Drivers Jonas Deloitte.

Bromsgrove District
Employment Land Review 2012

December 2012

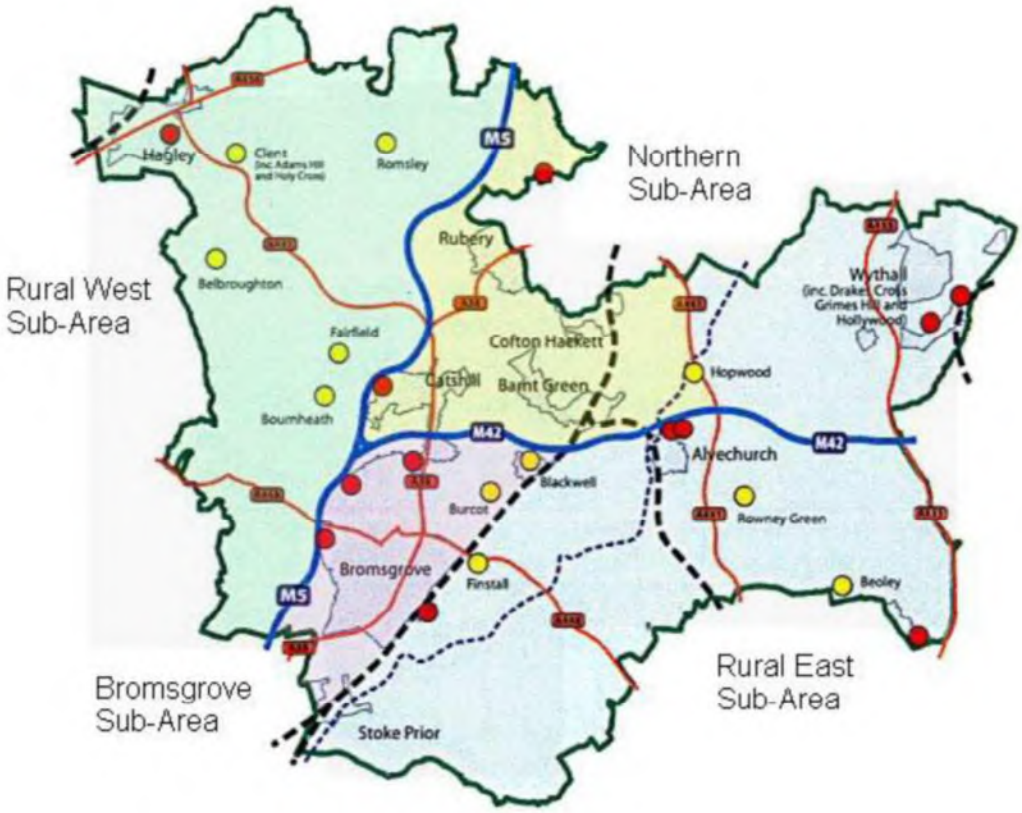
Contents

Executive Summary

Drivers Jonas Deloitte and WM Enterprise were initially commissioned by Bromsgrove District Council to prepare an Employment Land Review of the District as part of the Council's Development Plan evidence base. This Study was published in 2009 and has been updated in mid 2012, in line with progress on the Council's emerging Bromsgrove District Plan. The study and this update has been carried out in accordance with the following three stage process as advocated in good practice advice issued on behalf of the CLG:

- Stage 1: Taking stock of the existing employment land situation;
- Stage 2: Creating a picture of future requirements; and
- Stage 3: Identifying a new portfolio of sites.

For the purposes of this review, the District has been divided into 4 sub-areas, as illustrated on the plan below:



Stage 1: The Existing Employment Land Situation

Gross employment land supply within Bromsgrove District equates to just over 47 hectares. This figure includes Areas of Development Restraint (several of which now have planning permission for development or are at the pre-application stage) and existing commitments at Ravensbank Business Park (which are intended to meet the employment development needs of Redditch) and Longbridge (which is related to the Birmingham area). Excluding the contribution made by these sources, available supply serving Bromsgrove District as a whole is approximately 22 hectares.

Only 1.8 hectares of the District's supply is made up of allocations without planning permission, located wholly within the Saxon and Harris Business Parks in the Rural East sub area. The vast majority of net supply is made up of land within Local Plan allocations with planning permission.

Stage 2: Future Requirements

Based on the outputs of a small area forecasting model, a minimum of 19.9 hectares of land above that in current occupation is required in the District to accommodate the forecast growth in employment floorspace in the area up to 2030. This forecast requirement should be viewed as an absolute minimum in terms of the amount of land needed, as in reality, a much greater amount of land is required to allow for choice and churn in the market place. For example, projecting forward past employment completion rates in Bromsgrove would suggest a significantly higher land requirement than the minima generated by the forecast.

In terms of market demand, Bromsgrove, naturally as the largest settlement in the study area, is where the majority of demand is concentrated. Access to the town is good, being located close to the M5 and M42 motorways, and in addition affords easy access to Birmingham city centre for motorists via the Hagley Road, or by rail. Generally, developers are unwilling to build speculatively in the current climate. There is a greater market for smaller premises compared to larger premises.

Stage 3: Identifying a New Portfolio of Sites

Overall, there is reasonable quantity of existing employment land supply within the District as a whole when compared against forecast minimum requirements using small area forecasting techniques although choice will likely be limited, particularly for warehousing. This being said, virtually all of this supply is either committed or under construction [with only 2 hectares of vacant allocated employment land not having planning permission and located only at one site in the District (Saxon and Harris Business Park)]. Supply across the District is not evenly distributed and there are particularly limited levels of available land supply in the Rural West and North sub areas. Supply in certain central urban areas, including Bromsgrove, would also benefit from increased provision, including for offices.

Based on these key conclusions, a number of recommendations are set out which relate to the following main issues:

- With the exception of a very limited number of sites ranked as 'moderate' through this study, we would not recommend releasing or de-allocating existing Local Plan employment allocations sites (and main commitments) ranked as Best, Good or Moderate at this time through the Development Plan process. There is scope however to release the poorest performing sites from the employment portfolio (i.e. those ranked as 'Poor');
- Consideration should be given to enhancing the supply of land for all sectors generally and also in enhancing spatial deficiencies in supply within certain parts of the District; and
- Although this study focuses on the forecast requirements for the District, if there is a requirement to continue to assist in meeting the development needs of Redditch then supply will need to be further enhanced on land which is located in close proximity to the urban area of Redditch.

1 Introduction

1.1 Drivers Jonas Deloitte and WM Enterprise were initially commissioned in March 2008 to prepare an Employment Land Review of Bromsgrove District, in accordance with good practice guidance and relevant planning policy, on behalf of Bromsgrove District Council. The Study was published in 2009. In order to ensure robust and up to date evidence on employment land issues to inform the emerging Bromsgrove District Plan, an update of the study was commissioned in March 2012.

1.2 This report provides an update of the 2009 employment land study, with particular regard to the following considerations:

Planning Policy Context

1.3 Consideration of changes to national planning policy, notably publication of the National Planning Policy Framework in March 2012;

1.4 Establishment of the Greater Birmingham and Solihull Local Enterprise Partnership (GBSLEP) and the Worcestershire Local Enterprise Partnership (WLEP), both of which Bromsgrove District Council is part of;

1.5 Reconsideration of the study findings in light of the Government's intention to abolish Regional Spatial Strategies; and

1.6 Consideration of local planning policy and evidence base documents published / updated since the 2009 Study including the draft Bromsgrove Core Strategy 2 (2011), the draft Bromsgrove Town Centre Area Action Plan (2011) and, the Worcestershire Strategic Housing Market Assessment (February 2012).

Review of Socio-Economic Information

1.7 Provision of economic and socio-economic data extracted from a range of information sources to provide a picture of the make-up and relative performance of the local economy.

Quantitative Assessment of Supply

1.8 A review and update of the quantitative assessment figures in respect of vacancy rates, completion rates and any significant changes in employment land supply to that previously reported.

Qualitative Assessment of Supply

1.9 The completion of the qualitative assessment of a number of additional sites promoted through the Core Strategy process and sites defined in the draft Bromsgrove Town Centre Area Action Plan;

1.10 Provision of further / amended qualitative assessments of certain sites included in the 2009 study to, amongst other things, consider comments made during consultation on the draft Core Strategy; and

1.11 A high level review of all existing site assessments and associated scoring / ranking to take account of any significant changes in circumstances, such as changes in site availability and constraints.

Assessment of Market Demand and Need

1.12 Update of commentary on local market conditions through the review of updated vacancy and transactions information, the completion rates of new employment development and discussions with locally active commercial agents.

Economic Forecasting

1.13 Update and extension to 2030 of employment land forecasts, using updated Cambridge Econometrics base forecasts to allow recessionary impacts to be analysed for key employment uses / sectors; and

1.14 Provide a high level review of economic forecasts prepared for the sub-region by GVA as part of the Worcestershire Strategic Housing Market Assessment (SHMA).

Recommendations and Conclusions

1.15 Update of relevant commentary within all chapters and associated conclusions and recommendations to reflect the updated assessment and to respond, where appropriate, to comments made to consultation on the Core Strategy; and

1.16 Additional commentary on the appropriateness and realism of the economic vision of the draft Core Strategy as relates to the scope of this study.

Purpose and Scope of the Study

1.17 Bromsgrove District Council requires a comprehensive study and report on employment land requirements for the period up to 2030. There are three main aims of the study:

- To provide a robust evidence base to input into the new emerging Bromsgrove District Plan (which will subsume the Core Strategy) to inform the strategic approach and decision making processes regarding the supply of existing and future employment land provision and in terms of developing future policies and proposals for employment;

- To provide evidence to help safeguard the future of employment land in the District and any potential loss to alternative uses, in particular residential development; and
- To inform the consideration of relevant planning applications, planning obligations and the preparation of development briefs.

1.18 The study is also supported by a number of appendices which are included in a separate appendices document.

Stages and Outputs of the Study

1.19 The study has been carried out in accordance with the three-stage process for employment land reviews as detailed in the ODPM's 'Employment Land Reviews Guidance Note' dated December 2004 (the Guidance Note).

1.20 In particular, the Study is to be carried out in the following key identifiable stages:

- Stage 1: Existing employment and land situation;
- Stage 2: Future employment and land scenarios; and
- Stage 3: Employment land requirements, advice on strategic locations and policy recommendations.

2 Methodology

2.1 As identified in Chapter 1, this study has been carried out following the three stage process set out in the ODPM's (now DCLG) Employment Land Review guidance note of December 2004. This Chapter goes on to describe the approach taken to each of the stages. For convenience and where appropriate, information is repeated / summarised in subsequent chapters of this report.

Stage 1: Taking Stock of the Existing Employment Situation

Task 1: Baseline Information Gathering and Review

Sub Division of the Study Area

2.2 The study area has been divided into four sub-areas as shown in Table 2.1 below. This table also shows how the study area has been divided based on a 'best fit' of the Office of National Statistics ('ONS') middle layer super output area boundaries into each sub-area. A plan illustrating the broad extent of the study sub-areas is also included at **Appendix 1**.

Table 2.1: Overview of Study Sub-Areas

Sub Area	Commentary	Bromsgrove ONS Middle Layer Super Output Area
Rural West	West of the M5 including Hagley. This sub area also covers the settlements of Clent, Romsley, Belbroughton, Fairfield and Bournheath	001, 002
Bromsgrove	Covers the part of the District which is east of the M5, south of the M42 and west of the Birmingham to Droitwich railway line. The sub-area includes Bromsgrove and the settlements of Burcot and Blackwell	008 (half), 010, 011, 012, 013
North	Covers the part of the District which is north of the M42, east of the M5 and west of the A441. The sub-area includes Rubery, Catshill, Barnt Green and Cofton Hackett.	003, 006, 007, 008 (half)

Sub Area	Commentary	Bromsgrove ONS Middle Layer Super Output Area
Rural East	Covers the remaining part of the District which is east of the Birmingham to Droitwich railway line (south of the M42) and east of the A441 (north of the M42). The sub-area includes Wythall and the settlements of Alvechurch, Hopwood, Rowney Green, Beoley and Finstall.	004, 005, 009, 014

2.3 The sub-areas have been selected in consultation with Bromsgrove District Council and are identified to enable a more geographically focussed analysis associated with subsequent relevant work tasks.

2.4 In the context of sub-area analysis, where possible, the boundaries identified on the plan in Appendix 1 have been applied. However, for a limited number of published information sources, including that derived from the ONS, middle layer super output area boundaries have needed to be used. Although these do not always precisely coincide with the boundaries shown on the Plan in Appendix 1, due to the usually relatively limited level of variation, it is not considered that this impacts on the overall study outputs or the validity of the conclusions reached.

Planning and Economic Policy Review

2.5 For a study of this nature, it is important to have a thorough understanding of the aims, objectives and requirements of relevant national, regional / sub-regional and local level planning and economic policy. Table 2.2 below summarises the key planning and economic policy (and other) documents reviewed.

Table 2.2: Key Planning and Economic Policy Documents

Policy Level	Document to be Reviewed
National	• The National Planning Policy Framework (27th March 2012)
Regional	• RSS11: *Regional Spatial Strategy for the West Midlands* (2004) • West Midlands Regional Spatial Strategy Phase 2 Review Preferred Option (2007) • *Connecting to Success*: Draft West Midlands Regional Economic Strategy (2007) • West Midlands Regional Employment Land Study (2010)

Policy Level	Document to be Reviewed
Sub-Regional / Local	• Bromsgrove District Local Plan (2004) • Worcestershire Structure Plan (2001) • Draft Bromsgrove Core Strategy (2011) • Draft Bromsgrove Town centre Area Action Plan (2011) • Longbridge Area Action Plan (April 2009) • Worcestershire Strategic Housing Market Assessment (2012) • Documents setting out the aims and objectives of the two Local Enterprise Partnerships (LEPs) of which Bromsgrove District forms part

Review of Economic Data

2.6 Provision of economic and socio-economic data extracted from a range of information sources to provide a picture of the make-up and relative performance of the local economy.

Task 2: Quantitative Assessment of Employment Land and Premises

2.7 The study quantifies the level and distribution of existing floorspace and proposed future land and floorspace across the Bromsgrove Council area and its constituent sub areas. Supply is quantified by planning use class (B1, B2 and B8 uses) and also by employment sectors [office (B1a), manufacturing (B1b&c / B2) and warehouse / distribution (B8)].

Quantitative Assessment of Existing Floorspace and Premises

2.8 The most reliable figures for existing floorspace provision at the sub-local authority level have traditionally been business rates statistics provided by the Office for National Statistics (ONS) in collaboration with the Valuation Office. Readily available aggregated figures below the district (i.e. local authority) level are however no longer published and for the purposes of this update, we have relied on previously published information to provide an indication of the level of floorspace by main employment sector within the different sub-areas across the district.

2.9 The data identifies the total number and floorspace of ‘hereditaments’ (a piece of real, inheritable or taxable property on which rates may be charged and which is defined in law) by the main employment sector as described above.

2.10 The data does not distinguish between vacant and occupied space, rather an amalgamated figure for total floorspace is identified. Details on vacant premises, and hence vacancy rates for each study sub area and an assessment of the nature and quality of available premises, have been primarily obtained from the Worcestershire County Council Property Services Online Property Search and through discussions with commercial agents active in the area.

2.11 We have also carried out our own investigations on vacant premises to clarify details to ensure, for example, that the double-counting of premises is avoided as far as possible.

Quantitative Assessment of Potential Future Land and Floorspace

2.12 The assessment of current employment land supply has focussed mainly on the following:

- *Employment Allocations* – Sites without planning permission which are allocated for B1, B2 and B8 uses in the adopted Bromsgrove Local Plan. We have also considered certain other allocations with potential to accommodate new employment development where appropriate.
- *Employment Commitments* – Sites under construction at the time of survey or with extant planning permission for B1, B2 or B8 uses.

2.13 Quantitative land supply information has been obtained from annual monitoring and employment land availability reports prepared by the Council. This information has also been interrogated and expanded upon as necessary to provide a more detailed assessment of land supply and potential new employment floorspace by main planning use class / employment sector and broad location within the district. Further details on our approach to the quantitative assessment of supply is included at Chapter 5.

Task 3: Qualitative Assessment of Employment Land and Premises

2.14 A total of 31 sites have been subject to specific qualitative assessment (i.e. site appraisal), made up of existing employment areas, allocations and commitments (including certain 'Areas of Development Restraint' defined in the Local Plan) and sites put forward as part of the Core Strategy consultation process. The assessment also includes a number of currently unallocated areas identified to the north of Redditch in a study by White Young Green (December 2007) to assess the potential for land in Bromsgrove to meet the future development needs of Redditch.

2.15 Information which has been used to inform the completion of qualitative site assessments has been obtained from the following sources:

- Site visits;
- Information supplied by the Council and discussions with Council Officers and others as necessary; and
- Reviews of reports and other published data sources.

2.17 For the qualitative assessment of sites, we have applied appraisal criteria covering the following key matters:

- Market (Commercial) Attractiveness;
- Sustainable Environmental Development; and
- Strategic Planning, Economic and Regeneration Factors.

2.18 The qualitative assessment which has been applied in this Study was prepared in line with best practice. The qualitative assessment proforma used is included in **Appendix 2**.

2.19 The assessment of commercial factors has included a general consideration of the likely attractiveness of developed sites for employment retention, re-use and redevelopment. This particular element of the study has been based on the external inspection of buildings and sites only and has not included any detailed or specific analysis in terms of building survey or financial viability assessment for example.

2.20 Each site has been 'scored' separately in terms of its overall performance against market, sustainability and strategic policy criteria. In accordance with good practice, the scoring system used is relatively simplistic in approach. For example, it does not seek to weight scores. It is therefore important to consider scores in conjunction with associated qualitative assessment commentary which summarises the key negative and positive factors identified.

2.21 A single amalgamated score for each site is not recorded as it is important to separate out market, sustainability and strategic planning factors. For example, although an unconstrained greenfield site may be attractive to potential occupiers (and hence score well against certain commercial criteria), this score is unlikely to be replicated when assessed against sustainable development / environmental resource considerations.

2.22 Based on the qualitative assessment exercise, those sites and areas assessed have been ranked in terms of their importance and role in the local employment hierarchy. The following rankings have been used to categorise the overall qualitative performance of different sites:

a) *'Best'*: Very good quality relatively unconstrained sites suitable for local or incoming clients with a national / regional choice of locations.

b) *'Good'*: Sites which may be subject to some constraints but with potential to be suitable for inward investors and / or locally-based businesses.

c) *'Moderate':* Sites which score poorly against one or more qualitative factors but which (could) perform a role in the employment hierarchy, including for local businesses.

d) *'Other'*: Generally poor quality sites with significant constraints and often in inappropriate locations. These could have potential for (partial) de-allocation or release to other forms of development.

Stage 2: Future Growth Scenarios

2.23 In order to create a picture of future employment and land requirements, the following has been undertaken:

- A review of the local economy and production of quantitative forecasts of employment land requirements for the Bromsgrove District Council area through to 2030; and
- An overview of market demand and trends, considering key employment sectors and study sub areas.

Task 4: Quantitative Forecasts of Employment Land Requirements

Labour Market Forecasts

2.24 Labour market forecasts are based on an assessment of all aspects of the Bromsgrove District economy and not just on those aspects directly relevant to B1, B2 and B8 employment land use. This approach ensures that the employment land forecasts are consistent with a realistic assessment of how the Bromsgrove District labour market and economy are expected to develop over the study period to 2030.

2.25 Forecasts for Bromsgrove District have been produced using a bespoke, small area forecasting model that is driven by the national and regional forecasts produced by Cambridge Econometrics and which produces forecasts consistent with these regional and national forecasts. As appropriate, other relevant forecast information has been drawn upon (for example, population forecasts prepared by ONS).

2.26 In order to ensure that the employment land requirement forecasts are based on a comprehensive understanding of the economy of Bromsgrove District, its constituent labour markets and how these are likely to develop over the forecast period, a base position and annual forecasts through to 2030 have been produced for all of the following for the District:

- Population by age and gender;
- Activity rates by age and gender;
- In- and out-commuting;
- Self-employment by division;
- Employees in employment by sector;
- Economically active full-time students;
- Unemployment; and
- GVA.

2.27 In this way, employment land forecasts are able to be based on consistent and realistic assessments of the way in which the Bromsgrove District economy is expected to develop in the context of both national and regional forecasts as well as in the context of local factors.

2.28 In producing the forecasts, particular attention has been given to anticipated changes in the structure of employment and self-employment, as these will have the greatest impact on the level of demand for employment land and property. At the same time, consideration has been given to anticipated changes in labour productivity, particularly in relation to manufacturing, as this could impact on future employment land requirements such that forecasts based on employment levels alone might be misleading.

Employment Land and Premises Projections

2.29 There are essentially three sources of information on employment densities that can be used to translate employment and self-employment forecasts into land and floorspace requirements. These are the standards reproduced in the ODPM Guidance Note, densities derived from Valuation Office figures and densities derived from a survey of local businesses.

2.30 Experience from undertaking employment land studies elsewhere is that there can be significant differences between the densities reproduced in the Guidance Note and those obtained locally. In accordance with best practice, locally derived density figures are used where possible.

2.31 Local densities have been derived for each of the use categories by dividing the Valuation Office floorspace in that use category, adjusted for voids, by the total employment in the sectors that are typically located in buildings with that use category permission. Multiplying the result by forecasts of future employment in the relevant sectors and possibly adjusting for productivity growth impacts, then gives a forecast of minimum future floorspace requirements, by use category.

2.32 A survey has been undertaken of local businesses in activities such as manufacturing, construction, warehousing and distribution, transport and communications and business services (see subsequent paragraphs). An output of this survey is information from the individual businesses on their employment and their floorspace occupied, thereby providing an alternative source of local employment density information.

2.33 Various floorspace requirement forecasts have been translated into employment land forecasts by applying appropriate plot ratios. As plot ratio figures are not available from the Valuation Office, we have made use of information obtained from the survey of local businesses or from other local information. The information so derived is compared with the plot ratio figures in the Guidance Note.

2.34 Dividing the floorspace requirement forecasts by the relevant plot ratio estimates generates forecasts of employment land requirements. These have been produced for each year to 2030, by use category.

2.35 It has to be emphasised that the employment floorspace and employment land requirements generated by this method are the absolute minima needed to accommodate the level of economic activity forecast. In reality, a much larger amount of land will need to be made available to allow for losses of existing employment sites to other uses during the plan period as well as to ensure a sufficient choice of available sites and locations over the period up to 2030.

Alternate Forecasts Based on Different Growth Scenarios

2.36 The impact of different economic scenarios on the amount of employment land needed has been undertaken to provide high and low growth options as appropriate. This includes a base forecast together with other scenarios, notably an assessment of the employment land implications of higher housing (and hence population) growth and moves towards lower levels of commuting.

Employer Survey

2.37 In order to inform the forecasts and gain a further insight into business issues, a survey of circa 200 businesses across the District was undertaken during September 2012, updating a previous survey completed in 2008.

2.38 The survey included a representative sample of relevant businesses in Bromsgrove, in each of the larger settlements and, where appropriate, in their rural hinterlands. Nevertheless, the survey sought to interview all of the largest employers within the relevant sectors, not least because their requirements are likely to significantly influence the overall employment land requirement.

2.39 By ensuring that the sample of businesses surveyed is representative, we have provided coverage of early stage businesses, those in identified high growth potential sectors, etc., and thereby ensure that their needs are covered and reflected in the Study.

2.40 The survey was based on a bespoke questionnaire, which was deployed to obtain the following information:

- Ownership / control of businesses and where strategic decisions taken;
- Location and premises characteristics;
- Tenure of premises;
- Activities undertaken on site;
- Number of employees;
- Change in employment over recent years and anticipated;
- Floor space occupied and over how many floors;
- Site area occupied;
- Whether first site, additional site, relocation and if so, from where;
- Suitability of current premises / site;
- If planning to expand / contract and premises / site implications;
- Alternative locations considered / would consider; and
- Perceptions of premises / site shortages in the area.

2.41 A sample of the questionnaire used for the study is reproduced at **Appendix 3.**

2.42 The findings have been analysed using statistical software, with the findings used to inform both the employment land forecasts and the overall report of findings.

Projecting Forward Past Completion Rates

2.43 As an alternative means of quantifying likely future employment land requirements, the study also assess the scale and distribution of past completion rates (since 2001) across the district and projects these forward to 2030. Historic trend data in terms of past employment completions has been mainly obtained through a review of Employment Land Availability Reports published by the Council.

Task 5: Review of Market Trends and Demand

2.44 The study provides an overview of market trends and demand by study area and by broad employment sector (office, manufacturing and warehousing / distribution). The overview of market trends and demand has been based on the following:

- Business enquiries recorded over time, collected by the economic development department of Worcestershire County Council;
- Historic trends data and past completion rates as described at paragraph 2.43 above;
- Discussions with locally active commercial agents and developers;
- Relevant outputs from the employer survey; and

- Review of existing data sources such as EGi and the Worcestershire County Council's online commercial property database.

2.46 Where it has been possible to gather relevant information, we have provided commentary on the past trends and potential demand for rural employment development such as conversion of rural buildings and diversification.

Stage 3: Employment Land Requirements

Outputs of Stage 3

2.47 Building on and analysing the outputs of work tasks undertaken at Stages 1 and 2 of the Study, the report sets out a comprehensive overview of employment land requirements and advice upon strategic locations and policy recommendations. Stage 3 summarises the findings of Report Stages 1 and 2 and provides conclusions and recommendations in relation to the following key items:

- An assessment of current quantitative employment land supply versus forecast land requirements for Bromsgrove District;
- An assessment of the quantitative, qualitative and spatial aspects of employment land supply and vacant premises for Bromsgrove District and by study sub area;
- Identification of sites for retention as allocations for employment land in the emerging Local Plan documents;
- Identification of sites (and associated actions) where specific issues need to be addressed to enhance their qualitative performance and hence, contribution to the employment portfolio;
- Identification of sites which could be released from the employment portfolio or which could be considered for mixed use or non B class forms of (employment) development / redevelopment;
- The level of protection to be given to different sites relative to their performance in the employment hierarchy and other policy responses, such as in relation to employment in rural areas, larger villages and Bromsgrove;
- Consideration of any 'gaps' in the employment portfolio (including office uses) in quantitative and qualitative terms and how these should be addressed;
- The appropriateness and realism of the economic vision set out in the draft Core Strategy as relates to the scope of this study; and
- Recommendations in relation to future monitoring of employment land.

2.49 This Report is supported by technical appendices, including:

- Detailed qualitative assessment criteria used in the appraisal of sites;
- Completed individual qualitative assessment site appraisal proformas and associated site plans;
- Spreadsheets illustrating vacant premises (by type, size and location);
- A sample of the questionnaire deployed for the business survey carried out for the original 2009 study; and
- Detailed outputs from employment forecasting model, including forecast annual change through to 2030 for different forecast scenarios.

3 Policy Context

3.1 This section provides an overview of planning, economic and other policy and strategy documents of relevance to this employment land review. Consideration is given to a range of strategies at the national, regional / sub-regional, and local levels to provide a comprehensive picture of the policy context within which the study is set.

National Planning Guidance

The National Planning Policy Framework (27th March 2012)

3.2 Employment policy is set out at national level in the National Planning Policy Framework (NPPF) which was published on 27th March 2012. The NPPF replaces a large amount of previous guidance, including Planning Policy Statement 1 (Delivering Sustainable Development), Planning Policy Statement 4 (Planning for Sustainable Economic growth), Planning Policy Statement 7 (Sustainable Development in Rural Areas) and Planning Policy Guidance 13 (Transport).

3.3 The NPPF includes a presumption in favour of sustainable development which states that development that accords with the development plan should be approved without delay. In instances where the development plan is absent, silent or out of date it highlights that permission should be granted unless the proposal would have a significant adverse impact.

3.4 Much therefore hangs on the definition of "Sustainable" in this context and how it will, in practice, be interpreted. Clearly, the meaning will include plan compliance but the NPPF is much more emphatic than previous national Planning Policy Statements, in that plans should plan to meet all the needs identified locally. Paragraph 17, for example, which sets out the core planning principles of the new system, stresses that, "Every effort should be made objectively to identify and meet the housing, business and other development needs of an area and respond positively to wider opportunities for growth."

3.5 The NPPF contains a section entitled 'Building a strong, competitive economy' which emphasises the Government's commitment to securing economic growth in order to create jobs and prosperity. It also highlights that the planning system should operate to encourage and not act as an impediment to growth. Paragraph 21 emphasises that businesses should not be over-burdened by the combined requirements of planning policy expectations and local authorities through plan making should recognise and seek to address barriers to investment. This paragraph sets out the following bullet points which Local Authorities should address when drawing up a Local Plan. Local Planning authorities should:

- set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth;
- set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;

- support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors likely to locate in their area. Policies should be flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances;
- plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
- identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and
- facilitate flexible working practices such as the integration of residential and commercial uses within the same unit.

3.6 The NPPF also emphasises that planning policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of the site being used for that purpose. Applications for other uses on such land should be treated on their own merits having regard to market signals and the relative need for different land uses to support sustainable communities.

3.7 The NPPF contains a section entitled ‘Ensuring the vitality of town centres’ which states that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of town centres over the plan period.

3.8 A sequential approach is retained in the NPPF meaning that this test will be applied to planning applications for Town Centre uses outside of an existing centre and not in accordance with an up to date Development Plan. Town Centre uses are defined as retail, leisure, entertainment facilities, offices, arts, culture and tourism development. Offices are included within this scope of this employment land study.

3.9 Paragraph 28 of the NPPF supports economic growth in rural areas in order to create jobs and prosperity by taking a positive approach to sustainable new development. The paragraph states that Local Plans should:

- support the sustainable growth and expansion of all types of business and enterprise in rural areas;
- promote the development and diversification of agricultural and other land-based rural businesses;
- support sustainable rural tourism and leisure developments that benefit businesses in rural areas, communities and visitors, and which respect the character of the countryside; and
- promote the retention and development of local services and community facilities in villages.

3.10 The NPPF promotes sustainable transport with paragraph 34 highlighting that developments that generate significant movement should be located where the need to travel would be minimised and the use of sustainable transport modes can be maximised. Emphasis is also placed on the need provide a balance of land uses in an area so people are encouraged to minimise journey lengths for shopping, employment, leisure, education and other activities.

3.11 The Plan-making chapter of the NPPF highlights that each local planning authority should ensure that the Local plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects for the area. Further detailed guidance is provided about the need for local planning authorities to understand business needs within the economic markets operating in and across their area. To achieve this local authorities should:

- work together with county and neighbouring authorities and with Local Enterprise Partnerships to prepare and maintain a robust evidence base to understand both existing business needs and likely changes in the market; and
- work closely with the business community to understand their changing needs and identify and address barriers to investment, including a lack of housing, infrastructure or viability.

3.12 The NPPF states that this evidence base should be used to assess:

- the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;
- the existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs. Reviews of land available for economic development should be undertaken at the same time as, or combined with, Strategic Housing Land Availability Assessments and should include a reappraisal of the suitability of previously allocated land;
- the role and function of town centres and the relationship between them, including any trends in the performance of centres;
- the capacity of existing centres to accommodate new town centre development;
- locations of deprivation which may benefit from planned remedial action; and
- the needs of the food production industry and any barriers to investment that planning can resolve.

Employment Land Reviews Guidance Note (December 2004)

3.13 Whilst the vast majority of PPSs and PPGs were replaced by the NPPF, a number of pieces of technical supplementary guidance, such as the ELR Guidance Note, remains extant. This guidance note was prepared by Environmental Resources Management on behalf of the ODPM (now DCLG). The primary purpose of this guide is to provide planning authorities with effective tools with which to assess the demand for and supply of land for employment. In particular, sites allocated for employment need to reflect the changing requirements of businesses and local economies. This guide seeks to help those in the planning system to assess the suitability of sites for employment development, safeguard the best sites in the face of competition from other higher value uses and help identify those which are no longer suitable for employment uses.

3.14 The document contains advice on how to approach undertaking employment land reviews, how the reviews should relate to and inform the Development Plan and sets out the following three stage approach to undertaking such reviews:

- Stage 1 – Take stock of the existing situation, including an assessment of 'fitness for purpose' of existing allocated employment sites;

- Stage 2 – Compile a picture of future requirements by using a variety of means (i.e. economic forecasting, considering recent trends and/or assessing local property markets) to assess the scale and nature of likely demand for employment land and available supply in quantitative terms; and
- Stage 3 - Identify a 'new' portfolio of sites by undertaking a more detailed review of site supply and quality. Identification and designation of new employment sites should also take place to create a balanced local employment land portfolio.

3.15 Paragraph 2.25 of the guide identifies that employment land reviews should focus on those employment uses and premises falling within Class B of the Use Classes Order, specifically:

- Offices, both in town centres and elsewhere, including those for public administration;
- Light and general industrial;
- Wholesale and freight distribution; and
- High technology premises, including research, business and science parks.

3.16 Our approach to this study takes account of relevant advice contained in this guidance note building it into our existing methodologies. It is acknowledged that this guidance note does not form a definitive statement of government policy; however it nevertheless provides the most widely accepted and tested approaches to undertaking employment land reviews.

Regional and Sub-Regional Policy

Status of Regional Spatial Strategies

3.17 On 6th July 2010, the revocation of Regional Spatial Strategies was announced with immediate effect further to s79(6) of the Local Democracy, Economic Development and Construction Act 2009.

3.18 The 6th July revocation was then the subject of a challenge. In November 2010, the High Court ruled that the coalition Government had acted unlawfully in unilaterally revoking the system of regional spatial strategies. Mr. Justice Sales supported two grounds of the challenge, including one that contended that the environmental effects of removing regional spatial strategies should be considered, in line with European law. The effect of the ruling is twofold:

- The 6th July revocation decision has been quashed and as a consequence, the Regional Spatial Strategy as it stood on 5th July 2010 forms an ongoing part of the Development Plan;
- However, the Government's commitment to revoke Regional Spatial Strategies as announced on 27th May 2010 remained, was consolidated into Section 89 (3) of the Localism Bill, and passed into law as the Localism Act on 15th November 2011.

3.19 It is clear that declining weight may now be ascribed to Regional Policy with it only being 'a matter of time' before RSSs are formally abolished. However, the West Midlands Regional Spatial Strategy did rest upon a body of research and technical evidence which in some instances, is still relevant. It may therefore continue to be appropriate to have some degree of regard to the Strategy and its supporting evidence base until it is finally abolished / replaced by adopted Local Plans in all the Local Planning Authorities whose area it covered.

Regional Spatial Strategy 11 (formerly Regional Planning Guidance 11) for the West Midlands (WMRSS)

3.20 The current West Midlands Regional Spatial Strategy (RSS) (formerly RPG 11) was published in 2004. The overall vision for the West Midlands is

"one of an economically successful, outward looking and adaptable Region, which is rich in culture and environment, where all people, working together, are able to meet their aspirations and needs without prejudicing the quality of life of future generations."

3.21 Four major challenges are identified for the Region:

- Urban Renaissance – developing the MUAs in such a way that they can increasingly meet their own economic and social needs in order to counter the unsustainable outward movement of people and jobs facilitated by previous strategies;
- Rural Renaissance – addressing more effectively the major changes which are challenging the traditional roles of rural areas and the countryside;
- Diversifying and modernising the Region's economy – ensuring that opportunities for growth are linked to meeting needs and that they help reduce social exclusion; and
- Modernising the transport infrastructure of the West Midlands – supporting the sustainable development of the Region.

3.22 The following strategic objectives provide a context for the policies in the Strategy:

- to make the MUAs of the West Midlands increasingly attractive places where people want to live, work and invest;
- to secure the regeneration of the rural areas of the Region;
- to create a joined-up multi-centred Regional structure where all areas/centres have distinct roles to play;
- to retain the Green Belt, but to allow an adjustment of boundaries where this is necessary to support urban regeneration;
- to support the cities and towns of the Region to meet their local and sub-regional development needs;
- to support the diversification and modernisation of the Region's economy while ensuring that opportunities for growth are linked to meeting needs and reducing social exclusion;
- to ensure the quality of the environment is conserved and enhanced across all parts of the Region;
- to improve significantly the Region's transport systems;
- to promote the development of a network of strategic centres across the Region; and
- to promote Birmingham as a world city.

WMRSS Revision

3.23 In approving the RSS in June 2004, the Secretary of State identified a number of policy issues that needed to be addressed in future revisions to the document. Given the range of matters to be considered, the volume of work and the long timescales involved, the West Midlands Regional

Assembly as the Regional Planning Body (RPB) agreed that the issues raised by the Secretary of State should be looked at in three phases:

- Phase One - Black Country Study;
- Phase Two - Housing figures, centres, employment land, centres, transport and waste;
- Phase Three - Rural services, recreational provision, regionally significant environmental issues and provision of a framework for Gypsies and Travellers sites.

3.24 The Phase One study is not relevant to Bromsgrove District. Phase Two was never completed. It focussed on housing development, employment land, town centres, transport and waste together with overarching policies relating to climate change and sustainable development. In March 2010, following detailed consideration of the WMRSS process to date DCLG decided that further work was required before the Secretary of State could publish proposed changes. Following the change in Government it became clear that no further work on the RSS would take place and the proposed changes would not be published.

3.25 The WMRSS Phase Two Revision was formally submitted to the Secretary of State on 21st December 2007. Consultation on the revised draft closed on 8th December 2008. The Examination in Public opened in April 2009 and closed on the 24 June 2009. The EiP Panel Report was published in September 2009. Policy CF3 identifies the net dwelling provision and proposes average annual net additions to the dwelling stock of 19,895 between 2006 and 2026 for the West Midlands Region. Within that the allocation for Bromsgrove is 4,000 (200 pa) for the period between 2006 and 2021, with the potential for a further 2,000 – 3,000 for the period 2021-2026. The Panel proposed within policy PA6A a rolling five-year employment land reservoir of 7 hectares (ha) with an indicative target of 28 ha for the 20 year plan period.

Connecting to Success, West Midlands Regional Economic Strategy, Advantage West Midlands (2007)

3.26 Although this strategy is circa 5 years old, it is the most up to date economic strategy covering the West Midlands. It was launched in December 2007. The strategy sets an ambitious vision for the West Midlands:

‘To be a global centre where people and businesses choose to connect’

3.27 In order to enhance and maintain the West Midlands as a location in which people and businesses choose to invest, work, learn, live and visit the region must become more prosperous, but economic growth must also be supported by overall improvements in the quality of life. The headline focus of the strategy is closing the gap in performance of the West Midlands and that of the UK as a whole. The Strategy focuses on three main components of the economy – Business, Place and People in order to provide a Powerful Voice for the region. Strategic objectives are as follows:

- Seizing market opportunities;
- Improving competitiveness;
- Harnessing knowledge;

- Increasing Birmingham's competitiveness;
- Improving infrastructure;
- Sustainable communities;
- Sustainable living;
- Raising ambitions and aspirations;
- Achieving full potential and opportunities for all; and
- Powerful voice for the West Midlands.

3.28 Spatial interventions are primarily focused on the Regeneration Zones, knowledge assets (including high technology corridors) and Birmingham as the main economic drivers in the economy. The Strategy also focuses more limited resources on market towns and locations facing economic change or responding to opportunity.

Regional Employment Land Study, West Midlands Regional Assembly, 2009 (February 2010)

3.29 The Regional Employment Land Study (RELS) was produced annually by the West Midlands Regional Assembly until the organisation was disbanded in 2010. The 2009 report was the final published report. All land is monitored which is committed for an industrial/employment use in excess of 0.4 ha and falling within use classes B1, B1c, B2 and B8. The study also monitors B1a office development outside City and Town centres. Given the age of the report and nature of information it provides, RELS data is only of limited relevance to the current study, but it does provide a broad picture of past trends across the West Midlands and the sub-regional areas within it.

3.30 The total amount of employment land developed in the Region during 2008/2009 was 263.5 ha, an increase from the previous year (252.8 ha) (although, it is important to note that this includes data for Telford and Wrekin which was not available in the previous years report). Several authorities experienced a reduction in completions during this period including the West Midlands Metropolitan area, Warwickshire and Staffordshire. The decline in these areas demonstrates the impact of the recession.

3.31 With regard to Worcestershire, there has been an increase in the number of completions from 10 ha in 2007/08 to 14.7 ha in 2008/09.

3.32 B8 developments comprised 73.1 ha and 27.8% of total completions, an increase upon 20.6% of completions in 2007/08. Combined B1/B2/B8 completions stood at 81.4 ha and 30.9% of developments, decreasing from higher levels in the previous year at 57%. B2 general industry continued to show some improvement in completion levels, rising to 14.7% from 13.36% in the previous year.

Local Enterprise Partnerships (LEP)

3.33 In June 2010, the Coalition Government called on business leaders and local authorities to set out plans for developing Local Enterprise Partnerships which would take on the duty of leading economic development in 'functional economic areas'. Bromsgrove District Council is part of two

LEPs which have been approved by Government. These are the Greater Birmingham and Solihull Local Enterprise Partnership (GBSLEP) and the Worcestershire Local Enterprise Partnership (WLEP).

The Greater Birmingham and Solihull LEP

3.34 Bromsgrove District is one of nine local authorities that form part of the GBSLEP. The board is business-led but also contains representatives of the local authorities, universities and colleges. The objectives of this LEP are to promote:

- Sustainable private sector investment and growth;
- Business efficiency and competitiveness;
- Economic development and regeneration; and
- Employment.

3.35 To achieve the objectives the following aims have been identified:

- Increase Gross Value Added by 30% (8.25bn) by 2020
- Create 100,000 (net) private sector jobs by 2020
- Boost indigenous and inward investment
- Achieve global leadership in key sectors
- Build a world class workforce

3.36 To date, the GBSLEP has secured £8 million of European Regional Development Fund to support the Business Development Programme in addition to £125 million for the National Advanced Manufacturing Supply Chain Initiative.

The Worcestershire LEP

3.37 Bromsgrove District Council is also one of a number of partners involved in the Worcestershire Local Enterprise Partnership (WLEP) including all 6 local authorities in Worcestershire, Worcestershire County Council, Worcestershire Ambassadors, Institute of Directors, Federation of Small Businesses and the Herefordshire and Worcestershire Chamber of Commerce. WLEP board contains members from both the public and private sector. There is also a separate business board that drives the private sector work.

3.38 The vision of the WLEP is to create a strong, well-balanced and intelligent partnership which identifies and co-ordinates the delivery of the key economic priorities, which are recognised by business and public sector. The central objective of the WLEP is:

To create the right environment to encourage investment from new and existing businesses; to foster our own success, build on our small number of large industries, develop new industries from medium sized companies with global promise and help them grow.

3.39 The priorities of the WLEP are to:

- deliver the strategic employment sites and related infrastructure (services, highways access utilities etc.) needed to secure sustainable economic growth and a low carbon economy.
- ensure we have the right support for business start up, business growth, business retention – focussing on meeting the needs of strategic businesses, 'high growth' SMEs and the social enterprise sector.
- deliver the right infrastructure for business, including improved high speed broadband availability, improving access from the M5 to the Malvern Hills Science Park and QinetiQ, improving the by-pass leading to the Hereford and Bromyard roads to Herefordshire and creating better access for our strategic businesses and their supply chains in the north of the county to the motorway network through improvements to east-west links and the A449.
- invest in the skills of our workforce ensuring that provision is responsive to business needs, and relevant to future growth and business opportunities.

3.40 Worcestershire Local Enterprise Partnership (LEP) has already announced details of public infrastructure projects being awarded a major slice of its £3.8million in government funds to help kick start local development schemes. Under the government's Growing Places Fund, the WLEP Board has approved loans – subject to due diligence - for 'shovel ready' schemes in Worcester, Kidderminster and Pershore. Initially, at least 500 jobs could be created in the short term as a result of the funding, and many more are expected to follow. The first four projects to be allocated support are Hoo Brook Link Road, Kidderminster; University Park, Worcester; Worcestershire County Cricket Club and Springhill Farms, near Pershore.

Worcestershire Structure Plan, 2001

3.41 The Worcestershire Structure Plan was adopted in June 2001. It provides the strategic level planning policies which guide development within Worcestershire over the period 1996-2011. The policies considered below have been formally 'saved'. However, it is important to note that the Localism Act provides a framework for Structure Plans to be revoked by the Secretary of State.

3.42 The Structure Plan sets out a number of objectives including:

- Work towards a better balance between housing, employment, social and community facilities within settlements;
- Enhance the role of settlements as centres for service provision;
- Encourage urban and rural regeneration;
- Seek the location of development to locations which can be served by a choice of transport modes for both the movement of people and freight; and
- Facilitate the strengthening and diversification of the economic base of the Region and of Worcestershire by the provision of a mixed portfolio of development locations and sites and by the enhancement and management of an attractive County environment.

3.43 The Plan places an emphasis on the use of Previously Developed Land before Greenfield sites (Policy SD.3) and the promotion of development proposals which will sustain and improve the balance of housing, employment, community and social facilities within settlements (Policy SD.5).

3.44 The plan permits development within settlements outside urban areas (Policy SD.8), providing that it is within or adjacent to the boundary of the settlement and is at a level which is appropriate to meet local needs only. Town centres are promoted as the focus for key uses which attract large numbers of people (Policy SD.9). This includes commercial and office uses.

3.45 The employment policies within the plan place an emphasis on creation of a portfolio of employment sites in order to facilitate job creation and widen the County's economic base. Furthermore, the provision of employment land within the main settlements will assist in creating a better balance between housing and employment in the County. Within the rural areas of the County, the emphasis will be on diversification of the rural economy and the encouragement of local employment opportunities.

3.46 Policy D.19 sets out that Bromsgrove District is expected to provide for about 55 ha of employment land over the plan period. Bromsgrove District is also expected to provide a proportion of Redditch District's employment land allocation.

3.47 New wholesale warehouse and distribution centre development within Class B8 use should maximise access to railway / waterway termini (Policy D.24). Policy D.25 sets out that suitable individual sites may be restricted to a specific use within Class B of the Use Classes Order, in order to ensure the provision of a range of employment opportunities. Policy D.26 sets out that the preferred locations for new office development within the County are the town centres of a number of urban areas, including Bromsgrove.

3.48 New buildings for business purposes or for the expansion of existing businesses outside the Green Belt are permitted in or adjacent to rural settlements providing that proposals are in accordance with other plan policies, particularly SD.8 (Policy D.27). Within the Green Belt, the development of new buildings for business purposes or for the expansion of existing businesses in the Green Belt will only be permitted where it is proposed in the settlements in which the Local Plan deems that infilling is acceptable, and should be of a scale which is appropriate to the location (Policy D.28).

Local Policy

Bromsgrove District Local Plan 2004

3.49 The Bromsgrove District Local Plan was adopted in January 2004 and provides the local planning policies which guide development within Bromsgrove District. The policies considered below have been formally 'saved'. However, following the publication of the NPPF it is considered by the Council that full weight can no longer be attached to saved policies in the Local Plan. Instead, due weight can be attached to policies within the Local Plan depending on the level of conformity with the NPPF. For example policies that are entirely consistent with the NPPF can be given greater weight than those that are not.

3.50 Paragraph 5.5 of the document sets out an overarching strategy for the District. This includes:

- Restraint to development in open areas of the countryside and within villages in the Green Belt;

- Identification of key locations to meet housing and employment needs;
- Identification of sites in other locations excluded from the Green Belt for limited development purposes but recognising the limits to future growth;
- Provision of housing, employment, shopping, community and recreational facilities to ensure maximum benefit and access to disadvantaged groups;
- Provision of improved facilities to the benefit of the community at large through negotiated agreements with developers;
- Protection of historical assets; and
- Designation of areas of special landscape quality and protection and enhancement of the environment.

3.51 Policies DS3-DS5 set out the locations to which development will be directed. Bromsgrove is the main location for growth in the District, with a number of settlements (excluded from the Green Belt) to which limited development will be directed. A further 13 settlements are designated 'Village Envelope Settlements', where limited infill may be permitted, in accordance with Green Belt policy.

3.52 Policy E2 makes provision for 30 ha of land for Redditch-related employment needs. Policy E3 then allocates additional land to meet the employment land needs for the remainder of the District.

3.53 The Plan acknowledges that the expansion, consolidation and extension of existing commercial uses can offer an increased employment source and contribute to a sustainable pattern of land use. Extension to existing commercial uses within non-Green Belt areas is permitted providing that a number of criteria are met (Policy E4). The criteria relate to issues such as:

- Appropriateness of the scale and nature of the proposed activity;
- Traffic generation and parking provision;
- Impact on amenities of adjoining occupiers;
- Visual impact; and
- Prevention of the generation of unacceptable levels of pollution where the proposal relates to non-conforming uses within residential areas.

3.54 Policy E6 is concerned with inappropriate land uses in employment areas. The Policy notes that in areas where employment uses predominate, residential or other land uses will not be permitted where they could be adversely affected by noise, smell or traffic or issues relating to health or safety.

3.55 Policy E7 requires Development Briefs for all new employment land sites exceeding 2 ha in size.

3.56 The Plan sets out a number of criteria which should be met by new employment development (Policy E9). The criteria relate to issues such as the provision of sufficient car parking, demonstrating that the highway system has sufficient capacity to deal with any traffic which is generated by the proposed development, and ensuring that no undue environmental disturbance is caused to adjacent residential properties.

3.57 Proposals for retail or recreational uses of land allocated or zoned for industrial and commercial uses are not permitted (Policy E10).

3.58 It is important to note that the vast majority of policies within the Local Plan will be replaced by policies within the Core Strategy / Bromsgrove District Local Plan when this successor document is adopted.

Draft Core Strategy 2, Bromsgrove District Council (2011)

3.59 The Council formally consulted on the Draft Core Strategy 2 document between 21st January and 15th April 2011. This second draft Core Strategy differs from the first by taking on board emerging evidence, allocating sites and responding to consultation feedback.

3.60 The document sets out 12 strategic objectives to address key local challenges. The most relevant in relation to this employment land review are as follows:

- SO1 Regenerate the Town Centre to create a thriving and vibrant centre providing facilities to meet the needs of residents
- SO2 Focus new development in sustainable locations in the district such as on the edge of Bromsgrove Town in the first instance
- SO5 Provide support and encouragement for economic growth of existing and new businesses for example, in knowledge based industries and high tech manufacturing, whilst also supporting farming and rural diversification and investing in lifelong education and learning skills.

3.61 CP1 sets out housing and employment targets for the plan period. The employment target of 28 ha for period 2006-2026 is based on the RSS Panel Report.

3.62 CP4A and CP4B sets out the proposed allocations in the district. Most of the allocations focus on delivering housing however three of the sites include an element of employment development. For example, the expansion site at Perryfields Road proposes a mix of uses including 5 ha of employment land. The site in Hagley also proposes a mix of uses potentially including some employment use whilst the Ravensbank site is 10.3hecatres in size and it is entirely for employment which would contribute to meeting the future needs of Redditch.

3.63 The main policies effecting employment development are CP11, CP12 and CP13. CP11 (New Employment Development) sets out the types of employment opportunities that will help to broaden the economic base of the district and strengthen the local economy. These include the following:

- New technology opportunities as part of the Central Technology Belt;
- Office and mixed use schemes in the Town Centre;
- A range and choice of readily available employment sites;
- Economic development opportunities on strategic sites;
- Limited economic development in rural areas; and
- Skills and development training as part of the promotion of employment sites.

3.64 The purpose of CP12, entitled 'Existing Employment' is to protect and promote existing employment sites. The policy seeks to maintain high quality employment sites that are in sustainable locations. Non-employment uses are only permitted on employment sites where a number of criteria are met.

3.65 CP13 seeks to encourage the regeneration of rural areas by promoting development that contributes to diverse and sustainable rural enterprises, conversion schemes, live-work units, the diversification of the rural economy and recreation and tourism related initiatives.

3.66 A Publication version of the Core Strategy (which, in the light of the NPPF will now be called the Bromsgrove District Plan) is expected to be published for consultation in September 2012 and will take into account the recommendations of this study.

Bromsgrove Town Centre Area Action Plan, Bromsgrove District Council (2011)

3.67 The Draft Bromsgrove Town Centre Area Action Plan (AAP) was published for a 12 week consultation period in January 2011. The aim of the AAP is to create a coordinated framework for the future development of the town centre. This will ensure that new development and traffic improvements complement and enhance the centre's historic and environmental quality.

3.68 A total of 27 objectives are identified for Bromsgrove Town Centre. The most relevant in this instance are:

- Maintain the number of employment sites for light industrial usage;
- Make modern commercial office accommodation available; and
- Attract new technology businesses as part of improved links with the Technology Park and A38 technology corridor.

3.69 Policy TC1 (Town Centre Regeneration Strategy) sets out that the AAP will secure the long term future of the town centre enhancing its vitality and vibrancy, fixing its place within the West Midlands and beyond as a desirable place to live work, shop and invest.

3.70 The land use strategy for the town centre is set out within TC2. The employment/commercial section sets out that the Council will offer new opportunities for people to work in the town by providing flexible business spaces that provide a wide range of employment uses, as well as dedicated B1 office developments.

3.71 Policies TC8 to TC17 identify a range of sites where there are development opportunities in the town centre. The policies promote either mixed use development or employment on a number of the sites.

Longbridge Area Action Plan (AAP), Birmingham City Council & Bromsgrove District Council (April 2009)

3.72 Following an examination in public the AAP was adopted by both Bromsgrove and Birmingham Councils in April 2009. The AAP aims to deliver a major new high technology-focussed Regional Investment Sites and create divers communities. The vision for Longbridge focuses on sustainable, high quality built environments, well designed open spaces and green corridors and the creation of mixed-use places.

3.73 The area which is the subject of the AAP is mostly within the Birmingham City Council administrative area, although some of the plan area falls within Bromsgrove District. The document sets out that the area falling within the Bromsgrove District will provide:

- A mixed density residential scheme of a minimum of 700 dwellings including a neighbourhood centre and Class C2 and D2 uses (Proposal H2);
- Employment uses on the Cofton Centre Site (Proposal EZ3), incorporating Class B1(b), B1(c), B2 and B8 uses; and
- Open space with a linear open space walkway.

3.74 The document states in paragraph 3.121:

> "The Cofton Centre has potential for early development to provide a range of new employment opportunities for general and light industry and warehousing through re-use of the existing Cofton Centre buildings and new development on the areas formerly used for open storage."

Other Relevant Documents

Worcestershire Strategic Housing Market Assessment (SHMA)

3.75 Consultants GVA were commissioned by the 6 Worcestershire local authorities undertake a SHMA. The study was published in February 2012. The purpose of the study was to provide a strategic view of supply and demand in all housing sectors up to 2030 and to provide the local authorities with a comprehensive understanding of the dynamics and segments of the functional housing markets operating within the County of Worcestershire.

3.76 A key part of the work was to test a range of scenarios to project household growth in the period up to 2030. The two most relevant scenarios tested were 'employment constrained' and 'migration-led'. The 'migration-led' scenario resulted in a net requirement 6,980 dwellings in the nineteen year period between 2011 and 2030. The 'employment constrained' scenario resulted in a requirement of 6,780 dwellings for the same period. The evidence within the SHMA will be used to inform housing policies in the emerging Core Strategy going forward.

4 Socio-Economic Context

4.1 This chapter provides a brief overview of the socio-economic context of Bromsgrove District, drawing on data extracted from a range of information sources, including census information, to provide a broad picture of the make-up and relative performance of the local economy compared to the West Midlands and national average.

Resident Population Profile

4.2 Bromsgrove District has an aging population relative to the national average, with a lower relative percentage of population within the age ranges of 15-34 and a higher than average percentage of the population aged 40 and above. This general position is forecast to continue over the duration of the period of the Core Strategy / Bromsgrove District Plan to 2030.

Occupational and Industrial Classifications

4.3 Bromsgrove District has a notably higher percentage of its residents classified as being in employment as managers / senior officials and in professional occupations in comparison to the national and West Midlands average. Conversely, the relative proportion of economically active residents in sales and elementary occupations and working as process, plant and machinery operatives is below the national average[1].

4.4 The most significant employment sector for the District is manufacturing, accounting for over 18% of employment, which is greater than the national average of around 15%. The proportion of the resident population employed in education, health and social work also exceeds the national average.

4.5 In contrast, there a number of employment sectors which form a lower relative proportion of the Bromsgrove District economy such as transport and storage and, public administration.

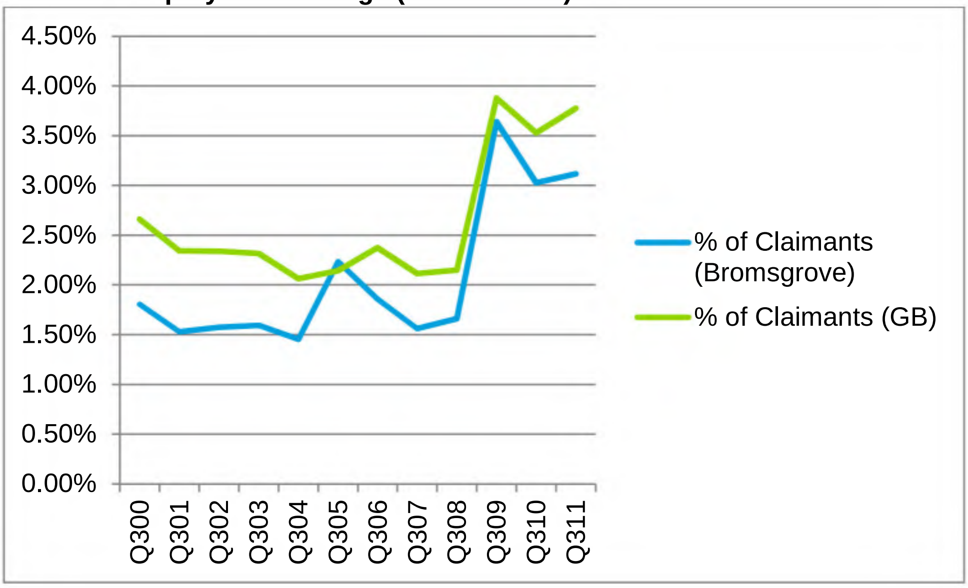
Economic Activity and Unemployment

4.6 Bromsgrove District has an economically active population of around 46,800, of which 43,200 are classified as being in employment. The percentage of the working age population identified as being economically active is approximately 79% which exceeds the national average (76.2%) and also the average for the West Midlands (74.2%). The proportion of the working population in self-employment is also greater than the national and West Midlands average, whereas the relative percentage of the population classified as unemployed in Bromsgrove is significantly less.[2]

[1] ONS – Annual Population Survey (April 2010 – March 2011)
[2] ONS – Annual Population Survey (April 2010 – March 2011)

4.7 Since 2006, unemployment levels (measured as numbers claiming unemployment benefits) in Bromsgrove District have consistently been below the national average, albeit that they have followed national trends, peaking at around 3.75% at the start of 2012[3].

Figure 4.1: Unemployment Change (2000 to 2011)



[3] Experian 2012

5 Employment Land and Premises – Quantitative Assessment of Supply

Introduction

5.1 The property profile, in terms of amount and broad distribution across Bromsgrove District and the constituent sub-areas, has been assessed through a quantitative analysis of existing employment floorspace and proposed future land and associated potential floorspace by B1, B2 and B8 use classes and also by main employment sectors (office, manufacturing and warehousing and distribution).

5.2 In order to provide an overall quantitative picture of supply, the following two main aspects have been considered:

- The amount and distribution of the existing stock of employment floorspace, distinguishing between vacant and occupied space; and
- The amount and distribution of employment land supply and associated potential new floorspace.

5.3 Further details and commentary on the main characteristics of quantitative supply are set out below and in the conclusions chapter.

Existing Stock of Employment Premises

Total Existing Employment Floorspace

5.4 The most reliable figures for existing floorspace provision at the Bromsgrove District level are provided by the Valuation Office Agency (VOA).

5.5 As noted in Chapter 2, hereditaments are defined as ‘a piece of real, inheritable or taxable property on which rates may be charged and which is defined in law’. In the majority of cases, a hereditament corresponds to an extent of contiguous or adjacent space appropriate for a single business occupier. Most hereditaments relate to groups of buildings, single buildings or premises within buildings. Large office or mixed-use commercial or industrial buildings will, if shared between several tenants or owners, consist of several hereditaments. These hereditaments may occupy some floors, part of a floor or space in, adjacent to, or associated with the building. For example a flower stall or newspaper kiosk in an office building can constitute a separate hereditament. Conversely a single large hereditament may comprise many distinct buildings, for example a large factory complex on a single site.

5.6 Thus, while the data reflects precisely the number of hereditaments at a certain time, this number may not be the same as the number of buildings or institutions that might be arrived at by another observer collecting information on the same building stock but for a different purpose. By and large the difference will be small, but for certain types of premises it can be more pronounced.

5.7 Table 5.1 provides a breakdown of employment hereditaments and floorspace by sector and at sub-area level (2007 data).

Table 5.1: Breakdown of VOA Data by Sector and Sub-Area (Number of Hereditaments and Floorspace)

Sub Area	Office (A2 and B1(a))	Manufacturing (B1(b&c) and B2)	Warehousing and Distribution (B8)
Rural West	64 (7,000 sqm)	63 (10,000 sqm)	34 (25,000 sqm)
Bromsgrove	263 (33,000 sqm)	128 (50,500 sqm)	117 (44,000 sqm)
North	79 (10,000 sqm)	18 (5,500 sqm)	25 (19,000 sqm)
Rural East	223 (70,000 sqm)	252 (144,000 sqm)	172 (78,000 sqm)
Total (2007)	**629 (120,000 sqm)**	**461 (210,000 sqm)**	**348 (166,000 sqm)**
		809 (376,000 sqm)	
Total (2012)	**730 (120,000 sqm)**	**820 (408,000 sqm)**	

Source: **www.statistics.gov.uk/neighbourhood and www.voa.gov.uk**

5.8 Readily available aggregated figures below the district (i.e. local authority) level are no longer published by the VOA or by ONS. 2012 VOA figures are available although these are only published at the district level and the data is also not directly comparable to previous figures due to the way in which it is collected and analysed / aggregated. For example, published VOA district figures now amalgamate manufacturing and warehousing data into a single 'industrial' classification.

5.9 In very broad terms however, the 2012 VOA figures suggest an overall increase in floorspace and numbers of hereditaments across the main sectors assessed with the exception of offices, where hereditaments have increased but the total floorspace for Bromsgrove as a whole has remained at a similar level to that recorded in 2007.

5.10 Figure 5.1 illustrates the average hereditament size (based on 2007 information). Although there will clearly be variation in unit sizes and sizes may have altered since the date of the information, this analysis does never-the-less provide a broad picture of the average scale of premises across different sectors and sub areas.

Figure 5.1: Average Hereditament Size by Sector and Sub-Area

Adapted from information at www.statistics.gov.uk/neighbourhood

Vacant Premises

5.11 Set out in Tables 5.2 and 5.3 is an overview of vacant premises by study area sub-area and sector, focusing on industrial / warehouse and office premises available as at the end of June 2012. Details on available premises have been obtained from the Worcestershire County Council Property Services online Property Search together with discussions with commercial agents active in the local area (and the review of marketing particulars).

5.12 We have also carried out our own investigations on vacant premises to clarify details obtained from the sources above to, for example, ensure that the double-counting of premises is avoided as far as possible. Detailed schedules of vacant premises are reproduced at **Appendix 4**.

Table 5.2: Vacant Office Premises

Sub Area	Size Bands in sq.m. (numbers of vacant properties shown in brackets)						Total
	0 – 100	101 – 500	501 – 1000	1001 – 2000	2001 – 5000	5001+	
Rural West	0 (0)	1,399 (8)	509 (1)	0 (0)	0 (0)	0 (0)	**1,908 (9)**
North	0 (0)	0 (0)	0 (0)	0 (0)	3643 (1)	0 (0)	**3643 (1)**
Bromsgrove	230 (3)	3,144 (15)	1684 (3)	0 (0)	0 (0)	0 (0)	**5,078 (21)**
Rural East	0 (0)	890 (3)	531 (1)	0 (0)	0 (0)	0 (0)	**1,421 (4)**
Bromsgrove District Total	**230 (3)**	**5,433 (26)**	**2,724 (5)**	**0 (0)**	**3643 (1)**	**0 (0)**	**11,051 (35)**

Source: Worcestershire County Council online Property Search & review of agents' particulars.

Table 5.3: Vacant Industrial & Warehousing Premises

Sub Area	Size Bands in sq.m. (numbers of vacant properties shown in brackets)						Total
	0 - 100	101 - 500	501 - 1000	1001 - 2000	2001 – 5000	5001+	
Rural West	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	**0 (0)**
North	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	**0 (0)**
Bromsgrove	162 (2)	4,930 (15)	1,663 (2)	0 (0)	6,538 (2)	5,017 (1)	**18,210 (22)**
Rural East	0 (0)	797 (3)	0 (0)	0 (0)	0 (0)	0 (0)	**797 (3)**
Bromsgrove District Total	**162 (2)**	**5,727 (18)**	**1,663 (2)**	**0 (0)**	**6,538 (2)**	**5,017 (1)**	**19,107 (25)**

Source: Worcestershire County Council online Property Search & review of agents' particulars.

5.13 A total of 35 offices premises were identified as being marketed as available as at the end of June 2012, equating to just over 11,000 sq m of floorspace. The focus of supply in terms of overall floorspace and also numbers of vacant properties is within the Bromsgrove sub area. The vast majority of vacant office premises in the Bromsgrove sub area, and the District more widely, fall within a size band of 101 sq m to 500 sq m.

5.14 As with offices, available industrial and warehousing premises are predominantly located within the Bromsgrove sub area (containing over 18,200 sq m of available space of the 19,100 sq m available across the District as a whole). Vacancies are spread across a number of District's main employment sites, including Bromsgrove Technology Park (notably the Sapphire Court development), Buntsford Court, Aston Fields Estate and Saxon Business Park.

Employment Land Supply

5.15 The assessment of existing employment land supply focuses on the following:

- **Employment Allocations** – Sites without planning permission which are allocated for B1, B2 and B8 uses in the adopted Bromsgrove District Local Plan or are recognised as existing employment sites. Also included separately are other relevant allocations with potential to accommodate new employment development where appropriate, notably Areas of Development Restraint assessed as part of this study.
- **Employment Commitments** – Committed sites (i.e. those under construction or with extant planning permission) for B1, B2 or B8 uses and existing employment uses with extant permission for other forms of development at the time of survey.

5.16 Information relating to quantitative land supply information has been obtained from the Council's Land Availability Employment Reports of April 2012 and also its Annual Monitoring Report (December 2011). Where necessary, the information contained within these documents has also been interrogated and expanded upon to provide a more detailed assessment of land supply and potential new employment floorspace by main planning use class / employment sector and study sub area. By taking this approach, a more in-depth analysis can be provided than by, for example, simply looking at sites in isolation.

5.17 The general approach applied to define (potential) sector apportionments and floorspace capacities for individual sites is as follows:

Allocations

- Obtaining site areas and other information from the Council's Land Availability Employment Report and AMR;
- Use of Development Plan information, discussions with the local planning authority, information from agents, past completions and qualitative assessment site visits to define the percentage apportionment of different employment uses for particular sites.
- To derive potential floorspace quantums, application of the following average gross floorspace densities per hectare, based on information contained in Appendix D of the Employment Land Reviews Good Practice Note of December 2004.
- Offices: 4,000 sq m / ha
- Industrial: 4,000 sq m / ha
- Warehouse: 5,000 sq m / ha

Commitments

- Information from the Council's Land Availability Employment Report and AMR;
- Where floorspace information is not recorded (such as in the case of certain outline planning permissions), a similar approach to that used for allocations has been used (note – where other information is not available and for sites which have not been qualitatively assessed as part of this study, an equal split between permitted uses is normally applied as a guide).

5.18 It should be recognised that employment monitoring information is not absolute. For example an employment allocation identified for B1, B2 and B8 uses may come forward for only one of these uses. Similarly, development may come forward at a higher or lower density than assumed as part of this review.

5.19 Whilst the limitations are acknowledged, the overall approach to the assessment does provide a good picture of employment land supply. This includes the identification of likely available land and associated floorspace capacity for different employment uses/sectors to be derived from existing local plan allocations and employment commitments.

5.20 **Table 5.4** illustrates the planning use classes attributed to ONS Classifications. The assignment of use classes as shown in the table is considered to be reasonably accurate by the Department of Communities and Local Government (DCLG) and ONS.

Table 5.4: Office of National Statistics Classes v Planning Use Classes

ONS Classification	Planning Use Class
Office	A2 and B1(a)
Manufacturing	B1(b), B1(c) and B2
Warehousing / Distribution	B8

5.21 In assessing potential floorspace, it is important to distinguish between B1 office (Class B1a) and B1 R&D and light industry (Classes B1b and c). Understanding this breakdown ensures a more robust approach to the assessment. Sub-dividing B1 uses enables a better comparison with information on existing stock and premises extracted from the databases used by the ONS (and VOA) and is also more consistent with forecasting and market classifications used in subsequent stages of this Employment Land Review.

5.22 In line with the approach adopted by the Council, the contribution of committed employment land at Longbridge and Ravensbank Business Park are recorded separately to the other sources of employment land supply in Bromsgrove District. Longbridge is predominantly located with the administrative area of Birmingham. Employment land at Ravensbank Business Park is intended to contribute to the employment needs of the Redditch area.

Employment Allocations and Commitments

5.23 **Tables 5.5 to 5.10** provide a quantitative assessment by sub-area of the size and (an estimate of) the potential floorspace capacity of:

- Local Plan employment allocations and Areas of Development Restraint; and
- Employment commitments (within and outside of Local Plan allocations), and including those commitments not yet started and also those under construction.

5.24 The quantitative assessment of employment land supply in this chapter does not consider the potential contribution able to be made by sites identified in the Bromsgrove Town Centre Area Action Plan. Relevant sites are however assessed in qualitative terms in the following chapter of this report.

5.25 In terms of Areas of Development Restraint, a number of these will likely come forward for mixed use development and the total amount of land estimated to come forward for employment on these sites has been provided by the Council.

Employment Allocations

Table 5.5: Adopted Local Plan Employment Allocations / Areas (without Planning Permission)

Sub Area Site	Available Area (hectares)	Floorspace Capacity Estimate in square metres [Site area estimate (in hectares) shown in brackets]				
		B1 (a)	B1 (b & c)	B2	B8	Total B Class
Rural West						
-	0	0 [0]	0 [0]	0 [0]	0 [0]	0 [0]
Rural West Total	**0**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**
North						
-	0	0 [0]	0 [0]	0 [0]	0 [0]	0 [0]
North Total	**0**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**
Bromsgrove						
-	0	0 [0]	0 [0]	0 [0]	0 [0]	0 [0]
Bromsgrove Total	**0**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**
Rural East						
Saxon and Harris Business Parks (BROM6)	1.8	1,200 [0.3]	1,200 [0.3]	2,400 [0.6]	3,000 [0.6]	7,800 [1.8]
Rural East Total	**0**	**1,200 [0.3]**	**1,200 [0.3]**	**2,400 [0.6]**	**3,000 [0.6]**	**7,800 [1.8]**
District Total	**0**	**1,200 [0.3]**	**1,200 [0.3]**	**2,400 [0.6]**	**3,000 [0.6]**	**7,800 [1.8]**

Table 5.6: Local Plan Areas of Development Restraint

Sub Area Site	Available Area (hectares)	Floorspace Capacity Estimate in square metres [Site area estimate (in hectares) shown in brackets]				
		B1 (a)	B1 (b & c)	B2	B8	Total B Class
Rural West						
Hagley ADR (HAG2B)	0.5	2,000 [0.5]	0 [0]	0 [0]	0 [0]	2,000 [0.5]
Rural West Total	**0.5**	**2,000 [0.5]**	**0 [0]**	**0 [0]**	**0 [0]**	**2,000 [0.5]**
North						
-	0	0 [0]	0 [0]	0 [0]	0 [0]	0 [0]
North Total	**0**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**
Bromsgrove						
Bromsgrove ADR (BROM 5A, 5B & 5D)	5	10,000 [2.5]	10,000 [2.5]	0 [0]	0 [0]	20,000 [5]
Bromsgrove Total	**5**	**10,000 [2.5]**	**10,000 [2.5]**	**0 [0]**	**0 [0]**	**20.000 [5]**
Rural East						
Ravensbank ADR (BE3)	10.3	6,865 [1.72]	6,865 [1.72]	13,730 [3.43]	17,165 [3.43]	44,625 [10.3]
Rural East Total	**10.3**	**6,865 [1.72]**	**6,865 [1.72]**	**13,730 [3.43]**	**17,165 [3.43]**	**44,625 [10.3]**
District Total	**15.8**	**18,865 [4.72]**	**16,865 [4.22]**	**13,730 [3.43]**	**17,165 [3.43]**	**66,625 [15.8]**

Employment Commitments

5.26 Employment commitments, which can be located within and outside of employment allocations, can also be defined as employment ‘gains’. They comprise of:

- Sites with planning permission for employment use where development has not started; and
- Sites with planning permission under construction as recorded in the 2012 Bromsgrove District Council Land Availability Employment Report and AMR.

Table 5.7: Employment Commitments (not started)

Sub Area Site	Available Area (hectares)	Floorspace Capacity Estimate in square metres [Site area estimate (in hectares) shown in brackets]				
		B1 (a)	B1 (b & c)	B2	B8	Total B Class
Rural West						
Wildmoor Mill Farm, Mill Lane (App no 2009/0985)	0.76	2,255 [0.38]	2,255 [0.38]	0 [0]	0 [0]	4,510 [0.76]
Rural West Total	**0.76**	**2,255 [0.38]**	**2,255 [0.38]**	**0 [0]**	**0 [0]**	**4,510 [0.76]**
North						
Part Cofton Centre, Unit 6, Longbridge (App no 2007/115)	2.03	0 [0]	0 [0]	6,014 [2.03]	0 [0]	6,014 [2.03]
Part Cofton Centre, Unit 5, Longbridge (App no 2010/0727)	3.27	3,400 [0.8]	3,400 [0.8]	3,400 [0.8]	4,167 [0.87]	14,367 [3.27]
North Total (excl Longbridge)	**0**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**
North Total (incl Longbridge)	**5.30**	**3,400 [0.8]**	**3,400 [0.8]**	**9,414 [2.83]**	**4,167 [0.87]**	**20,381 [5.30]**
Bromsgrove						
Former Garringtons / UEF Works (Bromsgrove Technology Park) (App no 2002/1014)	6.13	8,520 [2.13]	8,000 [2]	10,000 [2]	0 [0]	26,520 [6.13]
Buntsford Business Park, land adjacent Sugar Brook Mill (App no 2007/0704)	0.44	0 [0]	0 [0]	1,760 [0.44]	0 [0]	1,760 [0.44]
Bromsgrove Total	**7.02**	**8,520 [2.13]**	**8,000 [2]**	**11,760 [2.44]**	**0 [0]**	**28,280 [6.57]**
Rural East						
Saxon Business Park – Plot 5 Phase 2 (App no 2007/0689)	0.50	600 [0.15]	400 [0.1]	400 [0.1]	750 [0.15]	2,150 [0.5]
Saxon Business Park – Plot 2B (App no 2010/0308)	0.12	617 [0.12]	0 [0]	0 [0]	0 [0]	617 [0.12]

Sub Area Site	Available Area (hectares)	Floorspace Capacity Estimate in square metres [Site area estimate (in hectares) shown in brackets]				
		B1 (a)	B1 (b & c)	B2	B8	Total B Class
Wythall Green Business Park (App no 2009/0136)	11.8	24,495 [11.8]	0 [0]	0 [0]	0 [0]	24,495 [11.8]
Holly Tree Farm (App no 2010/0614)	0.13	520 [0.13]	0 [0]	0 [0]	0 [0]	520 [0.13]
Ravensbank Business Park, Plot 10 (App no 2010/0212)	2.68	1,419 [0.3]	1,500 [0.4]	1,587 [0.48]	5,313 [1.5]	9,819 [2.68]
Ravensbank Business Park, Plot 10A (App no 2007/1108)	1.5	716 [0.3]	1,000 [0.4]	1,000 [0.4]	1,000 [0.4]	3,716 [1.5]
Rural East Total (incl Ravensbank)	**16.73**	**28,367 [12.8]**	**2,900 [0.9]**	**2,987 [0.98]**	**7,063 [2.05]**	**41,317 [17.63]**
Rural East Total (excl Ravensbank)	**12.55**	**26,232 [12.2]**	**400 [0.1]**	**400 [0.1]**	**750 [0.15]**	**27,782 [12.55]**
District Total (incl Longbridge and Ravensbank)	**29.36**	**42,542 [16.11]**	**16,555 [4.08]**	**24,161 [6.25]**	**11,230 [2.92]**	**94,488 [29.36]**
District Total excl Longbridge and Ravensbank)	**19.88**	**37,007 [14.71]**	**10,655 [2.48]**	**12,160 [2.54]**	**750 [0.15]**	**60,572 [19.88]**

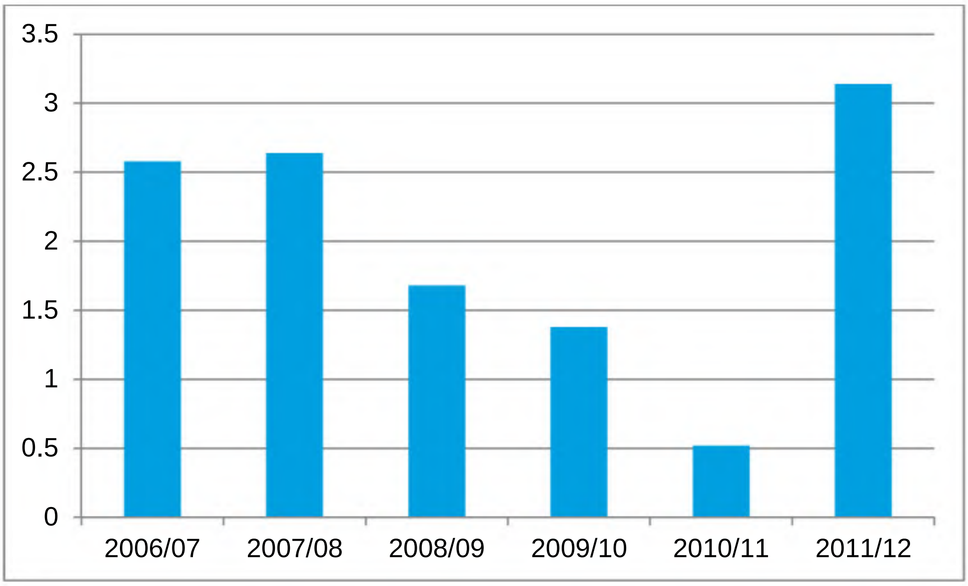
Table 5.8: Employment Commitments (under construction)

Sub Area Site	Available Area (hectares)	Floorspace Capacity Estimate in square metres [Site area estimate (in hectares) shown in brackets]				
		B1 (a)	B1 (b & c)	B2	B8	Total B Class
Rural West						
-	0	0 [0]	0 [0]	0 [0]	0 [0]	0 [0]
Rural West Total	**0**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**
North						
-	0	0 [0]	0 [0]	0 [0]	0 [0]	0 [0]
North Total	**0**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**
Bromsgrove						
-	0	0 [0]	0 [0]	0 [0]	0 [0]	0 [0]
Bromsgrove Total	**0**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**
Rural East						
-	0	0 [0]	0 [0]	0 [0]	0 [0]	0 [0]
Rural East Total	**0**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**
District Total	**0**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**	**0 [0]**

Employment Completions

5.27 The level of gross annual employment completions across Bromsgrove District as a whole from 2006/07 to 2011/12 (excluding development at Ravensbank Business Park) is illustrated in **Figure 5.3**.

Figure 5.3: Annual Employment Land Completion Rates (Hectares) in Bromsgrove District for the Period 2006/07 – 2011/12



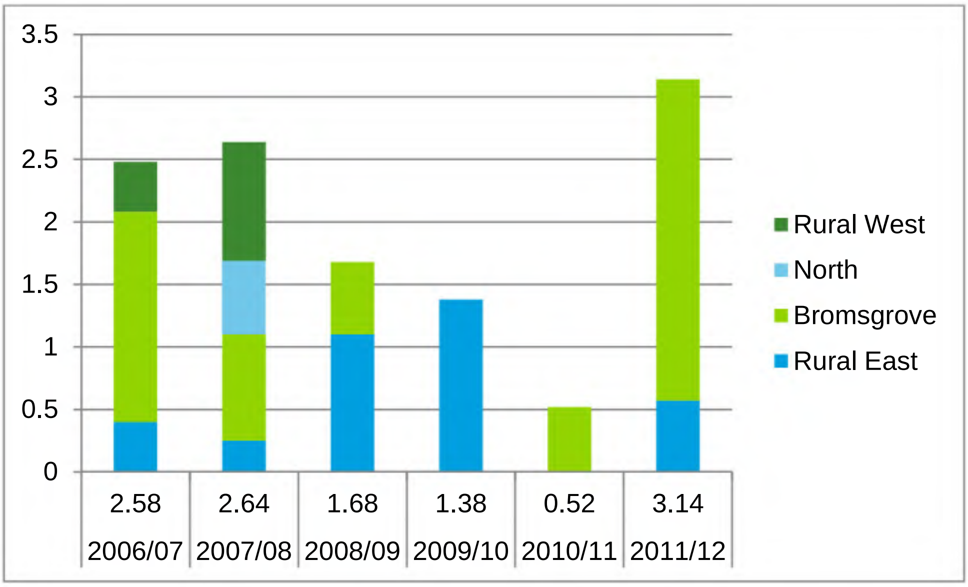
Source: (Draft) Bromsgrove District Council Employment Land Availability Employment Report April 2012

5.28 Over the 6 year period, 11.94 ha of employment land has been developed, which equates to an average completion rate of circa 1.99 ha per annum. There is a general trend towards a declining rate of annual employment completions across the District, with only one development completed during the 2010/11 monitoring period (Barnsley Hall Farm in Bromsgrove). However, the 2011/12 monitoring period saw a relatively large increase in completions, made up mainly of land (Plots 1 – 14) developed at Bromsgrove Technology Park.

5.29 As would be expected, pre-recessionary levels of completions across the District were generally higher. Over the period 2000/01 – 2007/08 the average annual completion rate during was around 2.77 ha, peaking at around 4 ha of land being developed during the April 2004 – March 2005 monitoring year.

5.30 Employment completions can be broken down further, by sub area. This enables a more detailed picture of employment development across the District to emerge (see Figure 5.4).

Figure 5.4: Annual Employment Land Completion Rates (Hectares), by Sub Area for the Period 2006/07 - 20011/12



Source: Bromsgrove District Council Land Availability Employment Reports April 2007 – April 2012

5.31 Over recent years the majority of recent development has taken place within the Rural East sub area, with most completions in this sub area being located at the Harris and Saxon Business Parks. Development at the Bromsgrove Technology Park and Buntsford Business Park has accounted for the majority of development completed in the Bromsgrove sub area over the last six years. The current employment land availability report (April 2012) notes that no development was under construction at the time of survey.

5.32 There have been no completions in the North and Rural West sub areas since the 2007/08 monitoring period. The only completion in the Northern sub area took place in the 2007/08 at the Cofton Centre at Longbridge.

5.33 Based on information obtained from the Council's Employment Land Availability Reports, the majority of development has taken place on identified (allocated) employment sites. Where 'windfall' development (i.e. outside of identified employment sites) has occurred, this has tended to be within the more rural sub areas of the District. This often corresponds to development (generally diversification into non-agricultural employment uses) on former / existing agricultural sites.

6 Existing Employment Land & Premises – Qualitative Assessment of Supply

Approach

6.1 In addition to a quantitative assessment of supply, it is important to undertake a qualitative review. The purpose of undertaking a qualitative assessment is to rigorously and systematically appraise all local plan employment land allocations and commitments and other sites identified by the Council, in terms of market attractiveness, environmental sustainability and strategic planning / economic considerations. This provides an understanding of the role of value of different sites within the districts employment land portfolio.

6.2 Regard has been given to good practice in setting the appraisal criteria. The main criteria used to assess sites are listed below. A comprehensive list of criteria is provided in **Appendix 2.**

Table 6.1: Qualitative Assessment Appraisal Criteria

Factor	Appraisal Criteria	Description
Market Attractiveness	Quality of wider environment	Quality of the existing portfolio, internal and external environment / Quality of external environment / Amenity Impacts / Adjoining land uses / Road frontage visibility / Availability of local facilities
	Accessibility	Ease of access to strategic highway / Quality of local road access / Quality of Site Access
	Market Conditions/Perception of Demand	Availability / marketing and enquiry interest
	Ownership	Ownership/Owner aspirations
	Site Development Constraints	Environmental constraints /physical site features / Ground conditions and contamination / Flood risk
Environmental Sustainability	Prudent use of natural resources	Sequential Location / Land classification /
	Accessibility to Non Car Transport Modes	Ease of access to public transport / Ease of walking and cycling
	Effective protection and enhancement of the Environment	Potential to enhance environmental quality without impacting on the sensitivity of environmental resources
Strategic Planning	Regeneration and Economic Development	Ability to deliver specific regeneration objectives //Local Economic Objectives

6.3 The results of the qualitative assessment have been derived from:

- Site visits (undertaken during 2008/09 and, in respect of additional sites included in this update, during May and June 2012);
- Information supplied by the Council;
- Review of reports and other available information sources; and
- Discussion with local commercial agents, site owners and Council Officers.

6.4 Detailed qualitative assessment results, together with individual site plans, are recorded for each site on pro-forma sheets which are included in **Appendix 5**.

6.5 Our assessment of commercial factors includes the consideration of the likely attractiveness of developed sites for employment re-use and redevelopment. This particular element of the assessment is based on our site visit only and does not include detailed or specific analysis in terms of a building survey or financial viability assessment for example.

6.6 As noted in Chapter 2, each site has been ‘scored’ separately in terms of its overall performance against market, sustainability and strategic planning criteria. In accordance with good practice, the scoring system used is relatively simplistic in approach. For example, it does not seek to weight scores. It is therefore important to consider scores in conjunction with associated qualitative assessment commentary which summarises the key negative and positive factors identified.

6.7 Through this qualitative assessment exercise, those sites and areas assessed have been ranked in terms of their importance and role in the local employment hierarchy. We have utilised the following rankings to categorise the overall qualitative performance of different sites:

- *‘Best’*: Very good quality relatively unconstrained sites suitable for local or incoming clients with a national / regional choice of locations.
- ‘Good’: Sites which may be subject to some constraints but with potential to be suitable for inward investors and / or locally-based businesses.
- ‘Moderate’: Sites which score poorly against one or more qualitative factors but which (could) perform a role in the employment hierarchy, including for local businesses.
- ‘Other’: Generally poor quality sites with significant constraints and often in inappropriate locations. These could have potential for (partial) de-allocation or release to other forms of development.

6.8 In ranking sites within in the employment hierarchy the ‘Areas of Development Restraint’ have been ranked as if they were available even though it is acknowledged that they are currently restricted in terms of availability by adopted Local Plan policy.

6.9 In other studies, we have also often identified separately ‘owner specific’ sites, which can be defined as employment allocations without planning permission which are not likely to be available on the open market. In accordance with good practice, uncommitted allocations which are only available for a specific occupier are excluded from available employment land totals until sites gain planning permission. In this case however and as agreed with the Council, there are no relevant owner specific sites forming part of the current employment land supply which apply to this particular study.

6.10 The following paragraphs set out the main conclusions for each of the sites assessed as recorded on the pro-forma sheets in **Appendix 5**, together with the identification of an individual site ranking based on the results of the qualitative assessment.

6.11 For ease of reference, sites in the following paragraphs are ordered by study sub area and also by the following two broad site types:

- Local Plan employment allocations and main commitments; and
- Other sites including small existing employment areas not specifically identified on the Local Plan proposals map, Areas of Development Restraint (ADR's) and, areas assessed to the north of Redditch as identified in the White Young Green Study (December 2007) to assess the future growth implications of Redditch Town to 2026.

Allocations and Main Commitments

Rural West

Nash Works

6.12 Nash works is located on Nash Lane, Belbroughton and is approximately 1 hectare in size. The site consists of two separate areas. One area comprises older poor quality buildings and the other comprises newly built office accommodation (circa 5 years old). The site is within designated Green Belt.

Market Attractiveness

6.13 Around half of the site consists of high quality office development. The other part of the site contains relatively poor quality buildings. The quality of the external environment is very good, located in a pleasant village location. At the time of the site visit the site did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors.

6.14 The site is located within a predominantly residential area therefore the site has a sensitive use close to it.

6.15 The site has a poor road frontage and is not very visible from local roads. The site benefits from being on the edge of the village of Belbroughton which has some local village services and facilities. Within the context of road links, the site is 1.9km from the A491, 5km from the A456 and 6.5km from Junction 4 of the M5. The width of surrounding roads could create issues for larger vehicles but the site access is good and there are likely to be only minimal visibility issues.

6.16 Whilst there are no environmental designations on the site, it is within the Green Belt which could limit future development potential. The site is constrained by its single access and its shape, which is long and narrow. There could be potential contamination issues on the part of the site which has not been redeveloped. Furthermore the site falls within an area at risk from flooding (flood zone 2).

6.17 A planning application has been submitted for the residential development (including 10 dwellings and two live work units) on the part of the site. This relates to the part of the site which contains the poor quality older buildings and indicates that the owners' aspirations for the site are not wholly employment based.

Environmental Sustainability

6.18 The site is within / on the edge of the village and is previously developed land. The site is located within 500m of a bus route, however the closest railway station is 6.8km from the site, at Hagley. There are reasonable pedestrian and cycle links to the site although there are no specifically designated cycle routes.

6.19 There are no environmental designations within or immediately adjacent to the site. However the site is relatively well screened by trees, there is a stream running adjacent to the site and the derelict buildings could potentially be affected by bats. Providing these issues are addressed in any future development, there is no need for the development of the site to significantly detract from the existing environmental quality.

Strategic Planning

6.20 It is considered that the site has some scope to contribute to local regeneration strategies and economic objectives through the regeneration of a vacant, underused site and the provision of local employment opportunities.

Role within the Employment Hierarchy

6.21 The site is classified as 'Moderate'.

Bromsgrove

Bromsgrove (BROM8) – Buntsford Hill Business Park/Land at Buntsford Hill Phase 2.

6.22 The site is well developed industrial estate. The site is allocated within the Local Plan (BROM8) as an Employment Development Site in order to assist in increasing the provision of land to meet the general employment needs of Bromsgrove District and to satisfy the strategic employment land requirement.

Market Attractiveness

6.23 The quality of the existing portfolio is poor to moderate. At the time of the site visit the site did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors.

6.24 Whilst there are a small number of residential properties on the opposite side of Buntsford Hill, the site is relatively well screened and proximity of residential properties should not significantly restrict the market attractiveness of the Business Park to most occupiers.

6.25 The site has good visibility from Buntsford Park Road. The site is located relatively close to Bromsgrove's services and facilities, with the town centre approximately 2.5km from the site. In the context of road links, the site is 0.6km from the A38, 5.2km from Junction 1 of the M42 and

6km from Junction 5 of the M5. The quality of road access is good and there appear to be no apparent visibility constraints affecting access to and from the site.

6.26 The site is not within an area of medium or high flood risk, although there is an area to the north east of the site which does have flooding issues.

Environmental Sustainability

6.27 Whilst the site is located out of centre, it is within the urban area and is wholly brownfield. There is access to the site by public transport given that the site is located within 500m of a main bus route, although Bromsgrove railway station is 2.1km from the site. The pedestrian links to the site are reasonable although there is no specific provision for cyclists.

Strategic Planning

6.28 Redevelopment of the site could provide qualitative benefits to the site although given the high occupancy rate on the site it is questioned whether this is required and furthermore this could create issues with existing occupiers. Whilst the site clearly plays a part in retaining jobs within the town, given its already developed nature, it has a limited ability to deliver wider economic development objectives such as additional job creation.

Role in the Employment Hierarchy

6.29 The site is classified as ‘Good’.

Bromsgrove (BROM8A) – Land at Buntsford Hill Phase 3 / Buntsford Gate.

6.30 This is a site offering high quality, modern premises. The site is allocated for B1, B2 and B8 Uses within Policy BROM8A of the Bromsgrove District Local Plan in order to help to provide sufficient land to meet the employment needs of the District.

Market Attractiveness

6.31 The quality of the existing portfolio is very good, with all buildings being very modern and built to a high standard. The parking and circulation space is also of good quality. The quality / nature of the surrounding environment is unlikely to significantly limit the attractiveness of the site for most users. At the time of the site visit the site did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors.

6.32 There appears to be no bad neighbour uses adjacent to the site although there are some residential properties which could be potentially sensitive in nature.

6.33 The site has a highly visible frontage to the A38, which is assisted by the roundabout at the junction of the A38 and Buntsford Hill. The site is located relatively close to Bromsgrove’s services and facilities, with the town centre 2.5km from the site. In the context of road links, the site is immediately adjacent to the A38, is 5.2km from Junction 5 of the M5 and 5.4km from Junction 1 of the M42. The quality of the local roads is relatively good with some potential for limited congestion during peak periods. There appears to be no visibility constraints affecting access to and from the site.

6.34 There appears to be no environmental or known adverse development requirements applying to the site and the site appears to have no physical constraining features. Contamination issues on the site are unlikely and the site is located within an area of low flood risk.

Environmental Sustainability

6.35 The site is located outside of centre but within the urban area of Bromsgrove and is more than 50% brownfield, although that area of the site which is undeveloped is greenfield in nature. Bromsgrove Railway Station is within walking distance (2km) from the site and the closest bus stop is immediately adjacent to the site on the A38. There are good pedestrian linkages to the site although no specific cycle links.

6.36 There are no environmental designations within or immediately adjacent to the site. Part of the site however is greenfield and could potentially be affected by ecological issues. However, this area of the site is surrounded on three sides by development and therefore development here is unlikely to detract significantly from environmental quality.

Strategic Planning

6.37 Given the site's allocation for employment uses it is considered that it has a very good ability to deliver economic development objectives.

Role in the Employment Hierarchy

6.38 The site is classified as 'Best'.

Aston Fields Industrial and Trading Estates and Silver Birches Business Park (including Sewage Works)

6.39 The site is located on Aston Road within a well established employment area which varies in quality. The site includes, Aston Fields Industrial Estate; Aston Fields Trading Estate; Silver Birches Business Park; a sewage works; a council depot; Buntsford Hill Business Park. The site is designated employment land and part of the site is allocated under BROM10 for a waste transfer station and civic amenities site which was completed in 2004/05.

Market Attractiveness

6.40 The existing buildings are generally of a reasonable quality. Whilst some buildings are of poorer quality they appear to be built for purpose. In some areas of the site there appears to be some limited issues with parking space, but this is not a significant issue. At the time of the site visit the site did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors, although potentially there could be some odour issue from the sewage works, and some intermittent noise from the adjacent railway line.

6.41 The sewage works could potentially be a bad neighbour use and the site is adjacent to residential properties which could represent a potentially sensitive use.

6.42 The site has good visibility from local roads and some visibility from the A38. Furthermore, the site is close to the services and facilities of Bromsgrove. In the context of road links, the site is immediately adjacent to the A38 and approximately 4.2km from Junction 1 of the M42. Whilst the quality of the road access is relatively good, the access to site is affected by congestion, particularly at the entrance to the site from the A38 at Sherwood Road where traffic entering and exiting Morrisons builds up. There are only limited issues affecting the site accesses.

6.43 There appears to be a number of available properties which are currently being actively marketed.

6.44 Parts of the site are within an area at high risk of flooding.

Environmental Sustainability

6.45 The site is located outside of the centre of Bromsgrove, but within the urban area. It is wholly brownfield. The site benefits from good public transport links – the most northerly part of the site is only 0.7km from Bromsgrove Train Station. There are good pedestrian and cyclist linkages to the site, although there are no specifically designated cycle routes.

Strategic Planning

6.46 The site represents an important employment site within Bromsgrove. Whilst redevelopment of the site could in theory contribute to regeneration through the improvement of those poorer quality buildings with high class business accommodation, this is likely to be at the expense of existing firms.

6.47 The site’s ability to deliver economic development objectives are limited by restrictions on future expansion. However, the site remains an important employment site within the largest settlement within the District and therefore despite restrictions it is considered that the site has a good ability to deliver economic development objectives.

Role within the Employment Hierarchy

6.48 The site is classified as ‘Good’.

Worcester Road/Sanders Road

6.49 The Worcester Road/ Sanders Road site is located in Bromsgrove on the edge of the town centre. It is a mixed industrial estate with a variety of occupiers. One small industrial unit was being actively marketed at the time of the study. There is also a short row of residential properties within the site. The site is allocated for employment use under Policy E2 of the Bromsgrove District Local Plan.

Market Attractiveness

6.50 The existing portfolio on the site ranges in quality, whilst some are good quality (i.e. the units on Sanders Road), the overall score is reduced by some poorer quality buildings around Factory Lane. The open storage nature of some of the occupiers on the site does not assist in enhancing the quality of the site. At the time of the original site visit, the site was exposed to some noise which could affect the amenity of the immediate environment.

6.51 There are some residential properties close to the site which could be adversely affected by the employment uses in the vicinity and thus are considered to be sensitive uses.

6.52 The site has good visibility from Worcester Road and is within walking distance (0.2km) from Bromsgrove Town Centre. In the context of road links the site is 0.4km from the A448, 3.3km from Junction 1 of the M42 and 6.2km from Junction 5 of the M5. The quality of road access is adequate but at the time of the site visit, Worcester Road was congested and turning right out of the site was very difficult.

6.53 There appears to be no recent planning applications on the site other than one in 2007 for conversion of one of the B2 units into a D1 use. It appears that part of the site is within an area which has a high risk of flooding.

Environmental Sustainability

6.54 The site is considered to be within a sustainable location. The site is on the edge of Bromsgrove Town Centre, and therefore it occupies a central location in sequential terms. The site is wholly brownfield in nature. Whilst the site is 2.2km from Bromsgrove train station, it is adjacent to the bus routes that run along Worcester Road and Bromsgrove bus station is only 0.6km from the site. There are good quality pedestrian links to the site although no specific cycle provision.

Strategic Planning

6.55 Redevelopment of poorer quality parts of the site (i.e. around Factory Lane) could improve the environmental and visual quality, providing that any redevelopment of the site respects and takes into account Sanders Park which is an identified area of open space adjacent to the site. There is also little cohesion between the newer units off Sanders Road and the older, poorer quality units and areas of open storage off Factory Lane. Notwithstanding this issue, the site in its current form does provide for a variety of units on the edge of the town centre and is very much in active use. Contributing to existing employment provision close to the town centre.

Role within the Employment Hierarchy

6.56 The site is classified as ‘Good’.

Sugarbrook Mill

6.57 This is a small site located on Buntsford Hill in Bromsgrove. The site is comprised of established industrial-type occupiers including Bromsgrove Body Repair, W&G Metalwork Ltd, and TtP Service and Performance. The site is within an area allocated for employment uses within the Bromsgrove District Local Plan.

Market Attractiveness

6.58 The quality of the existing buildings are poor to moderate, with some parking provision along the front of the site and further provision down the north-western edge. The existing buildings with established uses are found towards the front of the site facing Buntsford Hill, whilst new build has taken place towards the rear of the site. The site is located within a pleasant environment which is unlikely to significantly limit the attractiveness of the site for most users. At the time of the site visit the site did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors.

6.59 The site is close to sewage works, which could potentially be considered to be a bad neighbour use. There are three residential properties close to the site on the opposite side of Buntsford Hill which could form potentially sensitive uses.

6.60 The site has good visibility from Buntsford Hill and is relatively close to local services and facilities. In the context of road links the site is 600m from the A38 and is 5.8km from Junction 1 of the M42 and 6km from Junction 5 of the M5. The quality of the local road access is good and there appears to be only minimal visibility constraints affecting access to and from the site.

6.61 The original planning application on the site dates back to 1998. There appears to be no active marketing on the site but development was under construction at the time of the site visit. The site benefits from an extant planning permission, for which development was underway at the time of the site visit.

6.62 There appears to be no environmental or known development requirements applying to the site. There are however some physical site constraints, predominantly due to the shape of the site which is relatively narrow and tapers towards the rear. The site is also constrained by the single point of access from which access to the rear of the site can be obtained. Whilst contamination issues on the site are unlikely, part of the site is located within an area which has a medium risk of flooding.

Environmental Sustainability

6.63 The site is located outside of the centre of Bromsgrove but on the edge of the urban area. The site benefits from good public transport links, with the closest bus stop located 600m from the site, on the A38. Bromsgrove Railway Station is located 2.6km from the site. However, there are no existing footpaths or cycle links to the site.

6.64 There are no environmental designations within or adjacent to the site. However, the rear of the site is greenfield in nature and therefore there could be some ecological issues affecting the site which could be adversely affected by development.

Strategic Planning

6.65 Given that the site is part of a larger allocation for employment uses, it is considered that has some ability to contribute towards delivering economic objectives, but the size and nature of the Sugarbrook Mill limits the potential of this specific site

Role within the Employment Hierarchy

6.66 The site is classified as ‘Moderate’.

Bromsgrove Technology Park

6.67 Bromsgrove Technology Park is located on Aston Road in Bromsgrove and is nearly 10 ha in size. The site is designated as employment land and comprises a modern technology park. The first phase of Sapphire Court, which comprises 13 individual high quality business units in size from 1,402 to 5,378 sq ft, is now complete and being marketed – three of the units have been taken and agents report a good level of interest on the remaining units.

6.68 Office developments on the site are well let and include 'incubator' start-up affordable business units (Basepoint). There are however a number of vacancies in the Aston Court development, which is a courtyard development containing 15 office units around a central landscaped courtyard. Agents report that two of these office units are left (units 2 and 8) and that there has been some interest in these.

Market Attractiveness

6.69 The existing buildings are newly built and are of a high quality. There appears to be good provision of parking and circulation space in those parts of the site which have been developed. At the time of the site visit the site did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors, although potentially there could be some odour issue from the nearby sewage works, and some intermittent noise from the adjacent railway line.

6.70 The sewage works could potentially be a bad neighbour use and part of the site has been developed for residential properties which could represent a potentially sensitive use.

6.71 The site has good visibility from local roads. Furthermore, the site is close to the services and facilities of Bromsgrove. In the context of road links, the site is immediately adjacent to the A38 and approximately 4.2km from Junction 1 of the M42. Whilst the quality of the road access to the site is relatively good, the access to site is affected by congestion, particularly at the entrance to the site from the A38 at Sherwood Road where traffic entering and exiting Morrison's builds up. But overall there are only limited issues affecting the site access.

6.72 There have been a number of recent completions and development under construction (at the former Garrington Works / UEF site) although agents suggest that the site could be more actively marketed, including for design and build opportunities. Furthermore, the site owner(s) appear to be actively pursuing employment use on the site (apart from that area of the site which has been developed for residential use) and there is a further extant planning permission for the site.

6.73 Whilst the site is not within an area at risk from flooding, it is close to areas of flood risk.

Environmental Sustainability

6.74 The site is located outside of the centre of Bromsgrove, but within the urban area and is wholly brownfield. The site benefits from good public transport links – the most northerly part of the site is only 0.7km from Bromsgrove train station. There are good pedestrian linkages to the site, although there are no specifically designated cycle routes.

Strategic Planning

6.75 The site is viewed as being of strategic importance given its existing and potential future role within the Central Technology Belt. The site is a very important employment site within the largest settlement within the District and therefore it is considered that the site has a good ability to deliver economic development objectives.

Role within the Employment Hierarchy

6.76 The site is classified as 'Best'.

North

Cofton Hackett

6.77 The Cofton Hackett site (the Cofton Centre) is owned by St. Modwen. The Centre is advertising Design and Build opportunities and there have been a number of recent reported deals including the Philip Cornes Group Co Ltd (taking around 4,440 sq m of space) and Fleet Automotive Ltd, taking over 2,500 sq m. Extant planning permissions exist for the construction of two further units at the Centre.

6.78 The site is designated as employment land within the Bromsgrove District Local Plan. It is also included in the Longbridge Area Action Plan under Proposal EZ3 for uses within Class B1(b), (c) and B8.

Market Attractiveness

6.79 The existing buildings are modern and have been built to a high quality. There appears to be good parking, circulation and servicing space. The quality of the external environment is very good. There is a large area of parkland (Cofton Park) to the west of the site and the site is surrounded to the east and south by open countryside. The site access is directly opposite poor quality buildings which could impact on the attractiveness of the site.

6.80 At the time of the site visit, the site did not appear to be exposed to unreasonable levels of noise, dust or other amenity factors, although there was some intermittent noise from the adjacent railway line. Whilst there appears to be no bad neighbour uses, there are potentially sensitive uses to the north of the site in the form of residential properties.

6.81 The site has good visibility from Groveley Lane and is only 0.64km from the local shopping facilities of Cofton Hackett. In the context of road links the site is 1.93km from the A38 Bristol Road, 6.8km from Junction 4 of the M5 and 5.8km from Junction 2 of the M42. The quality of local road access is good and there appears to be no apparent visibility constraints affecting access to and from the site.

6.82 The site is being actively promoted for employment uses and the part of the site which is not yet developed benefits from planning permission for further industrial / warehouse development.

6.83 There appears to be no environmental or known development requirements applying to the site and the site appears to have no physical constraining features. There appears to be no contamination or flooding issues affecting the site.

Environmental Sustainability

6.84 Whilst the site is located out of centre, it is within the urban area and is wholly brownfield. The site benefits from good transport links with Longbridge Railway Station within walking distance (1.8km) and the closest bus stop 0.2km from the site. There are good pedestrian linkages to the site, with good quality footpath links although no specifically designated cycle routes.

6.85 There are no environmental designations immediately adjacent to the site, although there is a SSSI approximately 1 km south east of the site. Given that the majority of the site is now developed it is considered that further development will neither detract or enhance the townscape or additionally impact on environmental resources within the area.

Strategic Planning

6.86 Further development of the site for employment uses would be in line with its employment allocation within the Bromsgrove District Local Plan and also the Longbridge Area Action Plan, making a valuable contribution towards the employment component of the comprehensive regeneration of Longbridge. Therefore, development would contribute towards local regeneration strategies and economic development objectives for the area.

Role within the Employment Hierarchy

6.87 The site is classified as 'Good'.

The Avenue, Rubery

6.88 This site was once the Avesta Sheffield site however it is now an industrial estate of poor to moderate quality within a residential area. The site is an allocated employment site within the Bromsgrove District Local Plan. The site is surrounded by residential development.

Market Attractiveness

6.89 The quality / condition of the existing portfolio is poor to moderate. Parking provision on the site is insufficient, which was evidenced by a significant amount of on-street parking. The site is located within a residential area which may restrict the attractiveness of the site for certain users. At the time of the site visit the site did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors.

6.90 The site is surrounded by residential development on three sides, and designated open space on the fourth. Access to the site is provided through a residential area and therefore there are sensitive uses surrounding the site, although no bad neighbour uses.

6.91 The site has good visibility from The Avenue but this is a local road. The location of the site within a residential area does limit its visibility, although there is some signage which assisted in locating the site. The site has good access to local services and facilities, with the centre of Rubery approximately 400m from the site, although this would necessitate crossing the A38.

6.92 In the context of road links, the site is 1.4km from the A38 and 3.6km from Junction 4 of the M5. Given the residential nature of the location of the site, the quality of local road access could create potential issues, however there are likely to be only minimal visibility constraints affecting access to and from the site.

6.93 There appears to be no environmental or known abnormal development requirements applying to the site and it appears to have no constraining features other than its ability to grow beyond its current boundaries. Contamination issues are unlikely on the site and it is located within an area of low flood risk.

Environmental Sustainability

6.94 The site is located out of centre but is within the urban area of Rubery and is wholly brownfield in nature. The closest bus route is approximately 700m from the site and the closest railway station is Longbridge, which is 3.1 km from the site.

6.95 There are good quality footpaths available to the site which assists pedestrian access, however there is no specific provision for cyclists.

6.96 There are no environmental designations within or immediately adjacent to the site, although there is an area of designated open space adjacent to the site. Therefore, redevelopment of the site would improve the existing townscape without additionally impacting on environmental resources.

Strategic Planning

6.97 Redevelopment of areas of the site could improve the offer available to potential occupiers although this could be at the expense of existing businesses. Redevelopment of the site would improve the existing environmental quality but this would require significant investment. As such, and given the site's confined location within a residential area, it is unlikely that it could contribute significantly towards economic development objectives, beyond its existing local role in providing jobs.

Role within the Employment Hierarchy

6.98 The site is classified as 'Moderate'.

Rural East

Wythall Green Business Park

6.99 The Wythall Green Business Park a large site formerly occupied solely by Britannic. The site also consists of a sports pavilion, sports ground and parking areas. It has been assumed that the sports ground and adjacent area of landscaping will not be redeveloped for employment uses and they are therefore not included within the vacant area. The car park is also understood to be well used despite there being relatively few cars parked on it at the time of the site visit. The site is designated as employment land within the Bromsgrove District Local Plan.

Market Attractiveness

6.100 The quality of the existing portfolio is very good and the site benefits from modern and attractive buildings with a good level of circulation space and high quality landscaping. There is however an area of parking on the site which is of poor quality, and which is understood to suffer at times from flooding flooded. The external environment of the site is good, being set within an attractive rural area. Taking both of these into account it is likely that the site could be attractive for a number of users.

6.101 At the time of the site visit the site did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity constraints. The site does not appear to have any bad neighbour uses, although there is a cemetery, caravan park and golf course close to the site and a sports ground within the site which could be considered to be sensitive uses. The site has good visibility from Middle Lane and is approximately 1.1km from the local facilities of Wythall and 2.6km from the facilities at Hollywood. In the context of road accessibility, the site is 1km from the A435 and 3km from Junction 3 of the M42. The quality of the local road access is good and there appears to be no apparent visibility constraints with the site access.

6.102 The vacant part of the site has been available for a number of years and there is no apparent marketing of the site. The site is however the subject of an extant planning permission for office-led development which is a renewal of a previous permission which was not implemented. This indicates that the site owner is supportive of employment uses on the site but perhaps suggests that interest from potential occupiers / developers is more limited.

6.103 There appears to be no known abnormal development requirements applying to the site and the site has no formal environmental constraints or designations. However, there is a scheduled ancient monument approximately 200m west of the site.

Environmental Sustainability

6.104 The site is located outside of a defined urban area and is a mix of greenfield and brownfield. The site lies within 500m of a bus route, with the closest bus stop approximately 0.5km from the site. The closest railway station is Wythall, which is 2.4km from the site. There are some footpaths to the site although these are not continuous and are not on both sides of the road.

6.105 There are no environmental designations within or immediately adjacent to the site. However, development of the vacant part of the site will involved the development of greenfield land which is likely to have a detrimental affect on environmental resources in the location. Given the greenfield nature of part of the site, there could be ecological interests on the site which could be affected by development.

Strategic Planning

6.106 Whilst development of the remainder of the site could have a negative effect on existing environmental quality and other environmental objectives such as the loss of non-developed land, it could make a valuable contribution to meeting economic objectives including job creation. This potential benefit should be tempered however with the fact that the undeveloped part of the site has remained undeveloped for a number of years despite planning permission being in place.

Role with the Employment Hierarchy

6.107 The site is classified as ‘Good’.

Saxon and Harris Business Park (excluding the PolymerLatex Site)

6.108 The site is located on Hanbury Road in Stoke Prior. It is one of the largest employment sites in the District and is designated as employment land and is part allocated under Local Plan Policy BROM6 as land “reaffirmed for employment uses within Use Classes B1, B2 and B8”.

Market Attractiveness

6.109 Overall the quality of the existing portfolio is good, with buildings of good condition providing a good range of building type, size and tenure. There appears to be a good provision of circulation, parking and servicing areas. The quality of the external environment is also good and likely to be a positive factor to attracting occupiers.

6.110 The site does not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors. There are some residential dwellings adjacent to the site which could be considered to be a potentially sensitive use.

6.111 The site has good visibility from Hanbury Road and Westonhall Road. Whilst the site is close to residential development of Stoke Prior, there are limited other facilities in this location. In the context of road links, the site is 1.8km from the A38 and 5.7km from Junction 5 of the M5. The quality of local road access is good and there appears to be no issues associated with site access.

6.112 The Business Park appears a popular location and there is active marketing on the site for the available vacant units. The area has been actively developed over recent years with a number of completions recorded in the Council's employment land monitoring reports. There are also several remaining plots which benefit from extant planning permission.

6.113 There appears to be no known abnormal development requirements applying to the undeveloped part of the site and there are no environmental designations within or adjacent. The undeveloped part of the site is somewhat restricted due to its location between the canal and railway line. There could be the potential for minimal contamination on the site and there are some flooding issues affecting the parts of the site which are close to the canal.

Environmental Sustainability

6.114 The site is located outside of the defined urban area but is predominantly brownfield in nature. The site is within 500m of a bus stop although Bromsgrove Railway Station is 4.4km from the site. There are reasonable footpaths and cycle links (by road) to the site although there are no specifically designated cycle routes.

6.115 There are no environmental designations within or adjacent to the site, however the canal which runs through the site is a conservation area. There is a SSSI approximately 1km west of the site and a Registered Park and Garden approximately 2km south of the site. Further development on the site is unlikely to either enhance the area of have significant implications for environmental resources, although there could be some scope for ecological interests on that part of the site which is north of the canal.

Strategic Planning

6.116 It is considered that further development of the site is likely to have a neutral impact on local regeneration strategies for the area. Its current contribution towards economic objectives is significant given the large scale of the employment area although its future outward expansion (beyond the development of remaining plots) is constrained by the presence of the Green Belt.

Role in the Employment Hierarchy

6.117 The site is classified as 'Good'.

PolymerLatex

6.118 The Polymerlatex site is located on Westonhall Road Lane near to Stoke Prior and extends to approximately 9.5 ha. The site is vacant having previously been operated by Polymerlatex for the manufacturing of latex products. The site is within a designated employment area.

Market Attractiveness

6.119 The existing buildings on site appear to be of reasonable quality and condition. The majority of buildings on the site are bespoke and designed for the manufacturing process previously undertaken at the site, which will limit market attractiveness. The site appears to be occasionally exposed to some noise related to the Saxon and Harris Business Park and the railway line however this is not substantial. There are no sensitive uses adjacent to the site however there are residential properties nearby. There are also other employment uses located adjacent to the site.

6.120 The site has high visibility to a local road frontage. The site has reasonable access to services and facilities in Stoke Prior and Bromsgrove which are located approximately 0.5km and 4km respectively from the site. In terms of road links, the site is slightly detached from the strategic road network with the A38 being circa 3km from the site and the closest motorway junction (Junction 5 M5) also being circa 3km from the site. The existing access to the site is gained from Westonhall Road and has good visibility. The majority of the surrounding roads are capable of accommodating HGVs.

6.121 The Polymerlatex site was sold to the One Property Group in January 2012. The aspiration of the owner is to secure the site for residential / residential-led development.

6.122 There are no environmental designations although the site is known to be contaminated and would require appropriate remediation works prior to any redevelopment. The site is in an area of low flood risk.

Environmental Sustainability

6.123 The site is on the edge of a small village and is previously developed land in the majority. The site is located approximately 500m of a bus route however the nearest railway station is Bromsgrove which is approximately 5.5km from the site. There are pedestrian and cycle links to the site however there are no dedicated cycle lanes.

6.124 There are no environmental designations within or immediately adjacent to the site. The site is previously developed, vacant and the majority is industrial in appearance. The redevelopment of the site would provide a significant improvement to existing townscape quality whilst not additionally impacting on environmental resources.

Strategic Policy

6.125 The redevelopment of the site would contribute to local regeneration strategies through the reuse of a vacant brownfield site.

6.126 The site could have a good ability to deliver local economic development objectives although its accessibility and location restrict this to an extent.

Role in the Employment Hierarchy

6.127 The site is classified as ‘Moderate’.

Ravensbank Business Park

6.128 A large well occupied business park around 30ha in size with a small area within the site remaining undeveloped. The site is modern with good quality buildings and circulation space and appears to be popular given high occupancy levels. The site is within an area allocated for employment use under Policy E2 of the Adopted Bromsgrove District Local Plan. The site is of potential strategic significance, particularly if considered in the context of adjacent land to the east and south in Stratford upon Avon District which could be developed for employment use.

Market Attractiveness

6.129 The quality of the existing portfolio is very good, the buildings are modern and there appears to be sufficient circulation and servicing. The surrounding environment is also of a high quality and is likely to be attractive to potential occupiers given that the site is close to attractive countryside but also on the edge of employment land located within Redditch Borough. At the time of the site visit the site did not appear to be exposed to unreasonable levels of noise, smell, dust of other amenity factors.

6.130 The site has good visibility from Ravensbank Drive. The site has good access to local residential areas, however other facilities are closer in to Redditch and the town centre is approximately 4.5 km from the site. The site benefits from reasonable access to the A435 which is 1.3 km from the site from which access to Junction 3 of the M42 can be gained, 6.8km from the site. The quality of local road access is very good and there appear to be no visibility issues with either of the two site access points.

6.131 Planning permissions for Ravensbank Business Park date back to the 1990’s. There have been good levels of marketing on the site and recent completions. Vacancy levels appear very low.

6.132 There appears to be no environmental or known development requirements applying to the site and the site appears to have no physical constraining features. Contamination issues are unlikely on the site and there are no identified flooding issues.

Environmental Sustainability

6.133 The site is outside of centre but it is on the edge of the urban area of Redditch, although those parts of the site which are undeveloped are greenfield.

6.134 The site is located 5.7 km from Redditch Train Station but is immediately adjacent to bus services along Ravensbank Drive. There are reasonable footpath links to the site but no specific cycle routes.

6.135 There are no environmental designations immediately adjacent to the site, however the undeveloped part of the site is greenfield. Therefore redevelopment of this part of the site is likely to detract from the existing environmental quality and could impact on environmental resources.

Strategic Planning

6.136 Whilst development of the greenfield part of the site could impact adversely on environmental quality this would contribute to local economic strategies through provision of employment opportunities (including for the Redditch area) and the potential for existing businesses to expand or for new businesses to come into the area.

Role within the Employment Hierarchy

6.137 The site is classified as 'Good'

Other Sites (Unallocated Sites, ADRs and WYG areas)

Rural West

Wildmoor Farm

6.138 Wildmoor Farm is situated on Mill Lane in Fairfield. The site is a former farm and is now predominantly converted to employment use, secured through a series of planning permissions over time. Extant planning permission also exists for the creation of further B1 space at the site. In the Bromsgrove Local Plan the site is within designated Green Belt land.

Market Attractiveness

6.139 The quality of the existing portfolio is poor to moderate. The quality of the surrounding environment is very good and likely to be a positive factor to attracting occupiers. At the time of the site visit, the site did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors.

6.140 Whilst there appears to have no bad neighbour uses, there are some potentially sensitive uses in the form of residential properties. The site has good visibility from Mill Lane.

6.141 The closest services and facilities are those found within Catshill, the outskirts of which is approximately 1.2km from the site. In the context of road links, the site is 1.6km from the A491, 2km from the A38 and 1.8km from Junction 4 of the M5. The width of the local road access could potentially create some issues for larger vehicles. There are minimal constraints to the visibility at the site access.

6.142 There was no marketing evident on the site at the time of the site visit. The site owner is actively pursuing employment uses on the site, which is evidenced by recent employment floorspace completions and the extant permission.

6.143 There are some environmental constraints affecting the site. Whilst there are no formal environmental designations on or adjacent to the site, the site is within Green Belt and therefore development on the site is constrained. The site does not appear to have any physically constraining features. It is considered that there is only a limited potential for contamination on the site. The eastern edge of the site is potentially within an area at high risk of flooding.

Environmental Sustainability

6.144 The site is located completely outside of a defined urban area although it is wholly brownfield. The site has relatively poor public transport links, located more than 500m from a main bus route and the closest railway station is at Barnt Green, 7.4km from the site. Pedestrian and cyclist provision to the site is poor.

6.145 There are no environmental designations within or immediately adjacent to the site, although there is a scheduled ancient monument approximately 1km north west of the site. It is considered that redevelopment of the site is unlikely to detract nor enhance the townscape or additionally impact on the environmental resources in the area, save for potential Green Belt considerations.

Strategic Planning

6.146 It is considered that redevelopment of the site is likely to have a neutral impact on existing environmental and / or local regeneration and economic strategies for the area. Any redevelopment will need to be in accordance with Green Belt policy.

Role within the Employment Hierarchy

6.147 The site is classified as 'Moderate'.

Wassell Grove Business Park

6.148 This small site is fully developed with serviced offices in converted farm buildings. The main building is the Wassell Grove business centre which accommodates fully serviced offices. The site is within designated Green Belt.

Market Attractiveness

6.149 The quality of the existing portfolio on the site is very good. The buildings are converted farm buildings and appear to have been converted to a high standard. The quality of the external environment is also very good as the site is surrounded by countryside which is likely to be a positive factor in attracting occupiers. At the time of the site visit the site did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors.

6.150 There are some residential properties close to the site but given that the site is used for B1 office use it is considered that there are no issues with sensitive uses.

6.151 The site has good visibility from Wassell Grove Road and is 1.2km from the edge of Stourbridge. Stourbridge Town Centre is approximately 4.5 km from the site. In the context of road links the site is 1.4km from the A456 and 8.4km from Junction 3 of the M5. The local roads are rural in nature and could potentially create access issues. The site access itself is only subject to minimal visibility issues.

6.152 There appears to be no environmental or known adverse development requirements applying to the site. It is unlikely that there are any contamination issues affecting the site and the site is within an area of low flood risk.

Environmental Sustainability

6.153 The site is located outside of a defined urban area and is predominantly brownfield, although the undeveloped part of the site is greenfield. The site has relatively poor access to public transport, with the closest railway station 4.6km from the site in Stourbridge and the closest bus stop on the A456, 2km from the site. Provision for pedestrians and cyclists is also poor, with no footpaths or designated cycle links.

6.154 There are no environmental designations within or immediately adjacent to the site although there are a number of areas of ancient woodland within 0.5km. Furthermore, there is a registered park and garden and a scheduled ancient monument within 1.5km from the site. The site sits within open countryside. Further development (in the form infill and intensification) could detract from the existing environmental quality and could potentially be detrimental to environmental resources in this area.

Strategic Planning

6.155 It is considered that further development at the site could detract from existing environmental quality given that the site is located within open countryside. As such, the site's ability to deliver further economic objectives through expansion etc. is limited.

Role within the Employment Hierarchy

6.156 The site is classified as 'Moderate'.

Hagley ADR

6.157 The site is situated on Kidderminster Road (A456) and is an undeveloped greenfield site, which is heavily wooded around the periphery. The site extends to approximately 9 ha. The site is allocated as an Area of Development Restraint within the Proposal HAG2B. The site is also adjacent to another ADR (HAG2) and the Local Plan notes that it "would provide the opportunity for this land to be planned in a comprehensive manner and increase the potential for mixed use development". Together the sites extend to circa 13.6 ha.

Market Attractiveness

6.158 The quality of the external environment is very good and at the time of the site visit the site did not appear to be exposed to unreasonable levels of noise, smell, dust or amenity factors, although there was some noise from the traffic on the adjacent A456 and A491.

6.159 There are no bad neighbour uses adjacent to the site although there are residential properties nearby.

6.160 The site itself has good visibility from both the A456 and A491, however the site is heavily wooded around the edges and therefore the centre of the site is highly obscured. The site is within walking distance (700m) of the shopping area of Hagley and its relevant services and facilities. In the context of road links, the site is immediately adjacent to both the A456 and A491 and is 8.8km from Junction 3 of the M5. The quality of local roads is good and there is the potential to create an access with good visibility.

6.161 The site has been designated as an ADR several years. A comprehensive proposal for both HAG2 and HAG2B is being advanced which currently proposes a predominantly residential development with an element of employment provision adjacent to the A491.

6.162 The site is constrained by some environmental and physical factors although given the scale of the overall site, these will unlikely unduly restrict development. Part of the site slopes quite significantly from north to south and furthermore the presence of the band of trees around much of the site could limit visibility.

6.163 No ground condition or contamination issues are expected on the site and the site is within an area at low risk of flooding.

Environmental Sustainability

6.164 The site is outside the urban area and is wholly greenfield in nature. The closest bus stop to the site is 500m, with the nearest railway station (Hagley) 1km from the site. There are currently poor cycle and pedestrian links to the site, compounded by the need to cross both the A456 and the A491.

6.165 There are no environmental designations on the site but within 2km from the site there is a Registered Park and Garden (Hagley Park), and a scheduled ancient monument. As the site is greenfield and bordered by an area of woodland there may be ecological issues on the site. Therefore it is considered that should the site be developed and particularly if the band of woodland along the edge of the site is removed then the development would detract from the existing environmental quality and would be detrimental to the environmental resources of the area.

Strategic Planning

6.166 It is considered that given the undeveloped, greenfield nature of the site development of the site would not significantly contribute to the achievement of regeneration objectives.

6.167 It is considered that the site has limited ability to deliver local economic development objectives, in the context on the emerging proposals for the site which are predominantly residential.

Role within the Employment Hierarchy

6.168 The site is classified as ‘Good’. Should the entirety or a significant proportion of the site be advanced for employment development, then the site will be able to provide a more significant contribution to the future supply of employment land. Any mixed use development of the site should include an appropriate element of employment as part of the overall mix.

Bumble Hole Farm

6.169 The Bumble Hole Farm (or Bumble Hole Foods) site is located on Rocky Lane near to Bourneheath and Catshill. The site extends to approximately 4.8 ha. The site has been recently developed further with the addition of new buildings and an access. The site is within designated Green Belt.

Market Attractiveness

6.170 The existing buildings on site appear to be of reasonable quality and condition. The quality of the external environment is good being rural in nature. The proximity of the site to the M5 means that it is exposed to traffic noise. There are a few residential properties adjacent to the site.

6.171 The site has poor road frontage visibility with only the entrance to the site being visible from Rocky Lane. The site has reasonable access to services and facilities in Catshill and Bromsgrove which are located approximately 0.5km and 2.5km respectively from the site. In terms of road links, the site is slightly detached from the strategic road network with the A38 being circa 2.3km from the site and the closest motorway junction (Junction 1 M42) being circa 3km from the site. The existing access to the site is gained from Rocky Lane. The surrounding roads used to access the site are of a reasonable specification to accommodate HGVs. The existing site access has good visibility.

6.172 It is unknown whether the site is in single or multiple ownerships however we are aware that the aspiration of the owner is to further expand the current business at the site.

6.173 There are no environmental constraints or abnormal development requirements that have been identified although the site is within the Green Belt where development is significantly restricted. The size of the site would enable a reasonable amount of employment provision to be delivered. The shape (elongated) and the topography (undulating) however places some restrictions on the sites development. No poor ground conditions or contamination is expected at the site. The site is in an area of low flood risk.

Environmental Sustainability

6.174 The site is on the edge of a small village and is previously developed land. The site is located approximately 500m of a bus route however the nearest railway station is Bromsgrove which is approximately 5km from the site. There are no pedestrian and cycle links to the site.

6.175 There are no environmental designations within or immediately adjacent to the site. The site is previously developed and the buildings are of a reasonable quality therefore its development would neither detract nor enhance the townscape/environmental quality or impact further on the environmental resources in the area.

Strategic Policy

6.176 The site has limited scope to contribute to local regeneration strategies through the reuse of brownfield land however it is not vacant and derelict. If vacant and derelict then the redevelopment of the site would also be in conflict with the focus on regenerating the urban areas and Bromsgrove town centre specifically.

6.177 The site has a limited ability to deliver local economic development objectives other than through the provision of local jobs.

Role within the Employment Hierarchy

6.178 The site is classified as 'Moderate'.

Bromsgrove

Bromsgrove ADR (BROM 5A, 5B & 5D) – Land off Perryfields Road

6.179 The overall site extends to circa 90 ha and is currently undeveloped land in agricultural use. The site is designated under the Local Plan Policy BROM5 as an Area of Development Restraint. The Policy notes that the importance of this site is *"to ensure a balanced portfolio of employment land within Bromsgrove is essential…this land does offer the potential to be used for some employment purposes"*.

Market Attractiveness

6.180 The quality of the external environment is very good, with the site's location adjacent to countryside and on the edge of Bromsgrove. There is a degree of vehicular noise emanating from the M5 motorway. No other amenity impacts have been identified.

6.181 There appears to be no bad neighbour uses adjoining the site, but the site is directly adjacent to an existing residential area (along southern boundary), the amenity of which would need to be taken into consideration.

6.182 The site has good visibility from Perryfields Road and the site is only 1.6km from Bromsgrove Town Centre, with some local facilities closer to the site. The site is 2.9km from the A38, 3.4km from Junction 1 of the M42 and 5.1km from Junction 4 of the M5. The quality of the local road access is relatively good and there appears to be no apparent visibility constraints affecting access to the site.

6.183 The site has been available for a number of years. The owners of the land (Worcestershire County Council and Taylor Wimpey) are proposing a sustainable urban extension at the site, which will include an element of employment provision (B1 and B2 uses). The exact amount of employment land is undefined at present however approximately 5ha is proposed.

6.184 There appears to be no environmental or known development constraints applying to the site, although the site may constitute high quality Grade 1 or 2 agricultural land. The site appears to have no physical constraining features. The topography of the site is relatively flat, with a gentle slope towards the north-western edge. It is unlikely that there are contamination or ground condition issues affecting the site. A small part of the site in the north-western corner of the site (northern edge of BROM5B specifically) is within an area which is at high risk of flooding, however the vast majority of the site is at low risk therefore this would not constrain the wider development of this site.

Environmental Sustainability

6.185 Whilst the site is located out of centre, it is on the edge of the urban area of Bromsgrove. The site is entirely greenfield.

6.186 The site benefits from good links to local bus stops and is circa 1.9km from Bromsgrove Bus Station. However, the site is 3.7km from Bromsgrove Railway Station. Pedestrian and cycle links to the site are present however provision is limited and not continuous at present.

6.187 There are no environmental designations on or immediately adjacent to the site. However, the site is greenfield and is very open in nature. Therefore any development on the site would detract from the existing environmental quality and would be detrimental to the environmental resources in this location. There may also be ecological issues affecting the site.

Strategic Planning

6.188 The site has been identified in the Bromsgrove District Local Plan to provide employment uses which are required to assist in rebalancing the imbalance of workplaces to residence within the town, and therefore it is considered that the site could contribute towards local regeneration strategies for the area.

6.189 The site provides the opportunity to deliver a number of the local economic development objectives including through the provision of jobs.

Role within the Employment Hierarchy

6.190 The site is classified as 'Good'.

Bromsgrove Town Centre

6.191 Bromsgrove Town Centre site contains a range of town centre uses with retail use (use class A1) being predominant with some office uses generally above the ground floor level. An Area Action Plan (AAP) for the Town Centre is being prepared by the Council which identifies a number of development opportunities. Of the sites proposed there are 5 specific sites where the provision of employment uses, particularly offices, is proposed/suggested. These are:

- TC8 – Historic Market Site – A retail-led mixed-use development is proposed within the AAP which could include an element of office provision;
- TC12 – School Drive – A comprehensive redevelopment of the site is proposed in the AAP which could include an element of office provision;
- TC13 – Windsor Street – A retail-led redevelopment of this site is proposed in the AAP. The provision of office space on the upper floors is encouraged;
- TC15 – Birmingham Road / Stourbridge Junction – A scheme is being advanced which is retail-led but includes the provision of a commercial office suite along the Stourbridge Road frontage; and

- TC16 – Mill Lane – Redevelopment opportunity within Primary Shopping Area – Would be predominantly retail but could include an element of office provision on the upper floors.

6.192 In addition to the above, site TC17 (Worcester Road / Saunders Road Employment Area) is an existing employment site. This site is assessed separately within this section of the report.

Market Attractiveness

6.193 The overall quality of the existing portfolio is reasonable, with a wide variety of buildings. The Council is also due to implement a public realm improvement scheme which will significantly improve the environmental quality of the town centre and hence the attractiveness to potential investors and occupiers. As expected, the area is predominantly retail, although office use is present in some buildings, particularly at the first and second floors. However, the office use in this area appears to be predominantly Use Class A2 in nature.

6.194 There appear to be no obvious bad neighbour uses within the town centre. In terms of sensitive uses, there are some residential properties within and immediately adjacent to the town centre although this would not conflict with office type employment provision.

6.195 The sites have good visibility from a number of local roads, most predominantly the A448. A good range of services and facilities are within and adjacent to the town centre. In the context of road links, the site is adjacent to the A448, 0.7km from the A38 and approximately 2.5km from Junction 1 of the M42. The quality of the surrounding roads is good, but some roads do suffer from congestion, particularly at peak periods. There appears to be no significant issues affecting access to the sites.

6.196 In terms of the development opportunities identified in the AAP, these are at differing stages in their formulation however the Council is proactively working with land owners and interested parties to encourage the delivery of them with an element of employment provision.

6.197 With regard to environmental constraints affecting these sites, the town centre includes a conservation area and there are a number of listed buildings. Some of the town centre is within an area at risk from flooding.

Environmental Sustainability

6.198 The sites are all located within the town centre and are previously developed. The town centre contains a bus station providing links to numerous destinations. Bromsgrove railway station 1.6km from the site. There are good pedestrian and cyclist linkages to the sites. Overall the sites are considered to be a highly sustainable and sequentially preferable location for employment provision, particularly offices.

Strategic Planning

6.199 The provision of further employment development on the opportunity sites identified in the AAP and on unidentified sites would assist in delivering the Council's specific regeneration objective of regenerating Bromsgrove town centre.

6.200 The provision of additional employment provision within the town centre has the potential to provide a reasonable contribution towards local economic development objectives.

Role within the Employment Hierarchy

6.201 The town centre sites are classified as 'Good' and as such, an appropriate element of employment development as part of mixed use proposals, notably offices, should sought to be secured as part of their redevelopment.

Rural East

Weights Farm

6.202 The site is a former farm and is now completely in employment use (Weights Farm Business Park). Existing buildings are generally of poor to moderate quality and include a range of commercial / industrial occupiers. The site is within the Green Belt land designation.

Market Attractiveness

6.203 The quality of the existing portfolio is poor to moderate. There is some parking space on the site although most of this is of relatively poor quality. The quality of the external environment is very good, surrounded by countryside but still close to the edge of Redditch. At the time of the site visit the site did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors.

6.204 There are a couple of residential properties on Weights Lane which could be considered to be potentially sensitive uses, although the site has no bad neighbour uses.

6.205 The site has good visibility from Weights Lane but is more than 1km away from local facilities. In the context of road links, the A441 is 0.3km from the site and Junction 2 of the M42 is 5.4km from the site. The quality of the road access is relatively poor. Whilst the width of the local roads is likely to be sufficient, Weights Lane itself was of very poor quality with significant potholes that could create issues for smaller vehicles. The quality of the site access itself is reasonable although it is constrained by a bridge as Weights Lane passes under the railway line.

6.206 Applications on the site date back to the late 1990s. There was no apparent marketing on the site at the time of the site visit and whilst the owner(s) of the site appear to be continuing with employment uses on the site, there is no extant planning permission or recent completions.

6.207 Further development or redevelopment is constrained by the Green Belt designation affecting the site. The site is also constrained to the north by the presence of the railway line. The single access to the site is also constrained by the presence of the railway bridge.

6.208 There could be some contamination on the site although it is unlikely that it is significant. There appears to be no flooding issues affecting the site.

Environmental Sustainability

6.209 The site is located completely outside of a defined urban area but is nearly completely brownfield. Whilst there does appear to be a bus stop immediately adjacent to the site it is apparent that this is not served well by bus services, therefore it is considered that the site is located within 500m of a main bus route, on the A441. The closest railway station is Redditch, some 2.5km from the site. Pedestrian linkages to the site are poor and there is no specific provision for cyclists.

6.210 There are no environmental designations within or immediately adjacent to the site. Given the site's Green Belt location, the maintenance of openness in the area is paramount. However, it is considered that there is scope to improve the environment of the site potentially without impacting on the openness.

Strategic Planning

6.211 It is considered that there is scope to make improvements to environmental quality on the site, although it is unlikely that the site could contribute towards regeneration strategies or further contribute towards economic objectives beyond its current role as a local employment provider.

Role within the Employment Hierarchy

6.212 The site is classified as 'Moderate'.

Robin Hill Farm

6.213 Robin Hill Farm is located on Rowney Green Lane, Alvechurch. The site is around a hectare in size and is currently operational as a farm with previously completed change of use. The site is within designated Green Belt.

Market Attractiveness

6.214 The quality of the existing portfolio is poor to moderate, consisting of large agricultural type buildings. The quality of the external environment is very good. At the time of the site visit, the site did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors.

6.215 Whilst there are some residential uses close to the site, these are not adjacent and it is unlikely there will be adverse affect on these properties, other than noise from traffic.

6.216 The site has relatively good visibility from Rowney Green Lane. In the context of road links, the site is 1.6km from the A441. Whilst Junction 2 of the M42 is physically only 1.3km from the site, to actually access the junction you would need to travel over 6km. Alvechurch, with its local services and facilities, is 2.8km from the site.

6.217 Local road access to the site is relatively narrow and could potentially create issues for HGV access.

6.218 The site is constrained by the Green Belt. The site is relatively small, only approximately 1 hectare in size and further development on the site could potentially be constrained by physical features. There is likely to only be minimal contamination potential on the site and the site is not within an area at risk from flooding.

Environmental Sustainability

6.219 The site is located completely outside the urban area and is predominantly greenfield, with agricultural uses. Access to public transport is relatively poor, with the closest bus stop 700m from the site and the closest railway station 3.5km from the site in Alvechurch. Pedestrian links to the site are poor and there is no specific cyclist provision.

6.220 There are no environmental designations on or immediately adjacent to the site. There is a scheduled ancient monument just under 1km west of the site. However, it is considered that further development on the site is likely to detract from the existing environmental quality unless it involves development which reduces the mass of buildings currently on the site.

Strategic Planning

6.221 It is likely that further development on the site would detract from the existing environmental quality of the area, unless any new development is of a smaller mass / form than existing.

6.222 It is considered that the site has a limited ability to deliver economic development objectives, other than potentially contributing towards farm diversification.

Role in the Employment Hierarchy

6.223 The site is classified as ‘Poor’.

High House Farm

6.224 The site is located on Alcester Road and is less than a hectare in size. Access to the site is significantly restricted. The site is a farm holding which appears to be in employment use. The site is within designated Green Belt land.

Market Attractiveness

6.225 The quality of the existing portfolio was difficult to assess as the site could not be accessed. From aerial photography it appears that the buildings are of reasonable quality and there appears to be an adequate provision of parking, circulation and servicing space. Due to the location of the site it is significantly affected by noise from the dual carriageway.

6.226 The site is surrounded by open countryside and has no bad neighbour or potentially sensitive uses. The site has relatively good visibility to the A435. The site is more than 2km from local services. In the context of road links, the site is located immediately adjacent to the A435, although as this is a dual carriageway, only left turns out of the site are possible. The quality of the local road access is also very good.

6.227 Whilst the site access appears to have no visibility constraints, there is no slip road to / from the site and therefore there could be potential issues, particularly for larger, slower vehicles trying to leave the site. There are no identified flooding issues on the site.

Environmental Sustainability

6.228 The site is located completely outside of a defined urban area, within the Green Belt but appears to be wholly brownfield. Whilst the site is close to a bus route, access to this is limited due to the site's location immediately adjacent to a dual carriageway. The closest station is at Wood End, approximately 3.7km from the site. Pedestrian access to the site is poor and there is no specific provision for cyclists.

6.229 The site is well screened and therefore relatively low-rise development on the site is unlikely to impact significantly on environmental resources in the area, although more significant development would have impacts on the Green Belt.

Strategic Planning

6.230 The site currently consists of buildings and a significant area of hardstanding, therefore whilst development could improve the existing quality of the site to a limited extent by the provision of landscaping, the screening of the site would limit the effectiveness of this. It is considered that development is unlikely to contribute to regeneration strategies for the area.

6.231 Given the relatively small size of the site it has the potential to contribute little to the delivery of economic development objectives.

Role within the Employment Hierarchy

6.232 The site is classified as 'Moderate'.

Oakland International

6.233 The Oakland International site is located on Seafield Lane near to Beoley and extends to approximately 26 ha. The site comprises previously developed and greenfield land. The existing premises of Oakland International cover approximately 3.5 ha whilst the remainder of the site (22.5 ha) comprises of agricultural fields. The site is within the Green Belt.

Market Attractiveness

6.234 The existing buildings on site are of a reasonable quality and condition. The quality of the external environment is very good being a pleasant countryside location. The proximity of the site to the A435 means that it is exposed to traffic noise.

6.235 The site is located in the open countryside therefore there are no adjacent properties around the majority of the site. There is however another business (Seafield Pedigrees) on the opposite side of Seafield Road, and there is a public house, a petrol station / garage and a few residential properties next to the southern boundary of the site, which are clustered around a junction to the A435.

6.236 The existing Oakland International premises has poor road frontage visibility however approximately half of the eastern boundary of the wider site is highly visible from the A435. The site has limited access to services and facilities due to its location in the open countryside however Beoley and Redditch are reasonably close, at approximately 1.5km and 4km respectively. In terms of road links, the site is adjacent (in part) to the A435, 2.2km from Junction 3 of the M42. The existing access to the Oakland International premises is gained via a rural lane which has been slightly widened and has had a series of passing places created to enable HGVs to access the Oakland International premises. The surrounding roads currently used to access the site are therefore not ideal. The existing site accesses have slightly restricted visibility.

6.237 The site owner is promoting the site for employment use through the local plan process therefore they are actively pursuing employment uses on the site, including an aspiration to create a food science and research business park with related facilities. Access to the site has the potential to be improved as part of the proposed development of the wider site.

6.238 Whilst there are no environmental designations on the site, it is within the Green Belt where development is significantly restricted. There are no environmental constraints or abnormal development requirements that have been identified. The size, shape and topography of the site mean that it has physical capacity to accommodate a large level of employment provision with ease. No poor ground conditions or contamination is expected at the site. The site is in an area of low flood risk.

Environmental Sustainability

6.239 The site is within the open countryside and is part previously developed land and part greenfield land. The site is located within 500m of two bus routes, one along Beoley Lane (B4101) and the other along the A435. The closest railway station is 2.2km from the site at Wood End. There are limited pedestrian and reasonable cycle links to the site and there are no specifically designated cycle routes.

6.240 The majority of the site is greenfield and is in the open countryside therefore its development would significantly detract from the existing environmental quality and would conflict with Green Belt policies.

Strategic Policy

6.241 The site development would not significantly contribute to local regeneration strategies through the reuse of brownfield land and regeneration of a vacant, underused site.

6.242 The development of the site for employment could provide a good contribution to the achievement of local economic development objectives. The provision of a Food Science Park could have significant economic benefits although it is understood that the business case has not been fully tested at this stage.

Role within the Employment Hierarchy

6.243 The site is classified as ‘Moderate’.

Becketts Farm

6.244 The Beckett Farm site is located on Alcester Road (A435) near to Wythall on the edge of the Birmingham urban area. The site extends to approximately 2.4 ha. The site contains a number of buildings accommodating businesses, retail premises and a restaurant. The site is within the Green Belt.

Market Attractiveness

6.245 The existing buildings on site are of a reasonable quality and condition. The quality of the external environment is good being urban fringe/semi rural. The proximity of the site to the A435 means that it is exposed to traffic noise.

6.246 There are no adjacent properties around the majority of the site. There is however a museum and residential properties circa 500m to the west of the site and to the north east (less than 200m) is Wythall village where there is a school, church and a number of residential properties.

6.247 The site has excellent road frontage visibility along the A435 (Alcester Road). The site has reasonable access to services and facilities due to its location urban fringe/semi rural location. Wythall is less than 200m from the site and Drakes Cross and Hollywood are within 2km. In terms of road links, the site is adjacent to the A435 and 1.8km from Junction 3 of the M42. The existing access to the site is gained from the A435 and Middle Lane. The surrounding roads used to access the site are of a suitable size to accommodate HGVs and heavy volumes of traffic (A435 is a dual-carriageway). The existing site accesses have good visibility.

6.248 It is unknown whether the site is in single or multiple ownerships and we are unaware of the aspirations of the owner/s.

6.249 Whilst there are no environmental designations on the site, it is within the Green Belt where development is significantly restricted. There are no environmental constraints or abnormal development requirements that have been identified. The size, shape and topography of the site only restrict the quantity of provision. No poor ground conditions or contamination is expected at the site. The site is in an area of low flood risk.

Environmental Sustainability

6.250 The site is on the edge of the village and is previously developed land. The site is located within 500m of a bus route and Wythall railway station is 1.6km from the site. There are reasonable pedestrian and cycle links to the site although there are no specifically designated cycle routes.

6.251 There are no environmental designations within or immediately adjacent to the site. The site is previously developed and the buildings are of a reasonable quality therefore its development would neither detract nor enhance the townscape/environmental quality or impact further on the environmental resources in the area.

Strategic Policy

6.252 The site has limited scope to contribute to local regeneration strategies and to deliver local economic development objectives other than through the retention / provision of local jobs.

Role within the Employment Hierarchy

6.253 The site is classified as ‘Moderate’.

Ravensbank ADR (BE3)

6.254 This site is greenfield in nature constituting open land, which appears to be in current agricultural use. The site is highly screened. The site is designated as an Area of Development Restraint within the Bromsgrove Local Plan.

Market Attractiveness

6.255 The quality of the external environment is very good, with a mix of modern employment premises and open countryside. At the time of the site visit the site did not appear to be unreasonable levels of noise, smell, dust or other amenity factors, although there was some noise from the adjacent A4023 dual carriageway. There are no bad neighbour uses or potentially sensitive uses adjacent to the site.

6.256 The site potentially is very visible from the A4023 and the end of Hedera Road, although at present the heavy screening of the site by trees significantly restricts this visibility. The site is located 1-2km from local facilities within the Redditch urban area. In the context of road links the site is immediately adjacent to the A4023, 0.6km from the A435 and 5.9km from Junction 3 of the M42. However, due to the undeveloped nature of the site there is currently no access to the site from the A4023. Should the site be developed it may be accessed off Hedera Road. The quality of the local roads is good, although there is no access to the site itself at present.

6.257 The site has been allocated as an ADR for a number of years. There was no evidence of marketing or recent completions on the site. The site is within unknown ownership and it is apparent that there are no extant planning permissions on the site for employment development, although this fact is not surprising given its current designation as an ADR.

6.258 There appears to be no environmental constraints and abnormal development requirements, although the site could potentially be Grade 3 agricultural land. The site appears to have no physically constraining features. It is unlikely that the site is affected by contamination and there are no identified flooding issues with the site.

Environmental Sustainability

6.259 The site is outside of the urban area, on the edge of Redditch and is wholly greenfield. The site is 5.5km from Redditch Railway Station. Whilst the site is adjacent to the bus route along the A4023, it is considered that this is currently inaccessible. Therefore, considering access to bus routes from Hedera Road, the site is approximately 300m walk from the closest bus route. There is very poor walking and cycling provision to the site.

6.260 There are no environmental designations within or immediately adjacent to the site although there is a SSSI approximately 0.4km south west of the site. Notwithstanding this however, the site is greenfield and could have ecological interests, particularly considering the adjacent area of woodland. Therefore it is considered that development would detract from the existing environmental quality and could be detrimental to the environmental resources in the area.

Strategic Planning

6.261 The site is greenfield and it is considered that it is likely that the development of the site would detract from the existing environmental quality.

6.262 It is considered that the site has a good ability to deliver economic development objectives. It has been identified as a suitable site to meet the employment needs of Redditch.

Role within the Employment Hierarchy

6.263 The site is classified as ‘Good’.

White Young Green Area 4

6.264 The site is approximately 370 ha and is within designated Green Belt land.

Market Attractiveness

6.265 The quality of the external environment is very good and likely to be a positive factor in attracting businesses. At the time of the site visit the area did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors.

6.266 The majority of the site is in agricultural use. There are a number of existing buildings within the site. These appear to be within agricultural or residential use and there are also some sites accommodating employment uses within the site. These uses could be considered to be potentially sensitive, and also possibly ‘bad neighbour’ depending on the nature of the employment uses.

6.267 The site has some visibility to local roads. Whilst some areas of the site benefit from being closer to local services and facilities, other parts of the site do not, which results in the lower overall score for this appraisal criteria. At its closest point the site is adjacent to the A448 and 7.8km from Junction 1 of the M42.

6.268 The site is likely to be within multiple ownership and the owner aspirations are unknown.

6.269 Whilst there appear to be no physical constraining features on the site, the site is Green Belt which is likely to restrict future development in this location. The site includes an area of semi-natural ancient woodland. The greenfield nature of the majority of the site is also likely to have implications for future development as it is highly likely that there are be ecology interests affecting the site. Contamination on the whole is unlikely. There are also flooding issues affecting the site.

Environmental Sustainability

6.270 The site is located completely outside of a defined urban area and is predominantly greenfield. The site as a whole does not benefit from good public transport links although parts of the site are closer to bus routes and those areas of the site which are closest to railway stations are 2.6km from Redditch Railway Station. Generally there is relatively poor provision for pedestrians and cyclists.

6.271 It is considered that development of the site would significantly detract from the existing environmental quality and would be detrimental to environmental resources in the area.

Strategic Planning

6.272 Development of the site would detract from existing environmental quality, in particular by impacting on attractive open countryside within the Green Belt.

6.273 The site has a good ability to deliver regional / local economic development objectives, particularly relating to provision of employment land to meet the needs of Redditch.

White Young Green Area 5

6.274 The site is approximately 185 ha and is within designated Green Belt land.

Market Attractiveness

6.275 The quality of the external environment is very good and likely to be a positive factor in attracting businesses. At the time of the site visit the area did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors.

6.276 The majority of the site is in agricultural use. Existing buildings within the site area generally relate to farms. Residential development borders the site along the south-eastern edge, which could constitute a potentially sensitive use. To the north west of the site is the Hewell Grange Young Offenders Institution, Brockhill Remand Centre and Blakehurst Prison. These could potentially be considered to be 'bad neighbour' uses.

6.277 The site has visibility to local roads and some visibility to the A448. Whilst some areas of the site benefit from being closer to local services and facilities, other parts of the site do not, which results in the lower overall score for this appraisal criteria. At its closest point the site is adjacent to the A448 and 5.7km from Junction 1 of the M42.

6.278 The site is likely to be within multiple ownership and the owner aspirations are unknown.

6.279 Whilst there are no physical constraining features on the site, there are a number of designations which are likely to restrict future development in this location. The site is Green Belt, part of the site is a Registered Park and Garden and part of the site is a SSSI. Furthermore initial indications show that the site is Grade 3 agricultural land and there is an area of ancient replanted woodland on the site. The greenfield nature of the majority of the site is also likely to have implications for future development as it is highly likely that there are be ecology interests affecting the site. Contamination on the whole is unlikely. Part of the site is affected by flooding issues.

Environmental Sustainability

6.280 The site is located completely outside of a defined urban area and is predominantly greenfield. The site as a whole does not benefit from good public transport links although parts of the site are close to bus routes and those areas of the site which are closest to railway stations are 1.3km from Redditch Railway Station. Generally there is relatively poor provision for pedestrians and cyclists.

6.281 It is considered that development of the site would significantly detract from the existing environmental quality and would be detrimental to environmental resources in the area.

Strategic Planning

6.282 Development of the site would detract from existing environmental quality, in particular by impacting on attractive open countryside within the Green Belt.

6.283 The site has a good ability to deliver regional / local economic development objectives, particularly relating to provision of employment land to meet the needs of Redditch.

White Young Green Area 6

6.284 The site is approximately 55 ha and is within the designated Green Belt.

Market Attractiveness

6.285 The quality of the external environment is very good and likely to be a positive factor in attracting businesses. At the time of the site visit the area did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors.

6.286 The majority of the site is in agricultural use. There is a very limited number of existing buildings within the site and these appear to be within agricultural or residential use. There is some employment uses just outside the site at its easterly and westerly extremes. There is no significant ‘bad neighbour’ or potentially sensitive uses close to the site.

6.287 The site has some visibility to local roads. Whilst some areas of the site benefit from being closer to local services and facilities, other parts of the site do not, which results in the lower overall score for this appraisal criteria. At its closest point the site is 0.4km to the A441 and 5.3km from Junction 2 of the M42.

6.288 The site is likely to be within multiple ownership and the owner aspirations are unknown.

6.289 Whilst there are no physical constraining features on the site, the site is Green Belt which is likely to restrict future development in this location. The greenfield nature of the majority of the site is also likely to have implications for future development as it is highly likely that there are be ecology interests affecting the site. Contamination on the whole is unlikely. There are no flooding issues affecting the site.

Environmental Sustainability

6.290 The site is located completely outside of a defined urban area and is predominantly greenfield. The site as a whole does not benefit from good public transport links although parts of the site are closer to bus routes and those areas of the site which are closest to railway stations are 1.5km from Redditch Railway Station. Generally there is relatively poor provision for pedestrians and cyclists.

6.291 It is considered that development of the site would significantly detract from the existing environmental quality and would be detrimental to environmental resources in the area.

Strategic Planning

6.292 Development of the site would detract from existing environmental quality, in particular by impacting on attractive open countryside within the Green Belt.

6.293 The site has a good ability to deliver regional / local economic development objectives, particularly relating to provision of employment land to meet the needs of Redditch.

White Young Green Area 8

6.294 The site is approximately 400 ha and is with designated Green Belt land.

Market Attractiveness

6.295 The quality of the external environment is very good and likely to be a positive factor in attracting businesses. At the time of the site visit the area did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors.

6.296 The majority of the site is in agricultural use. Existing buildings within the site area generally relate to various farms, residential development (along the A441, Dagnell End Road and Ickneild Street) and Bordesley Hall office space and conferencing facilities. It is considered therefore that given the nature of the site there are no bad neighbour uses but some limited potentially sensitive uses.

6.297 The site has visibility to local roads and some visibility to the A441. Whilst some areas of the site benefit from being closer to local services and facilities, other parts of the site do not, which results in the low score for this appraisal criteria. At its closest point the site is adjacent to the A441 and 2.6km from Junction 2 of the M42.

6.298 The site is likely to be within multiple ownership and the owner aspirations are unknown.

6.299 The site is affected by Green Belt which will place restrictions on potential development in this location. Furthermore initial indications show that the site is Grade 3 agricultural land. The greenfield nature of the majority of the site is also likely to have implications for future development as there are likely to be ecology interests affecting the site. There appears to be however no physically constraining features and contamination on the whole is unlikely. Part of the site is however affected by flooding issues.

Environmental Sustainability

6.300 The site is located completely outside of a defined urban area and is predominantly greenfield. The site as a whole does not benefit from good public transport links although parts of the site are relatively close to bus routes and those areas of the site which are closest to railway stations are 2.6km from Redditch Railway Station and 3.6km from Alvechurch Railway Station. Generally there is relatively poor provision for pedestrians and cyclists.

6.301 It is considered that development of the site would significantly detract from the existing environmental quality and would be detrimental to environmental resources in the area.

Strategic Planning

6.302 Development of the site would detract from existing environmental quality, in particular by impacting on attractive open countryside within the Green Belt.

6.303 The site has a good ability to deliver regional / local economic development objectives, particularly relating to provision of employment land to meet the needs of Redditch.

White Young Green Area 9

6.304 The site is approximately 500 ha and is within the designated Green Belt.

Market Attractiveness

6.305 The quality of the external environment is very good and likely to be a positive factor in attracting businesses. At the time of the site visit the area did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors.

6.306 The majority of the site is in agricultural use. There are a number of existing buildings within the site. These appear to be within agricultural or residential use and there are also some sites accommodating employment uses within the overall site, particularly towards the easterly end. These uses could be considered to be potentially sensitive, and also possibly ‘bad neighbour’ depending on the nature of the employment uses.

6.307 The site has some visibility to local roads. Whilst some areas of the site benefit from being closer to local services and facilities, other parts of the site do not, which results in the lower overall score for this appraisal criteria. At its closest point the site is adjacent to the A435 and 0.8km from Junction 3 of the M42.

6.308 The site is likely to be within multiple ownership and the owner aspirations are unknown. Whilst there are no physical constraining features on the site, the site is Green Belt which is likely to restrict future development in this location. The greenfield nature of the majority of the site is also likely to have implications for future development as it is highly likely that there are ecology interests affecting the site. Contamination on the whole is unlikely. There are no flooding issues affecting the site.

Environmental Sustainability

6.309 The site is located completely outside of a defined urban area and is predominantly greenfield. The site as a whole does not benefit from good public transport links although parts of the site are closer to bus routes and those areas of the site which are closest to railway stations are 5.2km from Redditch Railway Station and 2.1km from Wood End railway station. Generally there is relatively poor provision for pedestrians and cyclists.

6.310 It is considered that development of the site would significantly detract from the existing environmental quality and would be detrimental to environmental resources in the area.

Strategic Planning

6.311 Development of the site would detract from existing environmental quality, in particular by impacting on attractive open countryside within the Green Belt.

6.312 The site has a good ability to deliver regional / local economic development objectives, particularly relating to provision of employment land to meet the needs of Redditch.

White Young Green Area 10

6.313 The site is over 300 ha in size and is within designated Green Belt land.

Market Attractiveness

6.314 The quality of the external environment is very good and likely to be a positive factor in attracting businesses. At the time of the site visit the area did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors.

6.315 The majority of the site is in agricultural use. There are a number of existing buildings within the site. These appear to be within agricultural or residential use and there are also some sites accommodating employment uses within the site. These uses could be considered to be potentially sensitive, depending on the nature of the employment uses. The site includes the Ravensbank Business Park and the Ravensbank Area of Development Restraint – the quality of which have been assessed separately.

6.316 The site has some visibility to local roads. Whilst some areas of the site benefit from being closer to local services and facilities, other parts of the site do not, which results in the lower overall score for this appraisal criteria. At its closest point the site is adjacent to the A435 and 3.1km from Junction 3 of the M42.

6.317 The site is likely to be within multiple ownership and the owner aspirations are unknown. Whilst there appear to be no physical constraining features on the site, the site is Green Belt which is likely to restrict future development in this location. The site includes an area of semi-natural ancient woodland. The greenfield nature of the majority of the site is also likely to have implications for future development as it is highly likely that there are be ecology interests affecting the site. Furthermore, there are heritage interests on the site, with a Scheduled Ancient Monument located at the western end of the site. Contamination on the whole is unlikely. There are no flooding issues affecting the site.

Environmental Sustainability

6.318 The site is located completely outside of a defined urban area and is predominantly greenfield. The site as a whole does not benefit from good public transport links although parts of the site are closer to bus routes and those areas of the site which are closest to railway stations are 5.5km from Redditch Railway Station and 2.2km from Wood End Railway Station. Generally there is relatively poor provision for pedestrians and cyclists.

6.319 It is considered that development of the site would significantly detract from the existing environmental quality and would be detrimental to environmental resources in the area.

Strategic Planning

6.320 Development of the site would detract from existing environmental quality, in particular by impacting on attractive open countryside within the Green Belt.

6.321 The site has a good ability to deliver regional / local economic development objectives, particularly relating to provision of employment land to meet the needs of Redditch.

White Young Green Area 11

6.322 The site is over 700 ha in size and is within designated Green Belt.

Market Attractiveness

6.323 The quality of the external environment is very good and likely to be a positive factor in attracting businesses. At the time of the site visit the area did not appear to be exposed to unreasonable levels of noise, smell, dust or other amenity factors.

6.324 The majority of the site is in agricultural use. There are a number of existing buildings within the site. These appear to be within agricultural or residential use and there are also some sites accommodating employment uses within the site. These uses could be considered to be potentially sensitive, and also possibly 'bad neighbour' depending on the nature of the employment uses.

6.325 The site has some visibility to local roads. Whilst some areas of the site benefit from being closer to local services and facilities, other parts of the site do not, which results in the lower overall score for this appraisal criteria. At its closest points the site is adjacent to the A448 and A441 and 3km from Junction 2 of the M42.

6.326 The site is likely to be within multiple ownership and the owner aspirations are unknown. Whilst there appear to be no physical constraining features on the site, the site is Green Belt which is likely to restrict future development in this location. The site includes an area of semi-natural and replanted ancient woodland. The greenfield nature of the majority of the site is also likely to have implications for future development as it is highly likely that there are be ecology interests affecting the site. Furthermore, there are landscape interests as a registered park and garden is located close to the site. Contamination on the whole is unlikely. There are flooding issues affecting part of the site.

Environmental Sustainability

6.327 The site is located completely outside of a defined urban area and is predominantly greenfield. The site as a whole does not benefit from good public transport links although parts of the site are closer to bus routes and those areas of the site which are closest to railway stations are 5.5km from Redditch Railway Station and 2.2km from Wood End Railway Station. Generally there is relatively poor provision for pedestrians and cyclists.

6.328 It is considered that development of the site would significantly detract from the existing environmental quality and would be detrimental to environmental resources in the area.

Strategic Planning

6.329 Development of the site would detract from existing environmental quality, in particular by impacting on attractive open countryside within the Green Belt.

6.330 The site has a good ability to deliver regional / local economic development objectives, particularly relating to provision of employment land to meet the needs of Redditch.

Qualitative Assessment Overview

6.331 **Tables 6.2** and **6.3** provide a summary of the sites which have been subject to qualitative assessment. In particular, the tables identify the 'scores' identified against the main appraisal criteria, together with their classification (i.e. ranking) in terms of their current role in the employment hierarchy.

Table 6.2: Qualitative Assessment Scores and Ranking – Employment Allocations and Main Commitments

Sub Area	Site	Market Attractiveness	Sustainability	Strategic Planning	Ranking
Rural West	Nash Works	3	3	2	Moderate
Bromsgrove	Aston Fields Industrial and Trading Estates and Silver Birches Business Park (Including Sewage Works)	3	3	2-3	Good
	Worcester Road/ Sanders Road	2-3	3-4	3	Good
	Bromsgrove (BROM 8) – Buntsford Hill Business Park/ Land at Buntsford Hill Phase 2	3	3	2	Good
	Bromsgrove (BROM 8A) – Land at Buntsford Hill Phase 3/ Buntsford Hill	4	3	2-3	Best
	Sugarbrook Mill	3	2	1-2	Moderate
	Bromsgrove Technology Park	3-4	3	3	Best
North	Cofton Hackett	3-4	3	3	Good
	The Avenue, Rubery	2	2-3	2	Moderate
Rural East	Wythall Green Business Park	3-4	1-2	2-3	Good
	Ravensbank Business Park	3-4	2-3	2-3	Good
	Saxon and Harris Business Parks (excl PolymerLatex)	3-4	2-3	2-3	Good
	PolymerLatex	2-3	2-3	2-3	Moderate

Table 6.3: Qualitative Assessment Scores and Ranking – Other Sites

Sub Area	Site	Market Attractiveness	Sustainability	Strategic Planning	Ranking
Rural West	Hagley ADR	3-4	1-2	2-3	Good
	Wildmoor Farm	3	2	2	Moderate
	Wassell Grove Road	3	1	2	Moderate
	Bumble Hole Farm	3	2	1-2	Moderate
Bromsgrove	Bromsgrove ADR (BROM 5A,B&D)	3-4	1-2	2-3	Good
	Bromsgrove Town Centre	3	4	3	Good
North	Ravensbank ADR	3	2	2-3	Good
Rural East	Oakland International	3	1-2	2	Moderate
	Becketts Farm	3-4	2	1-2	Moderate
	Robin Hill Farm	2-3	1	1-2	Poor
	High House Farm	2-3	2	1-2	Moderate
	Weights Farm	2-3	2	2-3	Moderate
	White Young Green Area 4	2-3	1	2	N/A
	White Young Green Area 5	2-3	1	2	N/A
	White Young Green Area 6	2-3	1	2	N/A
	White Young Green Area 8	2-3	1	2	N/A
	White Young Green Area 9	2-3	1	2	N/A
	White Young Green Area 10	2-3	1	2	N/A
	White Young Green Area 11	2-3	1	2	N/A

6.332 **Tables 6.4** and **6.5** provide a more complete overview of main sites, focussing on allocations and main commitments and also certain (larger) other sites with vacant land (as identified in the Council's employment land availability information) potentially capable of accommodating further employment use. Information is provided on the types and estimated quantum of employment uses appropriate for development at each site assessed and the likely timescales for vacant land to be brought forward (i.e. immediate - short or, medium to long term).

6.333 In addition, and although not captured in the Council's employment land monitoring information, there will be certain other existing employment sites which could accommodate further employment floorspace, such as through infill and intensification.

Table 6.4: Overview of Qualitative Assessment – Allocations and Main Commitments

Sub Area	Site	Rank	Availability	Area Available for Dev (Ha).	Office (B1a) (sq m)	Manu. (B1b, B1c, B2) (sq m)	W & D (B8) (sq m)
Rural West	–	–	–	–	–	–	–
Bromsgrove	Bromsgrove (BROM 8A) Land at Buntsford Hill Phase 3/ Buntsfordgate	G	Immediate - Short	0.44	0	0.44	0
	Bromsgrove Technology Park	B	Immediate - Short	6.13	2.13	4	0
North	Cofton Hackett	G	Immediate – Short	5.3	0.8	3.63	0.87
Rural East	Wythall Green Business Park	G	Immediate - Short	11.8	11.8	0	0
	Ravensbank Business Park	G	Immediate - Short	4.18	0.6	1.68	1.9
	Saxon and Harris Business Parks	G	Short – Medium Term	1.8 (allocated without permission) + 0.62 (allocated with permission) = Total = 2.42	0.3 + 0.27 Total = 0.57	0.9 + 0.2 Total = 1.1	0.6 + 0.15 Total = 0.75

Table 6.5: Overview of Qualitative Assessment – ADRs and Other Sites

Sub Area	Site	Rank	Availability	Area Available for Dev (Ha).	Office (B1a) (sq m)	Manu. (B1b, B1c, B2) (sq m)	W & D (B8) (sq m)
Rural West	Hagley ADR (HAG 2B)	G	Medium – Long Term	0.5	0.5	0	0
	Wildmoor Farm	M	Immediate – Short Term	0.76	0.38	0.38	0
Bromsgrove	Bromsgrove ADR (BROM 5A, B & D) – Land to the north of Perryfields Road	G	Medium –Long Term	5	2.5	2.5	0
	Holly Tree Farm	-	-	0.13	0.13	0	0
North	–	–	–	–	–	–	–
Rural East	Ravensbank ADR	G	Medium – Long Term	10.3	1.72	5.15	3.43

7 Overview of Market Demand

Introduction

7.1 Previous chapters deal with the quantitative and qualitative supply of employment land and premises. This section provides an overview in market terms of the various sub-areas of the study, updating as appropriate information included in the 2009 study. Taken together with the forecasts, business survey and the projection forward of past completion rates in the following sections, this will provide an indication of the scale and nature of demand for employment land.

7.2 The market overview included in this section is based on the following:

- Interrogation of local commercial agents and Council databases of available properties to obtain details and general overviews of market availability;
- Review of existing reports and strategies to provide a picture of local and more general external factors which will impact upon the existing and future market;
- Reviews of vacancies and completion rates and business enquiries recorded by Worcestershire County Council; and
- Interrogation of databases such as EGi.

7.3 Market practice is to operate the imperial system, with agents and surveyors quoting, letting and selling space on a price per sq ft basis. The only property sector that operates using metric as its primary measurement is Rating, driven by the Valuation Office Agency use of sq m.

7.4 Normal reporting convention in the market is therefore to provide all figures as metric to comply with RICS rules but then with imperial figures following in brackets.

7.5 In other chapters of this report we have adopted the metric system only and so for ease and conformity, we have used metric figures in this section too.

7.6 As a general note, we would normally expect to separate offices, manufacturing and storage and distribution property into different classes as there are differences in demand and requirements for these uses.

7.7 For two of the sub-areas within this study, there are very few employment sites at all, and the make-up of those sites does not necessarily constitute a true ‘market’. The majority may be in one use type with none in another, or there may be no bias with so few properties showing completely disparate characteristics in terms of size, age, type etc. that no meaningful conclusions can be drawn.

7.8 Ordinarily we would separate out the sectors and provide commentary on each market for supply and demand terms, but within this Chapter we have had to treat industrial property as a single sector and therefore have combined manufacturing with distribution and warehousing. This also accords with the data sets and records that have been kept to date (there is little analysis between the different use classes). If we attempted to split the data to comment separately on different use classes it would make analysis unreliable, could produce misleading data and incorrectly state trends.

7.9 If there are clear differences between the use classes in any of the sub-areas, we have commented separately on this. The following paragraphs provide an assessment of market trends and demand for each sub area.

Bromsgrove Sub Area

General Market Overview

7.10 The Bromsgrove sub area, as the name suggests, includes the main urban area of Bromsgrove itself together with small outlying settlements of Blackwell and Lickey Hill to the north and Stoke Heath to the south. It is sandwiched between the M5 motorway to the west, the M42 motorway to the north and the railway line to the east.

7.11 Bromsgrove is the main town within the Bromsgrove district and unsurprisingly the bulk of commercial property is located here and within its near environs. A total of 18,210 sq m (195,939 sq ft) industrial accommodation is available in the sub area. This vacancy figure is very significant in terms of the overall total of vacant accommodation for the district (equating to approximately 95% of the total 19,107 sq m (205,591 sq ft) in the Bromsgrove district as a whole). 5,078 sq m (54,639 sq ft) of available office accommodation is located within the sub area out of a total of 11,051 sq m (118,908 sq ft), (46%).

7.12 Along with the Rural East sub area, employment development over the past 10 years has been focussed in the Bromsgrove sub area, peaking at 2.57 ha in the 2011/12 monitoring period as a result of development at Bromsgrove Technology Park (Plots 1 – 14). Prior to this, completion rates had slowed with none being recorded during 2009/10 and only one (of 0.52 ha) in the Bromsgrove sub-area in 2010/11. Development in the sub area has tended to be focussed at the main employment sites including the Bromsgrove Technology Park, Buntsford Gate / Buntsford Hill and Aston Fields.

Industrial Property

7.13 Within the Bromsgrove sub-area, there are pockets of industrial land, primarily around Aston Fields, towards the south of the town centre, bounded by the A38 and the railway line.

7.14 In terms of vacant premises, as noted previously 18,210 sq m (195,939 sq ft) is available, which is a relatively significant level compared to the total amount of built stock in the sub area. This high level of vacancy is largely attributable to a relatively small number of larger available warehouse units at Corbett Business Park and Aston Fields, together with various new (smaller) modern premises at Sapphire Court, Bromsgrove Technology Park, which have achieved a very good BREEAM rating.

7.15 The average size of available industrial premises in Bromsgrove sub area is 400 sq m (4,304 sq ft), with a total of 22 properties currently vacant. The majority of vacant premises (17) are less than 500 sq m (5,380 sq ft).

7.16 Property ranges from the very small, for example with individual units of less than 100 sq m (1,076 sq ft), up units / combinations of units of circa 5,000 sq m (50,000 sq ft). However the number of large available units (1,000 sq m / 10,760 sq ft+) is limited, thereby restricting opportunities to some sectors / larger occupiers.

7.17 The most modern industrial stock is available at Bromsgrove Business Park with the recent completion of 13 mid sized industrial units as part of the Sapphire Court development.

7.18 Aston Fields Industrial Estate, incorporating Silver Birches Business Park, comprises a variety of terraced and detached industrial units in a range of sizes. The site benefits from good access to the A38 and the motorway, located within approximately 3 miles of J1 M42 and 5 miles of J5 M5. The Estate comprises 35 purpose built light industrial units arranged in six terraces, in a range of sizes. A small number of vacancies are available and currently being marketed within Aston Fields Trading Estate.

7.19 Buntsford Business Park is also situated close to Aston Fields. One unit was being marketed as available at the time of survey.

7.20 Sanders Road Industrial Estate is located on the edge of the town centre, and consists of a total of 22 units. All but one of these 22 units are currently let. Agents comment that again a range of different sized units coupled with good accessible location has been an advantage.

Offices

7.21 The majority (18 out of 21) of vacant property is less than 500 sq m (5,380 sqft). Office vacancies are spread across the sub area although availability is often concentrated in curtained defined employment areas such as Aston Court (Bromsgrove Technology Park) and Buntsford Gate.

Table 7.1: Vacant Office Space by Size Band – Bromsgrove Sub Area

Size Bracket (sq m)	No of Units	Sq m Available	% of Vacant Space
A (<100 sq m)	3	230	4.5%
B (101 – 500 sq m)	15	3144	61.9 %
C (501 – 1,000 sq m)	3	1684	33.6 %
D (1,001 – 2,000 sq m)	0	0	0 %
E (2,001 – 5,000 sq m)	0	0	0%
F (> 5,000 sq m)	0	0	0%

7.22 The office market in Bromsgrove is still fairly limited, confined primarily to small businesses. Much of the space in Bromsgrove sub area is available by suite or individual offices, which mirrors both the physical attributes of properties (for example cellular or multi-floor buildings) but also reflects how landlords/ owners believe a property will most readily let as they try to market a property in the most advantageous way.

7.23 In addition more recent development has often concentrated on the provision of self contained ‘own front door’ office buildings which have proved popular with occupiers, particularly where freehold options are available, such as at The Croft at Buntsford Gate Business Park on the outskirts of Bromsgrove.

7.24 Serviced offices and workshop units at Bromsgrove Technology Park are provided at Basepoint, where the managers have historically reported very steady turnover, primarily on short term licences.

7.25 In terms of new development coming forward within Bromsgrove, it is focused on Bromsgrove Technology Park, where design & build packages are available on serviced development plots from 0.2- 1.3 ha (0.5-3.3 acres). On-site infrastructure works are completed and a number of plots have already been developed. There is existing consent for the undeveloped remainder of the site (part implemented), however speculative development is considered to be difficult to encourage.

North Sub Area

General Market Overview

7.26 This sub area covers the part of the District which is north of the M42, east of the M5 and west of the A441. The sub-area includes Rubery, Catshill, Barnt Green and Cofton Hackett and is situated between south Birmingham and Bromsgrove.

7.27 The most significant office development (and source of currently available supply) in the Northern sub area is Topaz, at Junction 1 of the M42, which was originally designed as a Headquarters building, totalling 3,643 sq m (39,213 sq ft). However following no interest from a single occupier, and perceiving the demand for smaller units’ available freehold, a revised planning consent was achieved for the creation of 10 individual ‘own front door’ units ranging from 260 sq m (2,800 sq ft) to 936 sq m (10,075 sq ft). This development is now available but to date, a large number of the units remain vacant, although agents report some interest.

Industrial

7.28 We have been unable to discover any details of industrial property available in the Northern sub-area. It is unlikely that this is actually the case but rather that the availability extends to small workshop units/storage which have not been advertised widely. This area does however include St Modwen’s Cofton Centre, which is advertising Design and Build opportunities and there have been a number of recent reported deals including the Philip Cornes Group Co Ltd (taking around 4,440 sq m of space) and Fleet Automotive Ltd, taking over 2,500 sq m.

7.29 Ladybird House at The Avenue in Rubery contains a self-storage facility named Jobstock. We have been unsuccessful however in ascertaining the amount of vacant accommodation. We have therefore excluded these from our vacancy tables.

Office

7.30 As noted above, the only office vacancies identified in the sub area are at Topaz, which is a relatively significant source of supply in itself. As with industrial floorspace, it is likely that smaller office accommodation will be available in the sub area but that it is not advertised widely via main commercial agents.

7.31 Provided at Ladybird House at The Avenue in Rubery are serviced office suites (along with self storage facilities) suites. We have however been unable to ascertain the number or size of available suites nor the total size of accommodation offered, and therefore not included these in the vacancy tables.

7.32 The serviced offices suit start-up businesses as it offers good quality premises on an ‘easy in easy out’ option, so overall costs can be quantified and if an occupier faces financial difficulty the liability can be severed relatively promptly. This affords a transient market with a likely high changing vacancy offer, but which is unlikely to exceed a tolerable level for the owner/ landlord.

Rural West Sub Area

General Market Overview

7.33 The Rural West sub area mainly comprises a large expanse of undeveloped land to the west of the M5 motorway. Hagley is the most significant conurbation in the sub area, with good access along the A456 Hagley Road in to Birmingham City Centre.

7.34 Premises are confined to small estates or conversions in individual locations and there are few vacant properties or transactions to analyse. It is unlikely that demand is neither high in this area nor likely to improve so information is sporadic.

Industrial

7.35 There are no industrial premises currently advertised as being available in the rural west sub area. It is however likely that some floorspace will be available but that due to the nature of the area and its industrial stock, premises are not widely marketed.

7.36 In terms of potential new supply, there are no allocated sites in Rural West although the site does contain the Hagley ADR. The only committed development (i.e. with planning permission) is for additional B1 floorspace at Wildmoor Farm. In overall terms, this demonstrates a real lack of either available land in this widespread but undeveloped area, and also a lack of windfall opportunities.

Office

7.37 We were unable to find details of property to let or for sale in this sub-area. Whilst it is unlikely that occupation is really at 100%, it is more realistic to assume that the premises that are vacant are either so small or of insufficient quality for the owners to consider seeking tenants in the normal manner of advertising space in property circles.

7.38 The office premises in Hagley mainly comprise small suites above retail premises, with no significant large purpose built accommodation. The limited demand that exists stems from local independent practices and start up businesses.

7.39 A notable relatively recent office development has been the Forge at, Belbroughton. The scheme provides 8 x 2 storey office units in a courtyard setting with each unit being around180 sq m. All 8 units are currently advertised as being available.

Rural East Sub Area

General Market Overview

7.40 The Rural East sub-area covers the remaining part of the District which is east of the Birmingham to Droitwich railway line (south of the M42) and east of the A441 (north of the M42). The sub-area includes Wythall and the settlements of Alvechurch, Hopwood, Rowney Green, Beoley and Finstall.

Industrial

7.41 We have found details of 3 properties vacant in the Rural East sub-area, totalling approximately 800 sq m (8.608 sq ft). This is a small amount compared to the total amount of stock within the sub area. All recorded industrial vacancies are located at the Saxon Business Park

7.42 The majority of industrial accommodation within the sub area is found in the Hanbury Road area, incorporating Saxon Business Park, Harris Business Park, Prior Wharf and the Metal and Ores Industrial Estate.

7.43 The Prior Wharf estate comprises six industrial and workshop units single storey concrete framed construction with access via a single roller shutter door to each unit.

7.44 Saxon Business Park comprises brick built units of 1990s construction extending over approximately 17 acres. There is also the potential for Design and Build offices and warehouses on the remaining part of the site, with a number of plots benefiting from extant planning permission

7.45 Ravensbank Business Park is the other significant employment site in the sub area, and is the largest within the Bromsgrove district. The Park is situated on the borders of Redditch extending to 28 ha (70 acres) and largely composed of large distribution occupiers.

7.46 Within the sub-area some commercial property is also composed of converted farm buildings. For example, there are a variety of farm buildings in close proximity to each across four farms in Wythall, typical of the commercial stock in the Rural East sub area.

Office

7.47 Within the Rural East sub area, the majority of office stock is located in the conurbation of Stoke Prior. The two largest concentrations of employment space are Harris Business Park, Saxon Business Park and the Greenbox development. A renewal of a previous planning permission exists for significant office development at Wythall Green Business Park but this has not been implemented, despite having permission for a number of years.

7.48 Harris Business Park primarily contains second hand stock, the availability comprising two units at Delta House available for sale or to let.

7.49 Greenbox is now on its third phase of development, located at Westonhall Road, Stoke Prior. This has proved to be a popular development, with Quinton Colleges Limited agreeing a deal to take some space in 2011. The scheme provides a contemporary city-style office development set in mature grounds with rural views.

8 Forecasting Employment Land Requirements – Methodology and Findings

Introduction

8.1 The following details the methodology employed in forecasting Bromsgrove District's employment land requirements through to 2030.

8.2 The methodology is the same as that used in our June 2009 report and is based around forecasting all aspects of the local labour market, within the context of anticipated international, national and regional economic developments, and then translating the resultant local labour demand into floorspace and land requirements.

8.3 The major changes that have occurred since our previous report and since the February 2008 forecasts that underpinned it were produced, are the 'crisis' in the financial markets and the subsequent recessions in many developed countries, including the UK, which saw a double-dip recession.

8.4 These events have not only impacted on growth and employment levels but have also introduced an element of structural change, with manufacturing finding the UK a more attractive location than previously.

8.5 Even so, there remains a great deal of uncertainty within the world economy, such that producing forecasts is even more difficult than usual. That said, the difficulty relates more to the timing of events than to the events themselves. Accordingly, the changes in demand for employment land derived from the forecasts should be viewed as correct in terms of direction of change but may vary in terms of the timescale over which the change will take place. This is particularly true of current and near year forecasts, with the longer term forecasts expected to be more accurate as the national economy gets back to its natural growth rate.

8.6 Underlying the short-term uncertainty is the continuing financial crisis within the Euro-zone, which is impacting on the real economy through reduced effective demand as governments cut back on their expenditure, unemployment remains high and businesses are either reluctant to invest or face a shortage of available capital. As the Euro-zone is a major destination for UK exports so its crisis is impacting on demand for UK products and services. It is also impacting on demand for exports from developing countries such as Brazil, Russia, India, China and South Africa and thereby reducing growth rates in those countries, which, in turn, are reducing their demand for UK produced goods and services.

8.7 Inevitably, these events are combining with the UK Government's austerity measures to reduce UK demand and are impacting directly on both regional and sub-regional economies, including that of Bromsgrove. This is reflected in reduced employment and self-employment opportunities within Bromsgrove, which are reflected in the model and in the forecasts.

8.8 At the centre of the forecasts is a small area forecasting model specified by reference to local population, employment and other available data. This model is, in turn, driven by the labour market and output forecasts for the UK and for the West Midlands region produced by the Cambridge Econometrics national and regional forecasting models.

8.9 All forecasting models are extremely data hungry. Unfortunately, much of the data that would ideally be needed in order to specify a full economic model of the Bromsgrove District economy is not available. As such, there is inevitably a degree of estimation involved in producing forecasts of the District's floorspace and employment land requirements. Despite this, the forecasts presented in this report are considered to be robust and to represent the best available assessment of future employment floorspace and land requirements over the forecast period.

8.10 The following details the way in which the model operates and explains how the various inputs into it have been devised. In this way, it provides detail of how the forecasts have been generated.

The Model

Population

8.11 The starting point for the model is the demographic structure of the current and future population of Bromsgrove District.

8.12 Rather than relying exclusively on trend forecasts produced by the model itself, use is generally made of forecasts generated either by the local authority itself or by third parties such as the County Council of which the District is a constituent part, or by the Office for National Statistics.

8.13 In this particular case, three different sets of population forecasts were primarily used. These were:

- population projections sourced from the Office for National Statistics;
- population projections produced by Worcestershire County Council; and
- population projections generated by the model itself.

8.14 The population projections from the Office for National Statistics were based on 2010 population estimates and ran through to 2031. The population projections from Worcestershire County Council were based on the 2001 Population Census findings and ran through to 2035. The model's population forecasts were based on population estimates to 2010 and used regression techniques in order to generate best fit time series equations by age and gender, which were, in turn, used to project the population forward to 2030.

8.15 All three of the sets of projections used show the population of Bromsgrove District growing over the forecast period to 2030. The rates of growth are, however, different, such that three different 2030 population estimates result. The lowest of these estimates is the 106,000 persons produced by the Worcestershire County Council forecasts, while the highest is the 110,600 produced by the Office for National Statistics.

8.16 All sets of projections are consistent with the 2001 Population Census results, which showed Bromsgrove District as then having a population of around 87,900. Results from the 2011 Population Census have yet to be published.

8.17 In all cases, the population projections were made by age and by gender, although those published by Worcestershire County Council were for total population by age band and, after 2015, at five year intervals. Accordingly, estimation techniques were applied to generate a gender split and to fill in the missing years. Disaggregation by age and by gender is important, as the population figures are used, by the model, to generate numbers of economically active persons within the population and hence the resident labour-force.

8.18 As a further exercise, population projections were also produced based on an assumed higher level of new housing in the District than that implicit in the population projects detailed above, in part reflecting the prospect of Bromsgrove District accommodating some of the development needs of Redditch. The employment land implications of these higher population projections have been considered as one of a number of different scenarios.

Economic Activity Rates

8.19 Translating the resident population figures into workforce estimates requires assumptions to be made about current and future economic activity rates.

8.20 The economic activity rates used in the model are specified by reference to age and gender, such that changes in the demographic structure of the area generate changes in the number economically active.

8.21 The model assumes that no individual aged under 16 is economically active. It also assumes that economic activity can and does continue after state pension age, but with the proportion of those economically active beyond state pension age declining with age.

8.22 The actual economic activity rates used were derived from the 1991 and 2001 Population Censuses and were then projected forward in line with the identified trends but subject to moderation by national trends. The resultant forecasts show very modest growth in overall male economic activity rates over the forecast period and a much stronger rate of increase in female economic activity rates.

8.23 Outside of the general economic trends, activity rates are assumed to increase in response to a tightening labour market. As such, the model assumes that as the economy grows and demands for labour increases, so the proportion of the population that is economically active rises.

8.24 The model does not assume, however, that labour supply and labour demand equate to each other. Rather, it forecasts labour supply and labour demand independently and only increases the supply of labour, through the above mentioned increase in activity rates, should the labour market start to overheat.

8.25 Even so, the increase in activity rates is not set so as to restore balance to the labour market. Rather, the rate of increase is determined independently, and only allows for a relatively modest increase in activity rates, year on year.

8.26 In this way and as with the real economy, imbalances in the labour market lead to unemployment or to a change in commuting patterns or to a change in the proportion of the economically active population that has more than one job.

8.27 In practice, the model shows the economic activity rate, (total number economically active expressed as a percentage of the population of normal working age), as generally following an upward trend over the forecast period. This is, in part, due to a rising level of economic activity amongst females and, in part, due to an increase in the number of people electing to work beyond state pension age.

8.28 It also reflects the introduction of a rising state pension age for women and for men as well as the introduction of legislation removing default retirement ages such that men and women have a right to continue in employment beyond the normal state pension age , subject to their job continuing and subject to their being able to perform their tasks satisfactorily.

8.29 The effect of these changes is expected to be an increase in the economically active population of Bromsgrove as more individuals choose to work beyond their state pension age and individuals are forced to work longer before they become eligible for the state pension.

Employees in Employment

8.30 The base data used in forecasting the number of employees in employment in Bromsgrove District is sourced from the Annual Business Register and Employment Survey (“BRES”). This employer sourced information provides an estimate of the number of employees in employment whose jobs are based within Bromsgrove District.

8.31 The information from BRES is accessed as a number of data series together running from 1991 through to 2010. The data is drawn down from NOMIS at a four digit industry level. The fact that the data comes in different series reflects definitional changes that have taken place over the period, in turn reflecting changes in the industrial structure of the UK economy and a need to conform to EU reporting definitions.

8.32 The first stage in the forecasting process is to examine the data in order to identify and, where necessary, correct any miscoding or other obvious data errors. This exercise also facilitates a degree of familiarisation with the structure of the local economy.

8.33 Information on the agricultural sector is frequently lacking for some years. Where necessary, trend analysis is used to fill in the gaps.

8.34 For forecasting purposes, the employment data is aggregated into 32 different industrial sectors. These are the industrial sectors used by Cambridge Econometrics in reporting their regional and associated national forecasts. The aggregation process automatically removes some of the data series inconsistencies. Estimation and allocation techniques are used to remove the remainder.

8.35 Aggregation also has the benefit that it hides many of the sensitive data entries contained within the raw data and thereby facilitates publication.

Self Employment

8.36 Although information on self-employment is available from the Labour Force Survey, (LFS), it is notoriously unreliable at a small area level. This is due to the relatively small numbers that are sampled by the LFS.

8.37 In order to overcome this problem, information from the 1991 and 2001 Population Censuses is used to estimate the proportion of the Bromsgrove District resident population that is self-employed.

8.38 Specifically, the Population Census information is used to determine the ratio of self-employment to employees in employment by gender and by industrial division.

8.39 The assumption is then made that each ratio will either remain constant over the forecast period or, if significantly different from the relevant national ratio, will move marginally, year on year, towards the relevant national ratio. The consequence of the assumptions is that as employment in a particular sector rises or falls, so self-employment in that sector also tends to rise or fall.

Employment Projections

8.40 The employment projections for Bromsgrove District are substantially driven by the forecasts for the West Midlands, produced by Cambridge Econometrics.

8.41 This does not mean that the Bromsgrove District economy is assumed to be a microcosm of the West Midlands regional economy. Rather, the model assumes that the overall performance of the Bromsgrove District economy is determined by a combination of:

- local factors within each industrial sector;
- the overall industrial structure; and
- regional, national and international factors.

8.42 Of these, local factors are determined by reference to the historic performance of the local sector, relative to the regional sector, and by reference to time trends. As such, the model allows a local sector to behave differently from the same sector, both regionally and nationally.

8.43 As the model forecasts at an industry level, it explicitly recognises that the economy of Bromsgrove District has a different structure from that of the West Midlands and that this will, irrespective of other factors, produce different growth rates for the District economy from those of the wider West Midlands and the UK.

8.44 Regional, national and international factors are taken on board through using the Cambridge Econometrics model to drive the local forecasting model. Effectively, the local model allocates employment within the West Midlands region between Bromsgrove District and the rest of the region.

8.45 This allocation is performed at a 32 industry level and, as indicated above, takes account of factors local to Bromsgrove and its environs in the allocation.

8.46 As the model produces forecasts for employees in employment, so, and as described above, it produces forecasts for self-employment.

8.47 All of the forecasts are reviewed in order to determine that they look reasonable and are consistent with known events such as major factory closure, expansion or inward investment events. In practice, little manual adjustment is ever warranted.

Commuting

8.48 In producing a comprehensive picture of the Bromsgrove District labour market, the model needs to take account of the extent to which jobs within the Bromsgrove District area are taken by people who are resident outside of the District in places such as Redditch and Solihull. Equally, it needs to take account of the extent to which Bromsgrove District residents hold down jobs outside of the District, for example, in Birmingham and the Black Country.

8.49 This requirement arises because the population and labour force forecasts are residence based and the employment forecasts are place of employment based.

8.50 Normally, up to date information on in- and out-commuting is very difficult to obtain, such that net commuting has to be estimated, through the model, for a given year when all other elements of the labour market are known. Specifically, the level of net in- or out-commuting is derived as the balancing factor such that:

Resident labour force less:	[Resident unemployed	] = net commuting
	Self-employment	
	Jobs based in the District	
	Residents on schemes etc.]	

8.51 If the net commuting figure is a negative, it means that there is a net outflow of residents into employment outside the District. If the net commuting figure is positive, the District is a net importer of labour.

8.52 In the case of Bromsgrove, analysis of the 2001 Population Census figures shows that 25,400 of the District's resident workforce worked outside of the District and that 15,200 of jobs in the District were taken by individuals who did not live in the District.

8.53 As such, Bromsgrove District is a net exporter of labour, with an approximate net 10,200 residents having employment outside of the District in 2001.

8.54 The forecasting model does not assume that net commuting remains unchanged over time. Rather, the model looks at the relative performances of the Bromsgrove District labour market and the labour market in the rest of the West Midlands region and assumes that net out-commuting increases if demand for labour in the rest of the West Midlands grows at a faster rate than the demand for labour in Bromsgrove, and vice versa.

Students

8.55 Whilst full-time students are not treated as being economically active, a number do have part-time paid employment in retail outlets, bars and the like. The number of such individuals has been growing over recent years as a consequence of the overall increase in student numbers, changes to the way in which HE students are financially supported and a growth in the number of part-time employment opportunities.

8.56 This means that it is not appropriate to ignore the role of students in the labour market in places like Bromsgrove, particularly as the 2001 Population Census results indicate that over 1,400 of the full-time students resident in Bromsgrove District, at that time, were economically active.

8.57 The assumption within the model is that the ratio of full-time students with part-time jobs to the resident population aged 16-24 remains a constant.

8.58 This leads to the number of full-time students with part-time jobs declining through to 2018 under the ONS population projections but then following an upward trend over the balance of the forecast period. Under the Worcestershire County Council population projections, the number of full-time students with part-time jobs stays broadly the same through to 2021 before declining through to 2026, whence it plateaus before starting to rise once more over the last two years of the forecast period

8.59 The model's own population projections show a decline in the number of full-time students with part-time jobs through to 2015, followed by an increase to 2021, whence the number plateaus.

Double Jobs

8.60 One feature of the labour market over recent years has been a growth in the number of people that have more than one job. Typically, people with more than one job have one full-time job and one part-time job, rather than a portfolio of part-time jobs[4].

8.61 The model works on the assumption that the incidence of individuals with more than one job will continue to grow over time, but with males more likely to have two jobs than females.

8.62 Balancing the Bromsgrove District labour market for 2001 requires there to be 5,000 people with more than one job, assuming that no individual has more than two jobs. This amounts to 1 in every 9 of the District's resident working population having more than one job.

[4] M Simic and S Sethi, People with Second Jobs, Labour Market Trends, May 2003.

8.63 The proportion of people with more than one job appears high, relative to a national figure of 1 in every 35. It may be that the cost of living in Bromsgrove District is such that a high proportion of households need the income from double jobs in order to maintain an acceptable life style.

8.64 In addition and since double jobs are treated as the balancing factor in arriving at a picture of the Bromsgrove District labour market in 2001, any data errors will also accumulate within this element. This approach is taken in order to make the report and its findings more readily read and understood, but nevertheless, mean that the double job estimate needs to be treated with considerable caution.

Unemployment / On Schemes

8.65 The model mirrors the labour market in that it treats unemployment as a residual.

8.66 In this context, unemployment is the difference between the resident labour force in Bromsgrove District and those who are either employed or self-employed, irrespective of whether the employment or self-employment is based in Bromsgrove District.

Value Added

8.67 In the absence of information on value added specific to Bromsgrove District, the model assumes that value added per person employed in Bromsgrove District is the same, in each sector, as is value added per person employed in that sector in the West Midlands region.

8.68 Equally, the model assumes that labour productivity gains within each sector in the West Midlands will be mirrored in Bromsgrove District. As such, any overall differential performance between Bromsgrove District and the West Midlands is solely the result of differences in the two areas' industrial structures.

Employment Land Requirement

8.69 The model amalgamates the employment and self-employment projections into broad headings of: manufacturing, construction, retail in-town, retail out of town, hotels and catering, transport and communications, finance and business services, public administration and defence, education and health, and other services.

8.70 Standard square metres per employed person figures are then applied for each of the broad headings in order to produce the floorspace required to accommodate the stated number of people.

8.71 Finally, employment density estimates are applied to the floorspace requirements in order to arrive at estimates of the employment land requirement for each of the broad headings.

8.72 Appropriate amalgamations of headings are then used in order to arrive at the employment land requirements for each category.

8.73 In practice, the floorspace and land requirements for retailing, for hotels and catering and for education and health were not calculated for Bromsgrove District, as these are outside the scope of this particular employment land study.

8.74 In addition, various assumptions are made, either implicitly or explicitly, in order to compensate for known unknowns. For example, it is known that a number of construction businesses do not have formal business premises and are operated from the owners' homes. The precise number is unknown. In order to allow for this, the assumption is made that all self-employed builders operate from home and that all building firms covered by BRES have formal business premises.

8.75 More than one set of floorspace and employment land requirement figures were calculated. Specifically, one set was produced using the standard floorspace and density levels specified in the ODPM guidance[5], one set was produced using Bromsgrove District specific Valuation Office derived figures and one set was produced based on the findings from a survey of over 200 local employers carried out as part of the previous employment land study.

8.76 Whilst these different sets of floorspace and land requirements were generated, the figures presented in the following section of this report are primarily based on local findings rather than on the ODPM standards.

8.77 This approach has been adopted because it better reflects the current employment and site densities in the District, which are, themselves, considered to be better indicators of future densities than any other measure, including national standards.

8.78 The main reasons for this are twofold. Firstly, those manufacturing and warehouse and distribution activities already operating in the District are likely to constitute the occupiers of most of the manufacturing, warehouse and distribution floorspace in the future. Many will continue to occupy the same buildings on the same sites. As such, current floorspace and site densities will dominate future manufacturing, warehouse and distribution floorspace and site densities and thereby determine the character of manufacturing, warehouse and distribution in the area.

8.79 Secondly, new office developments are likely to be relatively low level and not town centre tower blocks. This means that floorspace and site densities within new developments will replicate those within existing developments rather than deviate from them.

8.80 The use of local figures is a recommendation within the ODPM guidelines.

Findings of the Forecasting Model

Introduction

8.81 The following details the principal outputs derived from the small area forecasting model specified for Bromsgrove District.

[5] Employment Land Reviews Guidance Notes, ODPM, 2005

Population

8.82 At the time of the 1991 Population Census, the total population of Bromsgrove District was 83,600. By 2001, this number had grown to around 87,900.

8.83 The forecasts produced by the Office for National Statistics, (ONS), anticipate the population of Bromsgrove District rising from an estimated 2010 total of 94,700 to reach 99,600 by 2016, 103,900 by 2021, 107,700 by 2026 and 110,600 by 2030.

8.84 Figures from Worcestershire County Council suggest a slower rate of population growth, with the population of Bromsgrove District expected to reach 96,200 by 2015, compared with the ONS's anticipated 98,900 and to reach 102,900 by 2025, compared with the ONS's 107,100. The Worcestershire County Council projection for 2030, at 106,000, is over 4% lower than the ONS projection for that year. The population projections generated by the model are closer to those of the ONS than to those of Worcestershire County Council, showing a population of 97,300 in 2015, 103,300 in 2025, 103,940 in 2026 and 109,140 by 2030.

8.85 Given the way that the forecasting model works, these different population assumptions have limited direct impact on the demand for employment land. Nevertheless, they do facilitate scenario testing as do other assumptions covered in the scenario section of this chapter.

Demographic Structure

8.86 Whilst the overall size of the population has implications both for the level of demand for housing land and for the level of demand for local services, it is the structure of the population that is of more concern in terms of the demand and need for employment land.

8.87 This is because the age structure and gender of the population largely determine the size and structure of the resident labour force.

8.88 The following table, (Table 8.1), compares the structure of the Bromsgrove District population at 2011 under the three different forecasts.

Table 8.1: Comparison of Population Projections for Bromsgrove District by Age and Gender, 2015

	ONS			Worcestershire County Council			Model		
Age	Male ('000)	Female ('000)	Total ('000)	Male ('000)	Female ('000)	Total ('000)	Male ('000)	Female ('000)	Total ('000)
0-15	9.18	8.80	17.98	8.64	8.28	16.92	8.98	8.52	17.50
16 to normal retirement age*	30.14	28.92	59.06	29.07	27.95	57.02	30.76	29.31	60.08
Over normal retirement age*	9.58	12.17	21.76	9.79	12.46	22.25	8.88	11.84	20.72
Total population	48.90	49.90	98.80	47.50	48.70	96.20	48.62	49.68	98.30

Sources: ONS, Worcestershire County Council, WM Enterprise Consultants

* Normal retirement age reflects changes in the state pension age, with females attaining state pension age between 62 and 63 and males at age 65.

8.89 The main differences between the three forecasts are ones of overall population size, with the ONS forecasts predicting a higher population than is the model or Worcestershire County Council. The age and gender ratios within the different population totals are broadly the same, although lower populations tend to have a higher proportion of older persons within the population.

8.90 Table 8.2 provides information on the forecast population structure in 2026 under the different forecasts, with Table 8.3 providing the same information but for 2030.

Table 8.2: Comparison of Population Projections for Bromsgrove District by Age and Gender, 2026

	ONS			Worcestershire County Council			Model		
Age	Male ('000)	Female ('000)	Total ('000)	Male ('000)	Female ('000)	Total ('000)	Male ('000)	Female ('000)	Total ('000)
0-15	9.87	9.41	19.28	9.27	8.89	18.16	9.14	8.82	17.96
16 to normal retirement age*	32.13	31.54	63.67	30.25	29.69	59.94	33.48	32.07	65.55
Over normal retirement age*	11.35	13.60	24.95	11.47	13.96	25.42	10.23	12.49	22.73
Total population	53.35	54.55	107.90	50.99	52.53	103.52	52.84	53.39	106.23

Sources: ONS, Worcestershire County Council, WM Enterprise Consultants

* Normal retirement age is taken as 66 for both males and females

Table 8.3: Comparison of Population Projections for Bromsgrove District by Age and Gender, 2030

	ONS			Worcestershire County Council			Model		
Age	Male ('000)	Female ('000)	Total ('000)	Male ('000)	Female ('000)	Total ('000)	Male ('000)	Female ('000)	Total ('000)
0-15	9.85	9.51	19.36	9.16	8.83	17.99	9.19	8.94	18.14
16 to normal retirement age*	32.51	31.72	64.23	30.51	29.81	60.32	34.28	32.59	66.87
Over normal retirement age*	12.19	14.82	27.01	12.50	15.18	27.68	10.91	13.22	24.12
Total population	54.55	56.05	110.60	52.17	53.83	106.00	54.38	54.75	109.14

Sources: ONS, Worcestershire County Council, WM Enterprise Consultants

* Normal retirement age is taken as 66 for both males and females

8.91 The differences shown in the above numbers have implications for the overall size of the labour force, with different segments of the population having different propensities to participate in the labour market.

Activity Rates

Table 8.4: Bromsgrove District Activity Rate 2001 and for Selected Years

Gender / Age	2001 % (Actual)	2015 %	2021 %	2026 %	2030 %
Male					
0-15	0.0	0.0	0.0	0.0	0.0
16-24	70.2	67.8	66.9	66.1	65.4
25-34	91.7	89.6	89.3	88.9	88.6
35-44	94.1	92.9	92.3	91.9	91.6
45-59	88.1	90.2	90.3	90.6	91.1
60-64	55.2	63.7	66.1	68.0	69.6
65+	12.1	14.7	16.3	16.2	16.4
Total*	87.5	89.5	89.0	89.2	89.6
Female					
0-15	0.0	0.0	0.0	0.0	0.0
16-24	68.8	67.7	67.4	67.1	66.9
25-34	81.9	84.9	85.9	86.8	87.5
35-44	81.8	82.4	82.6	82.9	83.3
45-59	75.0	82.6	84.5	86.5	88.2
60-64	29.3	50.6	61.0	67.5	72.7
65 +	5.4	7.5	9.3	9.4	9.9
Total*	74.7	82.5	82.2	83.9	85.5

Source: Derived from Population Census Figures W M Enterprise Consultants

* Total economically active (including pensioners) expressed as a percentage of the population of normal working age.

8.92 The activity rates used in the model were derived from Population Census results, by age group and by gender. These were then projected forward to reflect activity rate trends within different age and gender groups. In addition, adjustment was made to allow for an increase in economic activity rates amongst those age groups whose members must wait longer before becoming eligible for the state pension. This has the effect of increasing female activity rates throughout the forecast period and increasing male activity rates from 2020 onwards.

8.93 The activity rates were applied to all sets of population forecasts in order to arrive at three sets of Bromsgrove District labour force projections.

8.94 Overall, the figures indicate a marginal overall increase in male participation rates in the labour market from just over 88.1% in 2010 to reach 89.6% in 2030. Acting to reduce the expressed rate is an increase in the total number of males of working age from 2020 resulting from the increased state pension qualification age to 66.

8.95 Overall female participation rates decline over the forecast period until 2016 as more and more women have to wait longer before they become eligible for the state pension and as a consequence swell the number counted as being of normal working age. After 2016, the overall female participation rate starts to rise once more and continues to do so over the balance of the forecast period.

Size of the Workforce

8.96 Applying the activity rates to the population projections provides forecasts for the expected size and composition of the Bromsgrove District resident workforce.

8.97 Whilst the model produces estimates of the composition of the workforce by age and by gender, this level of detail is not directly relevant to this particular piece of work as the labour demand forecasts treat labour as a homogeneous commodity. Accordingly, the underlying composition of the workforce is not presented in the figures below.

Table 8.5: Bromsgrove District Workforce – Selected Years – Under Different Population Forecasts

Forecast (in '000's)	2013	2016	2021	2026	2030
ONS	49.9	51.1	52.7	54.4	55.6
Worcestershire County Council (extrapolated beyond 2011)	48.6	49.3	50.8	51.9	52.8
Model	49.9	51.2	53.0	54.9	56.3
Mean	49.5	50.5	52.2	53.7	54.9

Source:WM Enterprise Consultants

8.98 Overall, all three sets of projections see the resident workforce of Bromsgrove District growing over the forecast period. The Model based forecasts show the highest rate of growth, (17.0% 2010 to 2030), with the Worcestershire County Council the lowest, (10.2%). The ONS based forecasts show a 14.2% increase, which is close to the 13.9% mean of the three forecasts.

8.99 There is a degree of uncertainty over the size of the growth in the workforce with changes in the state pension age, abolition of compulsory retirement and changes to employer pension schemes and returns all expected to increase participation rates amongst those of working age.

Labour Demand

8.100 The structure of the Bromsgrove District economy is more like that of the UK than that of the West Midlands, in that it has less of an emphasis on manufacturing and more of an emphasis on services than the West Midlands. This is shown in the Table 8.6.

Table 8.6: Comparative Employment Structures, 2010

	Bromsgrove District %	West Midlands %	UK %
Primary	2.1	2.1	1.7
Manufacturing	8.6	11.0	8.2
Construction	8.7	7.1	6.9
Utilities	1.1	1.0	1.0
Services	79.5	78.7	82.2
Total	100.0	100.0	100.0

Sources: Cambridge Econometrics, NOMIS; WM Enterprise Consultants

8.101 Within the service industries, Bromsgrove District is relatively over-represented in Distribution and in Transport and Storage relative to both the West Midlands and the UK. It is, however, underrepresented in hotels and catering and in retailing. The following figure, (Table 8.7), provides more detail.

Table 8.7: Comparative Service Sector Employment

	Bromsgrove District %	West Midlands %	UK %
Retailing	8.1	12.2	11.7
Distribution	9.0	7.9	6.7
Hotels & Catering	3.8	6.5	7.4
Transport & Storage	11.9	5.9	5.7
Financial Services	3.9	3.8	4.4
Other Business Services	19.3	23.3	24.4
Public Administration, Education & Health	37.6	34.5	33.1
Other Services	6.4	5.9	6.5
Total	100.0	100.0	100.0

Sources: Cambridge Econometrics; Nomis

8.102 The forecasts through to 2030 indicate that service sector employment will reinforce its dominant position within Bromsgrove District, such that, by 2030, the service sector will account for over 80.1% of total employment. This is shown in the following figure, (Table 8.8).

Table 8.8: Forecast Relative Shares of Employment in 2030

	Bromsgrove District %	West Midlands %	UK %
Primary	1.6	1.3	1.2
Manufacturing	8.7	10.7	6.7
Construction	8.2	6.9	7.8
Utilities	1.4	1.3	1.0
Services	80.1	79.9	83.3
Total	100.0	100.0	100.0

Sources: WM Enterprise Consultants; Cambridge Econometrics

8.103 Over the forecast period, the overall structure of the Bromsgrove District economy is expected to change slightly, with manufacturing becoming marginally more important as a source of employment, at the expense of construction and the service sector,.

8.104 The service sector's share of gross value added in Bromsgrove District is expected to fall from a current 74.0% to reach 72.9% by 2016, 72.6% by 2026 and 72.4% by 2030, with manufacturing's share rising from 11.4% to reach 11.9% by 2018; a percentage that it maintains over the balance of the forecast period. Primary activities are expected to witness a decline in their share of GVA, whilst construction is expected to see a growth in its share of GVA.

8.105 Within the Bromsgrove District service sector, it is the business services sector that is expected to be the major source of new job opportunities, followed by accommodation and catering. Other significant sources of employment growth include retailing, transport and storage and other services. Education and health is also expected to be a net contributor of employment over the forecast period, although it is expected to lose rather than gain employment in the earlier years.

Commuting

8.106 Bromsgrove District is a significant exporter of labour, primarily to other parts of the West Midlands. Equally, it is a major importer of labour, predominately from the same areas. Analysis of the 2001 Population Census results showed that, in 2001, nearly 60% of the Bromsgrove District resident workforce worked outside of the Borough. Equally, nearly 40% of District jobs were taken by people living outside of the District. In aggregate, net out-commuting was a significant 10,209 people. The major work place destinations of those Bromsgrove District residents working outside of the District were Birmingham, the Black Country, Redditch, Solihull and Wychavon. At the same time, those non-Bromsgrove District residents working in Bromsgrove District predominately came from Birmingham, Redditch, the Black Country and Wychavon. Further detail is contained in the following table, Table 8.9.

Table 8.9: Commuting out of and into Bromsgrove District in 2001

Local Authority Areas	Commuting to from Bromsgrove		Commuting from to Bromsgrove		Net In
	No	%	No	%	No
Birmingham	10,830	42.6	4,061	26.7	-6,769
Black Country	3,769	14.8	2,352	15.5	-1,417
Solihull	1,955	7.7	741	4.9	-1,214
Coventry	341	1.3	96	0.6	-245
West Midlands County	16,895	66.5	7,250	47.7	-9,645
Redditch	2,641	10.4	2,747	18.1	106
Wychavon	1,550	6.1	1,473	9.7	-77
Worcester	816	3.2	642	4.2	-174
Stratford-on-Avon	624	2.5	399	2.6	-225
Wyre Forest	575	2.3	998	6.6	423
Warwick	312	1.2	110	0.7	-202
Malvern Hills	137	0.5	259	1.7	122
Elsewhere in the West Midlands region	540	2.1	594	3.9	54
Outside of West Midlands	1,316	5.2	725	4.8	-591
Total	25,406	100.0	15,197	100.0	-10,209

Source: WM Enterprise Consultants; NOMIS

8.107 Net out commuting rose by around 3,000 between 1991 and 2001 and is expected to continue to be a feature of the Bromsgrove District economy over the forecast period.

8.108 The extent to which net out-commuting is likely to change is dependent upon the rate of growth in the population of Bromsgrove District, relative to the rate of growth in local employment opportunities and the rate of growth in employment opportunities within commuting distance of Bromsgrove District.

8.109 All of the population projections suggest that net out-commuting has fallen below its 2001 Population Census number and that this trend will continue in the short term before growing once more over the balance of the forecast period. As such, Bromsgrove District will continue to be a net exporter of labour.

Double Job Adjustment

8.110 The forecasts assume that, by 2016, the number of jobs within Bromsgrove District that are taken by individuals who have another job will be between 3,270 and 3,334. This amounts to between 6.4% and 7.0% of all jobs in the District and means that between 5% and 6% of the economically active resident population will have more than one job. At present, around 4% of the UK workforce has more than one job, although indications are that this percentage is rising.

8.111 By 2030, the number of jobs within Bromsgrove District that are taking by individuals who have another job is expected to have grown to between 3,650 and 3,690.

8.112 However and as mentioned above, some caution needs to be exercised in relation to the double job figures. This is because the model methodology means that historic data inaccuracies can lead to these numbers being overstated and to any overstatement being perpetuated over the forecast period.

Labour Market Summary

8.113 The following provides summaries of the Bromsgrove District labour market based on the Worcestershire County Council population projections and on the ONS population projections. These have been selected as they respectively represent the lowest and the highest of the population projections considered.

Table 8.10: Bromsgrove District Labour Market Projections Based on Worcestershire County Council Population Projections

	2001 ('000)	2010 ('000)	2016 ('000)	2021 ('000)	2026 ('000)	2030 ('000)
Total population	87.9	93.5	96.8	100.2	103.5	106.0
of which: of normal working age	53.4	54.7	57.7	59.4	59.9	60.3
over normal retirement age	17.6	21.9	22.0	23.0	25.4	27.7
Labour force (all ages)	45.5	47.9	49.3	50.9	51.9	52.8
Plus net in commuting	(10.2)	(10.2)	(10.2)	(10.6)	(11.0)	(11.2)
Less double job adjustment	5.0	3.3	3.3	3.5	3.5	3.7
Less jobs taken by students	1.4	1.5	1.6	1.6	1.4	1.4
Unemployment	1.3	2.8	4.0	3.7	2.7	2.4

Sources: Worcestershire County Council; WM Enterprise Consultants

Table 8.11: Bromsgrove District Labour Market Projections Based on ONS Population Projections

	2001 ('000)	2010 ('000)	2016 ('000)	2021 ('000)	2026 ('000)	2030 ('000)
Total population	87.9	94.8	99.6	103.9	107.9	110.6
of which: of normal working age	53.2	55.7	59.8	62.2	63.6	64.2
over normal retirement age	17.7	21.7	21.6	22.6	24.9	27.0
Labour force (all ages)	45.4	48.7	51.1	52.7	54.4	55.6
Plus net in commuting	(10.2)	(10.2)	(10.2)	(10.6)	(11.0)	(11.2)
Less double job adjustment	5.0	3.3	3.3	3.4	3.5	3.6
Less jobs taken by students	1.4	1.7	1.6	1.6	1.7	1.8
Unemployment	1.3	3.8	5.7	5.6	5.6	5.5

Source: ONS; WM Enterprise Consultants

8.114 The principal differences between these two labour market scenarios can be summarised as follows:

- Whilst both sets of projections see the total population of Bromsgrove District increasing over the forecast period, there are differences in the magnitude of the increases. The smaller increase is shown by the County Council projections, with the larger increase shown by the ONS projections. Overall, the 2030 population projection totals lie within ± 2.5% of their combined mean.
- Allied to the different population projections is a difference in the projected labour force of 2,200, (4.0%), by 2030. It is the ONS population projections that generate the higher labour force projection, and the County Council forecasts that produce the lower labour force projection. This result is despite both forecasts using the same activity rate assumptions and arises because of the different age and gender structures contained within the two different sets of population projections.
- Under both scenarios, net out-commuting is assumed to rise over the forecast period. In practice, the net out-commuting rate will need to increase above its current forecast level if unemployment is to remain at an acceptable level under the ONS population projections. If net out-commuting doesn't rise and unemployment consequently fall, there is a likelihood that the ONS forecast population growth will not take place. The commuting figures do not take account of the effects of any employment land developed to meet the needs of Redditch residents as this is exogenous to the normal workings of the model.

- Irrespective and whilst it is impossible to draw firm conclusions about gross commuting levels, the expectation is that these may grow rather than decline.
- The number of Bromsgrove District residents with more than one job is expected to decline marginally over the earlier years of the forecast as jobs continue to be relatively hard to find. As the labour market tightens in later years, so the incidence of double jobs is expected to start to increase once more.
- Unemployment is expected to rise in the short-term as the number of job opportunities fails to keep pace with the growth in the population and in the labour force. Reductions in unemployment over subsequent years are the result of an increase in net out-commuting as well as growth in employment opportunities within Bromsgrove District itself.

8.115 Ultimately, the expectation under both scenarios is that Bromsgrove District will remain a relatively attractive place to live although an increasing number of its employment opportunities will be met from outside of the District.

Employment Land Requirement

8.116 The mechanism used to translate employment into an employment land requirement is firstly to multiply the number of employed persons, (employees in employment plus self-employed), by an assumed number of square metres per employee. The resultant number is then divided by an assumed plot development ratio in order to arrive at a total site requirement.

8.117 Whist the ODPM's Employment Land Reviews Guidance Note provides national standards for use in this type of work, there is also recognition in the Guidance Note of the appropriateness of using local figures, where these are available. The salient figures from the Guidance Note are set out in the table below.

Table 8.12: Standard Square Metres Per Employee and Site Density by Activity

	Square Metres Per Employed Person		Site Density
Activity	Gross Internal Area	Gross External Area	Site Density
Industry			
General	34.0	35.0}	0.35 to 0.45
Small Business	32.0	33.0}	
High tech / R & D	29.0	30.0}	0.25 to 0.40
Science Park	32.0	33.0}	
Warehousing & Distribution			
General Warehousing	50.0	50.0}	0.40 to 0.60
Large Scale & High Bay	80.0	80.0}	
Office			
General	19.0	20.5	0.41 to 2.00
Headquarters	22.0	23.0	
Serviced Business Centre	20.0	21.0	

	Square Metres Per Employed Person		Site Density
City of London	20.0	21.0	
Business Park	16.0	17.0	
Call Centre	12.8	13.0	
Retail			
Town / City Centre	20.0	24.0	
Restaurants	13.0	13.0	
Food Superstores	19.0	23.0	
Other Superstores / Retail Warehousing	90.0	93.0	

Source: Planning: Employment Land Reviews – Guidance Note, ODPM, December 2004

8.118 As mentioned above, the ODPM guidance recognises that the standards will not apply in all areas and therefore recommends that local information be used, where possible.

8.119 Accordingly, three different sources of employment density information were considered. The first was from the national guidelines, as issued by the ODPM, (i.e. the numbers cited in the above figure). The second was from local information derived from Valuation Office floorspace statistics for Bromsgrove District for 2006 and the sectoral employment estimates for Bromsgrove District. The third source was the findings from a telephone survey of over 200 businesses operating from premises in Bromsgrove District. This survey was conducted in May and June 2008 and, inter alia, sought information on numbers employed, floorspace occupied and the total site area.

8.120 The densities derived from Valuation Office floorspace statistics were calculated by taking the Valuation Office gross internal floorspace by use category, deducting the vacant floorspace and then dividing the result by the number of persons employed in Bromsgrove District in industries using premises within the relevant use category.

8.121 For example, the manufacturing floorspace per person was derived from the VO figure of 210,000 square metres of industrial floorspace less the 9,450 square metres of vacant industrial floorspace, giving total industrial floorspace in use of 200,550 square metres. Dividing this by the estimated 5,930 employees and self-employed engaged in manufacturing in Bromsgrove District in 2006, gave a gross internal square metres per person figure of 33.8.

8.122 The survey-derived figures were generated by asking each respondent business for details of both the number of employees that were based at its premises and also the square metres of floorspace occupied. The resultant numbers were then weighted and aggregated by major activity, (e.g. manufacturing, distribution), before dividing the resultant floorspace by the number of persons employed to arrive at a square metres per person figure. The survey covered only those industries and sectors relevant to the study.

8.123 Given the nature of economic activity in Bromsgrove District and given the aims of this study, not all of the ODPM employment category density rates are directly relevant. For example, Bromsgrove District has extremely little call centre activity. Equally, for example, retailing is outside the scope of this study.

8.124 As such, the following table, (Table 8.13), which contains the employment density figures used in calculating the building space required to accommodate Bromsgrove's employment, only covers those activities relevant to Bromsgrove District and to this study.

Table 8.13: Comparison of Employment Density Figures (Square Metres Per Person)

Activity		Bromsgrove District		
		ODPM (Gross Internal) Sq m	Derived Sq m	Survey (1) Sq m
Industry	- General	34.0}	33.8	36.8
	- Small business	32.0}		
Warehouse & Distribution	- General	50.0}	43.3	68.2
	- Large scale & high bay	80.0}		
Construction		-	25.5	27.7
Offices	- General	19.0	17.5	24.1

(1) Based on findings from a telephone survey of 200 Bromsgrove District Businesses.

8.125 The VO derived figures in the above table show the average manufacturing floorspace per employee as very close to the ODPM standard, and also very close to the figure revealed by the survey.

8.126 Figures for square metres per person in warehouses in the survey are in line with the ODPM average figures for general warehousing and for high bay and large-scale warehouses, reflecting a mix of warehouse types in Bromsgrove District. The survey figures are, however, significantly higher than the Valuation Office derived figures, which are below the ODPM average for general warehouses.

8.127 The figure for office space per person, at 24.1 square metres, is higher than the ODPM standard for general offices at 19.0 and is higher than the 17.5 square metres per employee derived from the Valuation Office figures.

8.128 Also included in the survey were a number of construction businesses. These had, on average, 27.7 square metres of floorspace per employee. This figure is in line with a weighted average figure for offices and warehouse and distribution derived from the Valuation Office figures. There is no equivalent figure produced by the ODPM.

8.129 The derived figure, at 25.5 square metres, is based on a weighted average of office space (40%) and warehousing (60%) but discounted by 40% to allow for those self-employed who work from home and have no formal business premises. In practice, the construction industry requirement is allocated between office and warehouse and distribution uses and does not appear as a separate requirement in the following table.

Current Floorspace Requirement

8.130 Applying the figures for square metres per employee to the 2010 employment estimate produces the following range of estimates for the amount of built space required in Bromsgrove District to house its various business activities.

Table 8.14: Built Accommodation Requirement, (Gross Internal Floorspace), Under Different Employment Density Assumptions

Activity	ODPM ('000 sq m)	Survey ('000 sq m)	Derived ('000 sq m)
Industrial	114.4	125.3	132.3
Warehouse & Distribution	175.3	231.4	247.0
General Office	134.5	170.3	181.4

Source: WM Enterprise Consultants

8.131 From Table 8.14, it is apparent that the floorspace requirements derived from the ODPM figures produce a lower requirement than is produced by either of the other two methodologies, with the VOA derived figures producing the highest requirement.

8.132 One further point in relation to Table 8.14 is that the figures in the table only provide sufficient gross internal floorspace to accommodate the current level of activity. As such, there is no allowance for spare capacity linked to frictional or other elements of the market, including the need to secure a balanced portfolio of land and premises linked to providing adequate choice within the market place. Equally, there is no allowance for walls, plant rooms and outbuildings.

Employment Land Requirement

8.133 Translating floorspace requirements into employment land requirements necessitates the adoption of appropriate factors to translate internal floorspace into gross external floorspace. It also requires the adoption of appropriate site development density assumptions.

8.134 The factors used in translating internal floorspace into gross external floorspace were a 5% increase for manufacturing, 5% for warehousing and 15-20% for offices. These figures are based on industry standards, including as presented in the 2001 Arup Economics Study for English Partnerships.

8.135 Two sets of site development density figures are available. These are the ones provided by ODPM and the ones available from the survey of Bromsgrove District businesses. The following table compares the numbers from these two sources.

Table 8.15: Site Density Figures

	ODPM	Survey
Industry	0.4	0.68
Warehousing	0.5	0.75
Transport		0.53
Construction		0.55
Offices	3.6	0.46

8.136 From Table 8.15, it is apparent that the site density of industry in Bromsgrove District, as revealed by the survey, is higher than the national average. This reflects the relatively long established nature of the District's production facilities.

8.137 The site density for offices is considerably lower in Bromsgrove District than that indicated by the ODPM figure. This is due to a number of Bromsgrove District offices being located on low density businesses parks, with relatively few high density office blocks present in the District.

8.138 Applying the various site density ratios to the calculated square metres required to accommodate existing economic activity in Bromsgrove District provides an estimate of the total employment land requirement. This is detailed in the following table.

Table 8.16: Employment Land Requirement (Hectares)

	ODPM		Survey		Derived	
	ODPM	Survey	ODPM	Survey	ODPM	Survey
Industry	20.4	12.1	32.8	19.3	34.7	20.4
Warehousing & Distribution (1)	38.3	24.1	80.6	51.1	76.3	48.3
Offices	4.0	31.3	5.6	43.5	5.9	46.3

(1) These figures include an estimate for construction.

8.139 The above figures indicate that reliance on ODPM standards would seriously underestimate the current actual employment land requirement in Bromsgrove District to accommodate its office based activities.

8.140 Equally, it is clear that redevelopment of Bromsgrove's existing manufacturing and warehouse facilities is going to require more land than is currently occupied, if site densities more applicable to modern working practices are to be adopted. This is reflected in the next sections.

Employment Floorspace and Land Forecasts

8.141 The following figure, Table 8.17, shows the current, (2010), estimated floorspace occupied in Bromsgrove District by different use categories, together with the forecast floorspace requirement for selected years through to 2030. The forecasts are based on local employment densities as revealed by the survey.

Table 8.17: Employment Floorspace Requirement ('000 square metres)

	2010	2016	2021	2026	2030
Industrial	131.5	160.1	156.1	152.2	149.0
Warehouse &Distribution	231.4	257.0	261.0	263.5	266.1
General Office	200.1	207.9	220.3	231.4	240.4

Source: WM Enterprise Consultants

8.142 The figures in Table 8.17 are in accordance with the normal convention used by property agents and developers in reporting floorspace. As such, they represent gross internal areas for industrial and warehouse premises and the net internal areas for offices. This means that the floorspace figures are not directly comparable between different uses and need to be variously adjusted in order to raise them to a common gross external area basis for use in calculating land requirements.

8.143 Also, in using the floorspace figures in Table 8.17, it is important to recognise that these do not include any allowance for vacant premises and do not allow for the provision of a balanced portfolio providing choice. As such, they are the absolute minima needed merely to accommodate current and forecast activity.

8.144 The following figure, (Table 8.18), sets out the anticipated employment land requirement for Bromsgrove District through to 2030 based on current employment densities and land development densities in the District. In producing these figures, the manufacturing, warehouse and distribution gross internal floorspace shown in Table 8.18 has been increased by 5% and the office floorspace by 17.5% in order to raise them to gross external area, before applying appropriate employment densities. Table 8.19 illustrates the change in floorspace requirement over the period based on the information in Table 8.18 and suggests an increase of 19.9 ha of land in employment use above the level occupied as at 2010 in order to accommodate the anticipated maximum requirements of each of the three categories.

Table 8.18: Employment Land Requirements (Hectares)

	2010 (ha)	2016 (ha)	2021 (ha)	2026 (ha)	2030 (ha)
Industrial	19.3	23.5	23.0	22.4	21.9
W&D	47.1	52.3	53.0	53.5	54.0
General Office	43.5	45.2	47.9	50.3	52.3

Source: WM Enterprise Consultants

Table 8.19: Change in Employment Land Requirements over the Study Period 2010 - 2030

Office	Industrial	Warehousing & Distribution
+8.8 ha	+4.2 ha	+6.9 ha

8.145 As with the figures in Table 8.17, the figures in Table 8.18 and Table 8.19 represent the absolute minimum needed to accommodate existing and future activities. In other words, the figures simply represent the amount of additional land needed to accommodate the level of additional floorspace in different employment classes required by 2030. In reality, a much larger amount of land will need to be made available to allow for losses of existing employment sites to other uses during the plan period as well as to ensure a balanced portfolio of employment land in terms of sufficient choice of available sites and locations over the period up to 2030. Through the use economic forecasting techniques, it is difficult to precisely define an exact amount or target for future employment land and it is therefore also important to have regard to other approaches to guide future employment land provision, including projecting forward past completion rates and market analysis.

8.146 The figures generated by the forecasts also exclude any requirement to meet the needs of Redditch residents and specifically exclude the 30 ha of land identified in the currently adopted Local Plan (referred to in section 3.52 of this report).

8.147 From the above, there are expected to be increases in the requirement for office, warehouse and distribution and industrial space. Whilst the figures indicate that the industrial land requirement will reduce after 2016, if forecast labour productivity changes are taken into account, then the 2030 requirement could remain unchanged from that shown in 2016, or potentially be even higher, depending upon the form that the labour productivity increases take.

Scenarios

8.148 Whilst the forecasts contained in the previous section can be viewed as a best estimate of how the Bromsgrove District labour market and economy will develop through to 2030, the potential impact on employment land requirement of deviations from the forecasts need to be assessed. This is whereby those elements most likely to impact significantly on employment land requirements can be monitored closely.

8.149 Identifying those elements of the forecasts that have the greatest impact on employment land requirements, is best achieved through modelling different scenarios. This is done in the remainder of this section.

Housing and Population

8.150 The model mirrors the real economy in that increases in population do not automatically generate employment opportunities for the additional people. That said an increase in the population and its associated spending power will generate some additional employment. This will, however, have the greatest direct impact on areas such as retailing rather than on the manufacturing, wholesale and distribution and office based activities that are covered by the employment land study. Warehouse based retailing is covered however within wholesale and distribution.

8.151 Housing the people and meeting their health and education needs as well as providing for additional facilities could add to local construction industry employment. Some additional office based employment could also be created in activities such as legal services and potentially as health administrative functions claim office space as an alternative to being housed within bespoke health buildings.

8.152 Quantifying these impacts and translating them into direct and indirect employment land requirements is difficult in the absence of a full model of the Bromsgrove District economy and knowledge of the location of the additional population. Specifically, it is impossible to quantify the extent of economic leakage and impossible to determine whether new schools, health centres, retail outlets, etc. will be needed or whether existing provision will be adequate.

8.153 Nevertheless, the population forecasts used in the model can be translated into housing requirements by applying an assumed household size. Details on household size can be extracted from the 2001 Population Census and also from more up to date information included in the Worcestershire Strategic Housing Market Assessment produced for the Worcestershire Local Authorities in February 2012 by GVA. The GVA report produces a slightly lower household size than the 2001 census and also predicts a relatively large decline in the average number of persons per household in Bromsgrove District by 2030.

8.154 A range of different scenarios can be produced as to the number of households that Bromsgrove District will have to accommodate by 2030, depending upon the population forecast used and the assumed number of persons per household.

8.155 Irrespective and without attaching any significance to any of the housing scenarios, the conclusion can be drawn that the 7,000 additional dwellings in Bromsgrove District Council's housing requirement forecast is consistent with the population and employment forecasts underpinning this employment land study, with the calculated employment land requirement also able to support a higher number of additional dwellings than 7,000 if the number of persons per household falls in line with the GVA Report forecast.

Commuting

8.156 At present, Bromsgrove District acts as a significant dormitory for Birmingham, the Black Country and other parts of the West Midlands region.

8.157 Should Bromsgrove District Council wish to provide sufficient employment land to accommodate all of its resident working population, then and on the assumption that the additional jobs to be generated in the District are in direct proportion to those already in the District, the additional minimum employment land requirement would be as set out in Table 8.20 below.

Table 8.20: Minimum Additional Employment Land Requirement If No Out-Commuting

Activity	Additional Hectares
Industrial	14.6
Warehouse & Distribution	17.8
General Office	20.8

Source: WM Enterprise Consultants

8.158 The above figures assume that in-commuting remains at its current level. Should in-commuting cease, then the above figures could be reduced by around 60%.

8.159 In practice, commuting levels are not likely to change in the way indicated in this scenario. Nevertheless, the scenario does show the extent to which Bromsgrove District relies on other areas to provide the employment land necessary to accommodate the economic activities of many of its residents.

Projecting Past Completion Rates

8.160 An alternative approach to forecasting likely future requirements is to look at past completion rates and to project these rates forward, to help to inform an employment land requirement figure.

8.161 Tables 8.21 and 8.22 set out predicted future development rates for the District and study sub areas based on projecting forward past average annual development rates occurring over a ten year period (2001-2011). Table 8.21 considers the past contribution of development at Ravensbank Business Park in deriving an average whereas this development is excluded from Table 8.22.

8.162 It should be noted however that the completion rates used are understood to be gross average completion rates. The average annual net change in employment land will likely be less when also considering losses to other uses and developments involving the redevelopment of employment premises to other employment uses for example.

Table 8.21: Future Employment Requirements Applying Past Completion Rates (Including Past Development at Ravensbank Business Park)

	Bromsgrove District	Rural West	North	Bromsgrove	Rural East
Average gross annual take up per annum (1)	3.43 ha	0.15 ha	0.25 ha	0.87 ha	2.21 ha
Need 2012 – 2030 (18 years)	61.74 ha	2.7 ha	4.5 ha	15.66 ha	39.78 ha

Source: Bromsgrove District Council Land Availability Employment Reports

Table 8.22: Future Employment Requirements Applying Past Completion Rates (Excluding Past Development at Ravensbank Business Park)

	Bromsgrove District	Rural West	North	Bromsgrove	Rural East
Average gross annual take up per annum (1)	2.29 ha	0.15 ha	0.25 ha	0.87 ha	1.08 ha
Need 2012 – 2030 (18 years)	41.22 ha	2.7 ha	4.5 ha	15.66 ha	19.44 ha

Source: Bromsgrove District Council Land Availability Employment Reports

8.163 Accepting the above caveats, the employment land requirements obtained using the approach delivers significantly different (i.e. higher) results than using the small area forecasting model, which is based on modelling future change in the economy rather than projecting forward past take up rates of employment land.

8.164 This underlines the need to apply the outputs of the small area forecasting model as an absolute minimum land requirement and that in reality, a much larger amount of land will be required to ensure continuing economic development and an adequate portfolio of sites, particularly if past (gross) development rates are to continue in the future.

9 Findings from the Employer Survey

Introduction

9.1 The following details the findings from a survey of 200 businesses operating in Bromsgrove District. The survey took place in October-November 2012 and sought responses to the same questions as those asked in an earlier survey that took place in April-May 2008.

9.2 The businesses covered in the surveys variously operated in the manufacturing, construction, wholesale, transport and distribution and in the business and financial services sectors. None of the businesses operated from High Street type retail premises; although a number were operating out of residential properties.

9.3 Both the surveys were conducted by telephone, with respondent businesses asked to complete a proforma questionnaire focusing on their current and future employment land requirements within the District. Other questions sought to gain an insight into the dynamics of the local business sector and an understanding of perceptions of Bromsgrove District as a place in which to operate businesses. In addition, the opportunity was used to gain an insight into perceptions of employment land and premises availability within the District as a whole and within different parts of it.

9.4 Those businesses selected for interview were drawn from stratified databases of eligible businesses, with selection aimed at giving as representative a sample as possible across and within sectors, but with due consideration being given to ensuring coverage of all relevant geographical parts of the District and of all industrial sectors within each of the different geographical areas. The four specific geographical areas covered by the survey were Bromsgrove town, Rubery and the North, the Rural East and the Rural West.

9.5 The 2008 survey was conducted in-house by WM Enterprise Consultants' own staff. The 2012 survey was conducted by specialist market research firm RMG:Clarity. It is unknown as to how many businesses took part in both surveys.

9.6 WM Enterprise Consultants would like to use this opportunity to thank all those businesses that participated in the surveys.

9.7 Whilst the findings presented below relate primarily to the October-November 2012 survey, the opportunity has been taken to make comparisons with the findings from the 2008 survey, particularly where the findings were significantly different. Nevertheless and although the 2008 survey covered a similar number of businesses (201) across the same sectors, it would be misleading to attribute statistical significance to any differences.

Overview of Surveyed Businesses

9.8 The following figure (Table 9.1) provides a summary of the businesses surveyed in 2012 and, where possible, compares this with a corresponding summary of the businesses surveyed in 2008.

Table 9.1: Characteristics of Businesses Surveyed in 2012 and in 2008

Characteristic	2012 %	2008 %
Activity		
Manufacturing	20.5	24.4
Construction	20.0	21.8
Wholesale	17.5	10.7
Transport and Distribution	12.0	7.6
Financial and Business Services	30.0	35.5
	100.0	100.0
Size		
Micro (< 10 employees)	83.4	
Small (11 – 49 employees)	13.6	
Medium / Large (50 + employees)	3.0	
	100.0	
Location		
Bromsgrove	61.0	50.0
Rubery and the North	12.0	17.7
Rural East	20.0	25.3
Rural West	7.0	7.0
Bromsgrove District (Total)	100.0	100.0
Trading at current address		
Less than 1 year	9.0	11.9
1 – 2 years	14.5	21.6
3 – 5 years	17.5	39.7
6 – 10 years	16.0	
Over 10 years	43.0	26.8
	100.0	100.0

Source: W M Enterprise Consul

9.9 Companies who responded to the 2012 survey employed a total of 2,033 persons (1,989 employees in the 2008 survey). The 2012 total represented the equivalent of 6.2% of all employees in employment in Bromsgrove District (6.0% in the 2008 survey). As indicated above, not all sectors were included in the surveys. Taking this into account lifts the 2012 survey percentage coverage of the workforce within eligible sectors to 13.7% (10.8% in the 2008 survey).

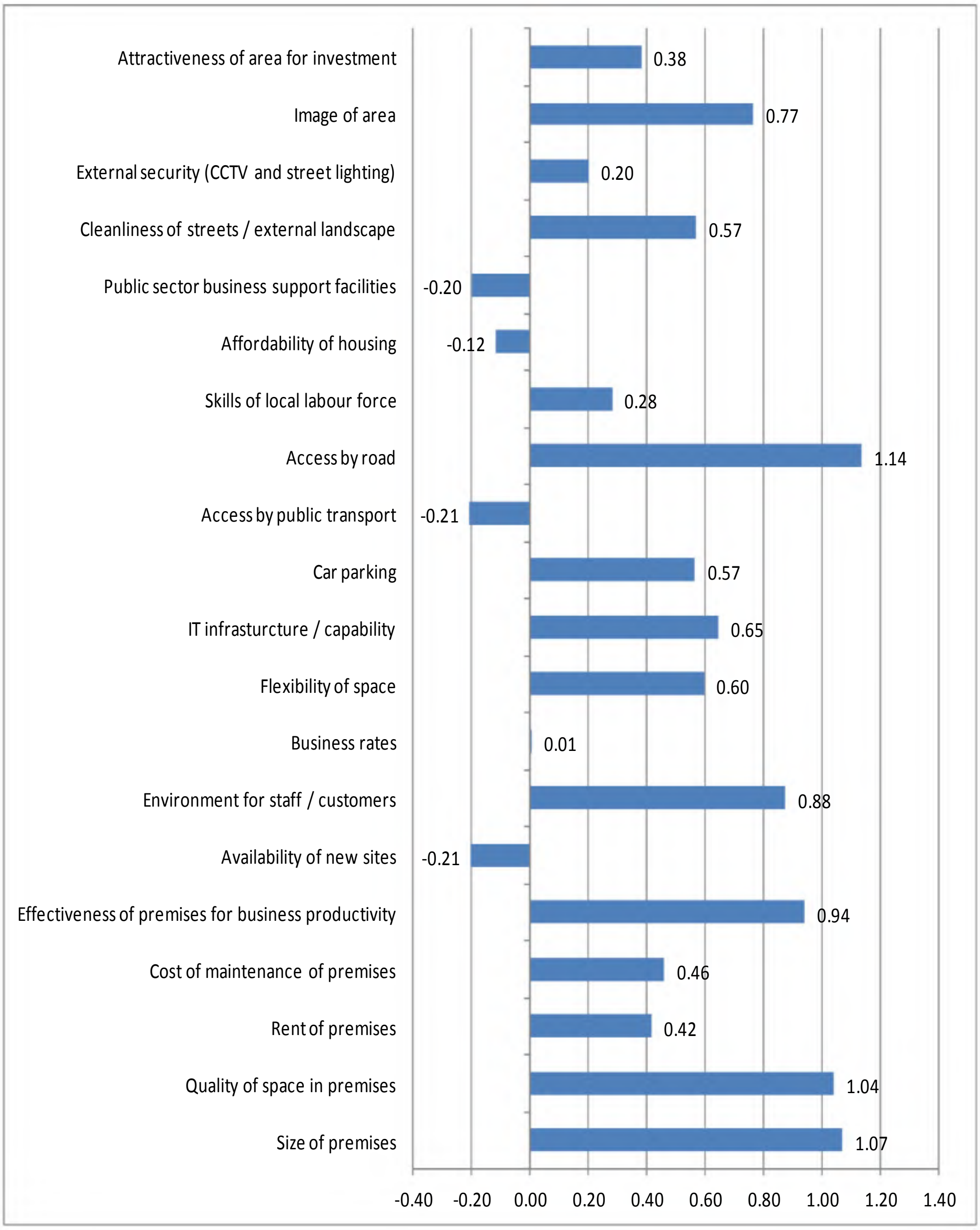
9.10 71.5% of the employees of the businesses surveyed lived inside the District, with around 42.4% living in the locality of the business, defined as within three miles.

Doing Businesses in Bromsgrove

9.11 Survey respondents were asked to rate various aspects of operating a business in Bromsgrove District, using a weighting of +2 for very good, +1 for good, -1 for poor and –2 for very poor. The results show how highly businesses rate various aspects of their current premises and locality. As the figures include people who were neutral, anything over +1 shows that a particular aspect is rated highly enough to cut through respondent apathy.

9.12 The findings from the 2012 survey are presented in Figure 9.2, with bars to the left of the central axis indicating perceived problem areas and those to the right indicating positive aspects of trading within Bromsgrove District. The length of each bar indicates the relative strength of opinion.

Figure 9.2: Positive and Negative Aspects of Operating in Bromsgrove District

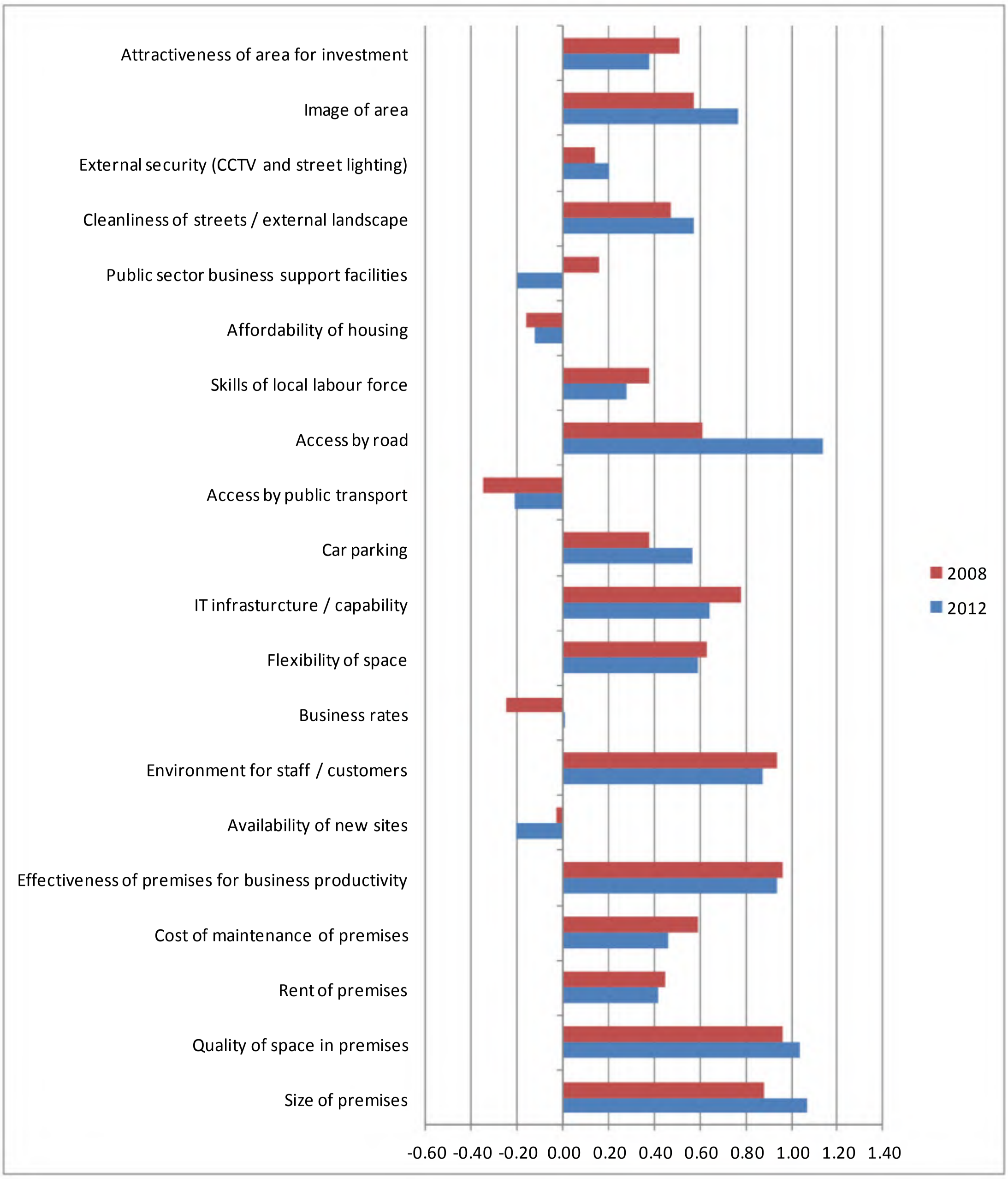


Source: WM Enterprise Consultants

9.13 As can be seen from Figure 9.2, the major concerns of businesses in Bromsgrove District are the availability of new sites, access by public transport, the availability of public sector support and, to a lesser extent, the affordability of housing. The need for improved public transport was especially pronounced in the Rural East area of the District but was also evident amongst Bromsgrove respondents.

9.14 Figure 9.3 compares the findings from the 2012 survey with those from the 2008 survey. Fundamentally, this shows strength of feeling to be different rather than the general perception, other than in one or two areas.

Figure 9.3: Positive and Negative Aspects of Operating in Bromsgrove District – Comparison of Findings Between 2008 and 2012 Surveys



Source: WM Enterprise Consultants

9.15 Most notable of the areas where there has been a change in perception is public sector business support services, where there has been a move from a positive perception to a negative perception. This reflects the effects of public sector expenditure cuts introduced over recent years as well as the associated dissolution of Advantage West Midlands.

9.16 The other area where there has been a shift in perception is in Business Rates, which have moved from being perceived as having a negative impact on business to being marginally positive!

9.17 The main problems faced by the surveyed businesses in Bromsgrove District were market pressures (21.5%), cash flow constraints (14.5%), the economic recession (12.0%) and the rising costs of running the business (5.5%). More positively, some 35.5% of businesses indicated that they were not facing any major problems.

9.18 Market pressure was particularly acute amongst Financial and Business Service businesses, with a third of those surveyed noting this to be a problem, and amongst Construction businesses, with a quarter stating that this was a problem. Manufacturing businesses were also finding market pressure to be a problem with 22% citing it. Interestingly, the Transport and Distribution sector, which had faced the highest level of market pressure at the time of the 2008 survey, was one of the sectors least suffering from market pressure at the time of the 2012 survey.

9.19 Cash flow problems followed a similar pattern with the Financial and Business Services sector suffering most from cash flow problems, closely followed by Construction businesses and Manufacturers. Wholesalers and Transport and Distribution businesses were the least affected.

9.20 7.3% of the Manufacturing businesses surveyed reported having skill shortages, as did 5.0% of Construction businesses, 4.2% of Transport and Distribution businesses and 3.6% of Financial and Business Services respondents. Allied to this, recruitment and retention of staff was most difficult amongst Financial and Business Services businesses, with 8.9% reporting a problem.

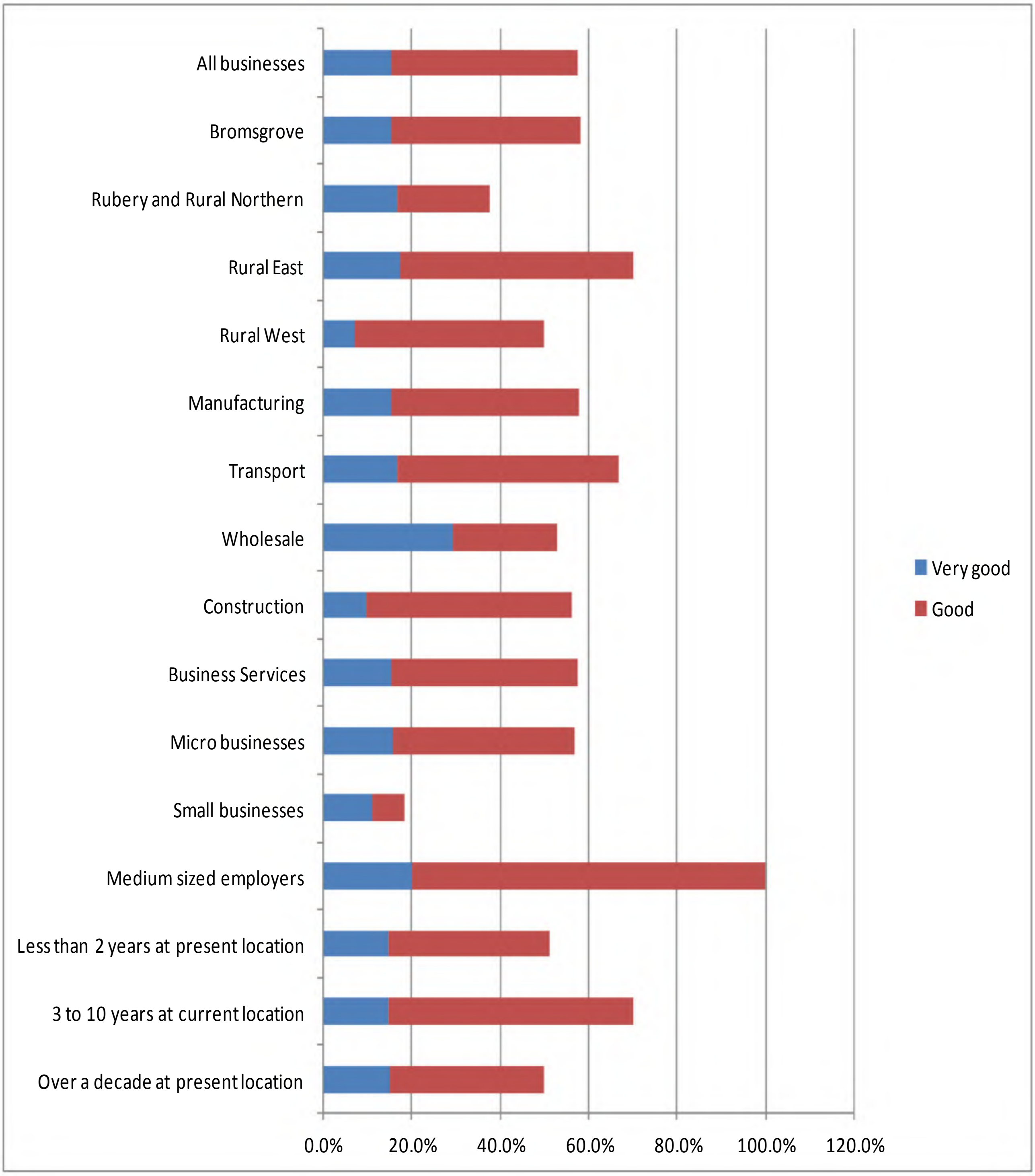
9.21 Surveyed businesses were asked to rate Bromsgrove District as a place in which to conduct business. The findings from this are presented in Figure 9.4, with the results shown in aggregate and for different categories of businesses.

9.22 59% (65% in 2008) of the 2012 survey respondents rated Bromsgrove District as a good or a very good place in which to do business. 33% (20% in 2008) felt it was average and less than 8% (11% in 2008) thought that it was either poor or very poor. Levels of satisfaction were particularly high in the Rural East (70% of respondents rating it either very good or good), despite the problems associated with public transport in this area of the District. The lowest level of satisfaction was in the North area, (37.5% rating it either very good or good).

9.23 Transport businesses rated the District highest in terms of being a good or very good place in which to do business. This in part reflects a general perception that the District is a good business location due to its centrality and access to the motorway network.

9.24 The level of business rates was the commonest reason for businesses giving the District a low rating. This is despite business rates being set nationally rather than locally. Also high on the list of problems was the cost and availability of parking in Bromsgrove town. This was particularly a problem for Business Services businesses.

Figure 9.4: Percentage of Businesses Surveyed in 2012 Rating Bromsgrove District as a Very Good or Good Business Location, By Business Attribute

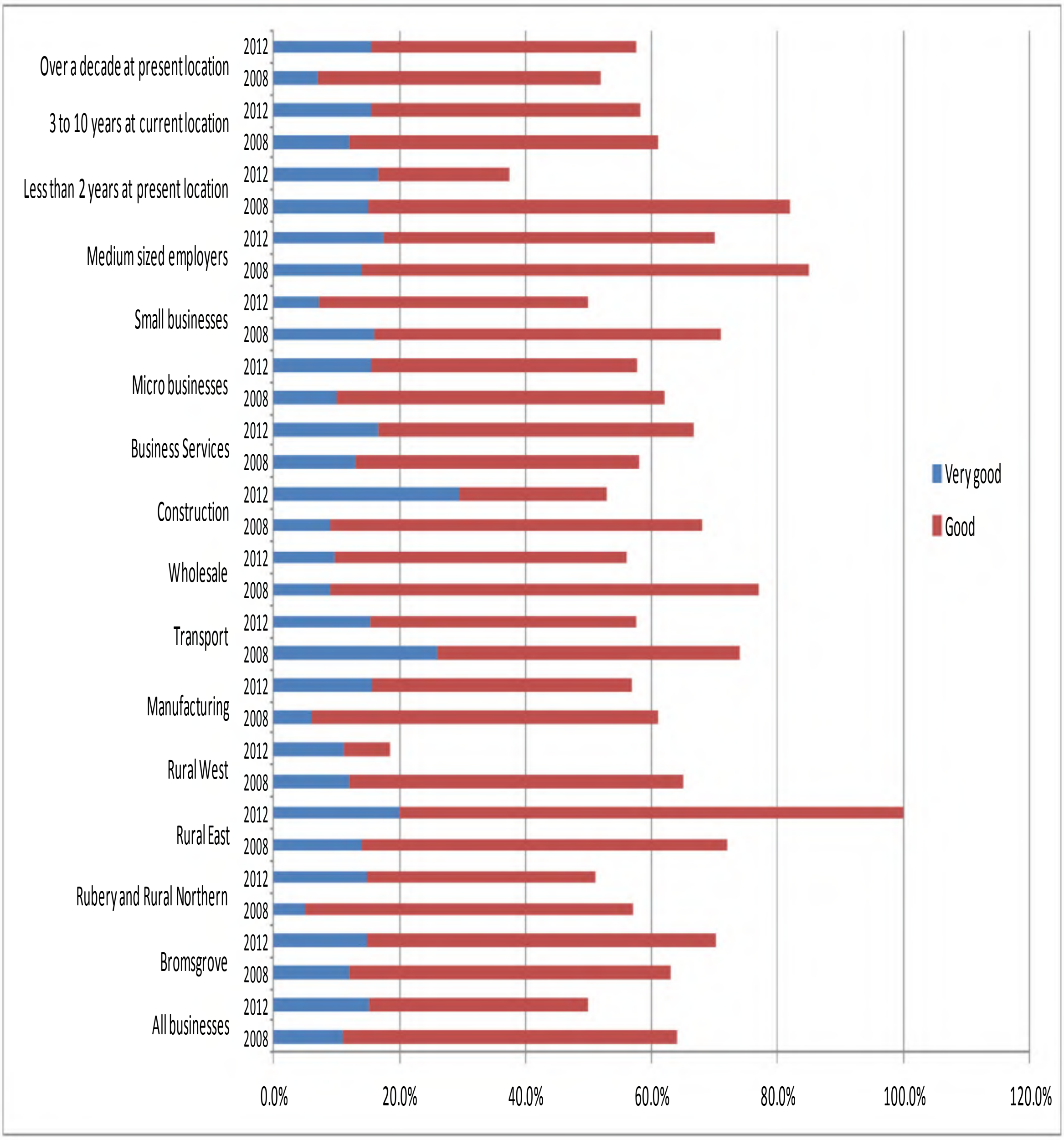


Source: WM Enterprise Consultants

9.25 Otherwise and with the exception of a shortage of business opportunities, problems cited tended to be more one-off linked to particular companies or locations and included mention of the low calibre of local candidates when recruiting, access difficulties for large lorries in relation to a particular site, a shortage of development sites to meet the needs of local businesses and the declining retail offering in the area such that fewer people were coming to the area.

9.26 Figure 9.5 compares the findings from the 2012 survey presented in Figure 9.4 with those from the 2008 survey.

Figure 9.5: Comparison between Results From 2008 and 2012 Surveys on Ratings of Bromsgrove District as a Very Good or Good Location, By Business Attribute



Source: WM Enterprise Consultants

9.27 From Figure 9.5 it is evident that whilst more of the businesses surveyed in 2012 viewed Bromsgrove District as a good or very good place from which to do business than did those surveyed in 2008, this was the result of more positive responses in a limited number of areas rather than across the board. Specifically, more positive responses from businesses that had been trading for 3-10 years in the current location, those that were medium sized and those in the Transport and Distribution sector more than compensated for more adverse views particularly from small businesses, from those based in Rubery and the Rural North and from those engaged in the Construction sector.

Business Relocation

9.28 44% of the businesses had always been at their current address, with a further 37% having re-located in the past from elsewhere within Bromsgrove District. The remaining 19% had moved into Bromsgrove District from a range of locations, although Birmingham accounted for 26% of these, the Black Country and the rest of Worcestershire for 21% each and Solihull for a further 10.5%. The balance came from a variety of locations.

9.29 Reasons for relocating were varied, although the most common was a need for larger premises (32.1%). A further 10.7% were home based businesses, with the relocation linked to a decision to move house. Fuller detail is provided in the following Figure (Table 9.6).

Table 9.6: Reasons Given By Businesses Surveyed in 2012 For Relocating To Current Premises

Reason	% Citing
Need for larger premises	32.1
Need for smaller premises	2.7
Need for better premises	6.3
Wanting bespoke premises having previously worked from home	2.7
Previous premises no longer available	8.9
Work from home and moved house	10.7
Moved closer to homes of management and staff	7.1
Bought premises	4.5
Other	25.0
	100.0

Source: WM Enterprise Consultants

9.30 66.1% of those that had relocated had not considered any location other than that selected, with a further 16% considering only locations in Bromsgrove District, mainly Bromsgrove and the Rural East.

9.31 Of the remainder, 8.9% did not know what other sites had been considered, whilst for the balance the principal alternatives considered had been Birmingham (4.5%), Worcester (4.5%), Redditch (3.6%), and elsewhere in the West Midlands region (7.1%). Some businesses had considered more than one location, hence the above percentages sum to more than 100.

9.32 Over a quarter of the businesses surveyed were operated from residential premises rather than from designated industrial and commercial premises. Those businesses operated from residential premises covered the full range of surveyed activities, as shown in the following figure (Table 9.7).

Table 9.7: 2012 Surveyed Businesses Operated From Residential and Business Premises, By Activity

Activity	Residential	Industrial / Commercial	Total	Percent Residential
Manufacturing	6	35	41	14.6%
Construction	19	21	40	47.5%
Wholesale	11	28	39	28.2%
Transport and Distribution	5	19	24	20.8%
Financial and Business Services	10	46	56	17.9%
Total	**51**	**149**	**200**	**25.5%**

Source: WM Enterprise Consultants

9.33 Whilst the proportion of surveyed businesses being operated from residential premises was significantly higher in the 2012 survey than in the 2008 survey (7.5%), it would be unwise to draw any conclusions that there has been a significant shift towards home based businesses over the last four years. Most likely, the difference is primarily the result of differences in the databases used.

9.34 Supporting this argument is the fact that 41.2% of the home based businesses had been operating for more than 10 years and a further 21.6% for between 6 and 10 years. Only 7.8% had been established for less than a year and 13.7% for between 1 and 2 years.

9.35 Most of the home based businesses (72.5%) expected that they would remain the same size for the foreseeable future, with 21.6% expecting to grow and 5.9% expecting to decline in size. All of the businesses in the latter category were in the Construction sector.

9.36 There was uncertainty as to whether the existing residential premises would continue to meet the needs of the businesses run from them, with only 3.9% stating that the premises would definitely meet their future needs and only 13.7% stating that they would definitely not. The uncertainty undoubtedly reflects the large amount of uncertainty within the economy.

Suitability of Premises

9.37 95% of all survey respondents considered their current premises to be suited to their current needs.

9.38 Of the remaining 5%, half stated that the premises were too small and 20% that they were too big. The other 30% had more site specific problems such as access difficulties or noise.

9.39 Businesses whose premises were too small covered all sectors and locations other than Rubery and the North. 60% of the respondents whose premises were too small did not believe that there were premises available that were suited to their needs. The other 40% did not know.

9.40 Just under half of the businesses surveyed put forward no suggestions as to what could be improved to help their businesses in Bromsgrove District, but with only 2% of all the businesses surveyed stating that they were doing quite well.

9.41 A wide range of suggestions were put forward by the other businesses surveyed, with reducing the level of business rates payable (including by not scrapping the small business relief) inevitably coming out on top, with 22.9% of the businesses putting forward suggestions mentioning it. The next most frequently mentioned answer related to increasing demand in the economy, including from the public sector, and making public sector contracts more accessible to smaller businesses. Tying for third place were increasing parking facilities and making parking cheaper and enhancing the Bromsgrove town centre offer and generally giving the area a facelift.

9.42 Fuller details are contained in the following table, Table 9.8, with the percentages relating to the 105 surveyed businesses that made suggestions as to how improvements might help their businesses.

Table 9.8: Factors That Would Improve Their Businesses Cited By Businesses Surveyed in 2012

Factor	% Citing
Reduce business rates payable (Including by not scrapping small business relief	22.9
More client work, including from public sector	17.1
Increase parking facilities and make parking cheaper	10.5
Improve Bromsgrove town centre offer and give area a facelift	10.5
Increase business support and financial help (local and national)	7.6
Promote the area in order to attract more businesses in	7.6
Improve public transport, including between residential and business areas	5.7
Relax the planning regime to make development easier	3.8
Improve broadband speeds	3.8
Improve road infrastructure to increase capacity and ease congestion	3.8
Increase business networking opportunities	2.9
Reduce tax on fuel and reduce energy prices	2.9
Make more large units and more offices available	2.9
Reduce rents	1.9
Make flexible leases more readily available	1.9
Improve rail links (including to London) and stations	1.9

Source: WM Enterprise Consultants

9.43 Other matters that were raised by single respondents included: fill in pot-holes on the roads, introduce liaison between councils and businesses when setting council expenditure priorities, improve flood prevention measures, allow businesses to advertise for free in local papers, establish schemes to help young people into work / self-employment, improve mobile phone coverage and improve the rural postal system.

Future Premises Requirements

9.44 Despite the uncertain economic climate, 31% of the surveyed businesses stated that they had plans to expand in the next year or so. Only 2% expected to contract, with the balance (67%) expecting to stay at roughly their current level of operation.

9.45 For some of the businesses planning to expand, the recent winning of new business meant that their plans were largely under-written. For the majority, however, expansion was more aspirational rather than necessarily achievable. Equally, many of the businesses expecting to stay the same size acknowledged that this could be difficult if the national economy fell deeper into recession or if forecast levels of national economic growth were not achieved.

9.46 If growth levels were achieved, some 13.5% of the surveyed businesses expected that their premises need would increase as against 1.5% that saw them reducing. For those 12 respondents that were able to quantify their additional requirement, the amount of additional floorspace required was 549,500 square feet, although the amount per business ranged from 300 square feet to 230,000 square feet.

9.47 The anticipated usage of the additional floorspace was 11% offices, 3.0% sales, 66.6% warehousing and 19.3% manufacturing.

9.48 Based on the principal use, the breakdown is c.400,000 square feet for warehousing, c.142,250 square feet for manufacturing and c.7,250 square feet of offices.

9.49 For those anticipating having additional floorspace requirements but who were unable to quantify the amount, the principal uses would be offices for six of them, industrial for three and warehousing for two.

9.50 The quantified additional demand for warehousing is predominantly in the Rural East, which accounts for 73.6% of the total, with the balance being in Bromsgrove. Demand for additional industrial space is focussed on Bromsgrove (96.1% of the total) with the balance in the Rural West. Demand for additional office space is also predominantly in the Rural East (95.5%) with the balance in Bromsgrove.

9.51 Looking at un-quantified demand produces a more even distribution with demand evident in most parts of the District, as shown in the following figure.

Table 9.9: Un-quantified Demand by Area and Activity

	Manufacturing	Construction	Wholesale	Transport and Distribution	Financial and Business Services
Bromsgrove	1	3	2	1	4
Rubery and North			1	1	2
Rural East	1		1		1
Rural West					1
Total	**2**	**3**	**4**	**2**	**8**

Source: WM Enterprise Consultants

9.52 59% of those businesses with expansion plans who felt that they would be unable to accommodate their expansion on their existing site believed that they would be able to find alternative premises within Bromsgrove District. The remaining 41% did not.

9.53 There was almost universal agreement amongst those that would be unable to find alternative premises in Bromsgrove District that they would not wish to operate from more than one site; although the possibility of acquiring or using adjacent premises, such as an adjacent unit on the same industrial estate, was not ruled out.

9.54 Of those respondents willing to relocate, 83% would only consider sites within Bromsgrove District, whilst the other 17% would extend their search to other parts of the West Midlands region. In general, those in the rural areas wished to remain in the rural areas, whereas those in Bromsgrove, whilst generally favouring remaining in Bromsgrove, would be more willing to consider moving to a rural area or outside of the District.

9.55 A third of the businesses that wished to relocate within Bromsgrove District wished to buy the freehold of their new premises and thereby move away from renting. In addition, 22% wished to move into premises that were better suited to their particular business activity. Over 55% of businesses would look closely at the costs associated with the new premises with a view to reducing the overall annual outgoings per square foot and 44% would be influenced in their choice by the availability of grants and other support.

9.56 80% of those looking to relocate would be looking for mid-range premises, with the other 20% seeking prestigious, office premises.

Longer Term Premises Requirements

9.57 63.5% of survey respondents were targeting turnover growth for their businesses over the next ten years, whilst only 5.5% were looking to reduce the size of the business. Those looking to reduce the size of the business were predominantly very small businesses, with retirement of the owner being a factor in the decision.

9.58 Businesses expecting to grow turnover, were targeting annual growth rates of between 1-2% and over 20%. Allied to the turnover growth, 47.5% of the surveyed businesses and 75% of those expecting turnover to grow were anticipating that employee numbers would also rise, with rates of growth falling within the same ranges as anticipated turnover growth. As such, increases in labour productivity did not appear to be high on respondents' agendas.

9.59 The types of jobs expected to be created covered a wide range of activities and skill levels including: accountants, administrative staff, construction workers, drivers, engineers, IT workers, sales, software developers, traders and warehouse staff.

9.60 20% of the surveyed businesses, equating to 31.5% of those expecting to see revenue growth, anticipated having a requirement for more floorspace. 5% of the surveyed businesses expected their premises requirements to reduce.

9.61 33.3% of the firms with additional premises requirements would look to move into alternative premises nearby, with a further 7.1% looking to take on adjacent units or office space. For 28.6% of respondents, the expected outcome would be a wholesale relocation, whilst 23.8% anticipate that, subject to planning permission, they would be able to extend their existing premises. Only two respondents indicated that they would look to find a site and build new premises on it and only one saw opening of an additional office as affording a viable solution.

9.62 Given the survey sample size, it would be unwise to read too much into the geographical and sector split of the businesses anticipating a requirement for additional floorspace, nevertheless and as shown in the following table, the geographical pattern appears to broadly follow the pattern of surveyed businesses, whereas the sector split suggests higher demand for office space and low demand for warehousing.

Table 9.10: Percentages of Surveyed Businesses By Category Anticipating A Requirement For Larger Premises In The Longer Term

Attribute	% of Surveyed Businesses
Location	
Bromsgrove	18.0%
Rubery and North	25.0%
Rural East	20.0%
Rural West	28.6%
All locations	20.0%
Sector	
Manufacturing	19.5%
Construction	22.5%
Wholesale	2.6%
Transport and Distribution	16.7%
Financial and Business Services	32.1%
All sectors	20.0%

Source: WM Enterprise Consultants

9.63 The following provides a more detailed analysis of the 2012 survey findings by sectoral activity. Comparator figures from the 2008 survey are included in parenthesis.

Manufacturing

Survey Sample

9.64 A total of 41 (2008, 48) manufacturing companies, with a total of 720 (574) employees, were interviewed as part of the survey. 30 (24) were in Bromsgrove, 3 (11) were in Rubery and the North, 7 (11) were in Rural East and 1 was in the Rural West.

9.65 14.6% of the businesses were based in residential premises and these have been excluded from the analysis where appropriate.

9.66 85% (2008, 81%) of manufacturing organisations were independent companies, none (2008, 6%) were Head Office sites and the remaining 15% (2008, 13%) were branches or subsidiaries of larger organisations.

9.67 A wide range of activities were covered, with Bromsgrove having all of these bar the manufacture of rubber and rubber products, which was found only in the Rural East and the Rural West.

Workforce

9.68 In total, 92.5% (2008, 90%) of the employees of the respondent businesses were employed full-time and 7.6% (10%) were employed part-time. The maximum number of employees on site across all the businesses, at any one time, was 85% (2008, 95.6%) of the total number employed. This suggests that there is some shift work within Bromsgrove District's manufacturing sector but also allows for some employees to be working off-site. Equally, there is suggestion that some companies are using agency staff to undertake on-site work.

9.69 Based on information from the 95% of surveyed businesses able to provide estimates, around 47% (2008, 54%) of the manufacturing workforce was drawn from the local community and an additional 40% (2008, 21%) from elsewhere within the District. In total 13% (2008, 17%) came from outside the District.

Site Characteristics

9.70 Overall, 34% (2008, 29%) of the surveyed manufacturing businesses held the freehold of their sites, with a further 59% (2008, 54%) occupying their sites under a lease. 5% (2008, 2%) occupied their premises under a licence agreement, with the balance having other arrangements.

9.71 29% (2008, 29%) of the manufacturing businesses described their premises as budget, with a further 51% (2008, 58%) describing them as mid range. 15% (2008, 10%) considered their premises to be prestigious. These splits have been typical in other areas where WM Enterprise has undertaken business surveys.

9.72 59% (2008, 29%) of the businesses had been trading from their current premises in Bromsgrove District for more than 10 years and a further 7% (2008, 23%) for between 6 and 10 years. 22% (2008, 25%) had been trading from their current premises for less than two years, including 7% (2008, 10%) which had been trading from their current premises for less than a year.

9.73 Two of the three businesses that had been trading in the District for less than one year were relocations from within the District with the other being a recent start-up. A similar picture is shown for businesses that had been trading at their current address for between 1 and 2 years, although one business had relocated from Gloucester. The overall pattern was similar to that revealed by the 2008 survey.

9.74 Under a quarter of the manufacturing businesses moving within or into Bromsgrove District considered other locations, with most of these considering only other sites in Bromsgrove District, although a number had considered sites in the adjacent towns and conurbation.

9.75 Overall, 27% (2008, 27%) of the surveyed manufacturers had always been at their present site in Bromsgrove District and a further 54% (2008, 38%) had relocated within the District. The remaining 19% had relocated into Bromsgrove from elsewhere and indicates that Bromsgrove District is seen as an attractive area into which to relocate.

9.76 The main reason for relocation was the need for larger premises. This accounted for 50% of all relocations. Other reasons for relocating were more firm specific, although 9% mentioned moving to better premises and a further 9% mentioned the need to move as a consequence of their previous premises no longer being available.

9.77 Over 80% of manufacturing businesses did not consider any other site when relocating. This is a significantly higher proportion than in other areas where this question has been asked and may indicate difficulties in finding suitable sites, although only two businesses specifically made mention of this fact.

9.78 The main reasons given for businesses being located in Bromsgrove District were proximity to key staff and the cost, size and quality of premises. These were the same factors as were recorded in the 2008 survey.

9.79 Ease of access to the motorway was also cited as a key locational factor for manufacturing businesses in both surveys.

9.80 90% (2008, 85%) of those manufacturers surveyed considered their current premises to be suited to their needs, which is slightly lower than the 94.5% (2008, 91%) satisfaction rate for all businesses. 50% of those whose current manufacturing premises didn’t meet their needs stated that their current premises were too small, 25% that they were too big and 25% that they were no longer compatible with being operated from domestic premises. Two of the businesses were in Bromsgrove and the others in the rural areas.

9.81 Significantly, 34% of respondents did not identify any significant problems that were facing their businesses.

9.82 Market pressure, including the effects of the recession and a lack of orders, was the main difficulty being experienced by manufacturers who identified problems, with 34% (2008, 32%) of respondents citing issues in this area. Cash flow and difficulties in raising bank finance was the next most frequently mentioned problem, with 12% of respondents citing this as a difficulty.

9.83 5% of manufacturing businesses (2008, 4%) suggested that a shortage of appropriately skilled staff was a key problem. Other problems mentioned included: exchange rates, rising costs of materials, parking, traffic congestion, infrastructure, flooding and the unpredictability of the economy.

9.84 Overall, 57.5% of the floorspace of manufacturing businesses was, predictably, used for industrial activities, with the majority of the remainder accounting for office and warehousing space (Table 9.11).

Table 9.11: Percentage of Floorspace within Surveyed Manufacturing Businesses Used For Different Activities

Activity	%
Office	19.9
Warehousing	18.7
Research and Development	0.0
Manufacturing	57.5
Other	3.9
Total	100.0

Source: WM Enterprise Consultants

9.85 No space was devoted by the surveyed businesses to R & D. This does not mean, however, that none of the businesses was undertaking R & D. Rather, to the extent that R & D was being conducted, it was being undertaken in areas not exclusively given over to this function.

Growth Plans

9.86 34% (2008, 42%) of the manufacturing businesses surveyed were expecting to see their businesses grow in the short-term, with none (2008, 4%) expecting to see a decline. The majority of businesses were expecting their businesses to remain static (66% v 54% in 2008). In terms of employment, 41% (2008, 42%) expected to increase staff in the short-term and 2% (2008, 4%) expected employment numbers to decrease. The balance was expecting their employee numbers to remain static (56% v 54% in 2008). The fact that employment is expected to increase in some businesses whilst turnover is expected to remain static was not specifically explored as part of the survey but included relocation of staff from other premises and recruiting part-time staff to replace full time. There was also an element of expectation that employment would increase but only if orders grew, with many considering this unlikely in the current economic climate.

9.87 19.5% (2008, 25%) of the surveyed manufacturers expected to expand their premises in the short-term. All of those expecting to require additional space were also expecting increases in both turnover and staff. A number of those expecting such increases felt, however, that the increases could be accommodated within the existing premises.

9.88 Most of the manufacturers expecting to increase their floorspace were unable to state by how much. This reflects uncertainty over the state of the economy and hence the extent to which growth expectations will be achieved.

9.89 Similarly, manufacturers were unable to state the use to which the additional floorspace would be put.

9.90 25% (2008, 73%) of manufacturing companies felt that their building would with modifications be suitable for the anticipated changes. The remainder felt that their current building would not be suitable, mainly because of a lack of room for expansion.

9.91 Of those that felt their building would not be suitable, 25% (2008, 31%) stated that there would be suitable alternative premises in Bromsgrove District. 38% (2008, 38%) believed there would not be and the remainder did not know, possibly because they had yet to commence a search.

9.92 Factors influencing decisions included the quality and the size of available premises, with one respondent stating a preference for building premises specifically geared to the needs of the business. None of the respondents was in favour of operating out of an additional site.

9.93 76% (2008, 69%) of manufacturing businesses expected a longer-term increase in turnover, with 16% (2008, 50%) of these businesses expecting to realise annual growth of over 20%. 24% (2008, 27%) of businesses expected turnover to stay the same and none (2008, 4%) expected a decrease.

9.94 A smaller proportion of manufacturing businesses (51% v 52% in 2008) expected employment growth in the long-term, with only one business expecting employment to fall, mainly as a consequence of shifting production overseas.

9.95 Employment growth was expected to cover a wide range of skills but with most growth expected to take place on the shop floor and to embrace both skilled and unskilled positions. The next most frequently mentioned area of employment growth was amongst sales staff.

Wholesale

Survey Sample

9.96 35 (2008, 31) businesses engaged in wholesale activities and employing a total of 234 (2008, 189) people were interviewed as part of the survey. 23 (2008, 12) of these were in Bromsgrove, 3 (2008, 3) of these were in Rubery and the North, 7 (2008, 5) were in Rural East and 2 (2008, 1) were in Rural West.

9.97 Around 69% (2008, 57%) of these were independent companies, 23% (2008, 33%) were branches or subsidiaries with the remainder being Head Office sites.

Workforce

9.98 Employment within wholesale businesses is predominantly full time, with 82% (2008, 79%) of employees employed full time and 18% (2008, 21%) part time.

9.99 39% (2008, 54%) of the workforce lived locally and 45% (2008, 20%) lived outside of Bromsgrove District. The maximum number of staff on site at any one time was 79% (2008, 91.5%) of the total employed. This suggests a higher level of shift work or a higher element of delivery work than was apparent from the 2008 survey.

Site Characteristics

9.100 43% (2008, 33%) of surveyed wholesale businesses owned the freehold of their premises a further 61% (2008, 67%) occupied their premises under a lease and 3% (2008, 0%) under a licence. As was found in the 2008 study, freehold premises tended to be significantly larger than their leasehold counterparts, (on average twice as big). Freehold premises also tended to have more floorspace per employee at 149m^2 (1982, 145m^2) per person compared to 75 m^2 (2008, 40m^2) per person for leasehold premises.

9.101 Overall, 35.5% of the available floorspace within the surveyed warehouse businesses was given over to warehousing, compared to 43.3% used to house office functions. This data is skewed by two wholesale businesses in Bromsgrove and one in Rural West that use their sites for office accommodation alone. In the other two areas average warehousing space exceeds that used for office accommodation. The overall split is shown in the table below.

Table 9.12: Percentage of Floorspace In Surveyed Wholesale Businesses Used for Stated Activity

Activity	2012 Survey	2008 Survey
Office	26.7%	43.3%
Retail	**5.9%**	7.9%
Warehousing	45.3%	35.5%
R & D	0.6	0.0%
Industrial	5.6%	0.0%
Other	15.9%	12.4%

Source: WM Enterprise Consultants

9.102 45.5% (2008, 67%) of the wholesale premises surveyed were defined as mid range, 9% (2008, 5%) as prestigious, with the remaining 45.5% (2008, 28%) defined as budget.

9.103 31% (2008, 43%) of those surveyed had occupied their current premises for more than 10 years, with a further 43% (2008, 24%) occupying their current premises for between 3 and 10 years. 17% (2008, 19%) had only been in their current premises for 1-2 years and 9% (2008, 14%) had been in their current premises for less than one year.

9.104 46% (2008, 29%) of the surveyed wholesale businesses had always been at their current address in the District. Of these, 44% (2008, 83%) had been there for more than 10 years. A further 29% (2008, 24%) of the surveyed wholesalers had relocated from a site elsewhere in the District to their present site, while 26% (2008, 43%) had relocated from a previous site outside of the District.

9.105 Wholesalers that had relocated into the area tended to have been previously located within the West Midlands region with only two of the nine having come from further afield. The key reason for relocation was business expansion, with specific locational influences being proximity to key staff, and the size of premises.

9.106 77% (2008, 52%) of wholesale premises were on one floor only and 23% (2008, 42%) were on two floors.

9.107 94% (2008, 95%) of respondents considered their current premises to be suited to their current business needs, leaving 6% (2008, 5%) whose premises were unsuited to their needs, with unsuitability linked to size and accessibility. This is a relatively high suitability rating compared to business surveys WM Enterprise has completed elsewhere.

9.108 The main problems currently faced by wholesalers in the District included market pressure (29% v 33% in 2008), cash flow and funding issues, skill shortages and a range of issues peculiar to individual businesses. 57% (2008, 19%) of those wholesale businesses surveyed were not experiencing any current problems.

9.109 66% (2008, 76%) of wholesale businesses felt that Bromsgrove District is a good or very good place in which to do business. The remaining 34% (2008, 10%) rated it as average and none (2008, 14%) as poor. For those rating the District positively, key reasons included accessibility and location in relation to the motorway and the environment in the District.

Growth Plans

9.110 26% (2008, 38%) of the surveyed businesses were expecting to experience business expansion in the short-term, with the same proportion also expecting employment to increase. While 2.9% (2008, 4.8%) expected the business turnover to decrease in the short-term, a greater proportion (8.6% v 2008 9.5%) expected to reduce their staffing levels. Not all of those expecting business growth also planned to increase their staffing levels, with some looking to increase efficiency whilst one business was looking to relocate out of the District and thereby reduce its local employment to zero.

9.111 Comment was also made by many respondents that it was difficult to see where growth would come from in the current economic climate, with some also stating that they had the capacity to increase turnover without adding to staff.

9.112 17% (2008, 14%) of the wholesale businesses surveyed believed that their floorspace requirements would increase in the short-term.

9.113 Given the uncertainty over the sources and extent of growth, many respondents were unable to specify the amount by which they expected their floorspace requirements to increase. For those that were, the increase was typically by around 50%. Extrapolating this across all wholesale businesses would suggest an overall requirement increase of less than 10%. This is less than the 13% indicated in the 2008 survey.

9.114 The additional space was expected to be split between office and storage use, with the former accounting for around 40% of the additional space and the latter 60%.

9.115 70% (2008, 100%) of the wholesaler businesses requiring additional floorspace felt that their current buildings were not suitable to accommodate their required changes. These businesses all stated that the current premises were nearing full capacity and that there was little or no space for further expansion.

9.116 Just under 30% of those needing additional space (2008, 100%) believed that there were no suitable alternative premises within Bromsgrove District to meet their space requirements. A further 43% believed that there were suitable alternative premises available within Bromsgrove, whilst the balance did not know.

9.117 Those responding indicated a preference for remaining in Bromsgrove District and would seek to relocate within the District in order to meet their expansion plans. The option of taking an additional site was not favoured.

9.118 In the longer-term, half (2008, two thirds) of businesses expected turnover to increase. Anticipated growth rates were generally modest and were certainly lower than those anticipated in the 2008 survey, in the main because of the current level of overall economic uncertainty.

Despite this, the percentage of respondents expecting a decline in turnover was, at 6%, lower than the 14% recorded in the 2008 survey.

9.119 Just under half (2008, 57%) of wholesalers expect to see an increase in employment in the longer-term, of which the vast majority also expected turnover to increase in this time period. Jobs are expected to be created in administrative and sales and customer services positions as well as for warehouse staff and drivers. One responded indicated, however, that the number of drivers was expected to decrease. This may be in expectation of sub-contracting the function.

9.120 Over half of the wholesale businesses surveyed cited other factors that they expected to impact on their future plans. The majority of these comments related to wider economic conditions including taxes, exchange rates and a further economic downturn.

9.121 26% of the wholesale businesses (2008, 14%) envisaged that their growth in the longer-term would create a need for additional space, whilst only one respondent expected his space requirement to reduce. Overall, those able to quantify their additional requirement were typically seeking to add around 50% to their current space. This translates into an additional 15% (2008, 10%) across all surveyed wholesale businesses.

9.122 Relocation would be the most likely way of obtaining the required additional space, with only one respondent content that his existing facility could accommodate his expansion plans. 56% of those expecting to have to relocate thought that they would be able to find appropriate premises in Bromsgrove District as against 22% that did not and a further 22% that did not know.

Transport and Distribution

Survey Sample

9.123 24 (2008, 15) businesses engaged in transport and distribution activities were interviewed as part of the survey. Together, these employed a total of 641 (2008, 205) people. 13 (2008, 10) of these businesses were located in Bromsgrove, 4 (2008, 2) were located in Rubery and the North, 7 (2008, 2) were located in Rural East and none (2008,1) was located in Rural West.

9.124 87.5% (2008, 67%) of the interviewed businesses were independent companies with just over 8% (2008, 25%) being branches or subsidiaries and the remaining organisation being a Head Office site.

Workforce

9.125 45% (2008, 56%) of the total workforce lived local to their place of employment, with 39% (2008, 22%) living elsewhere in the District and 39% (2008, 22%) living outside of the District.

9.126 Employment in the transport and distribution sector is predominantly full time, with just over 89% (2008, 93%) full time employees and just under 11% (2008, 7%) part time. The maximum number of staff on site at any one time was 71% (2008, 93%) of the total employed.

Site Characteristics

9.127 57% (2008, 40%) of the transport and distribution businesses interviewed operated from freehold premises, 30% (2008, 60%) from leasehold premises, 9% under sub-tenancy agreements and

4% under a licence. 12.5% (2008, 33%) were distribution depots, 33% (2008, 27%) were office accommodation, a further 21% (2008, nil) were operated from residential properties with the remaining 34% (2008, 40%) being a mixture of office and depot and office and warehouse sites or yards.

9.128 55% (2008, 67%) of transport and distribution businesses operated from mid-range premises 35% (2008, 33%) from budget premises and 10% from prestige premises (2008, 0%).

9.129 67% (2008, 47%) of those businesses interviewed had occupied their current premises for more than 10 years with a further 21% (2008, 40%) having occupied their site for between 3 and 10 years. Only 4% (2008, 0%) had occupied their site for less than a year, with the remainder occupying their site for 1-2 years.

9.130 58% (2008, 53%) of surveyed businesses had always been located at their current site, of which 86% (2008, 75%) had been there for more than 10 years and the remaining 14% for more than three years.

9.131 One quarter (one third in 2008) of businesses had a previous location in Bromsgrove District and 13% (2008, 13%) had relocated from elsewhere, but in all cases from within the West Midlands region. Businesses relocating into Bromsgrove District had primarily done so in search of bigger or better quality premises.

9.132 The floorspace per employee numbers varied considerably between respondents, with a mean of 66.4m^2 per employee (32.8m^2 per employee if one extreme is ignored) and a mean of 37.2m^2 per peak persons on site (70.45m^2).

9.133 The following table shows the split between the stated different uses to which the available floorspace was put.

Table 9.13: Percentage of Floorspace In Surveyed Transport and Distribution Businesses Used for Stated Activity

Activity	2012	2008
Office	47.6%	26.3%
Retail	1.6%	5.0%
Warehousing	29.6%	48.0
R & D	0.4%	0.0
Industrial	2.0%	6.3
Other	18.8%	14.3

Source: WM Enterprise Consultants

9.134 Premises falling within the “other” category were variously used for garaging, as workshops and for training.

9.135 50% (2008, 40%) of respondents stated that proximity to key staff was the main reason why they were located in their current premises. The next most frequently mentioned factors were the size of the available premises, which was mentioned by 13% (2008, 33%) of respondents, proximity to customers and ease of access to the motorway/road system. Other factors mentioned by more than one respondent included the quality and the cost of available premises.

9.136 96% (2008, 93%) of the surveyed businesses considered that their current premises were suitable for their needs, which is a high level of satisfaction compared to business surveys completed elsewhere. As with the 2008 survey, only one business stated that the site was not suited to its needs and that this was due to the site being too small. Location factors indicate that the 2008 and 2012 respondents were not the same.

9.137 Only 8% (2008, 13%) of the surveyed businesses stated that they were not experiencing any particular problems. For those with problems, the main problem was market pressures, including as a result of the recession, which were mentioned by 42% (2008, 60%) of businesses. Cash flow problems were affecting a further 21% of businesses and the rising cost of running the business was affecting an additional 13% (2008, 33%) of businesses. Other factors mentioned by more than one respondent, included traffic congestion and planning constraints.

9.138 Factors affecting individual businesses or sites included parking, infrastructure, red tape, site constraints, staff recruitment and retention, skill shortages, flooding and rising air taxes.

9.139 Overall, 50% (2008, 73.4%) of respondents rated Bromsgrove District as either a good or a very good place in which to do business. 42% (2008, 13%) rated it as average and 8% of businesses (2008, 0%) rated it as poor. No companies rated the District as very poor in 2012, although one did in 2008. Factors contributing to positive assessments were the ease of access to the motorway network, the local infrastructure, and the quality of the environment.

9.140 Negative perceptions of the District in 2012 were principally concerned with the high level of business rates and the cost of parking, although a lack of support and response from local government was mentioned as a factor by some respondents in their marking the area down to average.

Growth Plans

9.141 29% (2008, 40%) of respondent businesses expected their turnover to increase in the short-term while 71% (2008, 53%) expected it to stay the same. No business anticipated a short-term decrease in the size of the business (2008, one). Overall, 25% (2008, 33%) of those businesses surveyed expected employment to increase at the premises in the short-term and 67% (2008, 67%) expected it to stay the same. 8% of businesses surveyed in 2012 were expecting employment to decline, as against none in the 2008 survey. Two of the businesses expecting turnover growth did not expected employment to increase.

9.142 As with survey respondents in the other sectors covered, there were some respondents who already had their expansion plans in hand and others who were hoping to grow once economic conditions eased.

9.143 17% (2008, 13%) of the surveyed businesses expected that they would have additional floorspace requirements as a result of the anticipated growth. These businesses also expected short-term growth in turnover and employment. Typically, expectations were that the proposed additional requirement was for 100% more space. Based on this, the expansions would add a net 17% (2008, 5.1%) to the total transport and distribution floorspace covered by the survey.

9.144 An estimated 72% of the increased floorspace would be used for warehousing with the remainder being used for office accommodation and for driver facilities.

9.145 50% of the businesses with additional premises requirements believed that they would be able to extend their existing premises sufficient to meet their needs. The other 50% saw relocation as the only option but would wish to remain within Bromsgrove District.

9.146 In the longer-term, 46% (2008, 67%) of respondents expected their turnover to grow. One third (2008, 50%) of these expected an annual rate of growth of over 20%. The vast majority of the businesses expecting turnover growth also expected their employment requirements to increase over the same time period.

9.147 16.7% (2008, 26.7%) of respondents expected that their longer-term floorspace requirements would be higher than their current usages due to increases in turnover and/or staffing levels. Inevitably, there was considerable uncertainty as to the amount of additional space that might be required but an assumption that a further 8% over and above the short term requirement would not be unreasonable.

9.148 Whilst some businesses felt that they could extend their existing premises to meet their future needs, the majority saw relocation as the only viable option.

Offices

Survey Sample

9.149 A total of 60 (2008, 70) businesses in this sector were surveyed. Ten of these (2008, 6) were based in residential properties and have been excluded from the analysis where appropriate. Although termed as ‘offices’, more properly this sector is comprises financial intermediation, real estate and other business services activities.

9.150 The businesses employed a total of 375 (2008, 574) people. 29 (2008, 28) of the businesses were in Bromsgrove, 11 (2008, 7) were in Rubery and the North, 12 (2008, 24) were in Rural East and 8 (2008, 5) were in Rural West.

9.151 73% (2008, 80%) were independent companies, 13% (2008, 17%) were branches or subsidiaries and the remainder were Head Office sites.

Workforce

9.152 Approximately 35% (2008. 57%) of employees lived local to where they worked and a further 19 % (2008, 22%) lived within Bromsgrove District. The remaining 46% (2008, 21%) commuted to work from outside of the District.

9.153 81% (2008, 90%) of staff covered by the survey were full-time employees and 19% (2008, 10%) were part-time. Up to 98% (2008, 90%) of the staff could be on the premises at one time.

Site Characteristics

9.154 Excluding residential properties, 32% (2008, 28%) of surveyed businesses owned the freehold of their premises compared to 60% (2008, 58%) occupying their premises under a lease. The remainder were under a licence agreement or the respondent was unable to provide a response.

9.155 The average amount of floorspace per employee for this sector was 24.5m^2 (2008, 22.1m^2). The average amount per person normally on site was a slightly higher 27.5m^2.

9.156 Excluding the residential properties also used as offices, 86.2% of the available floorspace was used as offices. Including the residential properties, reduced this percentage to 83.2%. Further detail of the usage of the premises, but excluding the residential premises, is provided in Table 9.14.

Table 9.14: Percentage of Floorspace in Surveyed Business Services Firms Used for Stated Activity

Activity	2012	2008
Office	86.2%	84.86%
Retail	0.4%	1.64%
Warehousing / Storage	5.4%	7.27%
R & D	0.8%	0.39%
Industrial	2.1%	1.56%
Other	5.1%	4.27%

Source: WM Enterprise Consultants

9.157 The “other” category included meeting rooms, kitchens and welfare facilities.

9.158 Also excluding the residential properties, 19% (2008, 14%) of buildings were considered by their occupants, to be prestigious, 70% (2008, 55%) saw their buildings as mid-range whilst only 11% (2008, 26%) considered their premises to be budget.

9.159 46% of businesses were in single floor properties (2008, 57%), a further 46% in two storey buildings (2008, 31%) and the remaining 8% in three storey buildings (2008, 11% on three floors and 1% on four or more floors). Site densities were difficult to calculate from the available information but there is no reason to suggest that they are different from those revealed by the 2008 survey, although the apparent site density figures, at 0.4, needs to be treated with caution.

9.160 33% (2008, 21%) of the surveyed businesses in this sector had been working from their current address for more than ten years and a further 42% (2008, 45%) had been doing so for 3 to 10 years. 13% (2008, 26%) of businesses had been operating from their current address for 1 to 2 years while 12% (2008, 8%) had been at their current location for less than 1 year.

9.161 86% (2008, 40%) of the businesses trading at their current address for less than one year were relocations from within the District and only 14% (2008, 60%) new businesses. The relocations were principally within the District, with only one coming from outside.

9.162 Overall, 38% (2008, 40%) of the businesses surveyed had always been at their present address, 30% (2008, 20%) had relocated within Bromsgrove District, and 32% (2008, 35%) were relocations into the District.

9.163 Relocations within the District were predominantly for reasons of expansion (accounting for 60% of all such relocations), the availability of better quality premises, cost and proximity to key staff and customers. Only one of the surveyed businesses moved from home into formal business premises.

9.164 Over 50% of the businesses that had relocated within Bromsgrove District had considered another location within the District. Of those businesses that had considered alternative locations, those mentioned included Bromsgrove (50%) Rural Bromsgrove District (50% v 20.5% in 2008), Birmingham (25% v 23.1%), elsewhere in Worcestershire (62.5% v 20.5%), Warwickshire (0% v 10.3%) and sites elsewhere in the West Midlands (25% v 12.8%).

9.165 For 40% (2008, 46%) of businesses, proximity to where key staff lived was the major factor in selecting a location. 13% (2008, 28%) of businesses cited access to the motorway as a major locational factor, supporting similar findings for the other business sectors. Other important locational factors included local business climate (17%) quality of premises (5% v 18.5% in 2008), size of premises (10% v 18.5% in 2008), proximity to customers (12% v 16.9% in 2008) and cost of premises (15% v 5.4% in 2008).

9.166 2% (2008, 8%) of the respondents considered that their current premises were not suited to their current needs. In both surveys and in all cases the reason given for this was that the current premises were too small.

9.167 35% (2008, 37%) of the surveyed businesses stated that there were no major problems affecting their businesses. For those businesses with problems, market pressure was the main issue, being mentioned by 35% (2008, 26%) of the businesses surveyed, with a further 13% making reference to the difficult economic climate. Whilst 10.8% of the 2008 survey respondents mentioned existing site constraints as being a problem, this was only mentioned by one respondent in the 2012 survey.

9.168 Other problems mentioned by respondents included issues such as cash flow (13%) and an unwillingness of banks to lend (3%), parking (6%), rising costs and housing issues (5% each), recruitment and retention of appropriately skilled staff (5%), a lack of affordable land, a shortage of appropriate premises and planning constraints.

9.169 In general, the surveyed businesses rated Bromsgrove District as a good location in which to base their businesses. Specifically, 57% (2008, 59%) rated it as good or very good as against 16% (2008, 12%) that rated it poor or very poor. Factors that were seen as detracting from the area were the business rates, poor condition of the roads, the general decline in Bromsgrove town centre and a lack of help and support from the Council, when requested.

Growth Plans

9.170 37% (2008, 48%) of the surveyed businesses expected to see turnover increase in the short-term. Of these, 82% (2008, 94%) expected to recruit additional staff, whilst the remainder expected to be able to cope with their existing staff complement.

9.171 None (2008, one) of the surveyed businesses expected to see a reduction in turnover, although 3% did expect to see staff numbers reduce.

9.172 Overall, 10% (2008, 28%) of businesses surveyed expected to have an increased floorspace requirement and only one (2008, none) expected to have a reduced floorspace requirement. 66% (2008, 55%) of those businesses with anticipated floorspace requirement changes expected to recruit additional staff.

9.173 Although most respondents were unable to quantify the amount of additional space that they would require, it is estimated from those that were that the total additional requirement of all the surveyed businesses would be 3%.

9.174 77% (2008, 67%) of this additional space is expected to be office space with a further 16% (2008, 20%) being required for storage and 7% (2008, 12%) for sub-letting.

9.175 In stark contrast to the findings from the 2008 survey where 63% of those with expansion plans believed that these could be readily satisfied within their current building or through modifying it, none of the businesses surveyed in 2012 that had expansion plans believed that these could be accommodated within the existing premises. Accordingly, all of the 2012 respondents saw relocation as the only option.

9.176 83% of these businesses (2008, 47%) believed there would be suitable alternative premises within Bromsgrove District, whilst 17% (2008, 35%) did not think the District could meet their needs. Even so, the latter wished to remain in Bromsgrove rather than move out of the District but would not consider operating from more than one site as a viable option.

9.177 73% (2008, 79%) of the surveyed businesses expected to see their turnover increase in the longer term, with only 5% (2008, 4%) expecting their turnover to decrease. 24% (2008, >50%) of those businesses expecting turnover growth expected a rate of growth in excess of 20% per annum.

9.178 A lower proportion of respondents (52% v 64%in 2008) expected to increase their staff numbers over the longer term. 30% (2008, 22%) of those expecting a longer-term increase in turnover were however expecting to achieve this without any increases to their current staffing levels. Recruitment intentions covered a range of skills and activities, with many linked to the specific profession of the business.

9.179 20% of respondents expected that their floorspace requirements would be higher in the longer term than currently, with only one respondent expecting a lower requirement. Extrapolating from those respondents able to quantify their additional premises requirements suggests that a 12% (2008, 39%) increase on the floorspace currently occupied by all respondents operating businesses in this sector will be required.

9.180 33% (2008, 24%) of businesses felt that their current premises are suitable for their longer-term expansion plans compared to 66% (2008, 60%) that did not. However, a more positive finding is that 70% (2008, nearly two-thirds) of the businesses with longer-term expansion plans felt that there is adequate space in the District to meet these needs, with 20% thinking that there was not and 10% no knowing.

Construction

Survey Sample

9.181 A total of 40 (2008, 43) businesses operating in the construction sector were surveyed, although 19 (2008, 5) of these were based at residential properties and have therefore been excluded from the analysis where appropriate.

9.182 The surveyed businesses employed a total of 188 (2008, 402) people. 27 (2008, 19) of the businesses were in Bromsgrove, 3 (2008, 10) were in Rubery and the Rural North, 7 (2008, 5) were in Rural East and 3 (2008, 4) were in Rural West.

9.183 95% (2008, 90%) were independent companies, 5% (2008, 7%) were branch or subsidiaries and none (2008, 3%) were Head Office sites.

Workforce

9.184 Approximately 40% (2008, 45%) of those working in the construction sector lived local to where they worked and 13% (2008, 25%) lived elsewhere within Bromsgrove District, with the remaining 47% of employees in the sector living outside of the District.

9.185 92% (2008, 93%) of construction staff were employed on a full-time basis with 8% (2008, 7%) on a part-time basis. Up to79% (2008, 90%) of the staff employed could be on the premises at any one time. The difference between the findings from the two surveys may reflect the higher incidence of home based businesses surveyed in 2012, with employees of home based businesses reporting to work at customers' premises rather than at the employers' premises.

Site Characteristics

9.186 Excluding the residential property based businesses, 40% (2008, 34%) of surveyed businesses owned the freehold of their premises with 45% (2008, 58%) occupying their premises under a lease. The remainder had other arrangements or the respondent did not know.

9.187 62% (2008, 53%) of premises were described as being predominantly offices, with half of the remaining 38% consisting of offices and workshops / production facilities. The balance was evenly divided between: yard; office and yard; and office and warehouse.

9.188 6% (2008, 13%) described the premises as prestigious, 65% (2008, 76%) as mid-range, and 29% (2008, 11%) as budget accommodation. The results were little different regardless of whether or not the residential properties were included!

9.189 The average floorspace per person employed was 13.8m^2 (2008, 25.1m^2) and 17.5 m^2 (2008, 27.06m^2) per person normally on site. The 2012 findings are closer to the levels found in other areas than those found in the 2008 survey, which were relatively high for this sector.

9.190 Site densities varied considerably but, excluding one particularly large site which was based on a farm, averaged 0.38.

9.191 Table 9.15 shows the floorspace allocated to different activities in the sector and compares the findings from the 2012 survey with those from the 2008 survey.

Table 9.15: Percentage of Floorspace In Surveyed Construction Firms Used for Stated Activity

Activity	2012	2008
Office	67.2%	67.6%
Retail	3.9%	0.5%
Warehousing	19.5%	25.4%
R & D	0.8%	0.0%
Industrial	6.6%	4.5%
Other	2.0%	2.0%

Source: WM Enterprise Consultants

9.192 There is little difference between the findings from the two surveys, other than the 2012 survey had more space devoted to retail and to manufacturing at the expense of warehousing.

9.193 37.5% (2008, 21%) of the businesses had been at their present address for more than ten years, with a further 15% (2008, 21%) having been at their present address for between six and ten years. 10.0% (2008, 13%) of businesses had been at their current address for less than one year and 17.5% (2008, 18%) for 1 to 2 years.

9.194 Those businesses that operated out of residential properties had been operating from that address for varied lengths of time. A number had relocated but this was on the back of a decision to move house rather than anything specifically to do with the business.

9.195 Overall, 60% (2008, 35%) of businesses had always operated from their current address, 38% (2008, 33%) had a previous address within Bromsgrove District and only 2% (2008, 30%) had relocated from a previous address elsewhere, specifically in Birmingham.

9.196 Excluding the residential based businesses, those businesses that had relocated within the District had mainly done so for premises related reasons, with some requiring larger premises and others smaller ones.

9.197 For 70% (2008, 51%) of businesses, proximity to where key staff lived was the major factor in selecting a location. The next most important factor was the size of premises, with 28% (2008, 21%) of respondents citing this as important. 23% (2008, 26%) mentioned the ease of access to the motorway and national road system as an important reason for their location and reflects the sector’s willingness to travel long distances to secure and serve customers, rather than rely solely on local business.

9.198 Other important factors included cost of premises (8% v 19% in 2008) and quality of premises (8% v 14% in 2008). Other factors mentioned included the local business climate and the fact that the business was already established in Bromsgrove District.

9.199 Only 5% (2008, 7%) of respondents considered that their premises are not suited to their current needs. Both of these businesses occupied formal business premises, with one stating that the premises were too big and the other that they were too small.

9.200 Overall, 32.5% (2008, 40%) of construction businesses surveyed stated that there are no problems currently affecting their business. Of those businesses experiencing problems, 78% (2008, 21%) cited market pressure, including the difficulty in securing work and the general economic climate. Cash flow problems were cited by a third of the businesses experiencing problems, with 11% mentioning skill shortages and 5% recruitment difficulties. In this context, there was little difference between the 2008 and the 2012 surveys in terms of the proportions experiencing skill shortages.

9.201 Other issues cited by individual firms included the strength of the pound, site constraints, restrictions on site signposting, advertising costs and, given the wet summer and autumn, the weather.

9.202 In general, the construction businesses surveyed viewed Bromsgrove District as a good place in which to base their businesses, with 62.5% (2008, 67%) of those who replied stating, overall, that it was a good or very good place in which to do business. Only 2.5% (2008, 9.3%) rated the District as a poor area in which to base a business, with the remainder rating it as average.

9.203 The business viewing Bromsgrove District as a poor area in which to do business made the comment in contrast with Birmingham, where more business support was seen to be available.

Those businesses rating Bromsgrove District as very good tended to focus on the centrality of the location and the level of access to the national motorway network.

Growth Plans

9.204 25% (2008, 33%) of all construction sector businesses expected to expand in terms of turnover in the short-term and 67.5% (2008, 67%) expected it to stay the same. 7.5% (2008, nil) of the surveyed businesses expected turnover to decrease in the short-term, mainly due to continuing weak market conditions.

9.205 In comparison, 37.5% (2008, 23%) of the businesses surveyed were anticipating increasing their staff numbers in the short-term. The higher proportion anticipating employment growth but not income growth appears to reflect an expectation that growth will come and will require additional labour, but that such growth is uncertain but will not be immediate. Hence employment will grow towards the end of the period but will not be reflected in turnover in the period.

9.206 Only 7.5% (2008, 19%) of the businesses that were surveyed were expecting to need additional floorspace. One business expected a decrease in its floorspace requirement and 85% (2008, 79%) did not anticipate any need to expand premises. The 5% balance did not know.

9.207 Businesses expecting a requirement for more floorspace were anticipating a growth in turnover and in employment numbers.

9.208 The short-term additional floorspace requirement amounted to around 14% (2008, 31%) of the total non-residential construction floorspace occupied. None of the businesses operating from residential premises indicated a desire to move into more formal business premises.

9.209 71% (2008, 58%) of the expected increased floorspace was to be office space and 25% industrial space, with the remaining 4% to be used for retail. No space was expected to be used for warehouse/storage space (2008, 42%).

9.210 15% (2008, 16%) of businesses considered that their existing premises were unsuitable, even with modifications, to meet their shorter-term expansion plans.

9.211 For those that felt that their existing premises were incapable of accommodating their expansion plans, 17% (2008, 33%) felt that there would be suitable buildings in the District, 33% (2008, 16%) did not, and 60% (2008, 25%) did not know. However, for those businesses that did not feel that there are suitable buildings in the District, there was a preference to remain within it if possible.

9.212 55% (2008, 61%) of the surveyed businesses were anticipating longer-term growth as against 10% (2008, 2.3%) that were forecasting a decline. Longer-term increases in employment were forecast by 40% (2008, 47%) of businesses overall, and all of those forecasting turnover growth. Only 7.5% expected a reduction.

9.213 Anticipated requirements were for all types of building workers and for administrative staff.

9.214 12.5% (2008, 7%) of businesses were anticipating an increased floorspace requirement in the longer-term. The expected growth from those companies that gave figures indicated an increase of around 8% (2008, 5.4%) of the surveyed current floorspace figure for this sector.

10 Conclusions and Recommendations

10.1 This section of the report sets out a summary of key findings and recommendations.

Forecast Employment Land Requirements

Small Area Forecasting Model

10.2 Chapter 8 sets out forecasts utilising a small area forecasting model specified by reference to local population, employment and other available data. This model is, in turn, driven by the labour market and output forecasts for the UK and for the West Midlands region produced by the Cambridge Econometrics national and regional forecasting models.

10.3 The major economic changes that have occurred since the 2008 forecasts prepared for the previous employment land study has been the 'crisis' in the financial markets and the prolonged recessions seen in many developed countries, including the UK. These events have not only impacted on growth and employment levels but have also introduced an element of structural change, with manufacturing finding the UK a more attractive location than previously.

10.4 All forecasting models are extremely data hungry. Some of the data that would ideally be needed in order to specify a full economic model of the Bromsgrove District economy is not available. As such, there is inevitably a degree of estimation involved in producing forecasts of the District's floorspace and employment land requirements. Despite this, the forecasts presented in chapter 8 of this report are considered to be robust and to represent the best available assessment of future employment floorspace and land requirements over the forecast period.

Table 10.1: Minimum Forecast Employment Land Requirements for Bromsgrove District (2010 – 2030)

Forecast	Office	Manu.	W&D	Total
Base Forecast	+8.8 ha	+4.2 ha	+6.9 ha	19.9 ha

10.5 As noted previously, the forecasts represent the absolute minimum amount of land needed to accommodate the sectors' activities. In other words, the figures simply represent the amount of land needed to 'fit' the level of additional floorspace forecast to 2030 above that existing at the moment in respect of the different B class employment uses.

10.6 In reality, a much larger amount of land will need to be made available to allow for losses of existing employment sites to other uses during the plan period as well as to ensure a balanced portfolio of employment land in terms of sufficient choice of available sites and locations over the period up to 2030. The figures generated by the forecasts do not allow for local market churn, the associated need for there to be a selection of vacant sites and premises to offer sufficient opportunities for new business start ups, expansion, relocation and inward investment for a range of business sizes as well as accommodating aspirations for economic growth based on specialist knowledge sectors. Equally, the figures are stated with no reference to the level and nature of existing employment land supply and do not take into account any allowance for meeting the employment needs of Redditch Borough.

10.7 Through the use of economic forecasting techniques in isolation, it is therefore difficult to precisely define an exact amount or target for future employment land and it is important to also have regard to other approaches to guide future employment land provision, including projecting forward past completion rates and market analysis. This is considered further in this chapter.

10.8 With specific regard to the forecast change in manufacturing requirements, it is important to note that this is derived on a floorspace per employee basis. The base forecast assumes a constant floorspace per employee ratio over the period to 2030 but due to the nature of modern automated manufacturing moving towards being less employee intensive, this ratio could change in the future (i.e. more land than forecast may be required to accommodate manufacturing growth). As such there needs to be flexibility in the amount of land available and it will be important to plan positively for future manufacturing by ensuring that potential future labour productivity gains are taken into account when providing for employment land needs.

Planning Policies and Strategies

National Level and Regional

10.9 At the National and Regional level, a number of key economic and planning strategy objectives can be summarised as follows:

- Presumption in favour of sustainable development and that the planning system should operate to encourage economic growth in order to create jobs and prosperity;
- Maximise the use of Brownfield land and promote economy in use of land, including through the restoration of derelict and neglected land and buildings;
- Ensure that developments that generate significant levels of traffic are located where the need to travel would be minimised and the use of sustainable transport modes maximised. For offices, this includes adopting a sequential ‘town centre first’ approach;
- Support the sustainable growth and expansion of all types of business and enterprise in rural areas; and
- Plan positively and support the needs of existing business sectors, including the promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;

Sub Regional and Local

- Development will be focussed within sustainable locations such as within and on the edge of Bromsgrove town in the first instance;
- Creation of sustainable land use that will offer increased employment and helping to allow additional land to meet the employment land needs for the district;

- Land uses that are seen as inappropriate will not be permitted in employment predominant areas that could be affected by noise, smell, traffic or health and safety issues;
- Promote employment opportunities that will help to broaden the economic base of the Bromsgrove district and strengthen the local economy;
- Deliver a major new technology-focussed Regional Investment Site at Longbridge;
- Secure the long term future of Bromsgrove town centre enhancing its viability and vibrancy, fixing its place within the West Midlands and beyond as a desirable place to live, work, shop and invest; and
- Development in the North of Redditch has been suggested as an area that could create a more sustainable pattern of development, according to the WYG study.

Overview of Market Demand

10.10 Bromsgrove, naturally as the largest settlement in the sub area, is where the majority of demand is concentrated. Access to the town is good, being located close to the M5 and M42 motorways, and in addition affords easy access to Birmingham city centre for motorists via the A38, or by rail. Almost all of available industrial accommodation in the district is located in the Bromsgrove sub area, as well as a large proportion of office accommodation.

10.11 Primarily, within the Bromsgrove sub area, the strength of demand lies in industrial premises. Agents Report a shortage of existing small – mid size industrial stock and there are also few larger available premises which could restrict opportunities for some sectors.

10.12 Outside of the Bromsgrove sub area, the remainder of the district has very few industrial premises currently available and it is likely that the majority of premises are of such small size that these opportunities are not widely advertised.

10.13 Outside of Bromsgrove, much of land available for new build is at Ravensbank Business Park, situated in the Rural East sub area and serving Redditch. Developers are generally unwilling to build speculatively in the current climate. The Saxon Business Park also provides opportunities for new development, including design and build opportunities on the undeveloped remainder of the site, with a number of plots benefiting from extant planning permission.

10.14 There is a greater market for smaller premises compared to larger premises, typically around 2,000-5,000 sq ft for industrial premises and under 1,000 sq ft for offices.

10.15 Bromsgrove is not an established office location, catering primarily for small, local occupiers. Agents report some interest in the Topaz development and the planned environmental improvements and other developments in Bromsgrove town centre could assist in attracting new occupiers to the area. The Bromsgrove Technology Park is also a focus for future development with opportunities available, although at the present time, speculative development is considered hard to encourage.

10.16 The serviced offices within the study area both have very high occupancy rates. Occupants are attracted by the flexibility afforded by the serviced office accommodation, where ‘easy in, easy out’ terms are prevalent, and there is the opportunity of expanding into adjacent suites. Those industrial units that can offer similar flexible lease terms are also more in demand.

10.17 Given the downturn in the economy, many businesses are currently holding back on moving premises and incurring additional costs until the market stabilises. This fact is reflected in the declining rates of new employment development as identified in the Council's monitoring of employment completion rates across the District.

10.18 The type of premises most in demand are small self contained freehold properties, both industrial and office premises, and this type of property is still performing relatively well. A small lot size means that some owner occupiers have the cash reserves available to purchase premises freehold and do not have to rely on obtaining finance.

Business Survey Main Conclusions

10.19 The main conclusions that can be drawn from the findings from the 2012 employer survey are:

- Bromsgrove District is considered generally to be either a good or very good place in which to do business (circa 60% of respondents to the 2012 survey). The main reasons identified for this are the effectiveness, quality and space of premises, the local environment for staff and customers and access by road to many parts of the district.
- While accessibility, especially to the M5 motorway, is a key attraction for many businesses in making locational decisions, there is a need to improve the local road network in terms of capacity and maintenance.
- The main disadvantages of the area for business are access by public transport (particularly to the more rural parts of the district), the affordability of housing, the availability of new sites and public sector support.
- Most of the businesses surveyed had either always been at their existing premises or had moved there from another location within the local area, with only circa 20% of respondents originating from outside of Bromsgrove District. Of those businesses that had relocated, around 2/3 had considered the district as the only potential geographical location.
- 31% of businesses suggested that they plan to expand in the short term. A greater number identified a longer term intention to grow their turnover and often an associated increase in the numbers that they employ. To accommodate future growth plans and aspirations, the most commonly identified requirement in space terms is for additional warehousing. The vast majority of those businesses with expansion plans wish to remain in the district.

10.20 In summary, the 2012 business survey reveals that Bromsgrove District is viewed by the majority of existing businesses as an attractive. This reinforces the findings of the 2008 survey. It is also positive to note that the majority of businesses surveyed wish to stay in the area to accommodate their future growth plans.

10.21 Many of the results of the 2012 survey are broadly similar to those revealed in the 2008 survey. There are however some differences. For example, constraints to public sector support was not identified as a disadvantage in the 2008 survey and this change in response likely reflects the effects of public sector expenditure cuts at all levels over recent years as well as the associated dissolution of bodies such as Advantage West Midlands. It is also worthy of note that a greater proportion of respondents identified the availability of new sites as a constraint compared to the 2008 survey. Further details on main changes between the results of the 2008 and 2012 surveys are discussed in Chapter 9.

Overview of Supply

10.22 For the assessment of employment land supply, and also elsewhere in this study, where possible, the study area has been divided into sub areas for the purposes of analysis. As a broad guide, **Table 10.2** illustrates the general sub-division applied by way of identifying the 'best fit' of associated wards and ONS output areas. A plan showing the approximate boundaries of the study sub-areas is included at **Plan 10.1**.

Table 10.2: Sub-Division of the Study Area

Sub Area	Commentary	Bromsgrove ONS Middle Layer Super Output Area
Rural West	West of the M5 including Hagley. This sub area also covers the settlements of Clent, Romsley, Belbroughton, Fairfield and Bournheath	001, 002
Bromsgrove	Covers the part of the District which is east of the M5, south of the M42 and west of the Birmingham to Droitwich railway line. The sub-area includes Bromsgrove and the settlements of Burcot and Blackwell	008 (half), 010, 011, 012, 013
North	Covers the part of the District which is north of the M42, east of the M5 and west of the A441. The sub-area includes Rubery, Catshill, Barnt Green and Cofton Hackett.	003, 006, 007, 008 (half)
Rural East	Covers the remaining part of the District which is east of the Birmingham to Droitwich railway line (south of the M42) and east of the A441 (north of the M42). The sub-area includes Wythall and the settlements of Alvechurch, Hopwood, Rowney Green, Beoley and Finstall.	004, 005, 009, 014

Plan 10.1: Broad Extent and Location of Study Sub Areas

10.23 **Tables 10.4** and **10.5** provide an overview of vacant land across the Bromsgrove District (potentially) available for employment development, arising from extant planning permissions, existing adopted local plan allocations and Areas of Development Restraint specifically identified and assessed as part of this study. Separate tables and associated commentary on the supply of land and premises has also been prepared for each study sub-area. The main supply components included in these subsequent tables is explained in **Table 10.3**:

Table 10.3: Sub Area Supply Tables – Explanation of Components

Supply Component	Description	Report Reference
Employment Allocations	Sites without planning permission which are allocated for B Class employment development in an adopted Bromsgrove District Local Plan	Chapter 5 (Table 5.5)
Employment Commitments (not started)	Sites with extant planning permission for B1, B2 and / or B8 uses at which development has not commenced at the time of the Council's most recent annual monitoring report	Chapter 5 (Table 5.7)
Employment Commitments (under construction)	Sites with extant planning permission for B1, B2 and / or B8 uses at which development was under way at the time of the Council's most recent annual monitoring report	Chapter 5 (Table 5.8)
Other 'Qualitative Assessment' ('QA') Sites	Areas of Development Constraint identified in the adopted Local Plan which have been subject to a qualitative assessment as part of this study.	Chapter 5 (Table 5.6)

Table 10.4: Overview of Vacant Employment Land Availability within Bromsgrove District (Employment Allocations and Main Commitments)

Sub Area	Site	Classification	Availability	Area Available for Dev (Ha).	Office (B1a) (sq m)	Manu. (B1b, B1c, B2) (sq m)	W & D (B8) (sq m)
Rural West	–	–	–	–	–	–	–
Bromsgrove	Bromsgrove (BROM 8A) Land at Buntsford Hill Phase 3/ Buntsfordgate	G	Immediate - Short	0.44	0	0.44	0
	Bromsgrove Technology Park	B	Immediate - Short	6.13	2.13	4	0
North	Cofton Hackett	G	Immediate – Short	5.3	0.8	3.63	0.87
Rural East	Wythall Green Business Park	G	Immediate - Short	11.8	11.8	0	0
	Ravensbank Business Park	G	Immediate - Short	4.18	0.6	1.68	1.9
	Saxon and Harris Business Parks	G	Short – Medium Term	1.8 (allocated without permission) 0.62 (allocated with permission) Total = 2.42	0.3 0.27 Total = 0.57	0.9 0.2 Total = 1.1	0.6 0.15 Total = 0.75

Table 10.5: Overview of Vacant Employment Land Availability within Bromsgrove District (Other Qualitative Assessment Sites including ADR's)

Sub Area	Site	Classification	Availability	Area Available for Dev (Ha).	Office (B1a) (sq m)	Manu. (B1b, B1c, B2) (sq m)	W & D (B8) (sq m)
Rural West	Hagley ADR	G	Medium – Long Term	0.5	0.5	0	0
	Wildmoor Farm	M	Immediate – Short Term	0.76	0.38	0.38	0
Bromsgrove	Bromsgrove ADR (BROM 5A,B & D)	G	Medium –Long Term	5	2.5	2.5	0
	Holly Tree Farm	-	-	0.13	0.13	0	0
North	–	–	–	–	–	–	–
Rural East	Ravensbank ADR	G	Medium – Long Term	10.3	1.72	5.15	3.43

Bromsgrove District Overall

Employment Land Supply

10.24 Gross employment land supply within Bromsgrove District equates to just under 47 ha. This figure includes Areas of Development Restraint as well as existing commitments at Ravensbank Business Park (which are intended to meet the employment development needs of Redditch) and Longbridge (which is related to the Birmingham area). Excluding the contribution made by these sources, available supply serving Bromsgrove District as a whole is approximately 21.7 ha (and is 37.5 ha if including the currently assumed level of contribution of ADR's as part of overall supply).

10.25 Only 1.8 ha of the District's supply is made up of allocations without planning permission, located wholly within the Saxon and Harris Business Parks in the Rural East sub area. The vast majority of net supply is made up of land within Local Plan allocations with planning permission. There is currently no employment development under construction within the District.

10.26 An overview of the make up of quantitative employment land supply for Bromsgrove District as a whole is included at **Table 10.6**.

Table 10.6: Bromsgrove District – Overview of Employment Land Supply

Supply Component	Office (B1a) [hectares]	Manu. (B1b,c & B2) [hectares]	Warehousing (B8) [hectares]
Employment Allocations	0.3	0.9	0.6
Commitments (not started)	16.11	10.33	2.92
Commitments (under construction)	0	0	0
Commitments (Gross Total)	16.11	10.33	2.92
Commitments (Net Total) –excluding Ravensbank BP and Longbridge	14.71	5.02	0.15
Other QA Sites (1)	4.72	7.65	3.43
Total (Gross)	21.13	18.88	6.95
Total (excl other QA sites)	**16.41**	**11.23**	**3.52**
Total (excl Ravensbank, Longbridge & other QA sites)	**15.01**	**5.92**	**0.75**

(1): Other QA Sites include Areas of Development Restraint assessed as part of this study

Existing Stock

10.27 Within Bromsgrove District as a whole, the District has a total of circa 530,000 sq m of built employment floorspace. This is broadly split across the three main sectors but with floorspace within the office sector [use classes B1(a)] being the smallest at 120,000 sq m.

10.28 At the time of the study, around 30,000 sq m of industrial and office floorspace was being marketed as available, with almost 2/3 of this total accounted for by vacant industrial / warehousing premises. It is also likely this figure does not capture all vacant premises such as certain properties in rural areas which are not actively marketed through main stream commercial agents.

Rural West Sub Area

Employment Land Supply

10.29 The Rural West sub area only provides 0.76 ha of employment land supply, made up of a small commitment outside of allocated employment sites at Wildmoor Farm.

10.30 This is the smallest sub area in terms of its contribution to employment land supply, accounting for around 3% of the District's net supply of employment land. If the Hagley ADR located within this sub area is included then supply increases slightly (by 0.5 ha) to 1.26 ha.

Table 10.7: Rural West Sub Area – Overview of Employment Land Supply

Supply Component	Office (B1a) [hectares]	Manu. (B1b,c & B2) [hectares]	Warehousing (B8) [hectares]
Employment Allocations	0	0	0
Commitments (not started)	0.38	0.38	0
Commitments (under construction)	0	0	0
Commitments (Gross Total)	0.38	0.38	0
Commitments (Net Total) –excluding Ravensbank BP and Longbridge	0.38	0.38	0
Other QA Sites (1)	0.5	0	0
Total (Gross)	0.88	0.38	0
Total (excl other QA sites)	**0.38**	**0.38**	**0**
Total (excl Ravensbank, Longbridge & other QA sites)	**0.38**	**0.38**	**0**

1): Other QA Sites include Areas of Development Restraint assessed as part of this study

Bromsgrove Sub Area

Employment Land Supply

10.31 Net employment land supply within the Bromsgrove Sub Area is approximately 6.6 ha. The majority of this supply is located at Bromsgrove Technology Park (the former Garringtons / UEF works site). The employment land supply figure for the Bromsgrove sub area does not include the contribution of sites identified in the town centre area action plan which could provide further opportunities for new employment development, particularly for new (small scale) office provision.

10.32 The assessed Area of Development Restraint within this sub area [Land at Perryfields (BROM5A, B & D)] could add a further 5 ha to current supply, taking the total supply up to 11.6 hectares.

Table 10.8: Bromsgrove Sub Area – Overview of Employment Land Supply

Supply Component	Office (B1a) [hectares]	Manu. (B1b,c & B2) [hectares]	Warehousing (B8) [hectares]
Employment Allocations	0	0	0
Commitments (not started)	2.13	4.44	0
Commitments (under construction)	0	0	0
Commitments (Gross Total)	2.13	4.44	0
Commitments (Net Total) –excluding Ravensbank BP and Longbridge	2.13	4.44	0
Other QA Sites (1)	2.5	2.5	0
Total (Gross)	4.63	6.94	0
Total (excl other QA sites)	**2.13**	**4.44**	**0**
Total (excl Ravensbank, Longbridge & other QA sites)	**2.13**	**4.44**	**0**

(1): Other QA Sites include Areas of Development Restraint assessed as part of this study

North Sub Area

Employment Land Supply

10.33 The North sub area provides approximately 5.3 ha of employment land supply, made up of two planning permissions at the Cofton Centre at Grovely Lane (Units 5 and 6). This sub area also includes the vacant former Longbridge East Works site extending to approximately 16 ha. This is allocated for employment in the Bromsgrove District Local Plan although this area now has planning permission for residential development and is also allocated as such in the Longbridge Action Area Plan. Given this position, it is not counted as forming part of employment land supply for the purposes of this study as it will likely come forward for housing.

Table 10.9: North Sub Area – Overview of Employment Land Supply

Supply Component	Office (B1a) [hectares]	Manu. (B1b,c & B2) [hectares]	Warehousing (B8) [hectares]
Employment Allocations	0	0	0
Commitments (not started)	0.8	3.63	0.87
Commitments (under construction)	0	0	0
Commitments (Gross Total)	0.8	3.63	0.87
Commitments (Net Total) –excluding Ravensbank BP and Longbridge	0	0	0
Other QA Sites (1)	0	0	0
Total (Gross)	0.8	3.63	0.87
Total (excl other QA sites)	**0.8**	**3.63**	**0.87**
Total (excl Ravensbank, Longbridge & other QA sites)	**0**	**0**	**0**

(1): Other QA Sites include Areas of Development Restraint assessed as part of this study

Rural East Sub Area

Employment Land Supply

10.34 Excluding the Ravensbank Area of Development Restraint and also commitments at Ravensbank Business Park, total net employment land supply in the Rural East sub area is around 14.35ha. Inclusion of the 10.3 ha Ravensbank ADR would increase supply up to 24.65 ha. If also taking into account available committed land at Ravensbank Business Park, total supply increases to around 28.8 ha.

10.35 The majority of net supply in this sub area arises from unimplemented Local Plan commitments including land at Wythall Green Business Park and various plots at Harris Business Park. It should be noted however that the figure of land availability at Wythall Green Business Park is high (at 11.8 ha) and in reality, the land available for employment will be less, which is reflected in the extant planning permission which provides for 24,500 sq m of new office floorspace (which if applying the entire 11.8 ha site area, equates to a low site density of around 2,000 sq m per hectare).

Table 10.10: Rural East Sub Area – Overview of Employment Land Supply

Supply Component	Office (B1a) [hectares]	Manu. (B1b,c & B2) [hectares]	Warehousing (B8) [hectares]
Employment Allocations	0.3	0.9	0.6
Commitments (not started)	12.8	1.88	2.05
Commitments (under construction)	0	0	0
Commitments (Gross Total)	12.8	1.88	2.05
Commitments (Net Total) –excluding Ravensbank BP and Longbridge	12.2	0.2	0.15
Other QA Sites (1)	1.72	5.15	3.43
Total (Gross)	14.82	7.93	6.08
Total (excl other QA sites)	**13.1**	**2.78**	**2.65**
Total (excl Ravensbank, Longbridge & other QA sites)	**12.5**	**1.1**	**0.75**

(1): Other QA Sites include Areas of Development Restraint assessed as part of this study

Conclusions and Recommendations

Headline Conclusions and Recommendations

10.36 The overarching headline conclusions are:

* Overall, there is reasonable quantity of existing Gross employment land supply within the District as a whole when compared against forecast minimum requirements using small area forecasting techniques although choice will likely be limited, particularly for warehousing. This being said, excluding sites at Ravensbank and Longbridge substantially reduces the overall amount of land available and if Areas of Development Restraint are also excluded, there would be insufficient land to meet the minimum forecast requirements. Also, outside of Areas of Development Restraint, virtually all of the District's employment land supply is committed [with less than 2 ha of vacant allocated employment land not having planning permission and located only at one site in the District (Saxon and Harris Business Park)];
* Projecting past completion rates forward provides a different picture of requirements. Using this approach suggests a shortfall in employment land supply for the District over the period to 2030, which is particularly pronounced when also looking at the past contribution of development at Ravensbank which was identified to meet the employment needs of Redditch. This conclusion is reflected, to a degree, in the results of 2012 business survey where a number of respondents identified a lack of

availability of new sites as a constraint to growth. Even if excluding past development at Ravensbank, there is still slight deficit between total potential supply (37.5 ha) and projected requirements (41 ha) and in reality, this deficit will be larger as this supply figure also includes the potential contribution of the 10.3 ha Ravensbank ADR which as with Ravensbank Business Park, will have a role in meeting the employment needs of Redditch; and

* Supply across the District is not evenly distributed and there are particularly limited levels of available land supply in the Rural West and North sub areas. Supply in certain central urban areas, including Bromsgrove, would also benefit from increased provision, including for offices.

10.37 Based on these key conclusions, key recommendations relate to:

* With the exception of a very limited number of sites ranked as 'moderate' through this study, we would not recommend releasing or de-allocating existing Local Plan employment allocations sites (and main commitments) ranked as Best, Good or Moderate at this time through the Development Plan process. There is scope however to release the poorest performing sites from the employment portfolio (i.e. those ranked as 'Poor');
* Consideration should be given to enhancing the supply of land for all sectors generally and also in enhancing spatial deficiencies in supply within certain parts of the District;
* Ensuring that Areas of Development Restraint maximise their contribution to meeting future employment land requirements; and
* Although this study focuses on the forecast requirements for the District, if there is a requirement to continue to assist in meeting the development needs of Redditch then supply will need to be further enhanced on land which is located in close proximity to the urban area of Redditch.

Quantitative Supply Versus Forecast Requirements

10.38 Drawing together details in the above tables enables a total table to be derived to illustrate supply for the District as a whole compared against forecast requirements to 2030. Supply totals against the base employment forecasts is reproduced in **Tables 10.11**.

Table 10.11: Bromsgrove District: Total Supply versus Forecast Requirements to 2030 in Hectares (Base Forecast)

	Office (B1a)	Manu. (B1b,c & B2)	Warehousing (B8)	Total (B1 to B8)
A. Total Employment Land Supply (also including ADRs, Ravensbank & Longbridge sites)	21.13	18.88	6.95	**46.96**
B. Total Employment Land Supply (including Bromsgrove and Hagley ADRs but excluding Ravensbank ADR, Ravensbank Business Park & Longbridge sites)	18.01	8.42	0.75	**27.18**
C. Total Employment Land Supply (excluding all ADRs, Ravensbank Business Park & Longbridge sites)	15.01	5.92	0.75	**21.68**
D. Base Forecast Requirement 2010 – 2030	8.8	4.2	6.9	**19.9**
Surplus or Deficit (based on Gross Total ELS) (i.e. A minus D)	12.33	14.68	0.05	**27.06**
Surplus or Deficit (based on B minus D)	9.21	4.22	-6.15	**7.28**
Surplus or Deficit (based on C minus D)	6.21	1.72	-6.15	**1.78**

10.39 The snapshot of quantitative supply included in the above table does not take into account the qualitative or locational aspects of provision. Also, as noted previously, forecast figures should be seen as the absolute minimum amount of land needed to accommodate future forecast change in each of the main sectors of employment. They also do not take into account any requirement to accommodate the employment needs of Redditch Borough. These amounts therefore do not reflect the need to provide for choice in the employment portfolio. This includes ensuring that an adequate range of opportunities are provided for the growth of indigenous firms and for other new employment development and inward investment, including start-ups and SME's.

10.40 The continued availability of sites with good access to the motorway network will likely continue to be an important element of the employment portfolio to accommodate the forecast growth in the warehousing and distribution (and manufacturing) sector over the period to 2030. Similarly, ensuring an adequate supply of land for new office development, including within central urban areas, will be necessary to cater for growth in this sector.

Quantitative Supply versus Past Completion Rates

10.41 Table 10.12 provides an illustration of employment land requirements for the Bromsgrove District as a whole, and for the four defined sub areas within it, if adopting an approach of projecting forward past completion rates.

Table 10.12: Employment Land Supply versus Past Completion Rates

	Rural West Sub Area	North Sub Area	Bromsgrove Sub Area	Rural East Sub Area	Bromsgrove District
A. Total Employment Land Supply (also including ADRs, Ravensbank & Longbridge sites)	1.26	5.3	11.57	28.83	46.96
B. Total Employment Land Supply (including Bromsgrove and Hagley ADRs but excluding Ravensbank ADR, Ravensbank Business Park & Longbridge sites)	1.26	0	11.57	14.35	27.18
C. Total Employment Land Supply (excluding ADRs, Ravensbank & Longbridge sites)	0.76	0	6.57	14.35	21.68
D. Previous completion rate per annum (2000/01 – 2010/11) (also including Ravensbank BP)	0.15	0.25	0.87	2.21	3.43
E. Previous completion rate per annum (2000/01 – 2010/11) (excluding Ravensbank BP)	0.15	0.25	0.87	1.08	2.29
F. Need 2012 – 2030 (including Ravensbank BP)	2.7	4.5	15.66	39.78	61.74
G. Need 2012 – 2030 (excluding Ravensbank BP)	2.7	4.5	15.66	19.44	41.22
Extra Allocation Required (including ADRs, Ravensbank BP and Longbridge) (F – A)	**1.44**	**-0.8**	**4.09**	**10.95**	**14.78**

	Rural West Sub Area	North Sub Area	Bromsgrove Sub Area	Rural East Sub Area	Bromsgrove District
Extra Allocation Required (including ADRs but excluding Ravensbank BP and Longbridge) (G – B)	1.44	4.5	4.09	-5.21	3.74
Extra allocation Required (excluding ADRs, Ravensbank BP and Longbridge) (G - C)	1.94	4.5	9.09	5.09	19.54

10.42 Completion rates included in the above table (extracted from relevant annual monitoring reports) are gross average completion rates. As such, the average annual net change in employment land could be less when also considering losses to other uses or the fact that certain proposals will have been for the more intensive redevelopment of employment sites.

10.43 Accepting this caveat, the employment land requirements obtained using the above approach delivers different results than using the small area forecasting model, which is based on modelling future change in the economy rather than projecting forward past take up rates of employment land.

10.44 This underlines the need to apply the outputs of the small area forecasting model as an absolute minimum land requirement and that in reality, a larger amount of land will be required to ensure continuing economic development and an adequate portfolio of sites, particularly if past (gross) development rates are to continue (or indeed increase) in the future. Given that the completion period considered includes a number of years where completions have been depressed due to prevailing economic conditions, it is reasonable to assume that the average annual completion rate which will be experienced over the remainder of the Plan period to 2030 will increase, putting further pressure of employment land resources.

10.45 It also illustrates the difficulty in providing an exact figure for future employment land requirements. Based on the above table however, outputs suggest that over the entire period up to 2030, there would be a need to increase total employment land supply, particularly if continuing to adopt a policy position which seeks to help meet the employment needs of Redditch. It will therefore be important to undertake periodic reviews of the quality and quantity of the employment portfolio in line with recommendations on monitoring set out later in this chapter.

Qualitative and Spatial Aspects of Supply

10.46 In order to provide a broad indication of the distribution and qualitative nature of supply across Bromsgrove District, **Table 10.13** sets out an overview of the classification (i.e. ranking) and assessment of availability of key commitments and allocations (i.e. those sites included within Table 10.4) by study sub area. Also included in the table (in brackets) is the currently assumed contribution to supply which could be made by ADR's.

Table 10.13: Overview of Land Availability in Bromsgrove District by Classification and Sub-Area

Classification	Availability	Area Available for Development (Hectares)			
		Rural West	North	Bromsgrove	Rural East
Best	Immediate – Short			6.13 ha	
	Medium - Long				
Good	Immediate – Short	0.76 ha	5.3 ha	0.44 ha	18.4 ha
	Medium - Long	(0.5 ha)		(5 ha)	(10.3 ha)
Moderate	Immediate – Short				
	Medium - Long				

Classification	Availability	Area Available for Development (Hectares)			
		Rural West	North	Bromsgrove	Rural East
Poor	Immediate – Short				
	Medium - Long				

10.47 There is a wide spatial variation in the quantum of currently available employment land supply across the District, with the most significant concentrations to be found within the Rural East Sub Area, made up of land at Wythall Green Business Park, Ravensbank Business Park and, Saxon and Harris Business Parks, together with a potential further 10.3 hectares at the Ravensbank ADR. The bulk of supply for the Bromsgrove sub area is located at the Bromsgrove Technology Park, together with the potential for a further 5 hectares identified at the Bromsgrove ADR.

10.48 In terms of the contribution made by those sites listed in Table 10.13, with the exception of the Rural East sub area, and if excluding ADRs, all other sub areas have less than 7 ha of available land supply and the Rural West sub area has no supply at all save for the potential for the Hagley ADR to make a currently envisaged modest contribution.

10.49 For the Rural East sub area, whilst the level of supply appears comparatively high, as noted previously, it is likely that not all of the land at the Wythall Green Business Park will be available for development. Table 10.4 also includes land available at Ravensbank Business Park (circa 4.2 ha) which if excluded would also reduce the land available in the Rural East sub area. Similarly the exclusion of land at Longbridge (Cofton Hackett) would bring current supply in the North sub area down to nil as this accounts for all of the sub areas employment land supply.

Recommendations

10.50 Our recommendations relate in particular to:

A: Addressing Obstacles to the Development of Employment Sites

B: The level of protection to be given to the different sites specifically assessed as part of this study in terms of their role within the employment hierarchy;

C: Vacancies and the Availability of Types and Mix of Premises;

D: Rural Areas and Market Towns; and

E: Local Planning Policy and Other Responses.

A: Addressing Obstacles to the Development of Employment Sites

10.51 Through this study certain issues and obstacles have been identified which, in one way or another, could constrain the deliverability of sites within the area's employment land portfolio. The extent to which these issues affect different sites will vary from case to case and in the majority of instances, constraints do not significantly limit the future deliverability of vacant land within the employment portfolio.

10.52 As a generic guide however, Table 10.14 summarises some of the issues identified through the study, together with a summary of possible actions which are also expanded upon / listed elsewhere in the report.

Table 10.14: Overview of Issues and Suggested Responses

Issue	General Response

<table>
<tr><th>Issue</th><th>General Response</th></tr>
<tr><td>Limited availability of sites / premises for expanding local businesses (as identified through the business survey)</td><td rowspan="2">• Use of policy approaches, including:
o AAPs, SPDs and Masterplans on larger sites to seek to ensure range of available plots and premises, including for small and expanding businesses;
o Provision for additional employment opportunities in those parts of the District where supply of land and premises is currently restricted. This should include policies to promote employment opportunities in and around appropriate settlements outside of Bromsgrove town itself; and
• Influence through Economic Development and related strategies and involvement of the LEPs as required.</td></tr>
<tr><td>Site Constraints where these exist (such as access)</td></tr>
<tr><td>Potential for pressure for non-employment use such as residential</td><td>• Inclusion of policies to prevent the inappropriate erosion of better-performing sites to other non-employment (generating) uses.</td></tr>
<tr><td>Certain poor quality sites and buildings which make a limited contribution to the local employment portfolio</td><td>• Promotion of mixed use (re)development where this is a viable and effective means of enhancing a site's qualitative contribution to local townscape and employment land supply;
• For the poorest quality employment sites, consider (re)development to alternative uses and relocation of any displaced occupiers; and
• Application of a criteria-based policy to guide decisions concerning the release of employment sites, including individual premises outside of employment allocations and established employment estates / areas.</td></tr>
<tr><td>Sustainability and environmental consideration</td><td>• Preparation of a Sustainability Plan and Green Travel Plan to guide future development on larger sites; and
• Preparing AAPs, SPDs and Masterplans to guide the development of large / strategic sites to address sustainability and (site-specific) environmental issues.</td></tr>
</table>

B: Maintaining a Portfolio of Sites

10.53 The sites considered as part of this review have been ranked according to their importance and function in the employment land hierarchy. Site classifications and associated recommendations for each type of classification are summarised in the following table and expanded upon in subsequent paragraphs.

10.54 As a starting point and unless other site-specific recommendations indicate otherwise, Best, Good and Moderate sites should be retained for employment use. The release of such land and sites for other forms of development through the development control process should be carefully assessed. We would recommend the use of the following hierarchy of employment policies to assess and control such development.

Table 10.15 Site Classification and Recommendations

Classification	Recommendation
Best Urban (B)	Protect for B Class employment use
Good Urban (G)	Protect for B Class employment use
Moderate (M)	Normally protect for B Class employment use – apply criteria-based policy to consider other uses through the development management process
Poor (P)	Potential for release to other forms of development

Best and Good Sites

10.55 Sites ranked as Best and Good should be retained as they are considered valuable employment sites / areas which should be protected against loss and the gradual erosion through the encroachment of alternative uses. Their loss to other uses should only be allowed in exceptional circumstances, where it can be clearly demonstrated that continued / new employment is not viable or that a lack of demand it can be robustly proven. In respect of Bromsgrove town centre development sites defined in the emerging AAP, an element of employment use, including appropriate office provision, should be sought to be secured as appropriate as part of mixed use development.

10.56 **Table 10.16 and 10.17** outlines the sites (excluding ADR's and sites defined in the WYG Study) recommended for inclusion within these classifications:

Table 10.16: Best Sites

	Site
Rural West	-
Bromsgrove	Bromsgrove (BROM 8A) - Land at Buntsford Hill Phase 3 / Buntsfordgate
	Bromsgrove Technology Park
North	-
Rural East	-

Table 10.17: Good Sites

	Site
Rural West	-
Bromsgrove	Bromsgrove (BROM 8) - Buntsford Hill Business Park / Land at Buntsford Hill Phase 2
	Worcester Road / Sanders Road
	Aston Fields Industrial and Trading Estate and Silver Birches Business Park
	Bromsgrove Town Centre (various development sites)
North	Cofton Hackett
Rural East	Wythall Green Business Park
	Ravensbank Business Park
	Saxon and Harris Business Parks (excluding the PolymerLatex site)

Moderate Sites

10.57 Those sites identified as 'Moderate' are generally of reasonable quality but may be constrained in some way limiting their full current availability or market attractiveness. Certain 'Moderate' sites may be of interest mainly to local occupiers only. The majority of sites ranked as moderate are in existing employment use of already developed. The qualitative chapter of this report also sets out specific recommendations in respect of certain moderate sites, such as in relation the need to seek to secure employment as part of any mixed use development.

10.58 As a general policy approach to be reflected in the Core Strategy / District Plan, we would recommend that proposals for non B class employment uses which may come forward on employment sites through the development management process (and also on individual employment sites and premises not examined as part of this study) should only be permitted where the following criteria can be met. It will be necessary to monitor and manage the release of these sites for other uses to ensure that an overall quantitative and qualitative shortage of sites and premises does not occur:

* There would not be an unacceptable adverse impact on the quality and quantity of employment land supply when assessed against requirements and the scale and nature of supply and demand within the area; or
* There would be a net improvement in amenity in terms of the removal of a non-conforming use from within a residential area which create unacceptable environmental or traffic problems and where

recycling to an alternative use would offer amenity benefits. For sites in existing employment use, consideration should also be given to the ability to relocate existing occupiers where this is necessary.

10.59 In assessing quantitative and qualitative issues, regard should be had to available land and premises in the local area and it will therefore be important to monitor take up and losses using this study as a base position. Regard should also be had to ensuring that the loss of premises would not unacceptably compromise the ability to accommodate smaller scale requirements – as identified through our analysis of market demand, employment requirements are often for small – medium scale development. Thus, in assessing qualitative impacts on employment supply, it will be important to assess the realistic potential of premises / sites to accommodate such development when assessing proposals for their release to other uses.

10.60 Should proposals not be able to robustly demonstrate that they are capable of meeting the above criteria (in the case of best and good sites it would anticipated that it would be highly unlikely that proposals for non employment use would not be able to satisfy the above criteria), then proposals will only be acceptable where the following criteria can be satisfied:

* Lack of market demand – to including details of active marketing - to allow the full consideration of specific demand, details should be sought on marketing including duration, method and price, particularly in relation to premises. As part of this assessment, consideration should be given to the appropriateness for subdivision of premises; and
* Lack of viability for employment development – details of redevelopment costs to justify that employment development is not viable in the first instance, and if a wholly employment scheme is not a viable form of development, whether mixed-use development (including an appropriate element of employment) is a feasible and desirable means of overcoming viability constraints.

10.61 In assessing details of active marketing, it will be important to ensure that this has been done for an appropriate period and in a robust way. The precise period of marketing will be influenced by prevailing market conditions at the time but a minimum period of 12 – 24 months would normally be appropriate. Marketing should be carried out by an established commercial property agent and should include on-site boards, adverts in relevant publications, mail shots (national property publications and / or local press) and inclusion on Worcestershire Council on-line property search facility. The extent of marketing required will vary from site to site depending on its size and type.

10.62 Proposals should also demonstrate that the site is being marketed at a reasonable price comparable to other similar sites and premises in the locality. Flexibility in marketing should also be demonstrated; for example, offering sites / premises on a freehold or leasehold basis and promoting opportunities for smaller requirements through sub-division.

10.63 In determining the viability for employment, a development appraisal should accompany proposals to clearly demonstrate why redevelopment for employment purposes is not commercially viable, identifying the abnormal and other costs which would prevent an appropriate employment scheme coming forward.

10.64 A list of the ‘Moderate’ sites identified through this study is included in **Table 10.18**.

Table 10.18: Moderate Sites

	Site
Rural West	Wassell Grove Road
	Nash Works
	Bumble Hole Farm
	Wildmoor Farm
Bromsgrove	Sugarbrook Mill (now under construction)
North	The Avenue, Rubery
Rural East	Weights Farm
	Becketts Farm
	PolymerLatex Site
	Oakland International

	High House Farm

Poor Sites

10.65 Sites classed as 'Poor' perform poorly under the qualitative assessment, but can provide certain functions in the employment hierarchy such as through the supply of lower grade employment land and accommodation for secondary occupiers. Such sites (which in the case of this Study comprise of existing farms) are identified as having potential for release from the employment portfolio.

Table 10.19: Poor Sites

	Site
Rural West	-
Bromsgrove	-
North	-
Rural East	Robin Hill Farm

Areas of Development Restraint

10.66 **Table 10.20** identifies the ADR's assessed as part of this study, together with their associated ranking.

Table 10.20: Areas of Development Restraint

	Site	Ranking
Rural West	Hagley ADR (HAG 2B)	Good
Bromsgrove	Bromsgrove ADR (BROM 5A, B&D)	Good
North	-	-
Rural East	Ravensbank ADR	Good

10.67 Given the generally limited level of supply in certain parts of the District, consideration should be given to bringing forward ADR's (and potentially further alternative opportunities) through the Council's emerging Local Plan as a means on enhancing choice and overall level of future employment land supply. It will be important that the employment element provided as part of mixed use ADRs, such as at Hagley and Bromsgrove, maximise the amount of employment that they are able to provide for, potentially increasing the level of contribution applied for the purposes of this study. Should a policy approach be adopted of continuing to seek to meet part of the future employment needs of Redditch, then the Ravensbank ADR (and potentially other land in close proximity to Redditch) will have a valuable role to play.

C: Vacant Premises

10.68 The supply of vacant premises, in terms of amount, size, nature and quality, varies significantly across the study area. In many of the more rural sub areas (e.g. the Rural West and North sub areas), very limited vacancies have been identified but this will also be in part influenced by the nature of local markets, with premises often not advertised through commercial agents for example.

10.69 The Bromsgrove sub area offers a reasonable range of industrial and office units although space tends to be focussed in properties of less than 500 sq m. This said, agents report a 'shortage' of small – mid sized industrial units. There is are limited available large premises which could reduce the attractiveness of Bromsgrove as a location for certain potential occupiers.

10.70 Given the above supply issues and in order to maximise the opportunity for accommodating requirements in the area, it is critical that prospective occupiers can readily obtain comprehensive and up to date details of vacant premises and land. As such, we would recommend that the Worcestershire Council's on-line vacant property register continues to be maintained and regularly updated as an important proactive measure to promote local economic development.

D: Rural Areas and Settlements

10.71 Supply is often focussed mainly in the sub areas of Bromsgrove and the Rural East. Providing additional opportunities for (small-scale) sustainable employment outside of these sub-areas will also be important in order to promote a vibrant economy across the District as a whole.

10.72 To address this issue, we would support the provision of a suite of policies in the emerging Core Strategy / Local Plan to maintain and enhance opportunities for employment development within and on the edge of larger settlements as well as within rural areas more generally (also see 'E' below).

10.73 Also, the identification of specific additional sites at certain larger settlements outside of the Bromsgrove sub area (where the current level employment land supply is particularly restricted in terms overall amount and number / quality of opportunities) could also be considered through the District Plan, including sites in addition to those listed .

E: Local Planning Policy and Other Responses

Planning Policy Responses

10.74 We would recommend that a hierarchical policy approach towards the protection and promotion of the employment portfolio, as summarised in **Table 10.21**.

Table 10.21: Suggested Employment Policy Hierarchy

Issue	Policy Response
'Best' Sites	• Identify 'Best' new employment opportunities and existing sites, protect for B class employment uses, set out site-specific development requirements where relevant.
'Good' Sites	• Identify 'Good' new employment opportunities and existing sites, protect for B-class employment use, set out site-specific development requirements where relevant.
'Moderate' Sites	• Identify 'Moderate' sites and opportunities. Adopt a criteria-based policy to assess non-B class uses which may come forward through the development control process. Also apply relevant criteria generically to proposals which would result in the loss of any B class employment site or premises.
'Poor' Sites	• Identify 'Poor' sites as those which can be released from the employment hierarchy (possibly actively promote for other forms of development through the Local Plan).
General approaches to promote new employment in urban and rural areas	• General policy to promote small-scale sustainable employment opportunities in and on the edge of towns and other larger settlements (notably in those sub areas where supply is currently restricted).
	• General policy to promote / guide new employment development / expansion within urban areas and within other settlements; • General policy to promote / guide expansion of existing employment uses in rural areas; • Promotion of rural diversification and the business (i.e. employment generating) re-use of rural buildings in the first instance; and • Enhance currently available opportunities for new office development in central urban areas.

Supplementary Planning Documents

10.75 For major sites and those with complex or numerous issues to be considered (such as ADR's or other larger opportunities which may be promoted through the plan process), it will often be appropriate to prepare site Master Plans, Supplementary Planning Documents or Area Action Plans to guide future development. These can be a useful tool, particularly in terms of setting out clearly the main requirements and other considerations associated with particular development opportunities.

10.76 They should be based on a thorough understanding of commercial considerations and market realism to ensure that the optimum form and mix of development can be delivered. This understanding will require the input of commercial development surveyors. It will also be important to ensure that sites are promoted to accommodate a wide range of size requirements, including new start-ups and SME's, to accommodate demand.

Emerging Core Strategy: Economic Aims and Objectives

10.77 Table 10.22 summarises the key employment / economic policies set out in the Bromsgrove Draft Core Strategy 2 together with brief commentary in the context of the main conclusions and recommendations of the employment land study.

Table 10.22: Overview of Draft Core Strategy Economic Polices

Summary of Aim / Objective / Policy	Commentary
Core Policy 1: seek to develop 28 ha of employment land over the period 2006 - 2026	• Given past completion rates, over the 20 year period being assessed, this perhaps should be viewed as a minimum target, particularly if also including provision for meeting some of the employment growth needs of Redditch.
Core Policy 4a: Development of urban extension(s) to the north and west of Bromsgrove, including a minimum of 5 ha of employment land	• The Perryfields Road ADR will be a valuable means of increasing employment land supply for the Bromsgrove sub area, which is a main focus of demand / activity and will expand on the range of sites currently available in the area. Consideration should be given to going beyond the 5 ha minimum defined in the Policy to further enhance supply in the Bromsgrove area.
Core Policy 4b: Provision of other development sites including a 10.3 hectare expansion site at Ravensbank and also an element of employment as part of a mixed use development at Hagley.	• The identification of the Ravensbank expansion (the Ravensbank ADR) will be important to provide a strategic source of supply over the plan period to continue to assist in meeting the employment needs of Redditch. The existing Ravensbank Business Park has proved a popular location. Whilst not viewed as a strategic site / location, the provision of an appropriate element of employment as part of the development of the Hagley ADR will bolster supply in the Rural West sub area, where current employment land supply is extremely limited.
Core Policy 11: Sets out the types of employment opportunities that will be promoted, including: • New technology opportunities as part of the 'central Technology Belt' including Bromsgrove Technology Park and Longbridge; • Office and mixed use schemes Bromsgrove town centre; • A range and choice of readily available employment sites; • Economic development opportunities within strategic sites; and • Limited economic development in rural areas.	• Core Policy 11 sets out a range of employment opportunities which will be important to ensure a varied and robust portfolio. Many of the types of opportunity listed, such as the promotion of office development in the town centre, the provision of employment within strategic development sites (ADRs) and ensuring appropriate employment opportunities in the more rural parts of the District. • Of critical importance will be ensuring that there is an adequate range of choice of available sites across the district to maximise the potential to attract new business and inward investment.

Summary of Aim / Objective / Policy	Commentary
Core Policy 12: Seeks to safeguard valuable employment sites and sets out a range of criteria to be met before permitting their loss to other non employment uses, such as housing.	• The use of a criteria-based policy to protect employment sites from loss to other uses is an appropriate, setting out the circumstances when the development of housing or other non B class uses may be acceptable. Consideration could be given to amending criteria slightly along the lines of that set out at paragraphs 10.56 – 10.62 above)