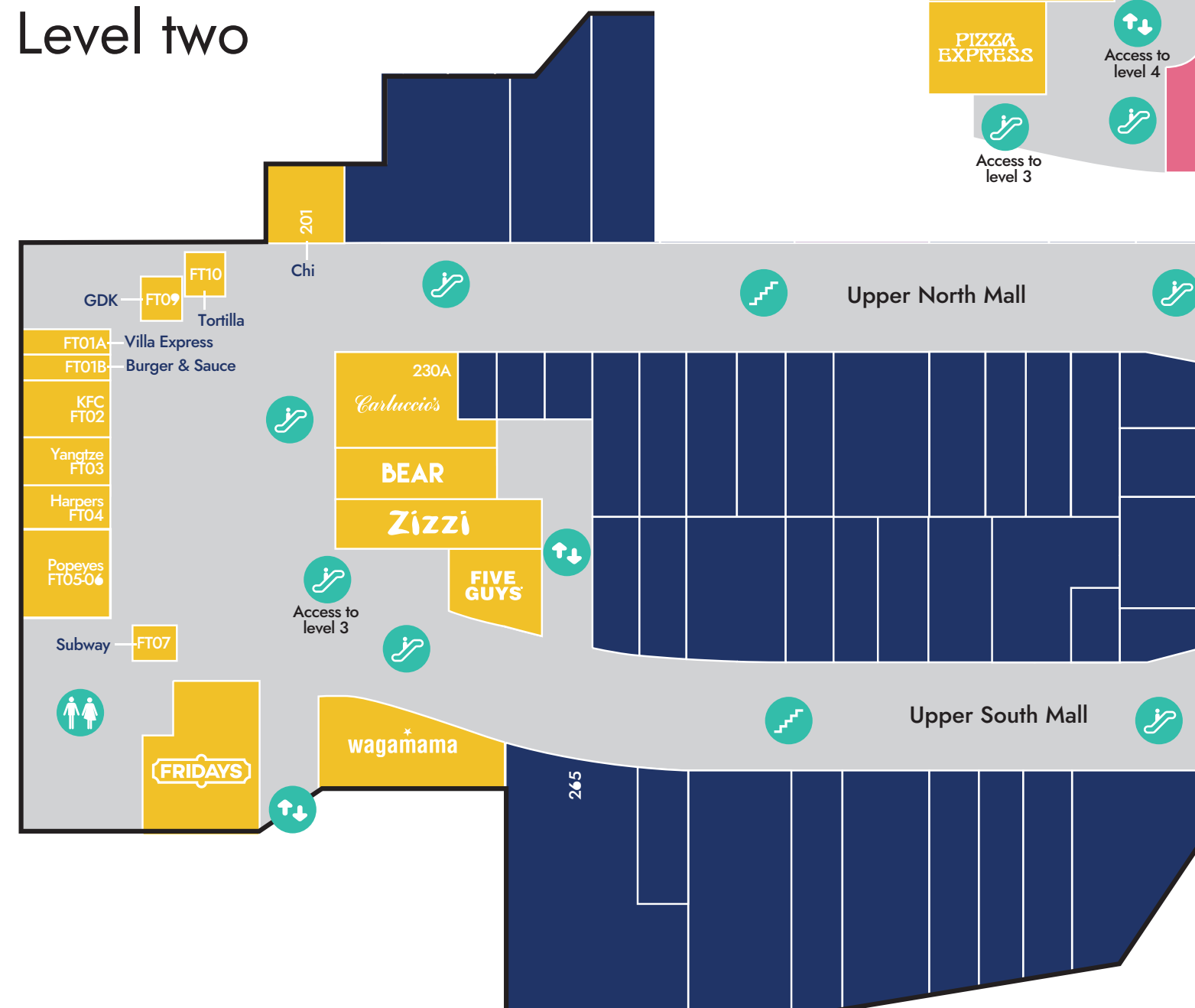
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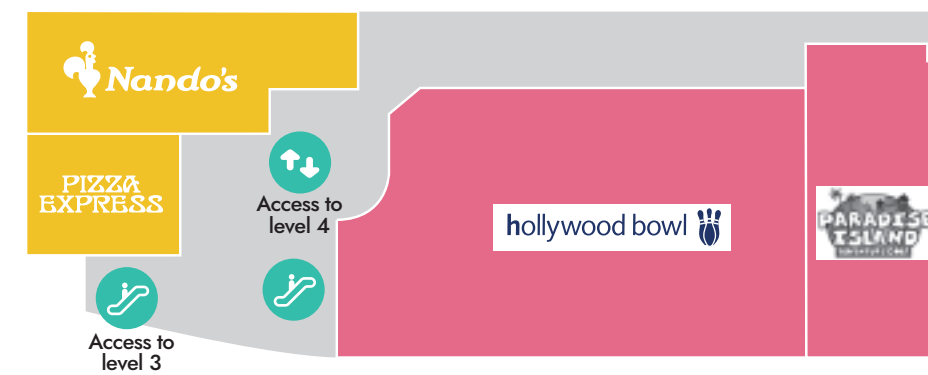
Levels 2,3,4 & 5

eat & play @ DERBION

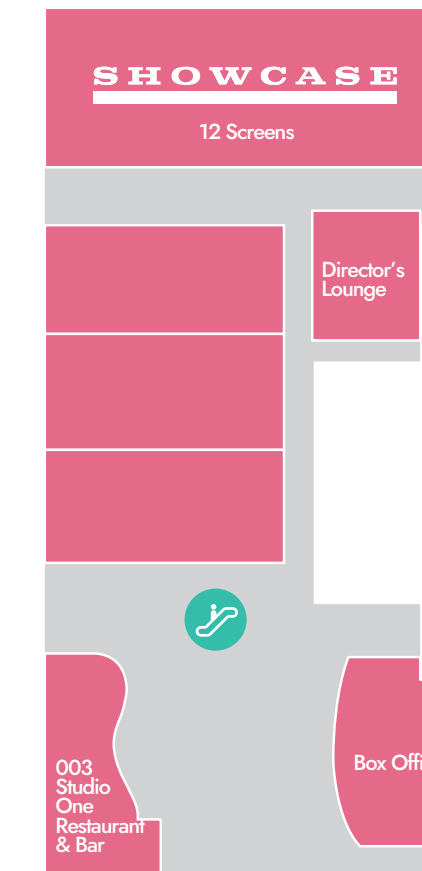
Level two



Level three



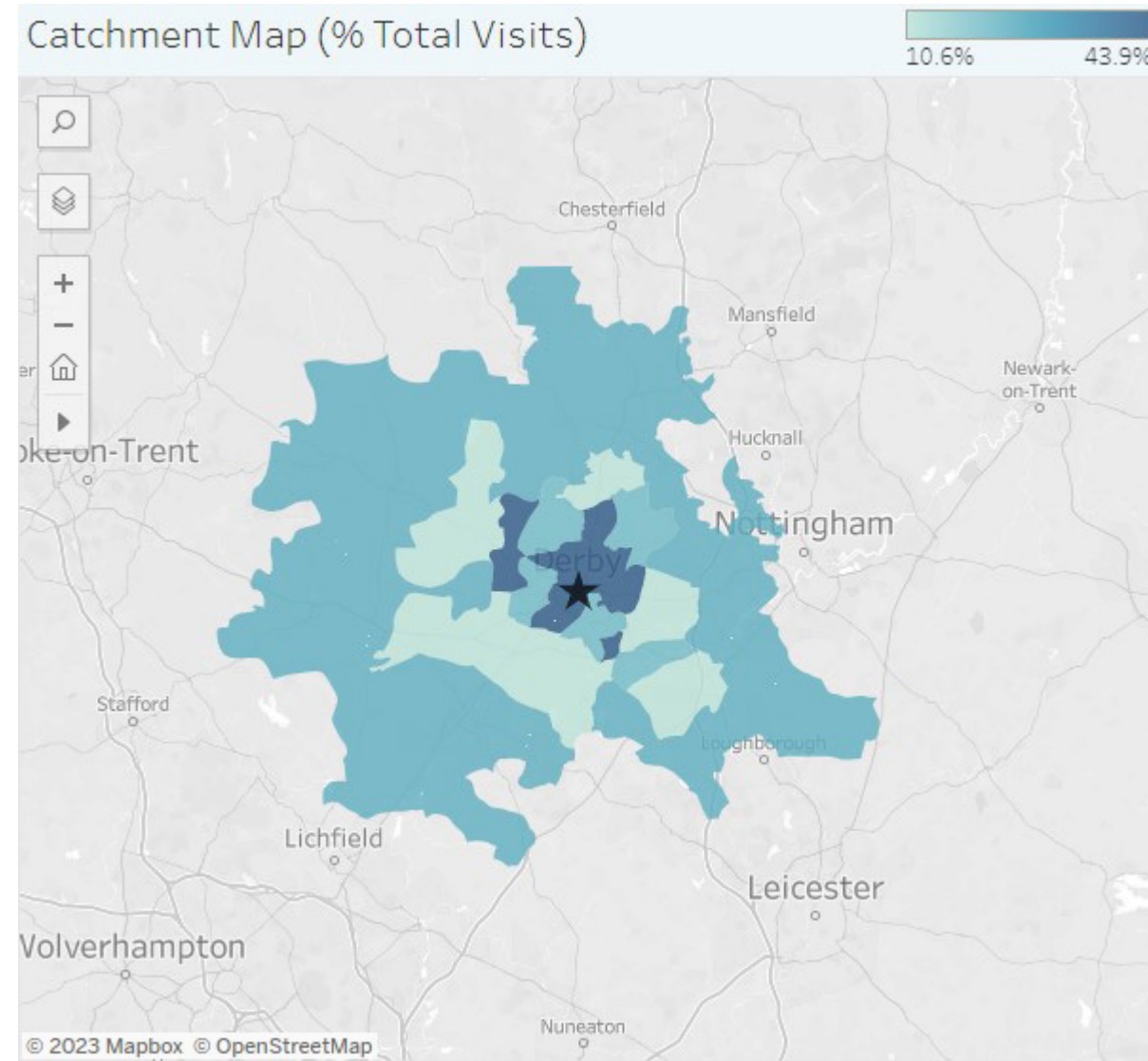
Level four



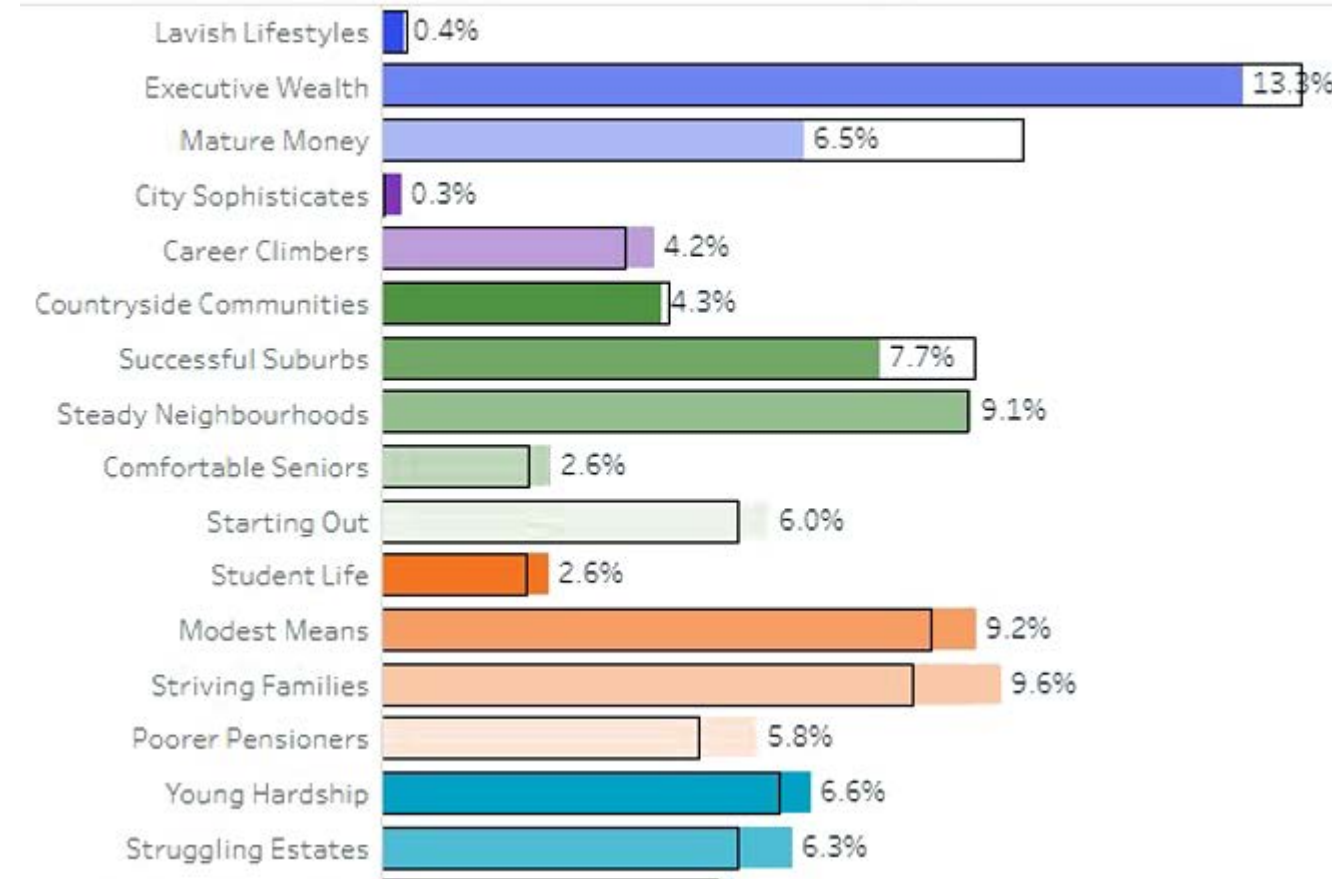
Level five



DERBION'S CATCHMENT



Acorn Group Visitation vs Catchment Expectation



Executive Wealth:
largest group present
in centre (**13.3%** share
of visits vs catchment
expectation of **14.2%**)

High presence of
comfortable family
groups in centre
making up a total of
29.7% of visitors

	Number of Households	Proportion of Catchment	Expected Annual Spend Potential	Quarterly Frequency (of spend)	Observed Spend Per Visit
Affluent Achievers	27,383	24%	£16,627	3	£51
Comfortable Communities	35,824	31%	£24,486	3	£44
Financially Stretched	27,386	24%	£18,842	3	£41
Rising Prosperity	4,802	4%	£9,986	3	£44
Urban Adversity	20,637	18%	£13,150	4	£36

Total Spend Potential	£ TOTAL
Retail Spend Potential	£662.3m
Catering Spend Potential	£696m
Leisure Spend Potential	£235m
Cinema Spend Potential	£19.3m

LIFE IN
MOTION

DERBION

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