Bromsgrove District
Employment Land Review

Final Report

June 2009

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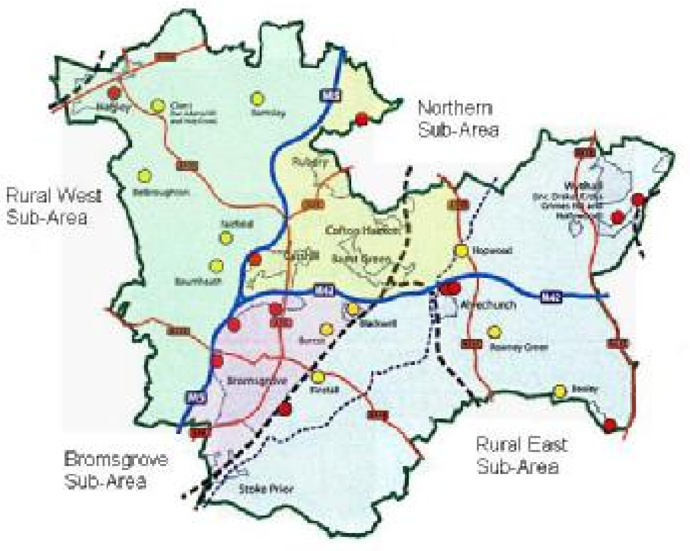
Appendices

Executive Summary

Drivers Jonas LLP and WM Enterprise were commissioned by Bromsgrove District Council to prepare an Employment Land Review of the District covering the period to 2026. The review was 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 under 79 hectares. However, this figure includes Areas of Development Restraint (which are currently not available for development) and also existing commitments at Ravensbank Business Park (which are intended to meet the employment development needs of Redditch). Excluding the contribution made by these sources, available net supply serving Bromsgrove District as a whole is approximately 39 hectares.

The vast majority of supply is made up of land within Local Plan allocations with planning permission and also development which is under construction. Taking development under construction out of the assessment of supply, net land supply in the District decreases to around 26 hectares.

Land supply is most focussed towards the Rural East sub area, with main concentrations at Wythall Green Business Park, Ravenbank Business Park and, Saxon and Harris Business Parks. When excluding sites identified as being under construction (including the Bromsgrove Technology Park), all other sub areas have less than 5 hectares of available land supply and the Rural West sub area has no supply at all which can be attributed to the Districts employment allocations and main commitments.

Stage 2: Future Requirements

Based on the outputs of a small area forecasting model, between 4 and 10 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 2026. 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, typically around 2,000-5,000 sq ft for industrial premises and under 1,000 sq ft for offices.

Stage 3: Identifying a New Portfolio of Sites

Overall, there is reasonable quantity of existing employment land supply within the District as a whole although 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)]. Also, the supply of land likely to be available for offices and warehousing appears more restricted by comparison to manufacturing (which as a sector is predicted to decline slightly in the amount of land it occupies over the study period). As also noted, the current distribution of employment land supply is unevenly spread across the District.

Based on these broad conclusions, key recommendations have been identified relating 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 any 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 offices and warehousing generally and also in enhancing spatial deficiencies in supply within certain parts of the District. This could include, for example, bringing forward certain existing 'Areas of Development Restraint' and enhancing office opportunities in central urban areas; 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 LLP and WM Enterprise were 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.

Purpose and Scope of the Study

1.2 Bromsgrove District Council require a comprehensive study and report on employment land requirements for the period up to 2026. There are three main aims of the study, as defined by the Council. These are:

- To provide a robust evidence base to input into the Council's LDF to inform their 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.

Stages and Outputs of the Study

1.3 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).

1.4 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 our approach 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)
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 information sources concerning existing building stock, including that derived from the ONS, middle layer super output area boundaries have needed to be used. Although these do not always exactly coincide with the boundaries shown on the Plan in Appendix 1, due to the usually relatively limited level of variation, it is not considered this will impact on the overall study outputs or the validity of the conclusions.

Planning and Economic Policy Review

2.5 For a study of this nature, it will be important to have a full understanding of the aims, objectives and requirements of relevant national, regional and local level planning and economic policy. Table 2.2 below summarises the key planning and economic policy documents reviewed.

Table 2.2: Key Planning and Economic Policy Documents

Policy Level	Document to be Reviewed
National	PPS1: *Delivering Sustainable Development (2005)*
	PPG4: *Industrial, Commercial Development and Small Firms (1992)*
	Draft PPS4: *Planning for Sustainable Economic Development (2007)*
	PPS6: *Planning for Town Centres (2005)*
	PPS7: *Sustainable Development in Rural Areas (2004)*
	PPG13: *Transport (2001)*
Regional	RSS11: *Regional Spatial Strategy for the West Midlands* (2004)
	West Midlands Regional Spatial Strategy Phase 2 Review Preferred Option (2007)
	Delivering Advantage: The West Midlands Economic Strategy and Action Plan (2004)
	Connecting to Success: Draft West Midlands Regional Economic Strategy (2007)
Sub-Regional / Local	Bromsgrove District Local Plan (2004)
	Emerging LDF Documents (e.g. Core Strategy Issues and Options documents, Longbridge AAP etc.)
	Worcestershire Structure Plan (2001)

Task 2: Quantitative Assessment of Employment Land and Premises

2.6 We have quantified the level and distribution of existing floorspace and proposed future land and floorspace across the Bromsgrove Council area and its constituent sub areas. Supply has been 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

2.7 The most reliable figures for existing floorspace provision at the sub-local authority level are business rates statistics provided by the Office for National Statistics (ONS) in collaboration with the Valuation Office.

2.8 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. This data has been analysed by sub-area within the Bromsgrove area, albeit that ‘best fit’ ONS output areas need to be applied.

2.9 Although ONS data does provide a vacancy rate for the main employment sectors for Bromsgrove District as a whole, sub-local authority area level ONS floorspace data does not however distinguish between vacant and occupied space, rather an amalgamated figure for total floorspace is identified.

2.10 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 therefore been primarily obtained from the Council's Industrial and Commercial Property Guide (March 2008) and Worcestershire County Council Property Services Online Property Search.

2.11 We have also carried out our own investigations on vacant premises to clarify details in the register 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 included other relevant 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 In addition, where information has been made available, the study also considers employment 'losses'. These can be defined as sites with planning permission which would result in the loss of an existing employment use / building or the loss / reduction of an identified employment allocation to alternative non-B Class form of development.

2.14 Quantitative land supply information has been obtained from annual employment monitoring 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. Further details on our approach to the quantitative assessment of supply is included at Chapter 4.

Task 3: Qualitative Assessment of Employment Land and Premises

2.15 The Council has identified approximately 31 sites / areas which have been subject to specific qualitative assessment (i.e. site appraisal). This includes 8 currently unallocated areas identified to the north of Redditch in a study by White Young Green dated December 2007 to assess the potential for land in Bromsgrove to meet the future development needs of Redditch.

2.16 Information which has been used to inform the completion of qualitative site assessments has been obtained from a range of sources. These include:

- 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 with regards to best practice. The qualitative assessment proforma used is included at **Appendix 2**.

2.19 Our assessment of commercial factors has included a general consideration of the likely attractiveness of developed sites for employment re-use and redevelopment. This particular element of the study has been based on our site visits 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 supported 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. We have utilised the following rankings 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, we have undertaken the following:

- A review of the local economy and production of quantitative forecasts of employment land requirements for the Bromsgrove District Council area through to 2026; 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 2026.

2.25 We have produced a set of forecasts for Bromsgrove District using our own 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, we have also drawn on other relevant forecast information (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, we have produced a base position and annual forecasts through to 2026 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, we can ensure that the employment land forecasts are 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, we have given particular attention 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, we have been mindful of 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 Our 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, we seek to use locally derived density figures.

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 will be 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 will be 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 2026, 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. As such, additional amounts need to be added in order to allow for voids, choice, development times, market friction, etc.

Alternate Forecasts Based on Different Growth Scenarios

2.36 The impact of different economic scenarios on the amount of employment land needed will be undertaken to provide high and low growth options as appropriate. We have derived the scenarios from the Phase 2 Review of the RSS, for example, the potential requirement for Bromsgrove District to cater for a proportion of the growth of Redditch. We have also considered other such scenarios as the Council might direct. For example, we could look at the employment land implications of higher than anticipated population growth or on moves towards lower levels of commuting.

Employer Survey

2.37 In order to inform the forecasts and gain a further insight into current business issues, we have undertaken a survey of circa 200 businesses across the District.

2.38 We have surveyed a representative sample of relevant businesses in Bromsgrove, in each of the larger settlements and, where appropriate, in their rural hinterlands. Nevertheless, we have interviewed 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 SPSS or SNAP software, with the findings used to inform both the employment land forecasts and the overall report of findings.

Task 5: Review of Market Trends and Demand

2.43 We have provided an overview of market trends and demand by study area and by broad employment sector (office, manufacturing and warehousing / distribution).

2.44 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 the Council, where available;
- Historic trends data and past completion rates, such as from the Council's Annual Monitoring Report;
- Discussions with key stakeholders, notably local agents and developers;
- Relevant outputs from the employer survey; and
- Review of existing studies and data sources such as FOCUS, EGi, the Valuation Office and the Council's commercial property register.

2.45 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

2.46 Building on and analysing the outputs of work tasks undertaken at Stages 1 and 2 of the Study, we have produced a comprehensive overview of employment land requirements and advice upon strategic locations and policy recommendations.

2.47 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 Development Framework (LDF) 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; and
- Recommendations in relation to future monitoring of employment land.

2.48 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; and
- Detailed outputs from employment forecasting model, including forecast annual change through to 2026 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, and council-wide levels to provide a comprehensive picture of the policy content influencing the study.

National Planning Guidance

PPS1: Delivering Sustainable Development (2005)

3.2 The purpose of this statement is to set out the overarching planning policies for the delivery of sustainable and inclusive patterns of development through the planning system. Paragraph 5 of the PPS states that the main objectives of the planning system are:

- Making suitable land available for development in line with economic, social, and environmental objectives to improve people's quality of life;
- Contributing to sustainable economic development;
- Protecting and enhancing the natural and historic environment, the quality and character of the countryside, and existing communities;
- Ensuring high quality development through good and inclusive design, and the efficient use of resources; and
- Ensuring that development supports existing communities and contributes to the creation of safe, sustainable, liveable and mixed communities with good access to jobs and key services for all members of the community.

3.3 In line with the Government's commitment to promoting a strong, stable and productive economy, planning authorities should provide for improved productivity, choice and competition ensuring suitable locations are available for industrial, commercial and other developments, whilst recognising that economies are subject to change.

PPG4: Industrial, Commercial Development and Small Firms (1992)

3.4 Paragraph 3 of this guidance states that development plans must work towards giving industrial and commercial developers and local communities greater certainty about the types of development which will / will not be permitted in specific locations. Furthermore, paragraph 6 goes on to outline that:

> *"Policies should provide for choice, flexibility and competition. In allocating land for industry and commerce, planning authorities should be realistic in their assessment of the needs of business. They should aim to ensure that there is sufficient land available which is readily capable of development and well served by infrastructure. They should aim to ensure that there is sufficient land available to meet differing needs. A choice of suitable sites will facilitate competition between developers; this will benefit end-users and stimulate economic activity".*

3.5 Paragraph 9 states that:

> *"Industry and commerce have always sought locational advantage in response to various external factors. These include: the demands of customers; access to raw materials and suppliers; links with other businesses; the workforce catchment area; the various transport considerations. Business often gives high priority to good access to roads, and sometimes rail, airports and ports".*

3.6 With regards to the location of employment uses, the guidance suggests (paragraph 12) that some types of modern distribution facilities which have a low density of employment, but are served by a large number of lorries, are best located away from urban areas where there is good access to the strategic road network. Furthermore, it is recognised that it may no longer be appropriate to separate industry and commerce from the residential communities for whom they are a source of employment.

Draft PPS4: Planning for Sustainable Economic Development (2007)

3.7 Draft PPS4 was published in December 2007, with a view to replace PPG4 detailed above. This review is seen as long overdue in the face of globalisation, rapid technological change and newly industrialised economies, as recognised in Kate Barker's 'Review of Land Use Planning' (December 2006) and subsequently in the White Paper 'Planning for a Sustainable Future' (May 2007). The overall emphasis of emerging PPS4 is on urging local authorities in England to plan positively for economic development and to promote new business and economic growth "unless there is a good reason to believe the costs would outweigh the benefit".

3.8 Draft PPS4 sets out a number of important policy approaches and objectives including:

- Specific planning tools are available to assist local planning authorities to support their economic goals, for example, through local development orders and simplified planning zones, removing the need for separate planning applications.
- Adopt a flexible approach to the supply and use of land through planning policies to ensure increased competition and enterprise, enhanced skills and innovation, increased job opportunities and greater investment.
- Regional planning bodies and local planning authorities should use a wider evidence base to understand both existing needs and likely changes to the market. The evidence base should, for example, take into account the nature and character of the area, the needs of the location and different businesses, and available market data.
- Local authorities should avoid designation of sites for single or restricted use classes wherever possible and avoid carrying forward existing allocations where they cannot be justified.
- A broad range of business types should be catered for and local authorities should take a constructive approach to changes of use where there is no likelihood for demonstrable harm.
- The use of previously developed land and new uses for vacant or derelict buildings, including historic buildings and those in rural areas, should be encouraged.
- It should be recognised that a site may be an acceptable location for development even though it may not be readily accessible by public transport.

3.9 It has recently been announced by CLG that PPS4 is to be rolled into a wider review of PPG 5, PPS 6, PPS 7 and part of PPG 13 to create a consolidated PPS dealing with a full range of economic issues.

PPS6: Planning for Town Centres (2005)

3.10 Paragraph 1.8 identifies the range of town centre uses to which PPS6 applies. This includes offices, both commercial and those of public bodies.

3.11 PPS 6 promotes a sequential approach to the location of major office developments, promoting first town centres, followed by edge of centre locations and then out of centre locations well served by public transport. Specifically it provides guidance on planning for offices in town centres and identifies that:

- An assessment of the need for new office floor space over the development plan document period should be carried out as part of the plan preparation and review process;
- Local need assessments will need to be informed by regional assessments and will form part of the evidence base for development plan documents; and
- The physical capacity of centres to accommodate new office development and the town centre's role in the hierarchy is also relevant to the planning for new office development.

PPS7: Sustainable Development in Rural Areas (2004)

3.12 Paragraph 2 states that local authorities should be aware of the circumstances, needs and priorities of the rural communities and businesses in their area in order that they can ensure that the policies contained within the local plan are relevant and effective.

3.13 With regards to the siting of development, paragraph 5 outlines that local planning authorities should

> *"1) Identify suitable sites for future economic development, particularly in rural areas where there is need for employment creation and economic regeneration.*
>
> *2) Set out in local development documents their criteria for permitting economic development in different locations, including future expansion of business premises to facilitate healthy and diverse economic activity in rural areas".*

PPG13: Transport (2001)

3.14 The key objective set out in this guidance is to promote accessibility to jobs, shopping, leisure facilities, and services by public transport, walking and cycling. Local authorities are advised to consider this when preparing local development plans and assessing planning applications.

3.15 Paragraph 21 outlines that local authorities should review their development plan allocations and should allocate or re-allocate sites which are (or will be) highly accessible by public transport, for travel intensive uses (including offices). Conversely, less travel intensive uses should be located where public transport is less effective.

3.16 Paragraph 32 states that "*local authorities should adopt a positive, plan-led approach to identifying preferred areas and sites for B1 uses which are (or will be) as far as possible highly accessible by public transport, walking, and cycling*".

3.17 Paragraph 30 states that development involving large amounts of employment should be located in city, town and district centres and near to major public transport interchanges.

3.18 Paragraph 44 concerns development within rural areas and states that:

> *"In determining the appropriate strategy for employment in rural areas, it is important to consider the scale, impact and likely catchment of developments. Local authorities will need to weigh up policy concerns but in general terms, the larger the number of staff employed on site the greater the need to ensure that development is accessible by public transport, walking and cycling. Depending on the nature of use, this may mean locating larger employment uses in or next to a designated local service centre. Employment uses which are regional or sub-regional in scale should be located where they accord with regional planning guidance and where they offer a realistic choice of access by a range of transport modes".*

The Barker Review (2006)

3.19 Kate Barker was asked to lead an independent review of land use planning to consider how, in the context of globalisation, and building on the reforms already put in place in England, planning policy and procedures can better deliver economic growth and prosperity alongside other sustainable development goals. While the focus of the review was on economic issues, the recommendations also sought to advance environmental goals. Key themes contained in the review were: enhancing the responsiveness of the system to economic factors; improving the efficiency of the system to reduce the costs associated with delivering desired outcomes; and ensuring that there is an appropriate use of land.

3.20 The outcome of the review was a series of headline recommendations. Those of most relevance for this Employment Land Review include:-

- Updating national policy on planning for economic development (PPS4) to ensure that the benefits of development are fully taken into account in plan-making and decision-taking, with a more explicit role for market and price signals;
- Supporting the town centre first policy; and
- Ensuring that new development beyond towns and cities occurs in the most sustainable way.

3.21 With regards to employment and employment land, the review suggests development plan policies should consider how the drivers of productivity can be supported, highlighting the benefits that employment and investment can bring an area and how they can be realised in their region / locality. Business interests therefore need to be taken into account as development plan documents are being prepared to ensure the role of market signals are recognised and allocations are relevant and up to date. Allocations should comprise of a range of sites in terms of size, use class, accessibility and availability, whilst the plan as a whole should have strong links to infrastructure provision. In short, the Barker Review recommends that an elevated status should be attached to business and economic issues in the planning process.

Planning White Paper (2007)

3.22 The White Paper sets out the Government's detailed proposals for reform of the planning system in response to the recommendations made by Kate Barker and others in respect of planning. The aim is to create a planning system that positively supports economic development and encourages greater investment, both domestic and foreign, in the UK economy.

3.23 The vision contained in the paper is for a:

> *"planning system which supports vibrant, healthy sustainable communities, promotes the UK's international competitiveness, and enables the infrastructure which is vital to our quality of life to be provided, in a way that is integrated with the delivery of other sustainable development objectives, and ensures that local communities and members of the public can make their views heard."*

3.24 There is continued emphasis on the development of brownfield land and locating development in sustainable locations to reduce the need to travel. It further focuses upon town centre planning and the role of planning in dealing with climate change.

3.25 It is noted that to be competitive, business needs to respond much more quickly to changes in market conditions. Here, planning can help by being responsive and efficient, and supporting vital economic development in a way which ensures it is consistent with wider environmental and social objectives.

3.26 Changes in the way Local Planning Authorities approach and address economic development decisions are also suggested. In particular:

- In decision taking planning authorities should take full account of the longer term benefits, as well as the costs, of development that will create jobs, including those with wider benefits to national, regional or local economies by improving productivity and competitiveness;
- There will be a new approach to determining planning applications which do not have the specific support of plan policies, using market information as well as environmental and social information;
- Development plans should promote mixed-use development and respond to new forms of economic development enabling each locality to fulfill its potential; and
- Authorities should make better use of market information and other relevant evidence in planning for sustainable economic development and in considering specific proposals for development.

Employment Land Reviews Guidance Note (December 2004)

3.27 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.

3.28 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.

3.29 Paragraph 2.25 of the guide identifies that employment land reviews should focus on those employment land uses or premises which are within the scope of PPG4 (DoE 1992), 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.

3.30 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 from a definitive statement of government policy; however it nevertheless provides reasonably up to date information on approaches to undertaking an employment land review.

Regional and Sub-Regional Policy

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

3.31 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."*

3.32 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.

3.33 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

3.34 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 (see para 1.33 of RPG 11). 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.

Phase 2 Revision - Preferred Option, December 2007

3.35 The Preferred Option was submitted to the Secretary of State in December 2007. Following submission, Baroness Andrews, Parliamentary Under Secretary of State in the CLG, wrote to the Regional Assembly expressing concern about the housing proposals put forward in the light of the Government's agenda to increase house building across the country.

3.36 The Minister asked the Government Office for the West Midlands to commission further work to look at options which could deliver higher housing numbers. Nathaniel Lichfield and Partners (NLP) published the Development of Options for the West Midlands RSS Study, in response to the National Housing and Planning Advice unit NHPAU. As a result, consultation on the Preferred Option document was extended until 8

December 2008 to allow for consultation on the NLP Study. The RSS Examination in Public will open on 28th April 2009.

3.37 The strategic objectives remain very similar to those in the adopted RSS and the overarching themes of urban and rural renaissance, diversification of the Region's economy and modernising transport infrastructure remain the same.

3.38 In the context of employment land provision, the Preferred Option sets out that the indicative long-term requirements for employment land in Bromsgrove District is 21 hectares, with a rolling five year reservoir of 7 hectares. However either Bromsgrove or Stratford on Avon Districts will also be expected to accommodate a level of development to meet the employment needs of Redditch Borough.

Development of Options for the West Midlands RSS (Nathaniel Lichfield and Partners)

3.39 The Development of Options Study has proposed an increase of housing allocations for Bromsgrove through all three growth scenarios.

- RSS Phase 2 allocation of housing for Bromsgrove – 2,100 dwellings
- Scenario 1: South East Focus – 5000 additional dwellings
- Scenario 2: Spreading Growth – 5000 additional dwellings
- Scenario: Maximising Growth – 7,500 additional dwellings

3.40 With regard to the key issues, impacts and infrastructure issues, the Study goes on to state that the combination of proposals in options for Birmingham South and Redditch, alongside underlying under-provision of the RSS Phase 2 against CLG Projections, past build rates, and major affordability threshold indicate potential for further development in Bromsgrove. It will be for the LDF to identify most appropriate location for accommodating growth. A review of the Green Belt would be necessary.

3.41 A key consideration informing the development of options for growth is the location of employment and patterns of commuting needs in relation to the location of housing development.

3.42 The Study identifies that the precise relationship between housing supply, economic growth and regeneration is not simple but additional housing supply could help review labour supply blockages in important growth sectors. In parts of the region, notably some rural areas and the south-east quadrant, housing output is not keeping pace with job growth. There is also evidence of increasingly footloose patterns of economic and housing investment influenced by factors such as quality of life and place. Whilst the precise relationship between jobs and housing is complex, the appraisal of options pointed clearly to additional housing in the south-east quadrant as a means of better matching employment and housing growth thereby better enabling new housing to support the growth of important economic growth sectors in that area.

Phase 3 Revision

3.43 Phase 3 of the revision to the RSS covers rural, housing (gypsies and traveller sites), culture, environment and minerals issues. A scoping report for Phase 3 was published in January 2007. The Draft Project Plan was published for consultation between 27 November 2007 and 18 January 2008. The final Project Plan will be published in Spring 2008. The spatial options are due to be launched in Winter 2008/9 followed by a period of public consultation. The launch of the Preferred Option is scheduled for Summer 2009 followed by a period of public consultation.

Delivering Advantage: The West Midlands Economic Strategy and Action Plan 2004 – 2010

3.44 Delivering Advantage sets out a Vision that by 2010

> *'The West Midlands is recognised as a world-class region in which to invest, work, learn, visit and live and the most successful in creating wealth to benefit all of its people"*

3.45 By 2010 it is anticipated that the region will have a truly diverse and dynamic business base. Key priorities in achieving the vision area enterprise, manufacturing, skills, transport and economic inclusion. To create conditions for growth sites must be made available to meet the needs of business or reused for other purposes.

3.46 Four pillars underpin the strategy and action plan, these are:

- Developing a diverse and dynamic business base;
- Promoting a learning and skilful region;
- Creating the conditions for growth; and
- Regenerating communities.

3.47 Four themes link into the pillars, these are:

- Improving the image a marketing the region;
- Creating and intelligence base for policy;
- Engaging with UK partners; and
- Engaging with European partners.

Connecting to Success, Consultation Draft, West Midlands Regional Economic Strategy 2007

3.48 The new Economic Strategy was launched on 10 December 2007. The strategy sets an ambitious vision for the West Midlands:

> *'To be a global centre where people and businesses choose to connect'*

3.49 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.

3.50 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, 2007 (August 2008)

3.51 The Regional Employment Land Study is produced annually by the West Midlands Regional Assembly. The 2007 report is the latest published report. All land is monitored which is committed for an industrial/ employment use in excess of 0.4 hectares and falling within use classes B1, B1c , B2 and B8. The study also monitors B1a office development outside City and Town centres.

3.52 The total amount of employment land developed in the Region during 2006/2007 was 201.2 hectares, a decline from the previous year (220 ha). The Metropolitan area consisting of the authorities of Birmingham, Coventry, Solihull and the Black Country has been the main focus of employment land development between 2000 and 2007. 449 hectares of employment development has taken place within the Metropolitan area which represents 28% of all employment development within the Region during this Period

3.53 With regard to Worcestershire, development has been concentrated in Bromsgrove and Wychavon with completions in the County averaging just over 15 hectares a year.

3.54 The period between 2000 and 2007 has seen significant changes in the type of employment land development which has taken place in the region. The decline in manufacturing has led to a decline in the demand for land for B2 General Industrial Purposes. Between 2000 and 2002 an average of 45 hectares per annum of employment land was developed for B2 purposes. The decline in manufacturing is in stark contrast to the considerable growth in B8 warehousing and distribution. 584.4 hectares of B8 development has taken place in the Region between 2000 and 2007.

3.55 The High Technology Corridors (HTCs) are also identified in the Regional Economic Strategy and are intended to encourage the diversification of the regional economy. The implementation of this strategy has seen significant progress between 2000 and 2007 with a number of development such as Longbridge and Bromsgrove Technology Park being progressed.

3.56 Of the total completions (201.2 hectares) in Bromsgrove District, 7.6 ha were developed in 2006-2007. 6.8 hectares of this is described as sub-regional.

3.57 Between 2000-2007, 30.9 hectares of the 33.1 developed, was not on previously developed land with the remaining1.3 ha through re-used agricultural buildings and 0.9 ha through the redevelopment of industry.

3.58 In 2001, 47 hectares of employment land was readily available with 3 hectares not readily available with a total supply of 49 hectares. In contrast, 25 hectares were readily available and 2 hectares not readily available with a total supply of 27 hectares. There has therefore been a -22 change in readily available employment land between 2001-2007.

Worcestershire Structure Plan, 2001

3.59 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. Under the Planning and Compulsory Purchase Act 2004, policies contained within the Worcestershire Structure Plan remained in place until 27 September 2007 unless their longevity was extended by the Secretary of State. The policies considered below have been formally 'saved'.

3.60 The document sets out a number of objectives of the Structure Plan. These include:

- 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.

3.61 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).

3.62 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 foci for key uses which attract a lot of people (Policy SD.9). This includes commercial and office uses.

3.63 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.

3.64 Policy D.19 sets out that Bromsgrove District is expected to provide for about 55 hectares of employment land over the plan period. Bromsgrove District is also expected to provide a proportion of Redditch District's employment land allocation of about 65 hectares. Paragraph 6.66 states:

> *"The provision of about 65 hectares to meet the needs of Redditch District will include the existing employment land at Ravensbank Business Park in Bromsgrove District which has already been allocated to help meet the employment needs of Redditch. The same allocation at Ravensbank should not be included as part of the employment provision of about 55 hectares in Bromsgrove District."*

3.65 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.

3.66 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).

3.67 In the context of re-use of rural buildings, Policy D.29 gives preference to employment end uses, providing that the building is suitable for re-use, the proposal will not generate trips by heavy goods vehicles on unsuitable roads, and, in the context of development within Green Belt, there is no greater impact on the Green Belt than that of the existing development.

Local Policy

Bromsgrove District Local Plan 2004

3.68 The Bromsgrove District Local Plan was adopted in January 2004 and provides the local planning policies which guide development within Bromsgrove District. Under the Planning and Compulsory Purchase Act 2004, policies contained within the Bromsgrove District Local Plan remained in place until 27 September 2007 unless their longevity was extended by the Secretary of State. The policies considered below have been formally 'saved'.

3.69 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.

3.70 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.

3.71 Policy E2 makes provision for 30 hectares 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.

3.72 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.

3.73 Policy E6 concerns 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.

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

3.75 The Plan sets out a number of criteria which should be fulfilled in 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.

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

Bromsgrove District Local Development Framework

Local Development Scheme, Bromsgrove District Council (2008)

3.77 The Local Development Scheme (LDS) sets out a timetable of Local Development Documents (LDDs) to be produced over the next three years of the Local Development Framework programme. The document sets out that the following documents will be produced:

- Core Strategy;
- Proposals Map;
- Longbridge Area Action Plan;

- Town Centre Area Action Plan; and
- Affordable Housing Supplementary Planning Guidance.

Bromsgrove District Core Strategy

3.78 Issues and Options consultation on the Core Strategy took place in 2005 and 2007. Results from the 2005 consultation indicated support for:

- Attraction of industries with higher paid jobs to Bromsgrove District;
- Small areas of employment within main settlements to support starter businesses and small-scale firms;
- Redevelopment and extension of existing sites to the south east and south of Bromsgrove;
- Opportunities for the reuse and adaptation of vacant or underused buildings within the main settlements;
- Encouraging new businesses to locate in main settlements, whilst supporting existing businesses in the rural areas;
- Encouraging reuse of rural buildings to provide small-scale office accommodation;
- Promotion of a mix of employment generating activities and reuse for non-employment sites; and
- Favourable consideration being given to housing or mixed-use developments on land currently allocated for industrial or commercial use, where the need for this employment use no longer exists.

3.79 A draft version of the Core Strategy went out to consultation in October 2008.

Bromsgrove Town Centre Area Action Plan, Bromsgrove District Council (July 2008)

3.80 The Bromsgrove Town Centre Area Action Plan was published for Issues and Options consultation in July 2008 which closed on 19 September 2008. The aim of the AAP for Bromsgrove town centre 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.

3.81 The economic objectives of the AAP are:

- Develop a knowledge driven economy, the infrastructure and skills base whilst ensuring all share the benefits
- Promote and support the development of new technologies of high value and low impact, especially resource efficient technologies and environmental technology initiatives
- Raise the skills levels and qualifications of workforce
- Sustainable use and development of material assets

Longbridge Area Action Plan (AAP) Submission Document, Birmingham City Council & Bromsgrove District Council (March 2008)

3.82 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 creation of mixed-use places.

3.83 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 submission 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.

3.84 The document states in paragraph 3.120:

> *"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

Joint Study Into the Future Growth Implications of Redditch Town to 2026 – Second Stage Report, November 2008

3.85 The stage 2 study follows the publication of the Nathaniel Lichfield and Partners' study identifying further options that could deliver higher housing numbers. Whilst it does not recommend allocating any additional growth to Redditch Borough, it suggests that 2,500 units from Bromsgrove's additional growth could be associated with the town. The Joint Study therefore considers two growth options based on 6,600 dwellings and 9,100 dwellings.

3.86 The study builds upon the Addendum to the Stage 1 study and is an objective appraisal of the most appropriate way of accommodating the growth options not constrained by the administrative boundaries of the local authorities or policy designations of Green Belt or Areas of Development Restraint (ADR).

3.87 Paragraph 3.03 identifies that the RSS Preferred Option states that 51 ha of employment land will be required of which 24 ha will be provided within Bromsgrove and/or Stratford-on-Avon and therefore 27 ha will be allocated to Redditch. According to the Redditch Borough Council's Employment Commitments which has a base date of April 2008, total commitments amount to 30.71 hectares.

3.88 To meet the increase of 6,600 dwellings, an additional 20.3 ha of employment land will need to be identified. In the absence of a more accurate assessment of the employment land required to support the higher growth option of 9,100 dwellings, Redditch council has made pro rata increase in employment land amounting to 39.6 ha.

4. Employment Land and Premises – Quantitative Assessment of Supply

Introduction

4.1 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).

4.2 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.

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

Existing Stock of Employment Premises

Total Existing Employment Floorspace

4.4 The most reliable figures for existing floorspace provision at the sub-Bromsgrove District level are provided by the Office for National Statistics (ONS).

4.5 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.

4.6 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 considerable.

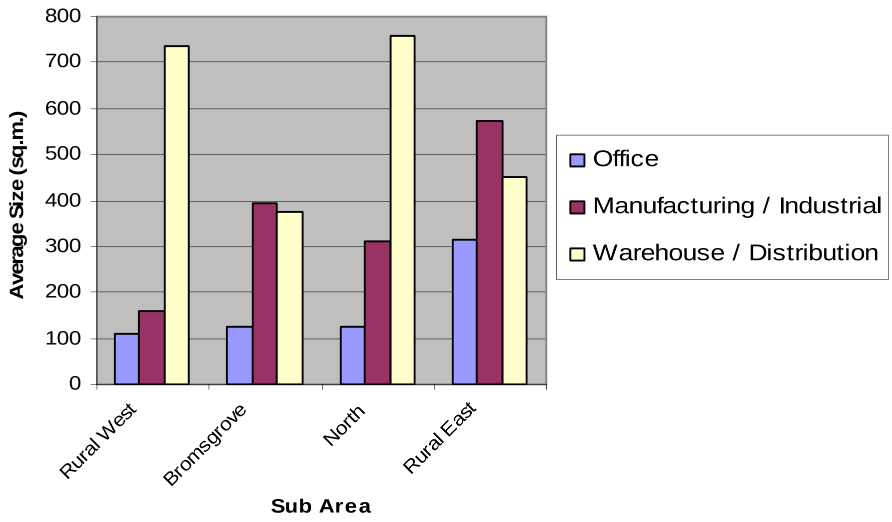
4.7 **Table 4.1** provides a breakdown of current employment hereditaments and floorspace by sector and at sub-area level (2007 data). **Figure 4.1** illustrates the average hereditament size. Although there will clearly be variation in unit sizes, this analysis does provide a very broad picture of the general scale of premises across different sectors and sub areas.

Table 4.1: Breakdown of ONS Data by Sector and Sub-Area (Number of Hereditaments and Floorspace)

Sub Area	Office A2 and B1 (a)	Manufacturing/ Industrial B1 (b), B1 (c) and B2	Warehouse or distribution B8
Rural West	64 (7,000 sq.m.)	63 (10,000 sq.m.)	34 (25,000 sq.m.)
Bromsgrove	263 (33,000 sq.m.)	128.5 (50,500 sq.m.)	117 (44,000 sq.m.)
North	79 (10,000 sq.m.)	17.7 (5,500 sq.m.)	25 (19,000 sq.m.)
Rural East	223 (70,000 sq.m.)	252 (144,000 sq.m.)	172 (78,000 sq.m.)
Bromsgrove District Total	629 (120,000 sq.m.)	461 (210,000 sq.m.)	348 (166,000 sq.m.)

Source: www.statistics.gov.uk/neighbourhood

Figure 4.1: Average Hereditament Size by Sector and Sub-Area



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

Vacant Premises

4.8 Sub-District level ONS floorspace data does not distinguish between vacant and occupied space, rather an amalgamated figure for total floorspace is identified.

4.9 Set out in **Tables 4.2** and **4.3** is an overview of vacant premises by study area sub-area and sector, focusing on industrial / warehouse and office premises available as at mid 2008. Details on available premises have primarily been obtained from Bromsgrove District Council's Industrial and Commercial Property Guide (March 2008) and Worcestershire County Council Property Services online Property Search.

4.10 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. More detailed schedules of vacant premises are reproduced at **Appendix 4.**

Table 4.2: 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)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
North	0 (0)	438.1 (2)	0 (0)	0 (0)	0 (0)	0 (0)	438.1 (2)
Bromsgrove	431.5 (7)	3,253.75 (16)	2,430.3 (4)	1,319 (1)	0 (0)	0 (0)	7,434.7 (28)
Rural East	943.1 (12)	468.2 (3)	0 (0)	0 (0)	0 (0)	0 (0)	1,411.3 (15)
Bromsgrove District Total	1,374.6 (19)	4,160.05 (21)	2,430.3 (4)	1,319 (1)	0 (0)	0 (0)	9284 (45)

Source: Bromsgrove District Council Industrial and Commercial Property Guide (March 2008), Worcestershire County Council online Property Search & discussions with agents

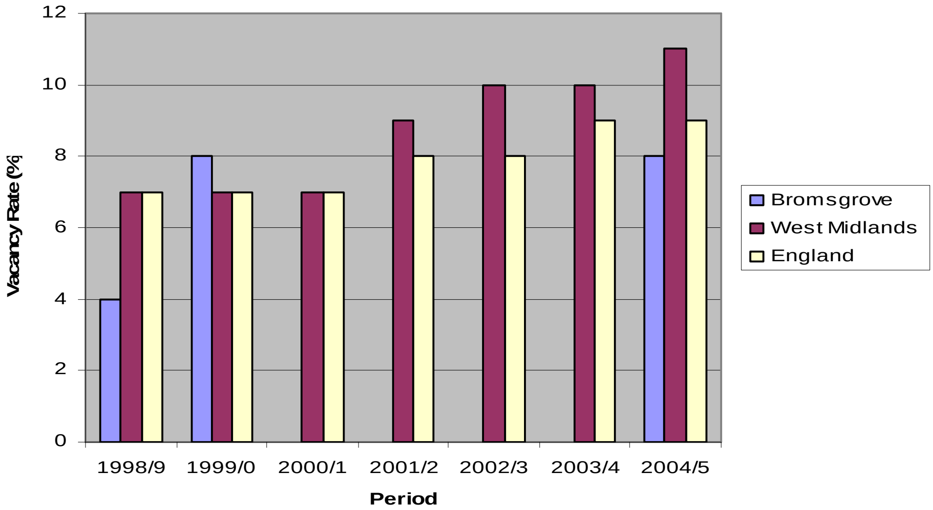
Table 4.3: Vacant Industrial & Warehousing Premises

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	177.7 (3)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	177.7 (3)
North	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
Bromsgrove	98.6 (1)	3787.8 (14)	1542.7 (2)	0 (0)	0 (0)	0 (0)	5,429.1 (17)
Rural East	92.9 (1)	1,502.2 (5)	3,410.2 (5)	2,271.2 (2)	0 (0)	0 (0)	7,276.5 (13)
Bromsgrove District Total	369.2 (5)	5,290 (19)	4,952.9 (7)	2,271.2 (2)	0 (0)	0 (0)	12,883.3 (33)

Source: Bromsgrove District Council Industrial and Commercial Property Guide (March 2008), Worcestershire County Council online Property Search & discussions with agents

4.11 **Figure 4.2** overleaf illustrates the broad annual percentage vacancy rate of employment premises (where available) across the Bromsgrove District Council area as a whole over the period 1998/99 to 2004/05, compared against the regional and national average.

Figure 4.2: Change in Vacancy Over Period 1998/99 to 2004/05



Source: Communities web site

4.12 Vacancy information for Bromsgrove District during the period 2000-2004 is not available and therefore it is difficult to extrapolate a clear pattern. However, in the 2004/5 period, vacancy rates in the District were below those within the West Midlands and England as a whole.

4.13 In quantitative terms and based on the ONS details included in **Table 4.1**, an 8% vacancy rate (as at 2004/05) equates to just under 40,000 sq m of vacant floorspace across all office, industrial and warehousing sectors. The level of current vacancy revealed in **Tables 4.2** and **4.3** suggests a lower total of approximately 22,167 sq m, which is equivalent to a 4.5% vacancy rate. The degree of difference is likely to be largely influenced by the fact that our methodology is only able to take into account those vacant properties which are being actively marketed.

Employment Land Supply

4.14 The assessment of existing employment land focuses predominantly 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.

4.15 Information relating to quantitative land supply information has been obtained from the Council's Land Availability Employment Reports of April 2007 and 2008. Where necessary, the information contained within these documents (and the Regional Employment Land Monitor published by the WMRA) has 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 (see **Tables 4.5 to 4.10**). By taking this approach, a more in-depth analysis can be provided than by, for example, simply looking at sites in isolation.

4.16 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 (April 2008);
- 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 (April 2008);
- 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, we normally apply an equal split between permitted uses as a proxy guide).

4.17 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.

4.18 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.

4.19 **Table 4.4** illustrates the planning use classes attributed to the 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 4.4: 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

4.20 In assessing potential floorspace, it is important to distinguish between B1 office and B1 light industry. 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 administrative databases used by the ONS and is also consistent with forecasting and market classifications used in subsequent stages of this Employment Land Review.

Employment Allocations and Commitments

4.21 **Tables 4.5 to 4.10** below provide a quantitative assessment by sub-area of the size and (an estimate of) the potential floorspace capacity of:

- Employment and other relevant allocations without planning permission; and
- Employment commitments (within and outside of Local Plan allocations), and including those commitments not yet started and also those under construction.

4.22 As well as considering additions to employment land supply arising from new development (employment gains), the study also considers employment losses (i.e. reductions in employment floorspace arising from planning permissions for other uses) to provide a picture of net supply.

Employment Allocations

Table 4.5: 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 Office	B1 Ind	B2	B8	Total B Class
Rural West						
-	0	0 [0]	0 [0]	0 [0]	0 [0]	0 [0]
North						
-	0	0 [0]	0 [0]	0 [0]	0 [0]	0 [0]
Bromsgrove						
-	0	0 [0]	0 [0]	0 [0]	0 [0]	0 [0]
Rural East						
Saxon & 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	1.8	1,200 [0.3]	1,200 [0.3]	2,400 [0.6]	3,000 [0.6]	7,800 [1.8]
District Total	1.8	1,200 [0.3]	1,200 [0.3]	2,400 [0.6]	3,000 [0.6]	7,800 [1.8]

Employment Commitments

4.23 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 2008 Bromsgrove District Council Land Availability Employment Report (and the Regional Employment Land Monitor – 'RELS').

4.24 In addition, there is also a need to look at employment 'losses'. These can be defined as sites with planning permission which would result in the loss of an existing employment use / building or the loss / reduction of an identified employment allocation to alternative non-B Class form of development. The consideration of losses will assist in establishing the net change of employment land. In certain circumstances, tables within the employment land study may record two entries for one site where, for example, planning permission exists for the redevelopment of an existing employment use to another form of employment development.

Table 4.6: Commitments within Local Plan Employment Allocations / Areas

Sub Area Site	Available Area (hectares)	Floorspace Capacity Estimate in square metres [Site area estimate (in hectares) shown in brackets]				
		B1 Office	B1 Ind	B2	B8	Total B Class
Rural West						
-	0	0 [0]	0 [0]	0 [0]	0 [0]	0 [0]
Bromsgrove						
Aston Road Extension	0.7	1717 [0.4]	0 [0]	857 [0.3]	0 [0]	2,574 [0.7]
Bromsgrove Technology Park	2.3	2800 [0.7]	2800 [0.7]	3600 [0.9]	0 [0]	9200 [2.3]
Buntsford Hill – Phase 3 – Buntsfordgate	0.73	800 [0.2]	120 [0.03]	800 [0.2]	1500 [0.3]	3220 [0.73]
Buntsford Park Road, Unit 8	0.23	0 [0]	0 [0]	0 [0]	1400 [0.23]	1400 [0.23]
Land Rear / next to Sugarbrook Mill	1.06	640 [0.16]	800 [0.2]	2000 [0.5]	1000 [0.2]	4440 [1.06]
Stoke Wharf	0.3	0 [0]	400 [0.1]	400 [0.1]	500 [0.1]	1300 [0.3]
Bromsgrove Total	5.32	5957 [1.46]	4120 [1.03]	7657 [2.0]	4440 [0.83]	22134 [5.32]
North						
Cofton Centre, Groveley Lane	4.9	3500 [0.8]	3500 [0.8]	6500 [1.6]	7400 [1.7]	20900 [4.9]
North Total	4.9	3500 [0.8]	3500 [0.8]	6500 [1.6]	7400 [1.7]	20900 [4.9]
Rural East						
Ravensbank Business Park	4.18	3000 [1.0]	3000 [1.0]	3000 [1.0]	4535 [1.18]	13535 [4.18]
Wythall Green Business Park	6.5	22600 [6.5]	0 [0]	0 [0]	0 [0]	22600 [6.5]
Harris Business Park (various)	1.48	1150 [0.28]	1200 [0.3]	1200 [0.3]	3000 [0.6]	6550 [1.48]

Sub Area Site	Available Area (hectares)	Floorspace Capacity Estimate in square metres [Site area estimate (in hectares) shown in brackets]				
		B1 Office	B1 Ind	B2	B8	Total B Class
Harris Business Park Phase 2	0.2	200 [0.05]	200 [0.05]	200 [0.05]	250 [0.05]	850 [0.2]
Rural East Total	12.36	26950 [7.83]	4400 [1.35]	4400 [1.35]	7785 [1.83]	43535 [12.36]
Rural East Total (excl Ravensbank Business Park)	8.18	23950 [6.83]	1400 [0.35]	1400 [0.35]	3250 [0.65]	30000 [8.18]
District Total	22.58	36407 [10.09]	12020 [3.18]	18557 [4.95]	19585 [4.36]	86569 [22.58]
District Total (excl Ravensbank Business Park)	18.4	33407 [9.09]	9020 [2.18]	15557 [1.95]	15050 [3.18]	73034 [18.4]

Table 4.7: Commitments Outside of Local Plan Employment Allocations / Areas

Sub Area Site	Available Area (hectares)	Floorspace Capacity Estimate in square metres [Site area estimate (in hectares) shown in brackets]				
		B1 Office	B1 Ind	B2	B8	Total B Class
Rural West						
Nash Works	0.35	1000 [0.25]	0 [0]	400 [0.1]	0 [0]	1400 [0.35]
Hagley Mews / The Old Woodyard	0.17	0 [0]	700 [0.17]	0 [0]	0 [0]	700 [0.17]
Wildmoor Mill Farm	0.76	1200 [0.3]	1850 [0.46]	0 [0]	0 [0]	3050 [0.76]
Rural West Total	1.28	2200 [0.55]	2550 [0.63]	400 [0.1]	0 [0]	5150 [1.28]
Bromsgrove						
Barnsley Hall Farm	0.52	2000 [0.52]	0 [0]	0 [0]	0 [0]	2000 [0.52]]
Lower Shepley Farm	0.2	0 [0]	800 [0.2]	0 [0]	0 [0]	800 [0.2]
Bromsgrove Total	0.72	2000 [0.52]	800 [0.2]	0 [0]	0 [0]	2800 [0.72]
North						
-	0	0 [0]	0 [0]	0 [0]	0 [0]	0 [0]
Rural East						
High House Farm	0.49	0 [0]	0 [0]	770 [0.49]	0 [0]	770 [0.49]
Rural East Total	0.49	0 [0]	0 [0]	770 [0.49]	0 [0]	770 [0.49]
District Total	2.49	4200 [1.07]	3350 [0.83]	1170 [0.59]	0 [0]	8720 [2.49]

Table 4.8: Commitments Under Construction

Sub Area Site	Available Area (hectares)	Floorspace Capacity Estimate in square metres [Site area estimate (in hectares) shown in brackets]				
		B1 Office	B1 Ind	B2	B8	Total B Class
Rural West						
Wildmoor Mill Farm, Mill Lane	0.76	0 [0]	3000 [0.76]	0 [0]	0 [0]	3000 [0.76]
Rural West Total	0.76	0 [0]	3000 [0.76]	0 [0]	0 [0]	3000 [0.76]
Bromsgrove						
Buntsford Hill – Phase 3 (various)	2.47	2000 [0.5]	2000 [0.5]	1900 [0.47]	5000 [1.0]	10900 [2.47]
Former Garringtons / UEF Works (Bromsgrove Technology Park)	8.95	12000 [3.0]	12000 [3.0]	11500 [2.95]	0 [0]	35500 [8.95]
Bromsgrove Total	11.42	14000 [3.5]	14000 [3.5]	13400 [3.42]	5000 [1]	46400 [11.42]
North						
-	0	0 [0]	0 [0]	0 [0]	0 [0]	0 [0]
Rural East						
Saxon Business Park – Phase 4	1.1	1000 [0.25]	1000 [0.25]	1000 [0.25]	1750 [0.35]	4750 [1.1]
Weston Hall Road – Phase 3	0.26	400 [0.1]	650 [0.16]	0 [0]	0 [0]	1050 [0.26]
Rural East Total	1.36	1400 [0.35]	1650 [0.41]	1000 [0.25]	1750 [0.35]	5800 [1.36]
District Total	13.54	15400 [3.85]	18650 [4.67]	14400 [3.67]	6750 [1.35]	55200 [13.54]

Table 4.9: Local Plan Areas of Development Restraint (without Planning Permission)

Sub Area Site	Available Area (hectares)	Floorspace Capacity Estimate in square metres [Site area estimate (in hectares) shown in brackets]				
		B1 Office	B1 Ind	B2	B8	Total B Class
Rural West						
Hagley ADR (HAG2B)	9.1	6,066.67 [1.52]	6,066.67 [1.52]	12,133.33 [3.03]	15,166.67 [3.03]	39,433.33 [9.1]
Rural West Total	9.1	6,066.67 [1.52]	6,066.67 [1.52]	12,133.33 [3.03]	15,166.67 [3.03]	39,433.33 [9.1]
Bromsgrove						
Land at Perryfields North (BROM5B)	15.8	10,533.33 [2.63]	10,533.33 [2.63]	21,066.67 [5.27]	26,333.33 [5.27]	68,466.67 [15.8]
Bromsgrove Total	15.8	10,533.33 [2.63]	10,533.33 [2.63]	21,066.67 [5.27]	26,333.33 [5.27]	68,466.67 [15.8]
North						
-	0	0	0	0	0	0

Sub Area Site	Available Area (hectares)	Floorspace Capacity Estimate in square metres [Site area estimate (in hectares) shown in brackets]				
		B1 Office	B1 Ind	B2	B8	Total B Class
		[0]	[0]	[0]	[0]	[0]
Rural East						
Ravensbank ADR (BE3)	10.3	6,866.67 [1.72]	6,866.67 [1.72]	13,733.33 [3.43]	17,166.67 [3.43]	44,633.33 [10.3]
Rural East Total	10.3	6,866.67 [1.72]	6,866.67 [1.72]	13,733.33 [3.43]	17,166.67 [3.43]	44,633.33 [10.3]
District Total	35.2	23,466.67 [5.87]	23,466.67 [5.87]	46,933.33 [11.73]	58,666.67 [11.73]	152,533.34 [35.2]

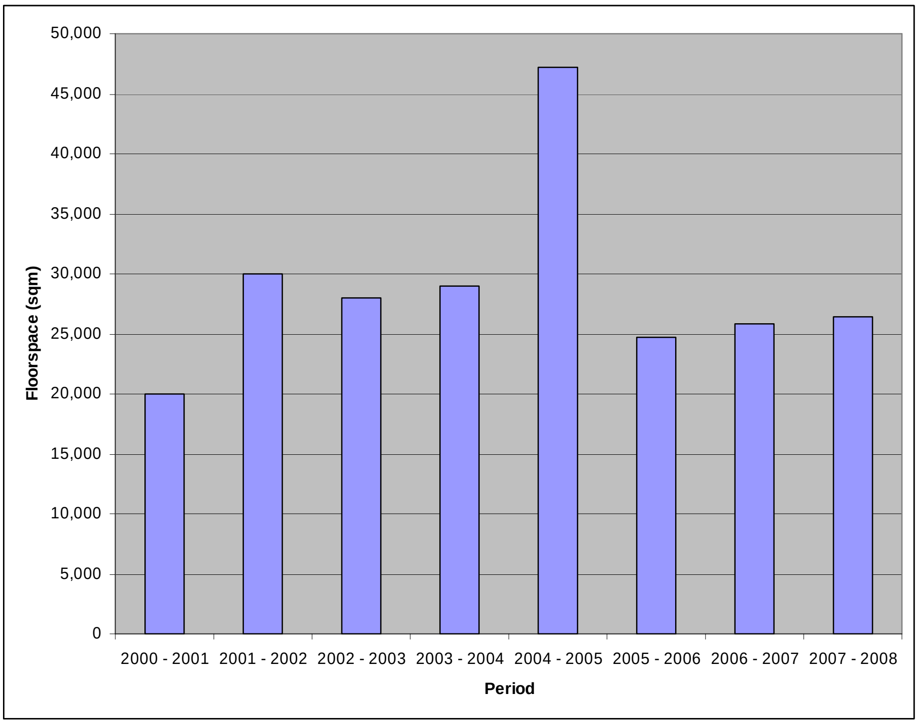
Table 4.10: Pending Losses of Employment Land and Floorspace

Sub Area Site	Available Area (hectares)	Floorspace Capacity Estimate in square metres [Site area estimate (in hectares) shown in brackets]				
		B1 Office	B1 Ind	B2	B8	Total B Class
Rural West						
Nash Works	0.35	0 [0]	400 [0.1]	1000 [0.25]	0 [0]	1400 [0.35]
Rural West Total	0.35	0 [0]	400 [0.1]	1000 [0.25]	0 [0]	1400 [0.35]
Bromsgrove						
Plot 5(b) Aston Road Extension	0.3	45 [0.05]	0 [0]	355 [0.25]	0 [0]	400 [0.3]
Unit 8 Buntsford Park Road	0.23	260 [0.05]	0 [0]	920 [0.18]	0 [0]	1180 [0.23]
Bromsgrove Total	0.53	305 [0.1]	0 [0]	1275 [0.43]	0 [0]	1580 [0.53]
North						
-	0	0 [0]	0 [0]	0 [0]	0 [0]	0 [0]
Rural East						
Unit A Harris Business Park	0.28	0 [0]	0 [0]	325 [0.14]	325 [0.14]	650 [0.28]
Rural East Total	0.28	0 [0]	0 [0]	325 [0.14]	325 [0.14]	650 [0.28]
District Total	1.16	305 [0.1]	400 [0.1]	2600 [0.82]	325 [0.14]	3630 [1.16]

Employment Completions

4.25 The level of gross annual employment completions across Bromsgrove District as a whole from 2000/2001 to 2006/08 (excluding development at Ravensbank Business Park) is illustrated in **Figure 4.3**.

Figure 4.3: Annual Employment Land Completion Rates in Bromsgrove District for the period 1996/7 -2007/8

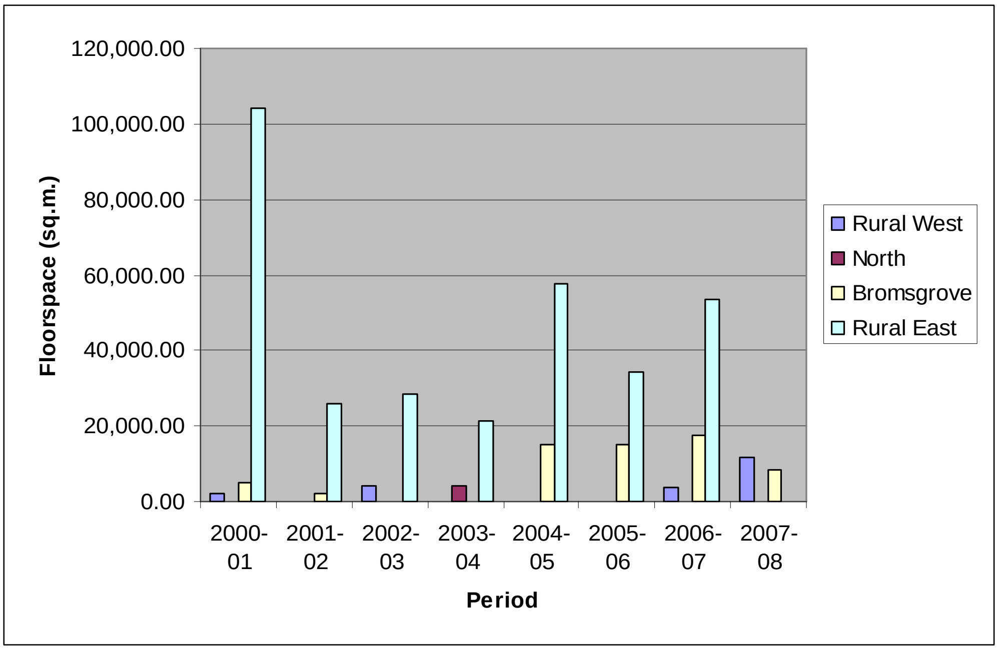


Source: Bromsgrove District Council Land Availability Employment Report April 2008

4.26 Over the period 2000/01 to 2007/08, the gross annual completion rate for new employment development (excluding land at at Ravensbank Business Park) was approximately 231,128 sqm. There was a relatively significant amount during the period April 2004 – March 2005 (47,200 sqm). The average annual completion rate from 2000-2008 is 28,891 sqm.

4.27 The information in the above table can be broken down further, by sub area. This enables a more detailed picture of employment development in the District to emerge.

Figure 4.4: Annual Employment Land Completion Rates, by Sub Area for the period 2000/01 -2007/8



Source: Bromsgrove District Council Land Availability Employment Report April 2008

4.28 **Figure 4.4** above demonstrates that the majority of recent development has taken place within the Rural East sub area since the 2000-2001 monitoring period. This corresponds most significantly to development at Saxon / Harris Business Parks, Wythall Green Business Park and in particular, the Ravensbank Business Park, which is allocated to meet the employment needs of Reddtich Borough. However the recent development in Rural East drops significantly in the period 2007-2008. Increasing development in Bromsgrove can be seen from the 2004/5 to 2006/07, corresponding particularly to the development of Bromsgrove Technology Park and Buntsfordhill. Completions in the Rural West and North sub areas appear to have been limited over the period, however development within the Rural West increases significantly in 2007-2008.

4.29 Based on information obtained from the Council's Employment Land Availability Report, 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.

5. Existing Employment Land & Premises – Qualitative Assessment of Supply

Approach

5.1 In addition to a quantitative assessment of supply, it is important to undertake a qualitative review of sites.

5.2 The purpose of undertaking such an 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.

5.3 Regard has been given to good practice in setting appraisal criteria. The main criteria used to assess sites are listed below. A comprehensive list of criteria, including associated detailed indicators, is reproduced at **Appendix 2**.

Table 5.1: Qualitative Assessment Appraisal Criteria

Factor	Appraisal Criteria	Description
Market Attractiveness	Accessibility to Motorway/ Strategic Road Network	Ease of access to the motorway/ strategic road network.
	Business Image	Availability/ marketing/ adjoining land uses/ road frontage visibility.
	Site Development Constraints	Environmental/ contamination/ flood risk/ access/ ownership/ pressure for alternative uses.
Strategic Planning and Sustainability	Accessibility to Non Car Transport Modes	Ease of access to public transport interchange (bus and rail).
	Enhancement of the Environment	Land type and potential to enhance the environment quality.
	Sequential Location	Regional city, town centre, urban area, out of urban area.
	Potential to Address Area of Deprivation	Location within an area of high/low economic activity/ affluent or deprived ward.

5.4 Results have been derived from:

- Site visits (undertaken July and August 2007);
- Information supplied by the Council;
- Review of reports and other available information sources; and
- Discussion with local commercial agents, site owners and Council Officers.

5.5 Detailed qualitative assessment results, together with individual site plans, are recorded for each site on pro-forma sheets which are included in separate technical appendices at **Appendix 3**.

5.6 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.

5.7 As noted in Chapter 2, 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.

5.8 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.

5.9 In ranking sites within in the employment hierarchy the 'Areas of Development Constraint' have been ranked as if they were available even though it is acknowledged that they are currently restricted in terms of availability by policy.

5.10 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 applying to this particular study.

5.11 The following paragraphs repeat the main conclusions for each of the sites assessed as recorded on the pro-forma sheets in **Appendix 3**, together with the identification of an individual site ranking based on the results of the qualitative assessment.

5.12 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 assessed but not currently allocated or committed for employment development. These sites include 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 of December 2007 to assess the future growth implications of Redditch Town to 2026.

Allocated and Main Commitments

Rural West

Nash Works

5.13 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 which was close to completion at the time of the site visit. The site benefits from a planning permission for demolition/restoration of the poor quality existing buildings and redevelopment for B1 office use. The site is within designated Green Belt.

Market Attractiveness

5.14 Around half of the site has recently been developed and consists of high quality office development called 'Mill Pool'. The other part of the site remains relatively derelict with poor quality buildings. The quality of the external environment is very good, 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.

5.15 The site is located within a residential area and therefore the site has potentially sensitive uses close to it.

5.16 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.

5.17 The site benefits from two extant planning permissions, therefore the site has been committed for approximately 5 years. The site is being actively marketed, with recent completions / development near completion at the time of the site visit. The site owner is actively pursuing employment uses on the site.

5.18 Whilst there are no environmental designations on the site, it is within the Green Belt. Therefore, notwithstanding the extant planning permissions on the site, future development potential is likely to be limited by this. The site is constrained by its single access and its shape, which is long and thin. There could be potential contamination issues on the part of the site which has not been redeveloped and furthermore it appears that the site falls within an area at risk from flooding.

Environmental Sustainability

5.19 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.

5.20 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

5.21 The site is within a lower super output area which is ranked 19,197 out of 32,482 for multiple deprivation and is therefore within the top quartile of least deprived for the country.

5.22 It is considered that the site has some scope to contribute to local regeneration strategies through the reuse of brownfield land and regeneration of a vacant, underused site.

5.23 The site is located within an area of high economic activity, where 77.5% of the economically active are in employment.

5.24 It is considered that the site has a limited ability to deliver economic development objectives other then provision of local jobs.

Role within the Employment Hierarchy

5.25 The site is classified as 'Moderate'

Bromsgrove

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

5.26 The site is well developed industrial estate. Current occupiers include Fuelparts, IRS, AROQ and Dufferco Ltd. 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

5.27 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.

5.28 Whilst there is a small number of residential properties on the opposite side of Buntsford Hill, the site is relatively well screened and it is considered that there should not be a problem with potentially sensitive uses.

5.29 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.

5.30 The vacant units on the site are being actively marketed. Vacancy levels appear to be average. There appears to be no extant planning permissions on the site.

5.31 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

5.32 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

5.33 The site is located within a lower super output area which is ranked 24,264 out of 32,482 for multiple deprivation and is therefore within a neighbourhood which is ranked as average to affluent for multiple deprivation.

5.34 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.

5.35 The site is located within an area of high economic activity, where 80.3% of the economically active are in employment.

5.36 The site is highly developed. At the time of the site visit there appeared to be only one vacant property on the site and this was a small ground floor office unit. Whilst the site clearly plays a part in retaining jobs within the town, it is considered that it has a limited ability to deliver wider economic development objectives.

Role in the Employment Hierarchy

5.37 The site is classified as 'Good'.

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

5.38 This is a site offering high quality, modern premises. It is understood that the owner of the site originally had aspirations to create a 'motorcity' on this site but currently there are only two car dealerships on site (Toyota and Peugeot). Other current occupiers include Bromsgrove District Housing Trust and Mortgage Brain. The site is allocated for B1,B2 and B8 Uses within Policy BROM8A of the Bromsgrove District Local Plan in order to provide sufficient land to meet the employment needs of the District.

Market Attractiveness

5.39 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.

5.40 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.

5.41 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.

5.42 The site has been available for between 2-5 years. The site is being actively marketed with a high level of interest as the majority of the vacant units / buildings are either under offer or sold. Employment uses are actively being pursued, with extant planning permissions existing for the site.

5.43 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

5.44 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.

5.45 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 surrounding environmental quality.

Strategic Planning

5.46 The site is within a lower super output area which is ranked 24,264 out of 32,482 for multiple deprivation and is therefore within a neighbourhood which is ranked as average to affluent.

5.47 The area of the site which is undeveloped is greenfield and is unlikely to have a significant effect on local regeneration strategies for the area.

5.48 The site is located within an area of high economic activity, where 80.3% of the economically active are in employment.

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

Role in the Employment Hierarchy

5.50 The site is classified as 'Best'.

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

5.51 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 the 2004-5 monitoring period.

Market Attractiveness

5.52 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.

5.53 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.

5.54 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.

5.55 There appears to be good marketing of vacant properties. The various site owners are actively marketing the site for employment uses and there extant planning permissions on the site.

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

Environmental Sustainability

5.57 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 area are no specifically designated cycle routes.

Strategic Planning

5.58 The site is within a lower super output area which is ranked 19,197 out of 32,482 for multiple deprivation and is therefore within a neighbourhood which is classed as average to affluent.

5.59 The site is located within an area of reasonably high economic activity, where 74.9% of the economically active are in employment.

5.60 The site represents and 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.

5.61 The site's ability to deliver economic development objectives are limited by restrictions on future expansion, due to presence of the railway line. 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

5.62 The site is classified as 'Good'.

Worcester Road/Sanders Road

5.63 The Worcester Road/ Sanders Road site is located in Bromsgrove. It is a mixed industrial estate with a variety of occupiers, including HLM, Bromsgrove, Mitubishi Motors and Weaver. There are potentially a number of vacant units on the site. 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

5.64 The quality of 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 site visit the site was exposed to some noise which could affect the amenity of the immediate environment.

5.65 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.

5.66 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.

5.67 There was no evidence of active marketing on the site although it was not always clear where units / buildings were simply closed rather than vacant. 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

5.68 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

5.69 The site is within a lower super output area which is ranked 16,370 out of 32,482 for multiple deprivation and is therefore within a neighbourhood ranked as average to affluent.

5.70 Whilst it appears that there are no vacant units on the part of the site on Factory Lane, redevelopment could improve the environmental and visual quality, providing that any redevelopment of the site respects and takes into account Sanders Park which is an area of open space adjacent to the site which is identified within the Bromsgrove District Local Plan. 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. Coupled with the employment land allocation on the site, it is considered that it has good ability to deliver economic regeneration objectives and contribute to regeneration.

5.71 The site is located within an area of high economic activity, where 76.4% of the economically active are in employment.

Role within the Employment Hierarchy

5.72 The site is classified as ‘Good’.

Sugarbrook Mill

5.73 This is a small site located on Bruntsford Hill, Bromsgrove. The site is comprised of established uses to the front (facing Buntsford Hill), including Bromsgrove Body Repair, W&G Metalwork Ltd, Juranese Springs Limited, SHP Services with new build to the repair. The site has an extant permission for 6,000 sq.m for the new unit under construction at the rear of the site. The site is within an area allocated for employment uses within the Bromsgrove District Local Plan.

Market Attractiveness

5.74 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 commenced 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.

5.75 The site is close to a 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.

5.76 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.

5.77 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.

5.78 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

5.79 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.

5.80 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

5.81 The site is within a lower super output area which is ranked 19,197 out of 32,482 for multiple deprivation and is therefore within a neighbourhood ranked as average to affluent.

5.82 Development of that part of the site which is greenfield in nature could potentially have some impact and detract from the existing environmental quality. Given the size of the site it is considered that it is likely that development will have only a neutral impact on local regeneration strategies for the area.

5.83 The site is located within an area of good economic activity, where 74.9% of the economically active are in employment.

5.84 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 of the site limits this ability.

Role within the Employment Hierarchy

5.85 The site is classified as 'Moderate'.

Bromsgrove Technology Park

5.86 Bromsgrove Technology Park is located on Aston Road in Bromsgrove and is nearly 10 hectares in size. The site is a modern technology park with areas still vacant and currently under development. Office developments on the site are now almost fully let and include 'incubator' start-up affordable business units. The site is designated employment land.

Market Attractiveness

5.87 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.

5.88 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.

5.89 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.

5.90 There appears to be very active marketing the site and there are a number of recent completions and areas of development which are under construction. 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 are further extant planning permissions for the site.

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

Environmental Sustainability

5.92 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

5.93 The site is within a lower super output area which is ranked 19,197 out of 32,482 for multiple deprivation and is therefore within a neighbourhood which is classed as average to affluent.

5.94 The site is located within an area of reasonably high economic activity, where 74.9% of the economically active are in employment.

5.95 The site's ability to deliver economic development objectives has some limitations in terms of on future expansion, due to presence of the railway line. However, the site remains an 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

The site is classified as 'Best'.

North

Cofton Hackett

5.96 The Cofton Hackett site is understood to be owned by St. Modwens. The site currently has six units on it. Unit 1 is occupied by EH Smith (a builders merchant); Unit 2 is occupied by PRG Europe (a supplier of entertainment technology); Units 3 and 4 are to let/for sale for industrial/warehousing; and Units 5 and 6 are undeveloped. An area for potential development remains on the site.

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

Market Attractiveness

5.98 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.

5.99 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.

5.100 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.

5.101 The site has been available for 2-5 years. At the time of the site visit, there was evidence of active marketing for employment use with some recent completions. The site is being actively promoted for employment uses and the part of the site which is not yet developed benefits from an outline planning permission for further industrial / warehouse development.

5.102 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

5.103 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.

5.104 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

5.105 The site is located within lower super output areas which are ranked 24,469 and 28,350 for multiple deprivation and are therefore within the top quartile of the least deprived for the country.

5.106 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. Therefore, development could contribute towards local regeneration strategies for the area.

5.107 The site is located within an area of high economic activity, where 78.6% of the economically active are in employment.

5.108 The site has a good ability to deliver a number of regional or local economic development objectives

Role within the Employment Hierarchy

The site is classified as 'Good'.

Longbridge Eastworks

5.109 This is a site large site designated as employment land within the Bromsgrove District Local Plan. However, now the site is also identified in the emerging Longbridge Area Action Plan under Proposal H2 for residential (minimum 700 dwellings) and new local facilities and shops. A planning application was submitted in May 2008 for development comprising mixed use relating to use classes C3, C2,A2,A3,A5 and D1 although this has not yet been determined.

Market Attractiveness

5.110 The quality of the external environment is very good. There is a large area of parkland (Cofton Park) to the north-west of the site and the site is surrounded to the south by open countryside. 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 there was some intermittent noise from the adjacent railway line.

5.111 Whilst there appear to be no bad neighbour uses, there are potentially sensitive uses at the western edge of the site in the form of residential properties.

5.112 The site has good visibility from Groveley Lane and is adjacent to housing and the local shopping facilities of Cofton Hackett. In the context of road links the site is 1.6km from the A38 Bristol Road and 6.3km from both Junction 2 of the M42 and Junction 4 of the M5. The quality of local road access is good and there appears to be no apparent visibility constraints affecting access to and from the site.

5.113 The site has been available for between 2-5 years. At the time of the site visit there was evidence of marketing although not for employment uses. It is non-employment uses, including residential, community and local retail uses that are being promoted on the site through the Longbridge Area Action Plan.

5.114 There appears to be no environmental or known development requirements applying to the site and site appears to have no physical constraining features. Whilst the site has been cleared, given the previous uses on the site there may be limited contamination issues. There are no flooding issues affecting the site.

Environmental Sustainability

5.115 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 (2.1km) and the closest bus stop immediately adjacent to the site. There are good pedestrian linkages to the site, with good quality footpath links although no specifically designated cycle routes.

5.116 There are no environmental designations immediately adjacent to the site, although there is a SSSI approximately 1km south east of the site. Given that the site is vacant and consists of a significant area of hardstanding, there is scope for development on the site to improve the existing townscape quality without additionally impacting on environmental resources.

Strategic Planning

5.117 The site is within a lower super output area which is ranked 28,350 out of 32,482 for multiple deprivation and is therefore within the top quartile of least deprived for the country.

5.118 The site currently consists of a large area of hardstanding, therefore development could improve existing environmental quality by provision of landscaping. However, the effects of employment development on the site in the context of contributing towards local regeneration strategies for the area is limited by the aspirations of the Local Authority, emerging planning policy and existing planning application for residential / community uses on the site.

5.119 The site is located within an area of high economic activity, where 78.6% of the economically active are in employment.

5.120 Given the allocation for residential / community use within the Longbridge Area Action Plan and the current planning application it is considered that the site has a limited ability to deliver regional or local economic development objectives through development of employment uses, although housing / community uses will assist indirectly in assisting economic development objectives.

Role within the Employment Hierarchy

The site is not classified in the employment hierarchy given the advanced stage of the Longbridge AAP which allocates the site for housing.

Rubery

5.121 This site was once the Avesta Sheffield site, it is now an industrial estate of poor to moderate quality within the residential area, with some vacancies. Occupiers include Pet Brands, INTU Interiors, Simply Stone and Rolabond. The site is an allocated employment site within the Bromsgrove District Local Plan. The site is surrounded by residential development and has been submitted as a strategic housing site as part of the Strategic Housing Assessment.

Market Attractiveness

5.122 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.

5.123 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.

5.124 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 A389.

5.125 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.

5.126 There is evidence of active marketing of the vacant units of the site.

5.127 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

5.128 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.

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

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

Strategic Planning

5.131 The site is within lower super output areas which are ranked 22,212 and 19,760 out of 32,482 for multiple deprivation the site is therefore considered to be within neighbourhoods which are average to affluent.

5.132 Redevelopment of areas of the site could improve the offer available to potential occupiers although this could be at the expense of existing businesses. It is considered that redevelopment of the site would improve the existing environmental quality.

5.133 The site is located within an area of high economic activity, where 79.4% of the economically active are in employment.

5.134 Given the site's confined location within a residential area, it is unlikely that it could contribute significantly towards regional economic development objectives, although it does currently perform an important local role providing local jobs. The site would also require huge investment to make it a good employment site.

Role within the Employment Hierarchy

The site is classified as 'Moderate'.

Rural East

Wythall Green Business Park

5.135 The Wythall Green Business Park a large site formerly occupied solely by Britannic, who are understood to still occupy some of the units in the main building and also still own the site in its entirety. Pearl Group occupy part of the main building. Serco occupy a separate building close to the entrance of the business park. 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

5.136 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 at the time of the site visit was quite badly flooded. The external environment of the site is also good, given that the site is located 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.

5.137 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.

5.138 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 which indicates that the site owner is supportive of employment uses on the site.

5.139 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. The site is unlikely to have any contamination issues and is located within an area of low flood risk.

Environmental Sustainability

5.140 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.

5.141 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 adversely affected by development.

Strategic Planning

5.142 The site is within a lower super output area which is ranked 27,593 out of 32,482 for multiple deprivation and is therefore within the top quartile of least deprived lower super output areas for the country.

5.143 Whilst development of the remainder of the site could have a negative effect on existing environmental quality, the implications this would have on local regeneration strategies are mixed. Whilst the site is allocated for employment land and development would therefore be in accordance with this, the vacant area of the site is predominantly greenfield and in the interest of regeneration, emphasis is placed on the development of previously developed land prior to greenfield sites.

5.144 The site is located within an area of high economic activity, where 79.9% of the economically active are in employment. Given that the site is likely to be attractive to most users and its allocation as employment land, it is considered that the site has a good ability to deliver local economic development objectives although the undeveloped part of the site has remained vacant for a number of years.

Role with the Employment Hierarchy

5.145 The site is classified as ‘Good’.

Saxon and Harris Business Park

5.146 The site is located on Hanbury Road in Stoke Prior. The site is designated as employment land and is part allocated under BROM6 as land "reaffirmed for employment uses within Use Classes B1, B2 and B8". This site includes the Metal and Ores site which is a mixed site with modern, high quality buildings at the front of the site with good parking, circulation and servicing. To the rear of the site is Stokeprior Metals which has buildings and external areas of lower quality with restricted circulation

Market Attractiveness

5.147 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.

5.148 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. Part of the site is occupied by the PolymerLatex chemical works which is likely to be considered to be a 'bad neighbour' use. Furthermore, there are some residential dwellings adjacent to the site which could be considered to be a potentially sensitive use.

5.149 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.

5.150 The site was allocated within the draft Local Plan for employment uses. There is active marketing on the site for the vacant units. The various site owners are actively promoting employment uses on the site.

5.151 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

5.152 The site is located outside of the defined urban area but is predominantly brownfied 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.

5.153 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

5.154 The site is within a lower super output area which is ranked 24,264 out of 32,482 for multiple deprivation and is therefore within a neighbourhood which is ranked as average to affluent.

5.155 It is considered that further development of the site is likely to have a neutral impact on local regeneration strategies for the area.

5.156 The site is located within an area of high economic activity, where 80.3% of the economically active are in employment.

5.157 It is considered that the site has a limited ability to deliver economic objectives. Whilst the site is a designated employment area, it's future expansion is constrained by the presence of the Green Belt. The site is also outside the urban area.

Role in the Employment Hierarchy

5.158 The site is classified as 'Good'.

Ravensbank Business Park

5.159 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. Occupiers include St. Ives Logistics, Broadfern, AMCP, Heller and SP Group. One unit, encompassing 232,678 sq.ft. warehouse and office space is unoccupied but has recently been let.The site is within an area allocated for employment use under Policy E2 of the Adopted Bromsgrove District Local Plan.

Market Attractiveness

5.160 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.

5.161 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.

5.162 Planning permissions for Ravensbank Business Park date back to the 1990's. There was good levels of marketing on the site and recent completions. Vacancy levels appear very low. Employment uses are actively being promoted and the site benefits from extant planning permissions.

5.163 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

5.164 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.

5.165 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.

5.166 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

5.167 The site is within a lower super output area which is ranked 23,568 out of 32,482 for multiple deprivation and is therefore within a neighbourhood ranked as average to affluent.

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

5.169 The site is located within an area of high economic activity, where 79.9% of the economically active are in employment.

5.170 Given that the site benefits from an employment allocation within the Bromsgrove District Local Plan and extent permissions, it is considered that the site has a good ability to deliver regional / local economic development objectives, particularly in the light of Bromsgrove having a requirement to deliver employment land to meet some of the needs of Redditch Borough Council.

Role within the Employment Hierarchy

5.171 The site is classified as 'Good'

Other Sites (Unallocated Sites, ADRs and WYG areas)

Rural West

Wildmoor Farm

5.172 Wildmoor Farm is situated on Mill Lane in Fairfield. The site is a former farm and is now predominantly converted to employment use. In Bromsgrove Local Plan the site is within designated Green Belt land.

Market Attractiveness

5.173 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.

5.174 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.

5.175 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, however there are only minimal constraints to visibility at the site access.

5.176 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 completion.

5.177 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

5.178 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.

5.179 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.

Strategic Planning

5.180 The site is within a lower super output area which is ranked 26,953 out of 32,482 for multiple deprivation and is therefore within the top quartile of least deprived for the country.

5.181 It is considered that redevelopment of the site is likely to have a neutral impact on existing environmental and / or local regeneration strategies for the area, providing that any redevelopment is in accordance with Green Belt policy.

5.182 The site is located within an area of high economic activity, where 78.6% of the economically active are in employment.

5.183 It is considered that redevelopment on the site has limited ability to deliver economic development objectives. There might be some limited infill opportunities.

Role within the Employment Hierarchy

The site is classified as 'Good'.

Wassell Grove Business Park

5.184 This small site is fully developed with serviced offices in converted farm buildings. Occupiers include Media Ltd, UK Tecko and Business Phones. The main building is a business centre which accommodates fully serviced offices. The site is within designated Green Belt and is an area of high landscape value.

Market Attractiveness

5.185 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 very good, 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.

5.186 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.

5.187 The site has good visibility from Wassall 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.

5.188 The site has been committed for between 2-5 years. There was evidence of active marketing both on site and the internet. The owners are actively pursuing employment uses on the site.

5.189 There appears to be no environmental or known adverse development requirements applying to the site, however the remaining part of the site which is not yet developed is small in nature and can only be accessed through driving through the other part of 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

5.190 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.

5.191 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 and the area of the site which is not yet developed is greenfield in nature, with a number of trees. Therefore it is likely that further development will detract from the existing environmental quality and could potentially be detrimental to environmental resources in this area.

Strategic Planning

5.192 The site is within a lower super output area which is ranked 29,415 out of 32,482 for multiple deprivation and is therefore within the top quartile of least deprived for the country.

5.193 It is considered that further development at the site could detract from existing environmental quality given that the site is located within open countryside and the undeveloped area of the site is greenfield in nature. The site has limited scope to deliver economic development objectives, although could potentially deliver towards economic development objectives through farm diversification.

5.194 The site is located within an area of high economic activity, where 77.8% of the economically active are in employment.

Hagley ADR (HAG2B)

5.195 The site is situated on Kidderminster Road and is an undeveloped greenfield site of around 9 hectares which is heavily wooded around the periphery. The site is allocated as an Area of Development Restraint within the Proposal HAG2B. The site is also adjacent to another ADR 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".

Market Attractiveness

5.196 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.

5.197 There are no bad neighbour uses adjacent to the site although there are potentially sensitive uses in the form of residential properties.

5.198 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 road access is good although at present the quality of site access is poor with visibility issues.

5.199 The site has been designated as an ADR for between 2-5 years. There is no evidence of active marketing and owner aspirations are unknown.

5.200 The site is constrained by some environmental constraints / abnormal development requirements that could limit development potential. More specifically, the site slopes quite significantly from north to south and furthermore the presence of the band of trees around the site could present a development constraint. Should the trees need to be retained this could also have implications for improving the site access.

5.201 It is unlikely that there are any contamination issues on the site and the site is within an area with a low risk of flooding.

Environmental Sustainability

5.202 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.

5.203 There are no environmental designations on the site but within 2km from the site there is a Registered Park and Garden (Hagley Park), a scheduled ancient monument and an Area of Great Landscape Value. As the site is greenfield and bordered by an area of woodland there is significant probability for 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 resource of the area.

Strategic Planning

5.204 The site is within a lower super output area which is ranked 31,790 out of 32,482 and is therefore considered to be within an affluent neighbourhood which is in the top quartile of least deprived for the country.

5.205 It is considered that given the undeveloped, greenfield nature of the site development of the site would detract from existing environmental quality.

5.206 The site is located within an area of high economic activity, where 77.8% of the economically active are in employment.

5.207 It is considered that the site has limited ability to deliver local or regional economic development objectives.

Role within the Employment Hierarchy

The site is classified as 'Moderate'.

Bromsgrove

Lower Shepley Farm

5.208 This small site is currently used as a farm and is located within the Green Belt.

Market Attractiveness

5.209 The quality of the external environment is good apart from the presence of the motorway very close to the site which may limit the attractiveness of the site for certain users. The presence of the motorway results in significant noise levels which affects the quality of the immediate environment.

5.210 There appears to be no bad neighbouring uses nor potentially sensitive uses nearby.

5.211 The site has limited visibility from Littleheath Lane. There are limited local shopping facilities available in Lickey End less than 1.6km from the site and a larger variety of services and facilities in Bromsgrove, approximately 3.2km from the site.

5.212 The site benefits from good access to the strategic highway network, being 1.8km from both the A38 and Junction 1 of the M42. Whilst the surrounding roads are rural in nature, they are relatively wide and there is unlikely to be significant congestion in the area at peak periods.

5.213 The site has been committed for 6-10 years. There is no apparent marketing of the site, however it appears that the owner is actively pursuing an employment use (extant planning permission exists for B1/B2 and B8).

5.214 There appears to be no environmental or known abnormal development requirements applying to the site other than the Green Belt designation. However, the site is small and is relatively irregular in shape which could constrain development on the site. It is unlikely that there are contamination issues and there are no flooding issues associated with the site.

Environmental Sustainability

5.215 The site is in a poor location sequentially, it is located completely outside of a defined urban area and is greenfield in nature.

5.216 Whilst there is a bus stop close to the site at the junction of Littleheath Lane with Dale Lane, this is not considered to be a main bus route. The closest railway station is 3.5km from the site at Barnt Green. Furthermore, there are no cycle or footpath links to the site.

5.217 There are no environmental designations immediately adjacent to the site, however the site is greenfield and overgrown in nature and therefore there may be ecological / environmental interests on the site which are likely to be adversely affected by development on the site.

Strategic Planning

5.218 The site is within a lower super output area which is ranked 25,948 out of 32,482 for multiple deprivation and is therefore within the top quartile of the least deprived for the country.

5.219 Given that the site is currently greenfield, it is considered that development at this location would detract from its existing environmental quality. Furthermore, the site is located outside of the main areas of growth as identified in Policies DS3 and DS4 of the Bromsgrove District Local Plan and therefore development of the site would conflict with these policies.

5.220 The site is located within an area of high economic activity, where 83% of the economically active are in employment. This is the highest in the District.

5.221 Whilst development of the site would go against planning policy in terms of suitable locations for development, should the proposals be brought forward in accordance with national / local policies on farm diversification, then the site has some, albeit limited ability to deliver regional or local economic development objectives.

Role within the Employment Hierarchy

The site is classified as 'Poor'.

Bromsgrove ADR (BROM 5B) – Land to the north of Perryfields Road

5.222 This site is over 15 ha in size and is currently undeveloped land which appears to be in agricultural use. The site is designated under the Local Plan Policy BROM05 as an Area of Development Restraint. The Policy notes that the importance of this fsite 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

5.223 The quality of the external environment is very good, with the site's location adjacent to countryside and on the edge of Bromsgrove. At the time of the site visit there were no significant amenity impacts, but there was a degree of vehicular noise which is to be expected considering the site's close proximity to the M42 and M5 motorways.

5.224 There appears to be no bad neighbour uses adjoining the site, but the site is directly adjacent to an area of residential development, the amenity of which would need to be taken into consideration.

5.225 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 and from the site.

5.226 The site has been available for between 2-5 years. There is no apparent marketing of the site and the owner(s) plans for the site are unknown.

5.227 There appears to be no environmental or known development requirements 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 issues affecting the site. The north-western edge of the site is within an area which is at high risk of flooding.

Environmental Sustainability

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

5.229 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 poor.

5.230 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

5.231 The site is within a lower super output area ranked 9,363 out of 32,482 for multiple deprivation and is therefore within a neighbourhood which is considered to be average to deprived. 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. However, this policy is also of development restraint in this area.

5.232 Although the site is located in the most deprived neighbourhood when compared to other sites that have been assessed, it is located within an area of high economic activity, where 76.7% of the economically active are in employment.

5.233 The site is greenfield and is located on the edge of the settlement of Bromsgrove. Therefore it is not within the most sequentially preferable location and development in this location would detract from the existing environmental quality.

Role within the Employment Hierarchy

The site is classified as 'Good'.

Bromsgrove Town Centre

5.234 Bromsgrove Town Centre site contains a range of town centre uses with retail uses predominant and some A2/ B1 office uses, generally above the ground floor level.

Market Attractiveness

5.235 The overall quality of the existing portfolio is good, with a good range of buildings. As expected, the area is predominantly retail, although office use can be seen in some buildings, particularly within first and second floors. The office use in this area appears to be predominantly Use Class A2 in nature.

5.236 There appear to be no bad neighbour uses within the town centre and no obvious potentially sensitive uses.

5.237 The site has good visibility from a number of local roads, most predominantly the A448. Local services and facilities are within and adjacent to the site. 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 is good, but some roads do suffer from congestion, particularly at peak periods and there appears to be no significant issues affecting access to the site as this can be done from a number of locations.

5.238 There is evidence of some marketing of vacant office properties but all other marketing information appears to relate to vacant retail units which are unlikely to be considered for an employment use. The site is within multiple ownership and there are no extant planning permissions for employment uses within this area.

5.239 There are no environmental constraints affecting this area but the site is within a conservation area and contains a number of listed buildings. Some of the town centre is within an area at risk from flooding.

Environmental Sustainability

5.240 The site is a town centre and it is brownfield and therefore is considered to be a very sustainable. The town centre benefits from a bus station, with Bromsgrove railway station 1.6km from the site. There are good pedestrian and cyclist linkages to the site.

5.241 The site falls within three lower super output areas, two of which are within neighbourhoods which are ranked as average to affluent and a third which is ranked as average to deprived for multiple deprivation.

5.242 The site is located within areas of high economic activity, where 76.4% and 76.7% of the economically active are in employment.

5.243 It is highly unlikely that the town centre will be redeveloped for employment uses, and it is concluded that retail uses will continue to predominate within this location. However, further employment development could potentially assist in delivering regeneration objectives and contributing towards economic development in order to ensure the viability and vitality of the town centre – the provision of jobs within this sustainable location.

Strategic Planning

5.244 The site falls within three lower super output areas, two of which are within neighbourhoods which are ranked as average to affluent and a third which is ranked as average to deprived for multiple deprivation.

5.245 The site is located within areas of high economic activity, where 76.4% and 76.7% of the economically active are in employment.

5.246 It is highly unlikely that the town centre will be redeveloped for employment uses, and it is concluded that retail uses will continue to predominate within this location. However, further employment development could potentially assist in delivering regeneration objectives and contributing towards economic development in order to ensure the viability and vitality of the town centre – the provision of jobs within this sustainable location.

Role within the Employment Hierarchy

The site is classified as 'Moderate'.

Rural East

Weights Farm

5.247 The site is a former farm and is now completely in employment use. Existing buildings are generally of poor to moderate quality and occupiers include Redditch Skip hire, Crusader Carpet Services, Astwoods Joinery and Apollo Fixings. The site is within the Green Belt land designation and includes an area of high landscape value.

Market Attractiveness

5.248 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.

5.249 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.

5.250 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 are 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.

5.251 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 are no extant planning permission or recent completions.

5.252 Further development or redevelopment is constrained by the Green Belt designation affecting the site and further to this the site contains an area of high landscape value. The site is also constrained to the north by the presence of the railway line. The single access to the site which is constrained by the presence of the railway bridge.

5.253 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

5.254 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.

5.255 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

5.256 The site is within a lower super output area which is ranked 22,983 out of 32,482 for multiple deprivation and is therefore within a neighbourhood which is ranked as average to affluent.

5.257 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.

5.258 The site is located within an area of low economic activity, where only 58.7% of the economically active are in employment. It is considered that the site could have some ability to help deliver economic development objectives by the provision of jobs to help to increase employment levels, although the site's location restricts this potential.

Role within the Employment Hierarchy

5.259 The site is classified as 'Moderate'.

Robin Hill Farm

5.260 Robin Hill Farm is located on Rowney Green Lane, Alvechurch. The site is around a hectares in size and is currently operational as a farm with recently completed change of use. The site is within designated Green Belt and is within an area of high landscape value.

Market Attractiveness

5.261 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.

5.262 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.

5.263 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.

5.264 Local road access to the site is relatively narrow and could potentially create issues for HGV access. The quality of the site access is relatively good and likely only to be subject to minimal constraints. The site has been available through a planning permission since around 2003. No evidence of marketing and owners aspirations unknown.

5.265 The site is constrained by the Green Belt and is within an area of high landscape value. 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

5.266 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.

5.267 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

5.268 The site is within a lower super output area which is ranked 16,268 out of 32,482 for multiple deprivation and is therefore within a neighbourhood ranked as average to affluent.

5.269 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 that that which is existing.

5.270 The site is located within an area of high economic activity, where 80% of the economically active are in employment.

5.271 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

5.272 The site is classified as 'Poor'.

High House Farm

5.273 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 now appears to now be in employment use. The site is within designated Green Belt land and also within an area of high landscape value.

Market Attractiveness

5.274 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.

5.275 The site is surrounded by open countryside and has no bad neighbour or potentially sensitive uses.

5.276 The site has relatively good visibility to the A435.

5.277 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.

5.278 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.

5.279 There are no identified flooding issues on the site.

Environmental Sustainability

5.280 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.

5.281 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 and the area of high landscape value .

Strategic Planning

5.282 The site is within a lower super output area which is ranked 23,568 out of 32,482 for multiple deprivation and is therefore considered to be within a neighbourhood which is ranked as average to affluent for multiple deprivation.

5.283 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.

5.284 The site is located within an area of high economic activity, where 79.9% of the economically active are in employment.

5.285 Given the relatively small size of the site and it's location within the Green Belt and area of high landscape value, it is unlikely that the site will contribute to economic development objectives.

Role within the Employment Hierarchy

5.286 The site is classified as 'Moderate'.

Ravensbank ADR (BE3)

5.287 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

5.288 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.

5.289 There are no bad neighbour uses or potentially sensitive uses adjacent to the site.

5.290 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 road are good, although there is no access to the site itself at present.

5.291 The site has been allocated as an ADR for approximately 4 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.

5.292 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

5.293 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.

5.294 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

5.295 The site is within a lower super output area which is ranked 23,568 out of 32,482 for multiple deprivation and is therefore within an area which is ranked as average to affluent.

5.296 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.

5.297 The site is located within an area of high economic activity, where 79.9% of the economically active are in employment.

5.298 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

5.299 The site is classified as 'Good'.

White Young Green Area 4

5.300 The site is approximately 370 hectares and is within designated Green Belt land.

Market Attractiveness

5.301 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.

5.302 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 is 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.

5.303 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.

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

5.305 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

5.306 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.

5.307 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

5.308 The site is within a lower super output area which is ranked 22,983 out of 32,482 for multiple deprivation and is therefore considered to be within a neighbourhood which is ranked as average to affluent.

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

5.310 The site is located within an area of relatively low economic activity, where only 58.7% of the economically active are in employment.

5.311 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

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

Market Attractiveness

5.313 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.

5.314 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.

5.315 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.

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

5.317 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

5.318 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 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.

5.319 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

5.320 The site is within a lower super output area which is ranked 22,983 out of 32,482 for multiple deprivation and is therefore considered to be within a neighbourhood which is ranked as average to affluent.

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

5.322 The site is located within an area of relatively low economic activity, where only 58.7% of the economically active are in employment.

5.323 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

5.324 The site is approximately 55 hectares and is within the designated Green Belt.

Market Attractiveness

5.325 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.

5.326 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. It is considered that there are no 'bad neighbour' or potentially sensitive uses close to the site.

5.327 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.

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

5.329 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

5.330 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.

5.331 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

5.332 The site is within a lower super output area which is ranked 22,983 out of 32,482 for multiple deprivation and is therefore considered to be within a neighbourhood which is ranked as average to affluent.

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

5.334 The site is located within an area of relatively low economic activity, where only 58.7% of the economically active are in employment.

5.335 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

5.336 The site is approximately 400 hectares and is with designated Green Belt land.

Market Attractiveness

5.337 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.

5.338 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.

5.339 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.

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

5.341 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

5.342 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.

5.343 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

5.344 The site is within a lower super output area which is ranked 23,568 out of 32,482 for multiple deprivation and is therefore considered to be within a neighbourhood which is ranked as average to affluent.

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

5.346 The site is located within an area of high economic activity, where 79.9% of the economically active are in employment.

5.347 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

5.348 The site is approximately 500 hectares and is within the designated Green Belt.

Market Attractiveness

5.349 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.

5.350 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 is also some sites accommodating employment uses within the 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.

5.351 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.

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

5.353 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

5.354 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.

5.355 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

5.356 The site is within a lower super output area which is ranked 23,568 out of 32,482 for multiple deprivation and is therefore considered to be within a neighbourhood which is ranked as average to affluent.

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

5.358 The site is located within an area of relatively high economic activity, where 79.9% of the economically active are in employment.

5.359 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

5.360 The site is over 300 hectares in size and is within designated Green Belt land.

Market Attractiveness

5.361 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.

5.362 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 is 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.

5.363 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.

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

5.365 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

5.366 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.

5.367 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

5.368 The site is within a lower super output area which is ranked 23,568 out of 32,482 for multiple deprivation and is therefore considered to be within a neighbourhood which is ranked as average to affluent.

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

5.370 The site is located within an area of high economic activity, where 79.9% of the economically active are in employment.

5.371 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

5.372 The site is over 700 hectares in size and is within designated Green Belt.

Market Attractiveness

5.373 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.

5.374 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 is 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.

5.375 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.

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

5.377 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

5.378 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.

5.379 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

5.380 The site is within a lower super output areas which are ranked 22,983 and 23,568 out of 32,482 for multiple deprivation and is therefore considered to be within a neighbourhood which is ranked as average to affluent.

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

5.382 The site is located predominantly within an area of low economic activity, where only 58.7% of the economically active are in employment.

5.383 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

5.384 **Tables 5.2** and **5.3** provide a summary of the sites which have been subject to qualitative assessment. In particular, the tables identify the 'scores' identified against the two broad appraisal criteria, together with their classification (i.e. ranking) in terms of their current role in the employment hierarchy.

Table 5.2: Qualitative Assessment Scores and Ranking – Employment Allocations and Main Commitments

Sub Area	Site	Market Attractiveness	Sustainability	Economic Policy	Classification
Rural West	Nash Works	3	3	1-2	Moderate
Bromsgrove	Aston Fields Industrial and Trading Estates and Silver Birches Business Pak (Including Sewage Works)	3	3	2	Good
	Worcester Road/ Sanders Road	2-3	4	2	Good
	Bromsgroe (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	Best
	Sugarbrook Mill	3	2	2	Moderate
	Bromsgrove Technology Park	3-4	3	3	Best
North	Crofton Hackett	3-4	3	2	Good
	Rubery	2	2-3	2	Moderate
Rural East	Wythall Green Busines Park	3-4	1-2	2	Good
	Ravensbank Business Park	3-4	2-3	2	Good
	Saxon and Harris Business Parks	3-4	2	2	Good

Table 5.3: Qualitative Assessment Scores and Ranking – Other Sites

Sub Area	Site	Market Attractiveness	Sustainability	Economic Policy	Classification
Rural West	Hagley ADR (HAG 2B)	3	1	1	Moderate
	Wildmoor Farm	3	2	1-2	Moderate
	Wassell Grove Road	3	1	1-2	Moderate
Bromsgrove	Lower Shepley Farm	2	1	1	Poor
	Bromsgrove ADR (BROM 5B)	3	1-2	2	Good
	Bromsgrove Town Centre	3	4	2	Moderate
North	–	–	–	–	–
	Ravensbank ADR	3	1	2	Good
	Bromsgrove ADR (BROM 5B) – Land to the north of Perryfields Road	2-3	1-2	2	Good
	Robin Hill Farm	2	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	2-3	N/A
	White Young Green Area 5	2-3	1	2-3	N/A
	White Young Green Area 6	3	1	2-3	N/A
	White Young Green Area 8	3	1	2	N/A
	White Young Green Area 9	3	1	2	N
	White Young Green Area 10	3	1	2	A

5.385 **Tables 5.4** and **5.5** provide a more complete overview of main sites, focussing on allocations and main commitments and also certain (larger) other sites with vacant land potentially capable of accommodating further employment use.

5.386 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).

Table 5.4: Overview of Qualitative Assessment – 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	Aston Fields Industrial and Trading Estate	G	Immediate - Short	0.7	0.4	0.3	0
	Bromsgrove (BROM 8A) Land at Buntsford Hill Phase 3/ Buntsfordgate	G	Immediate - Short	0.73	0.2	0.23	0.3
	Sugarbrook Mill (* now under construction)	M	Immediate to Short	1.06	0.16	0.7	0.2
	Bromsgrove Technology Park	B	Immediate - Short	2.3	0.7	1.6	0
North	Cofton Hackett	G	Immediate – Short	4.9	0.8	2.4	1.7
Rural East	Wythall Green Business Park	G	Immediate - Short	6.5	6.5	0	0
	Ravensbank Business Park	G	Immediate - Short	4.18	1.0	2	1.18
	Saxon and Harris Business Parks	G	Short – Medium Term	1.8 (allocated without permission) 1.68 (allocated with permission) *Loss of 0.28* Total = 3.20	0.3 0.33 *Loss of 0* Total = 0.63	0.9 0.7 *Loss of 0.14* Total = 1.46	0.6 0.65 *Loss of 0.14* Total = 1.11

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Table 5.5: Overview of Qualitative Assessment – Other Sites

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 (HAG 2B)	M	Medium – Long Term	9.1	1.52	4.55	3.03
	Wildmoor Farm	M	Immediate – Short Term	0.76	0.3	0.46	0
Bromsgrove	Lower Shepley Farm	P	Short – Medium Term	0.2	0	0.2	0
North	–	–	–	–	–	–	–
Rural East	Ravensbank ADR	G	Medium – Long Term	10.3	1.72	5.15	3.43
	Bromsgrove ADR (BROM 5B) – Land to the north of Perryfields Road	G	Medium – Long Term	15.8	2.63	7.90	5.27
	High House Farm	M	Immediate – Short Term	0.49	0	0.49	0

6. Overview of Market Demand

Introduction

6.1 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. Taken together with the forecasts and business survey in the following sections, this will provide an indication of the scale and nature of demand for employment land.

6.2 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 past trends, vacancies and completion rates; and
- Interrogation of databases such as EGi, FOCUS etc.

6.3 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.

6.4 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.

6.5 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.

6.6 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.

6.7 For two of the sub-areas within this study, there are very few employment sites at all, and the make-up of those sites in those sub areas do 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.

6.8 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.

6.9 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

6.10 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.

6.11 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 5,429 sq m (58,438 sq ft) industrial accommodation is available in the sub area, approximately 42% of the total 12,883 sq m (138,675 sq ft) in the district. 7,435 sq m (80,026 sq ft) of office accommodation is located within the sub area out of a total of 9,284 sq m (99,993 sq ft), (80%). In terms of number this represents 48% industrial properties and 66% office properties in the Bromsgrove District.

Industrial Property

6.12 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.

6.13 In terms of vacant premises, 5,429 sq m (58,438 sq ft) is available, in comparison to a built stock of 94,500 sq m (8,779 sq ft), a proportion of 5.75% (ONS).

6.14 The average size of available industrial premises in Bromsgrove sub area is 319 sq m (3,438 sq ft), with a total of 17 properties currently vacant. The majority of vacant premises (14) are less than 500 sq m.

6.15 Property ranges from the very small, for example with individual units of less than 100 sq m, up units of circa 760 sq m (8,000 sq ft). However there are no substantially larger units available above 1,000 sq m, thereby restricting opportunities to some sectors.

6.16 The largest unit that was until recently available was a warehousing/storage unit situated on Sherwood Road, totalling 3,182 sq m (34,247 sq ft), however this unit is now under offer at around the asking price of £22 psm (£2 psf) and currently in solicitors' hands, following quite strong interest. Should this unit have been included in the tables the figures are resultantly skewed as it is by some margin the largest unit recently available in the district.

6.17 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 approx 3 miles of J1 M42 and 5 miles of J5 M5.

6.18 The Estate comprises 35 purpose built light industrial units arranged in six terraces, in a range of sizes. All of these are now let, the advantages of the accommodation being they are self contained units offered on flexible leases.

6.19 Buntsford Business Park is also situated close to Aston Fields, here there are a couple of units available at the West Court phase,

6.20 Sanders Road Industrial Estate is located just west of the town centre, and consists of a total of 22 units. All 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

6.21 The majority (16 out of 28) of vacant property is between 100 and 500 sq m, representing 43.7% of total vacant premises. The total built office stock in the Bromsgrove sub area is 33,000 sq m (355,209 sq ft), representing a 22.5% vacancy rate overall (ONS), which is high compared to the equivalent vacancy level for industrial premises in this sub area and also in terms of the District's office and overall vacancy rate.

Table 6.1: Vacant Office Space by Size Band – Bromsgrove Sub Area

Size Bracket (sq m)	No of Units	Sq m Available	Sq ft Available	% of Vacant Space
A (<100 sq m)	7	431.5	4,645	5.8%
B (101 – 500 sq m)	16	3,253.7	35,023	43.7 %
C (501 – 1,000 sq m)	4	2,430.3	26,160	32.7 %
D (1,001 – 2,000 sq m)	1	1319.0	14,198	17.7 %
E (2,001 – 5,000 sq m)	0	0	0	0%
F (> 5,000 sq m)	0	0	0	0%

6.22 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.

6.23 In addition recent development has 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.

6.24 There are two office units (to let only) at The Croft remaining at Chase Commercial's 9,290 sq m (100,000 sq ft) Buntsford Gate Business Park, Unit 11 extends to 114 sq m (1,230 sq ft) and Unit 10 to 143 sq m (1,536 sq ft). The Croft comprises 12 units, totalling 1,858 sq m (20,000 sq ft), and the fourth and final phase of development at the Buntsford Gate. Also at Buntsford Gate is Avon House, where 1,319 sq ft (14,198 sq ft) is available over two floors of approximately 650 sq m (7,000 sq ft). Avon House was originally designed as a headquarters style building totalling 2,392 sq m (25,750 sq ft), however the building has since been let on a floor by floor basis to reflect the perceived demand of the market.

6.25 Six out of seven units in the first phase of Aston Court at Bromsgrove Technology Park have been sold, all to a single occupier combining the units to form one large unit. The last unit (203 sq m / 2,185 sq ft) is also currently under offer. Second phase will be available from late summer to Christmas, and two are already under offer. Units will range from 107 sq m (1,152 sq ft) to 536 sq m (5,770 sq ft) with the potential to combine units. The quoting price is £1,991 psm (£185 per sq ft) freehold for a shell finish with ceilings and floors able to be fitted as requested.

6.26 Serviced offices and workshop units at Bromsgrove Technology Park are provided at Basepoint, where occupancy rates are running at 85% overall.

The managers report very steady turnover, primarily on short term licences. In terms of office accommodation, a total of 288 sq m (3,096 sq ft), across 13 suites, is available, out of 1,399 sq m (15,062 sq ft) (79% let). Of the workshops/industrial accommodation, there are 2 units available totalling 101 sq m (1,086 sq ft), representing an occupancy rate of 89%.

6.27 Topaz, at Junction 1 of the M42, 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). 2 units are currently under offer, and there is strong interest on a further 5, although construction is yet to start. A total of 3,643 sq m (39,213 sq ft) will be constructed.

6.28 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 hectares (0.5-3.3 acres). On-site infrastructure works are completed and a number of plots have already been developed. There is existing outline consent for the undeveloped remainder of the site, however speculative development is considered to be difficult to encourage.

North Sub Area

General Market Overview

6.29 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.

6.30 There is only approximately 438 sq m (4,700 sq ft) of available commercial property of which we are aware within the Northern sub-area, all of which is office accommodation.

6.31 There are a total of 34,500 sq m (371,354 sq ft) built stock of commercial property in the sub-area, representing a vacancy rate of 1.25%. This is extremely low and likely to exclude some small, privately advertised properties.

Industrial

6.32 We have been unable to discover any details of industrial property available in the Northern sub-area. Again it is unlikely that this is actually the case, rather 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 for industrial / warehouse space of up 20,900 sq m (225,000 sq ft).

6.33 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

6.34 The availability we could ascertain in the Northern sub-area comprises just two properties, both under 300 sq m (3,000 sq ft) in size.

6.35 Also provided at Ladybird House mentioned above are serviced office suites. However, again, following multiple attempts we have 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.

6.36 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.

6.37 Lydiate Business Park comprises two refurbished farm buildings, plus two barn conversions. The agents report strong interest, due to a prominent location near to the motorway, and many viewings were generated. The final building, Ash House (265 sq m / 2,851 sq ft) has recently gone under offer recently, and is now in solicitors hands. The farm buildings were also let very recently.

6.38 Falling just outside of the Bromsgrove District Council borders is Parklands Reserve Business Park, off the A38 and forming part of the Longbridge Technology Park. It will provide large headquarters style accommodation, from 929 sq m (10,000 sq ft) up to 9,290 sq m (100,000 sq ft). It is likely that any large requirements for the north of Bromsgrove would be focussed here rather than the remainder of the northern sub-area.

Rural West Sub Area

General Market Overview

6.39 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.

6.40 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 high in this area nor likely to improve so information is sporadic.

Industrial

6.41 Total built industrial stock in the sub-area amounts to 35,000 sq m (376,736 sq ft, in 97 hereditaments (ONS). This provides an average of 361 sq m (3,883 sq ft) per unit.

6.42 The vacancy rate lies at 178 sq m (1,913 sq ft), which is just 0.5%.

6.43 The three units that we have detail of being available in the Rural West sub-area are all located in Fairfield west of Junction 4 M5. Two units are situated at Fairfield Court, Stourbridge Road. They are both very small, converted red-brick farm buildings (41 sq m). The other is at Wildmoor Mill, also very small at just over 96 sq m (1,000 sq ft).

6.44 In terms of potential new supply, there are no allocated sites in Rural West nor are there are committed sites with planning permission. This demonstrates a real lack of either available land in this widespread but undeveloped area, and also a lack of windfall opportunities.

Office

6.45 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% (of a total of 7,000 sq m built stock), 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.

6.46 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.

6.47 A notable recent office development has been at Mill Pool, Belbroughton. All of the eight units built, ranging from 130 sq m (1,400 sq ft) to 232 sq m (2,500 sq ft), are no longer available. All bar one were sold freehold to owner occupiers before practical completion at prices between £2,314 psm (£215) and £2,422 sq m (£225 psf), again demonstrating the demand for small owner occupied premises.

Rural East Sub Area

General Market Overview

6.48 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

6.49 We have found details of 13 properties vacant in the Rural East sub-area, totalling approximately 7,278 sq m (78,324 sq ft) (3.27% of total built stock vacant),averaging 560 sq m (6,000 sq ft) in size.

6.50 The two largest units that are available are located at Hanbury Road, at circa 1,130 sq m (12,000 sq ft) each. There are an additional three further units available in total on Harris Business Park, also situated on Hanbury Road.

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

6.52 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. The units are available freehold and one unit of 1,150 sq m (12,367 sq ft) remains available.

6.53 The Metal and Ores Industrial Estate is also situated on Hanbury Road. Here 2 units are available, one of 888 sq m (9,555) sq ft and one of 93 sq m (c1,000 sq ft).

6.54 Saxon Business Park comprises brickbuilt 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, from 465 sq m (5,000 sq ft) to 4645 sq m (50,000 sq ft), the Park having outline consent for B1, B2 and B8 uses

6.55 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 hectares (70 acres) and largely composed of large distribution occupiers.

6.56 The Park comprises a site of approximately 4 hectares (10 acres) and land is currently available for sale or Design and Build options. Planning permission exists for three units of 7,339 sq m (79,000 sq ft), 2,067 sq m (22,250 sq ft) and 3,716 sq m (40,000 sq ft) each, with an office content of approximately 10%. The site has not yet been openly marketed at present, but will be brought forward soon. The agents comment that no speculative build will be undertaken without first securing a pre sale or pre let.

6.57 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. Of a total of 9,894 sq m (106,500 sq ft) owned by Becketts, all is let, with the owner reporting still high demand and waiting lists for further accommodation. The farms benefit from good access to Junction 3 of the M42. Rents start from £4 psf but vary with the quality of accommodation and the length of lease, or type of agreement. There are a number of fairly large units let to single occupiers, for example one of 2,973 sq m (32,000sq ft), one of 1,672 sq m (18,000 sq ft) and four of 557 sq m (6,000 sq ft).

Office

6.58 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. Of a total built stock of 70,000 sq m (753,473 sq ft), there is 943 sq m (15,191 sq ft) vacant (1.35%).

6.59 Harris Business Park primarily contains second hand stock, the availability comprising three units averaging around 186 sq m (2,000 sq ft) available leasehold only.

6.60 Greenbox is now on its third phase of development, following successful disposal of the first nine units in Phase 1, plus of Phase 2 only two 90 sq m (971 sq ft) units remain available. Phase 3 has just completed and comprises 10 units each of 90 sq m (971 sq ft) with the potential to combine in various configurations. Four units are currently under offer on a freehold basis at 1,991 psm (£185 psf), quoting leasehold prices are £151 psm (£14 psf). All of the interest and purchases so far have been owner occupiers.

6.61 Serviced offices at Bordelsey Hall, Alvechurch. Currently, of the 5,853 sq m (63,000 sq ft) of office accommodation, only two suites are available, totalling 74 sq m (800 sq ft), giving an occupancy rate of 95%. The centre manager reports that this rate is very steadily maintained. Units range from 14 sq m (150 sq ft) in size, and can be interconnected to give larger sized suites.

7. Forecasting Employment Land Requirements – Methodology and Findings

Introduction

1.1 The following details the methodology employed in forecasting Bromsgrove District's employment land requirements through to 2026.

1.2 The methodology 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.

1.3 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.

1.4 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.

1.5 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

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

7.7 Rather than generate its own forecasts, the model normally makes use 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.

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

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

7.9 The population projections from the Office for National Statistics were based on 2004 population estimates and ran through to 2029. The population projections from Worcestershire County Council were based on the 2001 Population Census findings and ran through to 2011. Regression techniques were applied to the County Council projections in order to generate best fit time series equations by age and gender, which were, in turn, used to project the population forward to 2026.

7.10 Both of the sets of projections used show the population of Bromsgrove District growing over the forecast period to 2026. The rates of growth are, however, different, such that two different 2026 population estimates result. The lower of these estimates is the 96,300 persons produced by projecting forward the Worcestershire County Council forecasts, while the higher is the 101,800 produced by the Office for National Statistics.

7.11 Both sets of projections are consistent with the 2001 Population Census results, which show Bromsgrove District as then having a population of around 87,900.

7.12 In both cases, the population projections were made by age and by gender. This 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.

7.13 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 were than considered as one of a number of different scenarios.

Economic Activity Rates

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

7.15 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.

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

7.17 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.

7.18 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 demand for labour increases, so the proportion of the population that is economically active rises.

7.19 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.

7.20 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.

7.21 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.

7.22 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 normal retirement age. It also reflects the introduction of a rising normal retirement age for women aimed at bringing the age at which males and females become eligible for the state pension into line.

Employees in Employment

7.23 The base data used in forecasting the number of employees in employment in Bromsgrove District is sourced from the Annual Business Inquiry. This employer sourced information provides an estimate of the number of employees in employment whose jobs are based within Bromsgrove District.

7.24 The information from the Annual Business Inquiry, (ABI), is accessed as a number of data series together running from 1991 through to 2006. The data is drawn down from NOMIS at a four digit minimum list heading 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 with EU reporting definitions.

7.25 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.

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

7.27 For forecasting purposes, the employment data is aggregated into 28 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.

7.28 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

7.29 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.

7.30 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.

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

7.32 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

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

7.34 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.

7.35 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.

7.36 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.

7.37 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.

7.38 This allocation is performed at a 28 industry level and, as indicated above, takes account of factors local to Bromsgrove and its environs in the allocation.

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

7.40 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

7.41 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.

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

7.43 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 Self-employment Jobs based in the District Residents on schemes etc	= net commuting

7.44 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.

7.45 In the case of Bromsgrove, analysis 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.

7.46 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.

7.47 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

7.48 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.

7.49 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.

7.50 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.

7.51 This leads to the number of full-time students with part-time jobs rising through to 2012 under the ONS population projections but then reducing until 2017, when the number broadly plateaus. Under the extrapolated Worcestershire County Council population projections, the number of full-time students with part-time jobs rises through to 2017 before then declining over the balance of the forecast period.

Double Jobs

7.52 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.[1]

7.53 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.

7.54 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.

7.55 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.

7.56 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, means that the double job estimate needs to be treated with considerable caution.

Unemployment / On Schemes

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

7.58 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

7.59 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.

7.60 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

7.61 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.

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

7.62 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.

7.63 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.

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

7.65 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.

7.66 In addition, 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[2], 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 this employment land study.

7.67 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.

7.68 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.

7.69 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.

7.70 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.

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

Findings of the Forecasting Model

Introduction

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

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

Population

7.73 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.

7.74 The forecasts produced by the Office for National Statistics, (ONS), anticipate the population of Bromsgrove District rising from an estimated 2004 total of 90,300 to reach 97,000 by 2016, 99,700 by 2021 and 101,800 by 2026.

7.75 Figures from Worcestershire County Council suggest a slower rate of population growth, with the population of Bromsgrove District expected to reach 90,800 by 2011, compared with the ONS's anticipated 94,200. Projecting the County Council's figures forward, by age and by gender, suggests that Bromsgrove District's population will reach 96,330 by 2026, significantly less than the 101,800 predicated by ONS.

7.76 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

7.77 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 for employment land.

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

7.79 The following table, (Table 7.1), compares the structure of the Bromsgrove District population at 2011 under the two different forecasts.

Table 7.1: Comparison of Population Projections for Bromsgrove District by Age and Gender, 2011

	ONS			Worcestershire County Council		
Age	Male ('000)	Female ('000)	Total ('000)	Male ('000)	Female ('000)	Total ('000)
0-15	8.50	8.14	16.54	8.18	7.62	15.80
16 to normal retirement age*	29.20	26.36	55.56	28.24	24.98	53.22
Over normal retirement age*	8.50	13.70	22.20	8.18	13.60	21.78
Total population	46.20	48.20	94.20	44.60	46.20	90.80

Sources: ONS, Worcestershire County Council, WM Enterprise Consultants

* Normal retirement age is taken as 65 for males and 60 for females.

7.80 The main difference between the two forecasts is one of overall population size, with the ONS forecasts predicting a higher population than is Worcestershire County Council. The age and gender ratios within the different population totals are broadly the same.

7.81 Table 7.2 provides information on the forecast population structure in 2026 based on the ONS forecasts and on projecting forward the County Council forecasts.

Table 7.2: Comparison of Population Projections for Bromsgrove District by Age and Gender, 2026

Age	ONS Male ('000)	ONS Female ('000)	ONS Total ('000)	Worcestershire County Council Male ('000)	Worcestershire County Council Female ('000)	Worcestershire County Council Total ('000)
0-15	8.88	8.52	17.30	7.68	6.84	14.52
16 to normal retirement age*	29.62	26.18	55.80	29.33	24.35	53.67
Over normal retirement age*	11.20	17.70	28.90	10.39	17.46	27.86
Total population	49.70	52.40	101.80	47.40	48.65	96.06

Sources: ONS, Worcestershire County Council, WM Enterprise Consultants

* Normal retirement age is taken as 65 for males and 60 for females

7.82 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 7.3: Bromsgrove District Activity Rate 2001 and for Selected Years

Gender / Age	2001 % (Actual)	2006 %	2010 %	2016 %	2021 %	2026
Male						
0-15	0.0	0.0	0.0	0.0	0.0	0.0
16-24	70.2	69.3	68.7	67.7	66.9	66.1
25-34	91.7	90.5	90.1	89.6	89.3	88.9
35-44	94.1	93.5	93.3	92.7	92.3	91.9
45-59	88.1	89.0	89.8	90.3	90.3	90.6
60-64	55.2	59.5	61.7	64.2	66.1	68.0
65+	12.1	14.1	14.3	14.4	14.5	14.0
Total*	87.5	87.9	88.0	89.2	89.3	89.5
Female						
0-15	0.0	0.0	0.0	0.0	0.0	0.0
16-24	68.8	68.1	68.0	67.6	67.4	67.1
25-34	81.9	82.9	84.0	85.1	85.9	86.8
35-44	81.8	81.6	82.3	82.4	82.6	83.0
45-59	75.0	78.3	80.3	82.6	84.5	86.4
60-64	29.3	31.7	33.7	41.6	48.0	54.5
65 +	5.4	5.4	6.6	7.5	7.3	7.7
Total*	74.7	75.8	76.9	79.7	81.1	82.8

Source: Derived from Population Census Figures

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

7.83 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.

7.84 The resultant activity rates were applied to both sets of population forecasts in order to arrive at two sets of Bromsgrove District labour force projections.

7.85 Overall, the figures indicate a marginal overall increase in male participation rates in the labour market and a higher rate of increase in participation on the part of females. Nevertheless, female participation rates remain below those of males for all age groups except the youngest.

Size of the Workforce

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

7.87 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 7.4: Bromsgrove District Workforce – Selected Years – Under Different Population Forecasts

Forecast	2006	2010	2016	2021	2026
ONS	47.5	48.2	49.4	50.4	51.2
Worcestershire County Council (extrapolated beyond 2011)	47.7	46.7	47.8	48.4	49.1
Mean	47.6	47.5	48.6	49.4	50.2

Source: WM Enterprise Consultants

7.88 Overall, both sets of projections see the resident workforce of Bromsgrove District growing over the forecast period. The ONS forecasts show the higher rate of growth, (7.8% 2006 to 2026), with the Worcestershire County Council the lower, (2.9%). The mean of the projections is for a 5.5% increase in the workforce.

Labour Demand

7.89 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 following table.

Table 7.5: Comparative Employment Structures, 2006

	Bromsgrove District %	West Midlands %	UK %
Primary	1.1	1.8	1.6
Manufacturing	10.3	14.2	10.4
Construction	6.5	6.6	6.8
Utilities	0.4	0.5	0.3
Services	81.7	76.9	80.8
Total	100.0	100.0	100.0

Sources: Cambridge Econometrics, NOMIS; WM Enterprise Consultants

7.90 Within the service industries, Bromsgrove District is relatively over-represented in financial services and within this in insurance. It is also over-represented in hotels and catering and in public administration, education and health, relative to both the West Midlands and the UK. It is, however, underrepresented in transport and communications and in retailing. The following figure, (Table 7.6), provides more detail.

Table 7.6: Comparative Service Sector Employment

	Bromsgrove District %	West Midlands %	UK %
Retailing	10.0	12.9	12.4
Distribution	7.3	9.5	7.6
Hotels & Catering	10.0	7.4	7.8
Transport & Communications	2.4	7.5	7.4
Financial Services	11.5	3.5	4.5
Other Business Services	15.6	19.3	20.8
Public Administration, Education & Health	35.3	32.4	31.6
Other Services	7.9	7.5	7.9
Total	100.0	100.0	100.0

Sources: Cambridge Econometrics; Nomis

7.91 The forecasts through to 2026 indicate that service sector employment will reinforce its dominant position within Bromsgrove District, such that, by 2026, the service sector will account for over 84.4% of total employment. This is shown in the following figure, (Table 7.7).

Table 7.7: Forecast Relative Shares of Employment in 2026

	Bromsgrove District %	West Midlands %	UK %
Primary	0.6	0.9	1.0
Manufacturing	7.7	10.4	7.4
Construction	7.2	7.5	7.3
Utilities	0.2	0.3	0.2
Services	84.4	80.9	84.1
Total	100.0	100.0	100.0

Sources: WM Enterprise Consultants; Cambridge Econometrics

7.92 Over the forecast period, the overall structure of the Bromsgrove District economy is expected to get even closer to that of the UK, although the differences in structure within the service sector are expected to be maintained.

7.93 The service sector's share of gross value added in Bromsgrove District is expected to rise from a current 77.3% to reach 79.9% by 2016 and 81.0% by 2026. This relatively modest rise is despite the service sector's share of total employment, including self-employment, rising from 78.4% to 81.2%, over the same period.

7.94 Within the Bromsgrove District service sector, it is the education and health sector that is expected to be the major source of new job opportunities, followed by other business services, with the former's growth driven by the needs of an ageing population. Between them, the other business services sector and education and health are expected to account for 72% of net service sector employment growth. Other sources of employment growth include retailing, hotels and catering, insurance and distribution, which, together, account for the balance of the anticipated service sector employment growth.

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Commuting

7.95 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.

7.96 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.

7.97 The major work place destinations of those Bromsgrove District residents working outside of the District were Birmingham, the Black Country, Redditch, Solihull and Wychavon.

7.98 At the same time, those non-Bromsgrove District residents working in Bromsgrove District predominately came from Birmingham, Redditch, the Black Country and Wychavon.

7.99 Further detail is contained in the following table, Table 7.8.

Table 7.8: Commuting out of and into Bromsgrove District in 2001

Local Authority Areas	Commuting to from Bromsgrove		Commuting from to Bromsgrove		Net In
	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

7.100 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.

7.101 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.

7.102 Under the ONS population projections, the expectation is that net out-commuting will continue at its 2001 Population Census number. Under the local authority population projections, there is potential for net out-commuting to reduce slightly.

Double Job Adjustment

7.103 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 2,600 and 3,500. This amounts to between 6% and 8% of all jobs in the District and means that between 5% and 7% 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.

7.104 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

7.105 The following provides summaries of the Bromsgrove District labour market based on extrapolated Worcestershire County Council population projections and on the ONS population projections.

Table 7.9: Bromsgrove District Labour Market Projections Based on Extrapolated Worcestershire County Council Population Projections

	2001	2006	2007	2008	2009	2010	2016	2021	2026
	('000)	('000)	('000)	('000)	('000)	('000)	('000)	('000)	('000)
Total population	87.9	91.6	91.5	91.4	91.3	91.3	93.4	94.9	96.3
of which: of normal working age	53.4	54.2	53.5	53.3	53.1	52.5	52.8	52.6	52.4
over normal retirement age	17.6	19.4	20.1	20.4	20.8	21.2	23.7	25.8	27.9
Labour force (all ages)	45.5	47.7	47.4	47.1	47.0	46.8	47.8	48.4	49.1
Plus net in commuting	(10.2)	(10.2)	(10.2)	(10.2)	(10.2)	(9.2)	(9.2)	(9.2)	(9.2)
Less double job adjustment	5.0	3.2	3.1	3.4	3.4	3.4	3.5	3.6	3.7
Less jobs taken by students	1.4	1.3	1.4	1.4	1.4	1.5	1.6	1.6	1.3
Unemployment	1.3	1.7	1.4	1.3	1.0	1.4	1.7	1.5	1.1

Sources: ONS; WM Enterprise Consultants

Table 7.10: Bromsgrove District Labour Market Projections Based on ONS Population Projections

	2001	2006	2007	2008	2009	2010	2016	2021	2026
	('000)	('000)	('000)	('000)	('000)	('000)	('000)	('000)	('000)
Total population	87.9	91.6	92.2	92.6	93.5	97.8	97.0	99.7	101.8
of which: of normal working age	53.2	54.9	55.1	55.2	55.4	55.2	55.8	56.1	55.6
over normal retirement age	17.7	19.7	20.2	20.5	21.2	21.7	24.4	26.6	28.9
Labour force (all	45.4	47.4	47.8	48.0	48.3	48.2	49.4	50.4	51.2

	2001	2006	2007	2008	2009	2010	2016	2021	2026
ages)									
Plus net in commuting	(10.2)	(10.2)	(10.2)	(10.2)	(10.2)	(10.2)	(10.2)	(10.2)	(10.2)
Less double job adjustment	5.0	3.2	2.5	2.5	2.5	2.5	2.6	2.6	2.7
Less jobs taken by students	1.4	1.6	1.6	1.6	1.7	1.7	1.6	1.6	1.6
Unemployment	1.3	1.7	1.4	1.4	1.7	1.2	1.3	1.4	1.5

Source: Worcestershire County Council; WM Enterprise Consultants

7.106 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 extrapolated County Council projections, with the larger increase shown by the ONS projections. Overall, the 2026 population projection totals lie within $\pm$ 2.8% of their combined mean.
- Allied to the different population projections is a difference in the projected labour force of 2,100, (4.4%), by 2026. It is the ONS population projections that generates 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 the extrapolated County Council projections, the expectation is that net out commuting falls as the growth in local job opportunities exceeds the rate of growth in the working population. Under the ONS projections, net out commuting remains relatively constant and may even rise if unemployment is to remain at or around its current level.
- 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 rise under the tighter labour market conditions associated with the lower population and labour force projections of the County Council forecasts. The higher population projections of the ONS lead to a more modest rise in double jobs, after an initial fall.
- Unemployment is expected to rise in the short-term under the ONS forecasts and then to decline before rising and falling in line with normal economic cycles. The extrapolated County Council forecasts suggest that the labour market will remain tight over the forecast period, such that unemployment will not rise in the short-term, although it does display longer-term oscillations in response to economic cycles.

7.107 Ultimately, the expectation under both scenarios is that Bromsgrove District will remain a relatively attractive place to live and work with attendant low levels of unemployment.

Employment Land Requirement

7.108 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.

7.109 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 7.11: 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	
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

7.110 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.

7.111 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 2006 and, *inter alia,* sought information on numbers employed, floorspace occupied and the total site area.

7.112 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.

7.113 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.

7.114 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.

7.115 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.

7.116 As such, the following table, (Table 7.12), 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 7.12: 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.

7.117 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.

7.118 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.

7.119 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.

7.120 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.

7.121 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

7.122 Applying the figures for square metres per employee to the 2007 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 7.13: 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	140.4	153.8	130.6
Warehouse & Distribution	140.0	184.8	121.2
General Office	153.9	194.8	141.5

Source: WM Enterprise Consultants

7.123 From Table 7.13, it is apparent that the floorspace requirements derived from the Valuation Office figures produce a lower requirement than is produced by either of the other two methodologies, with the survey producing the highest figures.

7.124 One further point in relation to Table 7.13 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

7.125 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.

7.126 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.

7.127 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 7.14: 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

7.128 From Table 7.14, 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.

7.129 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.

7.130 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 7.15: Employment Land Requirement (Hectares)

	ODPM		Survey		Derived	
	ODPM	Survey	ODPM	Survey	ODPM	Survey
Industry	36.1	21.3	40.3	23.7	36.6	21.6
Warehousing & Distribution (1)	47.9	30.2	59.8	37.9	40.9	25.9
Offices	4.6	36.1	6.4	49.8	4.6	36.1

(1) These figures include an estimate for construction.

7.131 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.

7.132 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.

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Employment Floorspace and Land Forecasts

7.133 The following figure, Table 2.16, shows the current, (2007), estimated floorspace occupied in Bromsgrove District by different use categories, together with the forecast floorspace requirement for selected years through to 2026. The forecasts are based on local employment densities as revealed by the survey.

Table 2.16: Employment Floorspace Requirement ('000 square metres)

	2007	2008	2009	2010	2016	2021	2026
Industrial	153.7	149.2	149.0	147.5	142.3	137.2	131.2
Warehouse &Distribution	184.8	184.4	184.4	185.8	185.0	184.5	183.9
General Office	194.8	196.6	197.7	202.8	210.2	217.4	224.8

Source: WM Enterprise Consultants

7.134 The figures in Table 7.16 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.

7.135 Also, in using the floorspace figures in Table 7.16, 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.

7.136 The following figure, (Table 7.17), sets out the anticipated employment land requirement for Bromsgrove District through to 2026 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 7.17 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 7.18 illustrates the change in floorspace requirement over the period based on the information in Table 7.17 and suggests a relatively modest increase of 6 hectares of land in employment use above the level occupied as at 2007.

Table 7.17: Employment Land Requirements (Hectares)

	2007	2008	2009	2010	2016	2021	2026
	(ha)	(ha)	(ha)	(ha)	(ha)	(ha)	(ha)
Industrial	23.7	23.0	23.0	22.8	22.0	21.2	20.3
W&D	37.9	38.0	38.1	38.4	38.6	39.2	39.7
General Office	49.8	50.2	50.5	51.8	53.7	55.5	57.4

Source: WM Enterprise Consultants

Table 7.18: Change in Employment Land Requirements over the Study Period 2007 - 2026

Office	Industrial	Warehousing & Distribution
+7.6 ha	-3.4 ha	+1.8 ha

7.137 As with the figures in Table 7.16, the figures in Table 7.17 and Table 7.18 represent the absolute minimum needed to accommodate existing and future activities, with no allowance for vacancies or the need for a balanced land portfolio.

7.138 From the above, there is expected to be a small increase in the requirement for warehouse and distribution space and a relatively large increase in the requirement for general office space. Accompanying this will be a decline in the requirement for industrial land. If, however, labour productivity increases are taken into account in forecasting demand for industrial space, the 2026 requirements is marginally higher at 20.7 hectares.

7.139 Ultimately, appropriate additions need to be made to the above figures in order to ensure that a balanced portfolio of sites is available to meet the needs of indigenous businesses and of those either planning to start-up in business in the District or to re-locate into it.

Scenarios

7.140 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 2026, 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.

7.141 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 following sections.

Population

7.142 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.

7.143 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.

7.144 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.

7.145 Despite these reservations, it is estimated that a population increase of 10,000 would generate the equivalent of 6,800 construction jobs for a year and a further 680 permanent jobs within construction and other services relevant to the employment land study.

7.146 Given that most of the 6,800 construction jobs would be on site, their employment land requirements would be small. The 680 permanent jobs would, however, require an estimated additional 2 hectares of construction related land and an estimated extra 2 hectares of office space.

Housing

7.147 An increase in housing provision over and above that implicit in the base forecasts has an identical impact to that of a population increase. This is because the impact of a population increase is largely felt through an increase in construction activity linked to housing the increased population and providing associated services.

7.148 Underpinning the above 10,000 population increase is an assumption that current persons per household numbers in Bromsgrove District are replicated in any new houses built. As such, the assumption is that 10,000 additional persons will require just over 4,000 additional dwellings at 2.4985 persons per dwelling.

7.149 4,000 additional dwellings will generate an additional requirement for 2 hectares of construction industry related land and an estimated extra 2 hectares of land for office use. These figures exclude the land on which the new houses and associated infrastructure will be built.

Community

7.150 At present, Bromsgrove District acts as a significant dormitory for Birmingham, the Black Country and other parts of the West Midlands region.

7.151 Should Bromsgrove District Council wish to provide sufficient employment 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 7.19 below.

Table 7.19: Minimum Additional Employment Land Requirement If No Out-Commuting

Activity	Additional Hectares
Industrial	14.2
Warehouse & Distribution	17.3
General Office	20.3

Source: WM Enterprise Consultants

7.152 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%.

7.153 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

7.154 An alternative approach to forecasting likely future requirements is to look at past completion rates and to project these rates forward, together with an additional allowance for increases in take up and choice, to derive an employment land requirement figure.

7.155 Utilising completion figures included in Chapter 4 of this study, Tables 7.20 and 7.21 set out predicted future development rates for the District and study sub areas based on projecting past average annual development rates forward. Both tables apply an annual average completion rate arising from development over the period 2001/02 to 2006/07. Table 7.20 considers the past contribution of development at Ravensbank Business Park in deriving and average whereas this development is excluded from Table 7.21.

7.156 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 much less when also considering losses to other uses and developments involving the redevelopment of employment premises to other employment uses for example.

Table 7.20: 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)	5.62 ha	0.14 ha	0.06 ha	0.78 ha	4.65 ha
Need 2008 - 2026	106.78 ha	2.66 ha	1.14 ha	14.82 ha	88.35 ha

Source: Bromsgrove District Council Land Availability Employment Report 2007

Table 7.21: 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)	3.08 ha	0.14 ha	0.06 ha	0.78 ha	2.1 ha
Need 2008 - 2026	58.52 ha	2.66 ha	1.14 ha	14.82 ha	39.9 ha

Source: Bromsgrove District Council Land Availability Employment Report 2007

7.157 Accepting the above caveats, the employment land requirements obtained using the approach delivers significantly 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.

7.158 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. It also illustrates the difficulty in providing an exact figure for future employment land requirements.

8. Findings from the Employer Survey

Introduction

8.1 The following details the findings from a survey of 201 businesses operating in Bromsgrove District. The businesses variously operated in the manufacturing, construction, wholesale and distribution and in the business and financial services sectors. None of the businesses operated from High Street type retail premises, although a small proportion of the total (7.5%) were currently operating out of residential properties.

8.2 The survey was 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.

8.3 The survey took place in April and May 2008, with those selected for interview drawn from a stratified database of eligible businesses. Those selected for interview were chosen so as to give 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, North, Rural East and Rural West.

8.4 WM Enterprise would like to use this opportunity to thank all those business that participated in the survey.

Overview

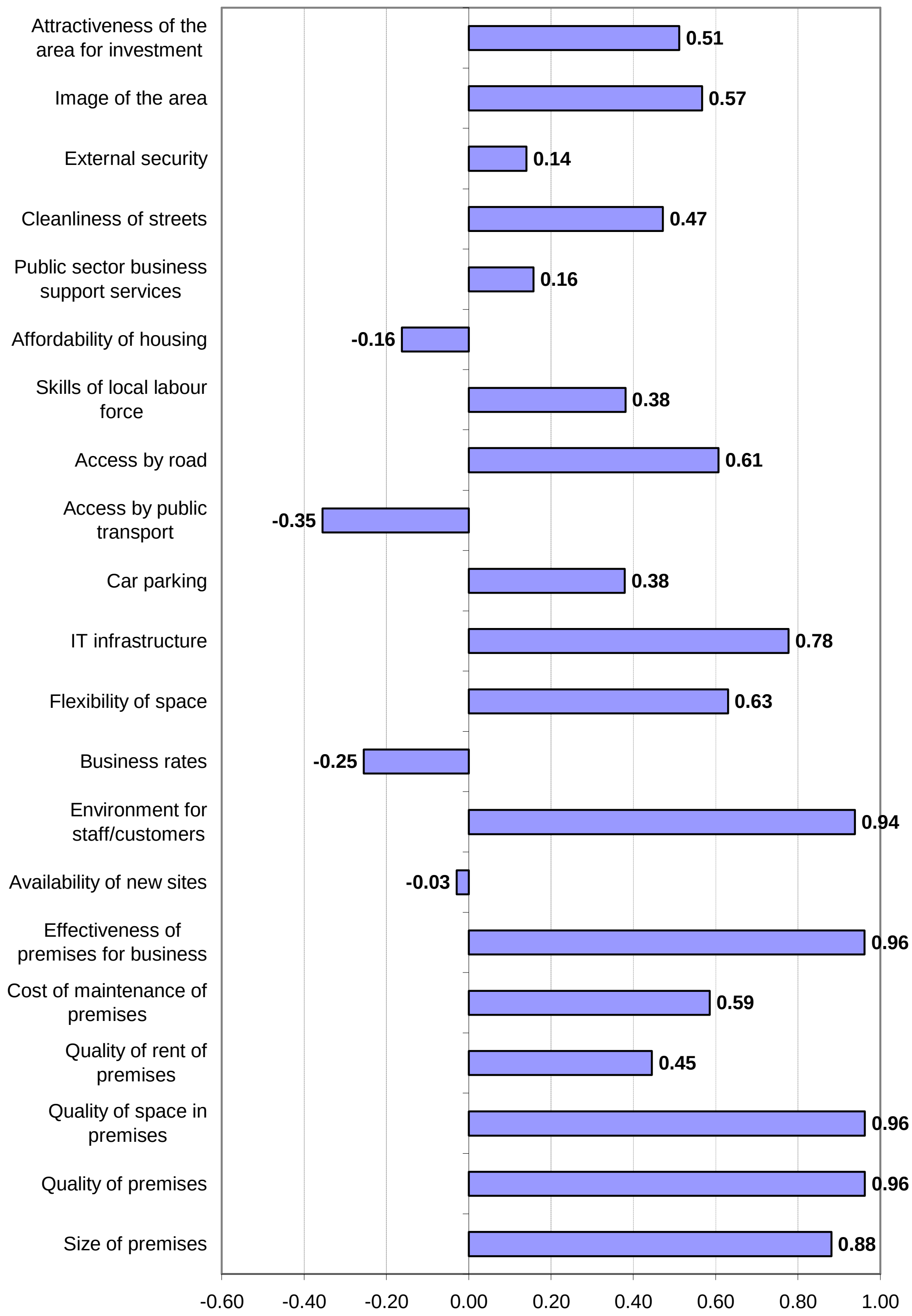
8.5 Companies who responded to the survey had a total of 1,989 employees, the equivalent of 6.0% of all employees in employment in Bromsgrove District. As indicated above, not all sectors were included in the survey. Taking this into account lifts the percentage coverage of the workforce within eligible sectors to 10.8%.

8.6 45.3% of the employees of the businesses surveyed lived inside the District, with around 33% living in the locality of the business.

8.7 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.

8.8 The main findings are presented in Figure 8.1, 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 8.1: Positive and Negative Aspects of Operating in Bromsgrove District



Source: WM Enterprise Consultants

8.9 As can be seen from Figure 8.1, the major concerns of businesses in Bromsgrove are the affordability of housing, the level of business rates, and access by public transport, with the availability of new sites being a concern, but of less significance. When compared with the findings from a recent study conducted in Yorkshire, the Bromsgrove District study shows a very similar balance in terms of the need for more affordable housing and access by public transport, with the need in Bromsgrove being slightly less pronounced. The need for improved public transport was especially pronounced in the Rural East area of the District.

8.10 The main problems faced by the surveyed businesses were market pressures (22%), rising costs of running the business (8%), and existing site constraints (6%).

8.11 Market pressure was particularly acute for one third of transport businesses and 31% of manufacturers. A lack of appropriately skilled staff was mentioned most frequently by wholesale businesses. Site constraints were highest for manufacturing businesses and those operating from distribution depots.

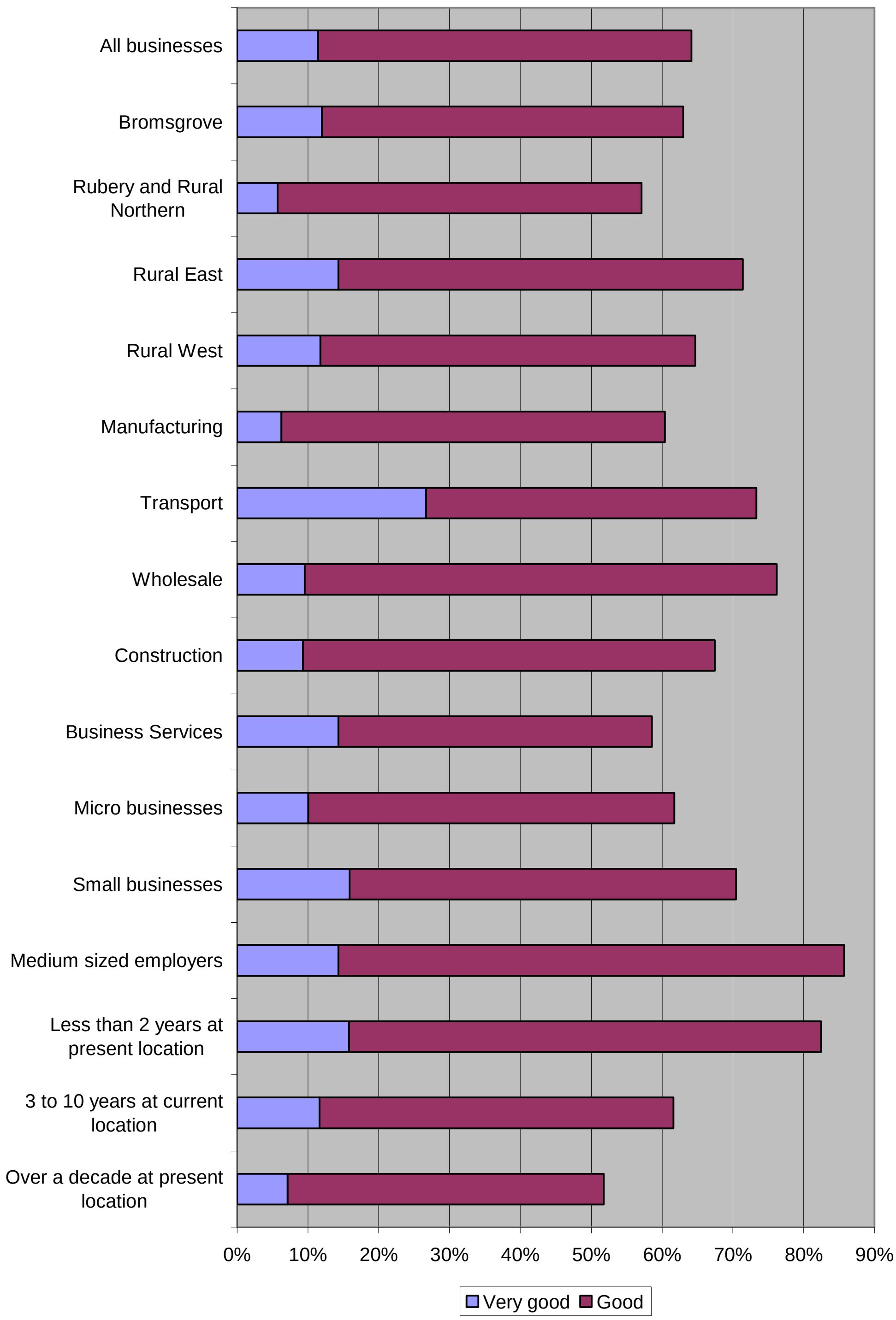
8.12 Almost two thirds of the survey respondents rated Bromsgrove District as a good or a very good place in which to do business (Figure 1.2). 20% felt it was average and only 11% thought that it was either poor or very poor. Levels of satisfaction were particularly high in Rural East (71% of respondents 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, (57% rating it either very good or good).

8.13 These findings place Bromsgrove District marginally ahead of other areas where WM Enterprise has recently undertaken business surveys and employment land reviews. In these instances, 60% of respondents, on average, rated their respective areas as good or very good places in which to do business and 12% rated them as poor or very poor.

8.14 Wholesale and transport businesses rated the District highest in terms of being a good or very good place in which to do business. Despite problems of public transport, this is evidence that the District is perceived by existing businesses as a good location due to its centrality and access to roads.

8.15 While access to motorways and centrality were positive issues, those businesses rating the District as a poor or very poor place in which to do business cited the disrepair of the roads as a key reason for this perception. In addition, as related to previous findings, the level of business rates was also a common reason for businesses giving the District a low rating. This is despite business rates being set nationally rather than locally, although there are proposals for local authorities to be able to levy a local business rate to finance economic development activities.

Figure 8.2: Percentage of Surveyed Businesses Rating Bromsgrove District as a Very Good or Good Business Location, By Business Attribute



Source: WM Enterprise Consultants

8.16 Table 8.3 provides a summary of the businesses surveyed in each of the four sub-areas and in Bromsgrove as a whole. It shows the average number of square metres of floorspace per employee, average site density and the split of usage of the surveyed premises.

Table 8.3: Distribution of Surveyed Activity Within Bromsgrove District

Area	m^2 per person	Site Density	Approximate proportions of floorspace (%) Office	Sales	W&D	R&D	Ind	Other
Bromsgrove	39.2	0.64	55.24	4.17	20.86	0.25	11.75	7.53
North	22.5	0.58	57.31	1.29	20.83	0.00	10.29	10.29
Rural East	46.4	0.54	57.63	0.51	14.71	0.51	18.98	5.78
Rural West	16.3	0.82	96.10	0.00	3.90	0.00	0.00	0.00
Bromsgrove District (Total)	36.9	0.60	59.64	2.42	17.92	0.25	12.26	6.95

Source: WM Enterprise Consultants

8.17 The figures indicate the mix of business activity in the four areas compared to the District as a whole. The Rural West area is almost entirely comprised of office space compared to a rate of between 55% and 60% in the other three areas. This is also related to the fact that this area contains the highest proportion of businesses operating from residential premises and is a clear explanation for the low amount of floorspace per person and the high site densities apparent in the Rural West area.

8.18 In the other three areas the data is broadly comparable in terms of the proportions of floorspace being used for different business activities. In the Rural East area the figure for floorspace per person is highest and site density is lowest. This is due to this area having a concentration of factory and production facilities and distribution depots.

8.19 Table 8.4 shows the net short-term floorspace requirements by type and by the four individual areas:

Table 8.4: Short-Term Floorspace Requirements By Proposed Activity (m^2)

Area	Sub-letting	Office	Retail	W&D	R & D	Industrial	Other
Bromsgrove	28.0	5,199.4	0.0	4,025.3	0.0	2,907.2	139.8
North	238.1	1,119.0	0.0	1,285.7	0.0	214.3	0.0
Rural East	635.9	3,543.4	0.0	1,105.1	0.0	416.6	0.0
Rural West	0.0	250.0	0.0	0.0	0.0	0.0	0.0
Total	901.9	10,111.7	0.0	6,416.1	0.0	3,538.1	139.8

Source: WM Enterprise Consultants

8.20 Analysis of the short-term premises needs of the surveyed businesses in each area shows that the greatest demand across the District will be for office space, with a requirement of over 10,000 square metres. Over half of this space is required in Bromsgrove and one-third within the Rural East area of the District.

8.21 Warehousing and industrial space requirements are also significant. Again, the greatest requirement for these types of space is within Bromsgrove. The Rural West area of the District requires very little floorspace compared to the other areas.

8.22 The following provides a more detailed analysis of the survey findings by sectoral activity.

Manufacturing

Survey Sample

8.23 A total of 48 manufacturing companies, with a total of 574 employees, were interviewed as part of the survey. 24 were in Bromsgrove, employing 318 people, 11 were in North, employing 161 people, 11 were in Rural East, employing 92 people and 2 were in Rural West, employing 3 people.

8.24 Both of the businesses located in Rural West, were based in residential premises and these have been excluded from the analysis where appropriate.

8.25 81% of manufacturing organisations were independent companies, 6% were Head Office sites and the remainder were branches or subsidiaries of larger organisations.

8.26 The main industrial sectors represented were fabricated metal manufacturing, (18.8% of respondents), machinery and equipment manufacturing, (16.7%), and electrical manufacturing (16.7%). Machinery and equipment manufacturing was most prominent in the North area of the District while fabricated metal manufacturing was most prominent in the Rural East area. The pattern in the Bromsgrove area was representative of that for the District as a whole.

Workforce

8.27 In total, 90% of the employees of the respondent businesses were employed full-time and 10% were employed part-time. This varied from 90% being employed full time in Bromsgrove to 100% in Rural West. The maximum number of employees on site across all the businesses, at any one time, was 95.6% of the total number employed. This suggests that there is relatively little large-scale shift work within Bromsgrove District's manufacturing sector.

8.28 Around 54% of the manufacturing workforce was drawn from the local community and an additional 21% from elsewhere within the District. In total 17% came from outside District.

Site Characteristics

8.29 Manufacturing firms accounted for 21,160 sq. m. of floorspace (21,106 square metres excluding residential premises), 28.8% of the total surveyed across all business types. This floorspace was contained within a total of 7.6 acres (3.08ha) of land, 25% of the total for all businesses surveyed.

8.30 Overall, 29% of the surveyed manufacturing businesses held the freehold of their sites, with a further 54% occupying their sites under a lease. 2% occupied their premises under a licence agreement, with the balance having other arrangements, mainly involving a mixture of leased land but with an owned building and some subletting.

8.31 29% of the manufacturing businesses described their premises as budget, with a further 58% describing them as mid range. 10% considered their premises to be prestigious. This split has been typical in other areas where WM Enterprise has undertaken business surveys.

8.32 29% of the businesses had been trading from their current premises in Bromsgrove District for more than 10 years and a further 23% for between 6 and 10 years. 25% had been trading from their current premises for less than two years, including 10% which had been trading from their current premises for less than a year.

8.33 The five businesses that had been trading in the District for less than one year were predominantly relocations from within the District or from elsewhere. A similar picture is shown for businesses that had been trading at their current address for between 1 and 2 years.

8.34 Less than half of manufacturing businesses moving into Bromsgrove District from elsewhere typically did not consider other locations and typically were restricted in their choice of sites by a need to be in a location that was easily accessed by their key staff.

8.35 Overall, 27% of the surveyed manufacturers had always been at their present site in Bromsgrove District and a further 38% had relocated within the District. 29% had relocated into Bromsgrove from elsewhere, which is a high proportion compared to business surveys WM Enterprise has conducted elsewhere and indicates that Bromsgrove District is seen as an attractive area into which to relocate.

8.36 Of those surveyed businesses that had relocated to their current address from elsewhere, 47% had considered alternative sites within the District. This supports the finding that the District is seen as an attractive area in which to relocate. Key reasons for the relocation included the need for expansion space, with the specific location chosen being dictated by proximity to both the home of the decision maker and the homes of other key staff.

8.37 15% of manufacturing businesses did not consider any other site when relocating. This is approximately half the proportion in other areas where this question has been asked and may indicate difficulties in finding suitable sites.

8.38 The main reasons given for businesses being located in Bromsgrove District were proximity to key staff (42%) and the cost, size and quality of premises. The size of premises was mentioned by 31% of respondents whilst premises quality and cost were both indicated by 23% of respondents.

8.39 Ease of access to the motorway is also a key locational factor for manufacturing businesses, being mentioned by a further 23% of respondents. This was mentioned most frequently by businesses in Bromsgrove and the Rural East areas of the District.

8.40 85% of those manufacturers surveyed considered their current premises to be suited to their needs, which is slightly lower than the 91% satisfaction rate for all businesses. The most dissatisfied types of manufacturing businesses were Electrical and Optical Equipment Manufacturers, Other Non-Metal Manufacturers and Metal Manufacturers.

8.41 Between them, the manufacturers whose premises did not suit their needs occupied over 18% of the total manufacturing floorspace surveyed. Those that considered their premises unsuited to their needs mainly stated that their premises were too small with a lack of space for expansion.

8.42 Market pressure was the main difficulty being experienced by manufacturers as a whole, with 32% of respondents citing issues in this area. A significant number cited an economic downturn as a major contributory factor to this problem. Existing site constraints were also cited as a problem by just over 10% of the manufacturing businesses surveyed.

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8.43 4% of manufacturing respondents also felt that both road traffic and parking were key problems affecting their business. A further 4% suggested that a shortage of appropriately skilled staff was a key problem.

8.44 Site density indicators can be seen in Table 8.5 below. Variations in site density appear to be based on the type of industrial premises and use of the site rather than geographical factors when compared with the use of floorspace for different activities.

8.45 In the Rural East area, site densities are highest (when the Rural West area is excluded because of the small sample size). The Rural East area is characterised by the highest proportion of space used by manufacturing businesses for industrial purposes and therefore explains the intensive use of sites in this area. This area shows a high floorspace per person, mainly due to one manufacturer based on a large site with relatively few employees.

8.46 The North and Rural West areas show comparatively low levels of floorspace per employee. This can be related to a number of micro-manufacturers operating from relatively small premises and the fact that in Rural West, these premises simply provide office space for home-based manufacturers.

Table 8.5: Site Density Indicators for Manufacturing Premises

Area	m^2 per person		Site Density
	Total Employment	Maximum Number on Site	
Total	36.86	37.92	0.68
Bromsgrove	35.80	37.45	0.59
North	18.06	18.06	0.78
Rural East	74.35	76.00	0.87
Rural West	9.67	9.67	1.00

Source: WM Enterprise Consultants

8.47 Overall, 40% 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 8.6).

Table 8.6: Percentage of Floorspace Within Surveyed Manufacturing Businesses Used For Different Activities

Activity	% of Floorspace				
	Total	Bromsgrove	North	Rural East	Rural West
Office	37.3	41.5	32.3	21.8	100.0
Retail	2.5	4.0	2.3	0.0	0.0
Warehousing	10.6	10.0	24.5	0.0	0.0
R & D	0.5	1.0	0.0	0.0	0.0
Industrial	42.7	38.8	32.7	69.1	0.0
Other	6.3	4.7	8.2	9.1	0.0

Source: WM Enterprise Consultants

8.48 Relatively little space was devoted by the surveyed businesses to R & D. Specifically, of the surveyed manufacturing businesses, only one business in Bromsgrove had a specific R & D area, accounting for 25% of its premises. This does not mean, however, that none of the other 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

8.49 42% of the manufacturing businesses surveyed were expecting to see their businesses grow in the short-term, with only 4% expecting to see a decline. The balance were expecting their businesses to remain static (54%). In terms of employment, 42% expected to increase staff in the short-term and 4% expected employment numbers to decrease. The balance was expecting their employee numbers to remain static (54%). This is therefore the same short-term pattern for both business growth and employee numbers and shows that those expecting turnover growth also expected employment growth, with little evidence of anticipated labour productivity growth of significance.

8.50 25% of the surveyed manufacturers expected to expand their premises in the short-term. With the exception of one firm, all of those expecting to see turnover growth expected this to lead to an increased premises requirement.

8.51 The manufacturing firms expecting to have an increased space requirement were expecting to add a net 38% to the total floorspace surveyed. This takes into account two firms expecting a relatively small decrease of 3.8% of current manufacturing floorspace in the District.

8.52 Two large companies, both based in Bromsgrove, accounted for over 70% of this planned increase. The Bromsgrove area accounted for 79% of the net planned increases to manufacturing space and the Rural East area accounted for 14%. The remainder was planned in the North area. There are no planned increases to manufacturing premises in the Rural West area, although only two businesses here were surveyed and both were home-based, with no plans to move to more formal business premises.

8.53 55% of the additional floorspace is required to facilitate more efficient production and is to be used for manufacturing. 30% of the space to be used for office space and 13% for warehousing. The remainder is to be used for sub-letting.

8.54 73% of manufacturing companies felt that their building would be suitable for these changes, either as it stands or with modifications. The remainder felt that their current building would not be suitable.

8.55 Of those that felt their building would not be suitable, 31% stated that there would be suitable alternative premises in Bromsgrove District. 38% believed there would not be and the remainder did not know.

8.56 69% of manufacturing businesses expected a longer-term increase in turnover, with over 50% of these businesses expecting to realise annual growth of over 20%. 27% of businesses expected turnover to stay the same and only 4% expected a decrease.

8.57 A smaller proportion of manufacturing businesses (52%) expected employment growth in the long-term. Of these, all expected a growth in turnover and the greatest requirement was for skilled manual workers (32%) followed by process, plant and machine operatives (25%), and professional and elementary occupations (both cited by 14% of respondents).

8.58 Those companies able to quantify their space requirements were expecting to require an additional 1,440 square metres of floorspace in the longer-term. This is equivalent to a 6.8% increase on the floorspace currently occupied by respondents operating manufacturing businesses in the longer-term.

DRIVERS JONAS

Wholesale

Survey Sample

8.59 Companies engaged in wholesale activities and employing a total of 189 people were interviewed as part of the survey. 12 of these were in Bromsgrove, employing 111 people, 3 of these were in North, employing 24 people, 5 were in Rural East, employing 52 people and 1 was in Rural West, employing 2 people.

8.60 Around 57% of these were independent companies, 33% were branches or subsidiaries with the remainder being Head Office sites.

Workforce

8.61 Employment within wholesale businesses is predominantly full time, with 79% of employees employed full time and 21% part time.

8.62 54% of the workforce lived locally and 20% lived outside of Bromsgrove District. The maximum number of staff on site at any one time was 91.5% of the total employed. This implies a relatively low level of shift work as well as only a small element of delivery work.

Site Characteristics

8.63 One third of surveyed wholesale businesses owned the freehold of their premises with the remaining two thirds occupying their premises under a lease. 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 145m2 per person compared to 40m2 per person for leasehold premises.

Table 8.7: Site Density Indicators for Wholesale Premises

Area	m^2 per person		Site Density
	Total Employment	Maximum Number on Site	
Total	65.99	72.09	0.75
Bromsgrove	52.99	58.24	0.59
North	93.63	93.63	0.99
Rural East	82.96	93.78	0.96
Rural West	14.50	14.50	2.00

Source: WM Enterprise Consultants

8.64 The average site density for all wholesale establishments in Bromsgrove District is 0.75, which is significantly above the ODPM's 0.5 guidance for site density for uses of this type. A site density of 2.0 for the Rural West area is due to only one wholesale business being surveyed in this area, operating across two floors.

8.65 The number of square metres per employee is lowest in Bromsgrove compared to the other three areas of the District but is comparable to other studies WM Enterprise has completed elsewhere. The figures are representative of the wholesaling sector for which considerable space will be allocated to warehousing use with low employment density.

8.66 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 8.8: Percentage of Floorspace In Surveyed Wholesale Businesses Used for Stated Activity

Activity	Total	Bromsgrove	North	Rural East	Rural West
Office	43.3	43.3	43.7	31.6	100.0
Retail	7.9	13.8	0.0	0.0	0.0
Warehousing	35.5	27.9	56.3	48.4	0.0
R & D	0.0	0.0	0.0	0.0	0.0
Industrial	0.0	0.0	0.0	0.0	0.0
Other	12.4	13.3	33.3	20.0	0.0

Source: WM Enterprise Consultants

8.67 67% of the wholesale premises surveyed were defined as mid range, 5% as prestigious, with the remaining 28% defined as budget.

8.68 43% of those surveyed had occupied their current premises for more than 10 years, with a further 24% occupying their current premises for between 3 and 10 years. 19% had only been in their current premises for 1-2 years and 14% had been in their current premises for less than one year.

8.69 29% of the surveyed wholesale businesses had always been at their current address in the District. Of these, 83% had been there for more than 10 years. A further 24% of the surveyed wholesalers had relocated from a site elsewhere in the District to their present site, while 43% had relocated from a previous site outside of the District.

8.70 Wholesalers that had relocated into the area tended to be have been previously located within the West Midlands region and the majority had relocated into the Bromsgrove area. The key reason for relocation was business expansion, with specific locational influences being proximity to key staff, and the size of premises.

8.71 52% of wholesale premises were on one floor only and 42% were on two floors.

8.72 95% of respondents considered their current premises to be suited to their current business needs, leaving 5% whose premises were unsuited to their needs. This is a relatively high suitability rating compared to business surveys WM Enterprise has completed elsewhere.

8.73 The main problems currently faced by wholesalers in the District included market pressure (33%) and rising costs of running the business (29%). 19% of those wholesale businesses surveyed were not experiencing any current problems.

8.74 76% of wholesale businesses felt that Bromsgrove District is a good or very good place in which to do business. A further 10% rated it as average and 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.

8.75 Areas for improvement for businesses in the District were similar to those for the manufacturing businesses surveyed and related to improving the quality of the roads, accessibility for HGVs in some areas, and increasing the availability of public transport.

DRIVERS JONAS

Growth Plans

8.76 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 4.8% expected the business turnover to decrease in the short-term, a greater proportion (9.5%) expected to reduce their staffing levels. All of those expecting business growth also planned to increase their staffing levels.

8.77 14% of the wholesale businesses surveyed believed that their floorspace requirements would increase in the short-term. Of these, all were expecting their turnover to grow and staffing levels to increase.

8.78 Overall, the immediate expansion plans of the surveyed businesses would add only 13% of floorspace to the total currently occupied by them. Almost two-thirds of the additional wholesale floorspace was required by one company in Bromsgrove. In total, over 75% of this space is required for warehousing with the remainder being required for office accommodation.

8.79 All three 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.

8.80 All three of those needing additional space believed that there were no suitable alternative premises within Bromsgrove District to meet their space requirements. These responses related to a general lack of suitable alternative premises and those of a suitable size. However, two of the three businesses would prefer to remain in the area but would consider relocation.

8.81 In the longer-term, two thirds of businesses expected turnover to increase. Of these, 50% expected growth of over 20% annually. However, 14% expected a decrease and the remainder expected turnover to remain the same. This is indicative of potential for the wholesale sector in the District to decline in the longer-term, although it is difficult to predict long-term trends with any accuracy.

8.82 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. 50% of the jobs are expected to be created in administrative and sales and customer services positions.

8.83 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 an economic downturn.

8.84 Three of the wholesale businesses (14%) envisaged that their growth in the longer-term would create a need for additional space. One stated that the current building could accommodate this growth with modification but one felt that the building would not be suitable. However, both businesses felt that there is capacity in Bromsgrove District to accommodate this longer-term change. The third business did not reply.

8.85 Overall, the expanding businesses were expecting to require around a net 1,237 square metres of additional space. This equates to an additional

9.9% more than the current total wholesale floorspace occupied by the surveyed businesses.

Transport and Distribution

Survey Sample

8.86 15 businesses engaged in transport and distribution activities were interviewed as part of the survey. Together, these employed a total of 205 people. 10 of these businesses were located in Bromsgrove, employing 120 people, 2 were located in North, employing 12 people, 2 were located in Rural East, employing 60 people and 1 was located in Rural West, employing 13 people.

8.87 Two-thirds of the interviewed businesses were independent companies with just over one-quarter being branches or subsidiaries and the remaining organisation being a Head Office site.

Workforce

8.88 56% of the total workforce lived local to their place of employment, with 22% living elsewhere in the District and 22% living outside of the District.

8.89 Employment in the transport and distribution sector is predominantly full time, with just over 93% full time employees and just under 7% part time. The maximum number of staff on site at any one time was 93% of the total employed. This implies that these businesses have a relatively low level of shift work.

Site Characteristics

8.90 40% of the transport and distribution businesses interviewed operated from freehold premises with the remaining 60% operating from leasehold premises. One-third were distribution depots, 27% were office accommodation, with the remaining 40% being a mixture of office and depot sites.

8.91 Two thirds of transport and distribution businesses operated from mid-range premises and one-third from budget premises. No businesses considered their site to be prestigious.

8.92 47% of those businesses interviewed had occupied their current premises for more than 10 years with a further 40% having occupied their site for between 3 and 10 years. The remainder had occupied their site for 1-2 years.

8.93 53% of surveyed businesses had always been located at their current site, of which three-quarters had been there for more than 10 years and the remaining quarter for between 6 and 10 years.

8.94 One third of businesses had a previous location in Bromsgrove District and 13% had relocated from elsewhere. Of the two businesses that had relocated from outside the District, one required larger premises and one wanted to purchase premises rather than rent.

8.95 Site density indicators are shown in Figure 1.9 below. The total site density of 0.53 is higher than for previous surveys elsewhere, although in these cases, for example in the North West, land may have been cheaper than in Bromsgrove District. It may also be indicative of a larger proportion of covered storage space and office accommodation.

8.96 The figures for floorspace per person vary considerably between the four sub-areas surveyed. The high floorspace per person for the North area relates to a small sample for this area and a large site with a very small number of employees. It should therefore be treated with caution and the average figure for the District is far more representative.

Table 8.9: Site Density Indicators for Transport and Distribution Premises

Area	m^2 per person		Site Density
	Total Employment	Maximum Number on Site	
Total	63.94	68.62	0.53
Bromsgrove	83.88	86.78	0.59
North	59.17	206.67*	0.27
Rural East	34.35	34.35	0.94
Rural West	20.77	22.50	1.42

Source: WM Enterprise Consultants

8.97 Table 8.10 shows how the available floorspace was allocated by the surveyed companies in this sector.

Table 8.10: Percentage of Floorspace In Surveyed Transport and Distribution Businesses Used for Stated Activity

Activity	Total	Bromsgrove	Northern	Rural East	Rural West
Office	26.3	26.0	10.0	7.5	100.0
Retail	5.0	7.5	0.0	0.0	0.0
Warehousing	48.0	44.5	45.0	92.5	0.0
R & D	0.0	0.0	0.0	0.0	0.0
Industrial	6.3	9.5	0.0	0.0	0.0
Other	14.3	12.5	45.0	0.0	0.0

Source: WM Enterprise Consultants

8.98 Overall, 48% of the available floorspace was given over to warehousing activities with 26% used for offices. The balance of the space was used for retail, industrial or other activities in relatively small proportions. There are considerable variances by area but it should be noted that a small sample size may have skewed these results. For example, the low floorspace per person and high site density in the Rural West area can be attributed to one business operating in this sector but having purely office accommodation.

8.99 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 factor was the size of the available premises, which was mentioned by 33% of respondents. Ease of access to the motorway/road system was mentioned by 26% of respondents. Other factors were mentioned by 26% of respondents and included being an established business at that location and security factors.

8.100 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. Only one business stated that the site was not suited to its needs and this was due to the site being too small. In this case, the business (located in Bromsgrove) was proactively looking for a new site at present.

8.101 Only 13% of the surveyed businesses stated that they were not experiencing any particular problems. For those with problems, the main problem was market pressures, stated by 60% of businesses, and the rising cost of running the business, stated by 33% of businesses. These problems included increases in the price of fuel, tax, VAT issues and a general economic downturn.

8.102 Overall, 73.4% of respondents rated Bromsgrove District as either a good or a very good place in which to do business. Two businesses (13%) rated it as average and one business (6%) rated it as very poor. Factors contributing to positive assessments were the ease of access to the motorway network, the local infrastructure, and the quality of the rural environment.

8.103 Negative perceptions of the District related to the image and appearance of the area and internal road links to business parks.

Growth Plans

8.104 40% of respondent businesses expected their turnover to increase in the short-term while 53% expected it to stay the same. The remaining business anticipated a short-term decrease in the size of the business. Overall, one-third of those businesses surveyed expected employment to increase at the premises in the short-term and the remaining two-thirds expected it to stay the same. All but one of those businesses expecting turnover growth also expected employment to increase.

8.105 Only two (13%) of the surveyed businesses expected that they would have additional floorspace requirements as a result of the anticipated growth, both of these businesses also expected short-term growth in turnover and employment. The expectation was that this expansion would add a net 5.1% to the total transport and distribution floorspace covered by the survey.

8.106 Over three-quarters of the increased floorspace would be used for warehousing with the remainder being used for office accommodation. The businesses planning to expand were both located in the Bromsgrove area.

8.107 Three businesses (20%) did not consider that their current building is suitable for their short-term expansion plans, including both businesses that were expecting additional floorspace requirements. For all of these businesses, this related to the fact that the building is operating at capacity and there is no room to expand. Of these three businesses, one felt there would be suitable buildings in Bromsgrove District to meet their expansion requirements and two did not know.

8.108 In the longer-term, two thirds of respondents expected their turnover to grow. Half of these expected an annual rate of growth of over 20%. However, of the businesses expecting turnover growth, only half expected their employment requirements to increase over the same time period.

8.109 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. Based on estimates made by the businesses, there is an expectation for floorspace requirements of 1,425 square metres in the longer-term, an increase by 11% in the longer-term. A significant proportion of this increased requirement is due to one company's demand.

Offices

Survey Sample

8.110 A total of 70 businesses in this sector were surveyed, although six of the businesses 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.

8.111 The 64 businesses subject to analysis employed a total of 574 people. 28 of the businesses were in Bromsgrove, employing 324 people, 7 were in North, employing 63 people, 24 were in Rural East, employing 168 people and 5 were in Rural West, employing 19 people.

8.112 80% were independent companies, 17% were branches or subsidiaries and the remainder were Head Office sites.

Workforce

8.113 Approximately 57% of employees lived local to where they worked and a further 22% lived within Bromsgrove District. 17% commuted to work from outside of the District while the remainder of those interviewed were unable to provide this information. While office workers are traditionally most likely to travel longer distances to work, this does not appear to be the case in Bromsgrove District.

8.114 90% of staff covered by the survey were full-time employees and 10% were part-time. Up to 90% of the staff could be on the premises at one time.

Site Characteristics

8.115 Excluding residential properties, 28% of surveyed businesses owned the freehold of their premises compared to 58% occupying their premises under a lease. The remainder were under a licence agreement or the respondent was unable to provide a response.

Table 8.11: Site Density Indicators for Business Services Premises

Area	m^2 per person		Site Density
	Total Employment	Maximum Number on Site	
Total	24.05	26.80	0.46
Bromsgrove	24.36	28.91	0.69
North	15.41	15.66	0.24
Rural East	28.39	29.44	0.34
Rural West	8.95	9.44	0.78

Source: WM Enterprise Consultants

8.116 The average amount of floorspace per employee for this sector was 22.1m^2 (Table 8.11). The figures for floorspace per employee and site density changed by only a negligible margin if the businesses based in residential properties were also included. The least densely occupied premises were in the Rural East area although site densities were lowest in the North area. Due to the nature of this sector there is little difference between the figures for total employment and those for the maximum number of people on site at any one time.

Table 8.12: Percentage of Floorspace In Surveyed Business Services Firms Used for Stated Activity

Activity	Total	Bromsgrove	North	Rural East	Rural West
Office	84.86	78.93	92.14	86.50	100.00
Retail	1.64	2.86	0.00	1.04	0.00
Warehousing	7.27	9.82	0.00	7.92	0.00
R & D	0.39	0.00	0.00	1.04	0.00
Industrial	1.56	3.57	0.00	0.00	0.00
Other	4.27	4.82	7.86	3.46	0.00

Source: WM Enterprise Consultants

8.117 Overall, almost 85% of the available floorspace within this sector provides office accommodation. There is very little spatial variation, although in Bromsgrove, there is a higher proportion of space used for warehousing, combined with the available office accommodation. Very little space is used for research and development functions and 'Other' includes space used for meeting rooms, subletting and ancillary facilities.

8.118 Also excluding the residential properties, 14% of buildings were considered by their occupants, to be prestigious, 55% saw their buildings as mid-range whilst 26% considered their premises to be budget.

8.119 57% of respondent businesses were on a single floor, 31% on two floors, 11% on three floors and the remaining 1% on four or more floors. Businesses operating on a single storey were not necessarily in a single storey building. For this reason, the apparent site density figures for the area, at 0.4, needs to be treated with caution.

8.120 21% of the surveyed businesses in this sector had been working from their current address for more than ten years and a further 45% had been doing so for 3 to 10 years. 26% of businesses had been operating from their current address for 1 to 2 years while only 8% had been at their current location for less than 1 year.

8.121 Of the 8% of businesses trading at their current address for less than one year, 40% were relocations from within the District and 60% new businesses.

8.122 Those businesses trading from their current address for between one and two years showed a slightly different pattern. Specifically, 18% were start-ups, while approximately 40% had relocated from elsewhere in Bromsgrove District and 40% had relocated from elsewhere in the West Midlands.

8.123 Overall, 40% of the businesses surveyed had always been at their present address, 20% had relocated within Bromsgrove District, and 35% were relocations into the District.

8.124 Relocations within the District were predominantly for reasons of expansion, cost and proximity to key staff and customers. There is no evidence that this is related to business start-ups moving from home into formal business premises.

8.125 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 Rubery (20.5%), Birmingham (23.1%), elsewhere in Worcestershire (20.5%), Warwickshire (10.3%) and sites elsewhere in the West Midlands (12.8%).

8.126 For 46% of businesses, proximity to where key staff lived was the major factor in selecting a location. 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 quality of premises (18.5%), size of premises (18.5%), proximity to customers (16.9%) and cost of premises (15.4%).

8.127 8% of the respondents considered that their current premises were not suited to their current needs. In all cases the reason given for this was that current premises are too small to accommodate expansion and/or diversification of the business.

8.128 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 26% of the businesses surveyed. 10.8% mentioned existing site constraints as being a problem. Other problems were mentioned by 17% of respondents and included issues such as cashflow and parking.

8.129 In general, the surveyed businesses rated Bromsgrove District as a good location in which to base their businesses. Specifically, 59% rated it as good or very good as against 12% that rated it poor or very poor.

Growth Plans

8.130 48% of the surveyed businesses expected to see turnover increase in the short-term. Of these, 94% expected to recruit additional staff, whilst the remainder expected to be able to cope with their existing staff complement.

8.131 Only one of the surveyed businesses expected to see a reduction in turnover and it was perceived by the respondent that this will result in decreased employment due to the fact the business is being sold.

8.132 Overall, 28% of businesses surveyed expected to have an increased floorspace requirement. 55% of those businesses expected to recruit additional staff. In the short-term, an additional 6,467m^2 of floorspace is required. This amounts to around an additional 47% of the current floorspace for this sector covered by the survey. If these types of firm operating out of residential premises are taken into account, the extra floorspace required is marginally higher.

8.133 Two-thirds (67%) of this additional space is expected to be office space with a further 20% being required for warehousing and 12% for sub-letting.

8.134 Including those businesses currently operating from residential premises, 63% of those with expansion plans believed that these could be readily satisfied within their current building or through modifying it. 29% of businesses felt this could not be accommodated within their current premises. This was generally due to a lack of available space in which to expand or the space being unsuitable to do so.

8.135 Of those businesses for which the current building is unsuitable for this expansion, 47% believed there would be suitable alternative premises within Bromsgrove District, 35% did not think the District could meet their needs, and the remaining 18% did not know.

8.136 This shows that whereas some businesses consider there to be an adequate stock of office premises in the District, others take a contrary view. It was stated that there is not enough support for the development of premises by the Council and that Redditch is a better option.

8.137 79% of the surveyed businesses expected to see their turnover increase in the longer term, with only 4% expecting their turnover to decrease. More than half of those businesses expecting turnover growth expected a rate of growth in excess of 20% per annum.

8.138 A lower proportion of respondents (64%) expected to increase their staff numbers over the longer term. 22% of those expecting a longer-term increase in turnover were however expecting to achieve this without any increases to their current staffing levels.

8.139 Those companies able to quantify their longer-term requirements were expecting to require an additional 5,489m^2 of floorspace. This equates to a 39% increase on the floorspace currently occupied by all respondents operating businesses in this sector.

8.140 Only 24% of businesses felt that their current premises are suitable for their longer-term expansion plans compared to 60% that did not. However, a more positive finding is that nearly two-thirds of the businesses with longer-term expansion plans felt that there is adequate space in the District to meet these needs.

Construction

Survey Sample

8.141 A total of 43 businesses operating in the construction sector were surveyed, although 5 of these were based at residential properties and have therefore been excluded from the analysis where appropriate.

8.142 The 38 businesses subject to the analysis employed a total of 402 people. 19 of these were in Bromsgrove, employing 176 people, 10 were in North, employing 149 people, 5 were in Rural East, employing 44 people and 4 were in Rural West, employing 33 people.

8.143 90% were independent companies, 7% were branch or subsidiaries and the remainder were Head Office sites.

Workforce

8.144 Approximately 45% of those working in the construction sector lived local to where they worked and 25% lived within Bromsgrove District. 24% of employees in the sector lived outside of the District and the remainder of respondents could not provide this information.

8.145 93% of construction staff were employed on a full-time basis with 7% on a part-time basis. Up to 90% of the staff employed could be on the premises at any one time.

Site Characteristics

8.146 34% of surveyed businesses owned the freehold of their premises with 58% occupying their premises under a lease. The remainder had other arrangements or the respondent did not know.

8.147 53% of premises were described as being predominantly offices and 40% as mixed use. The remainder was split between factory and production facilities and distribution depots. 13% described the premises as prestigious, 76% as mid-range, and 11% as budget accommodation.

Table 8.13: Site Density Indicators for Construction Premises

Area	m^2 per person		
	Total Employment	Maximum Number on Site	Site Density
Total	25.11	27.06	0.55
Bromsgrove	35.16	38.92	0.86
North	12.78	13.50	0.33
Rural East	30.59	32.83	0.30
Rural West	19.85	20.47	0.68

Source: WM Enterprise Consultants

8.148 The amount of floorspace per person was relatively high for this sector compared to other studies that WM Enterprise has completed elsewhere (Figure 1.13). Specifically, the floorspace per person was 25.1 m^2. Including the residential premises, the floorspace per person rose only slightly to 25.9 m^2.

8.149 The construction industry is different from other sectors as the majority of time is spent on other peoples' properties. For this reason, there is a small difference between floorspace per person (25.1m^2) and the floorspace for the maximum number of employees on site at any one time (27.1m^2). However, this difference is not as pronounced as WM Enterprise has found elsewhere and this is likely to relate to the characteristics of the firms interviewed.

Table 8.14: Percentage of Floorspace In Surveyed Construction Firms Used for Stated Activity

Activity	Total	Bromsgrove	North	Rural East	Rural West
Office	67.58	62.53	75.50	45.00	100.00
Retail	0.53	0.00	2.00	0.00	0.00
Warehousing	25.42	34.79	20.00	21.00	0.00
R & D	0.00	0.00	0.00	0.00	0.00
Industrial	4.47	0.00	0.00	34.00	0.00
Other	1.97	2.63	2.50	0.00	0.00

Source: WM Enterprise Consultants

8.150 Table 8.14 shows the floorspace allocated to different activities in the sector and provides some explanation for the floorspace per person figures. It shows that two-thirds of the space available is used for offices and is therefore indicative of the construction sector premises in the District being administration sites for their companies. It is also evident that a number of firms are classified as being within the construction sector but undertake a range of activities, including supply of equipment to the sector and its servicing, property development companies, or trade sales for building materials.

8.151 21% of the businesses had been at their present address for more than ten years, with a further 21% having been at their present address for between six and ten years. 13% of businesses had been at their current address for less than one year and 18% for 1 to 2 years.

8.152 Those businesses that operated out of residential properties had been operating from that address for varied lengths of time. All had always operated from that address, with the exception of one that had relocated to their present address from outside Bromsgrove District. There is no evidence to suggest that home-based businesses in this sector are comprised of start-ups, with many entrepreneurs choosing to run their businesses from their homes rather than from more formal business premises.

8.153 Overall, 35% of businesses had always operated from their current address, 33% had a previous address within Bromsgrove District and 30% had relocated from a previous address elsewhere.

8.154 Of those businesses that had relocated within the District, key reasons for this were mainly related to the need for expansion into larger premises. Those who had relocated into Bromsgrove District from elsewhere had done so for a number of reasons, including expansion, security issues in their previous location and proximity to key staff.

8.155 For 51% of businesses, proximity to where key staff lived was the major factor in selecting a location. As for the other sectors, 26% cited the ease of access to the motorway as a reason for their location. Other important factors included the size of premises (21%), cost of premises (19%) and quality of premises (14%). Other factors were stated by 16% of respondents and included the availability of space to expand for three businesses and security.

8.156 Only 7% of respondents considered that their premises are not suited to their current needs. Of these three businesses, all had been based at their current premises for longer than three years and none was based at a residential property. The reason given for this perception was exclusively related to the need for space in which to expand.

8.157 Overall, 40% of construction businesses surveyed stated that there are no problems currently affecting their business. Of those businesses experiencing problems, 21% cited market pressure, which was the main issue across all business sectors. 9.3% of businesses mentioned both parking problems and road traffic congestion.

8.158 The construction industry in general has a skill shortage, and this was a major problem for 7% of the businesses surveyed compared to only 3.5% of all the businesses surveyed. This is indicative of a higher than average skills shortage in the sector in Bromsgrove District.

8.159 In general, the construction businesses surveyed viewed Bromsgrove District as a good place in which to base their businesses, with 67% of those who replied stating, overall, that it was a good or very good place in which to do business. Only 9.3% rated the District as a poor area in which to base a business, with the remainder rating it as average.

Growth Plans

8.160 One-third of all construction sector businesses expected to expand in terms of turnover in the short-term and two-thirds expected it to stay the same. No businesses expected turnover to decrease in the short-term, which is a positive finding for the sector.

8.161 In comparison, only 23% of the businesses surveyed were anticipating increasing their staff numbers in the short-term. All of those anticipating a growth in turnover in the short-term also expected growth in their staff numbers to accompany this.

8.162 19% of the businesses that were surveyed were expecting to need additional floorspace. Only one business expected a decrease in its floorspace requirement and 79% did not anticipate any need to expand premises.

8.163 Businesses expecting a requirement for more floorspace were almost exclusively anticipating a growth in turnover and in employment numbers. The only exception was one that anticipated increased turnover but had no plans to increase staffing numbers. However, in a number of cases, employment growth and business growth was wholly dependent on the business's ability to expand premises.

8.164 The short-term additional floorspace requirement was 3,344 square metres, around 31% of the total construction floorspace surveyed. There was no difference if businesses operating from residential premises were included, which suggests that there is little demand from these home-based companies to move into formal business premises.

8.165 58% of the expected increased floorspace was to be office space and 42% warehouse/storage space.

8.166 84% of businesses considered that their existing premises were suitable to meet their shorter-term expansion plans either through the existing building or by modifications to it.

8.167 For those that felt that their existing premises were incapable of accommodating their expansion plans, one-third (33) felt that there would be suitable buildings in the District, 16% did not, and 25% did not know. However, for both businesses that did not feel that there are suitable buildings in the District, there was a preference to remain within it if possible.

8.168 61% of the surveyed businesses were anticipating longer-term growth as against 2.3% (one business) that was forecasting a decline. Longer-term Increases in employment were forecast by 47% of businesses overall, and all of those forecasting turnover growth. Anticipated requirements were for skilled manual labourers (stated by 43% of businesses planning to increase employment), elementary occupations (29%) and professional positions (29%).

8.169 Only three businesses (7%) were anticipating an increased floorspace requirement in the longer-term. The expected growth from those companies that gave figures indicated an increase of around 574m^2 or 5.4% of the surveyed current floorspace figure for this sector.

9. Conclusions and Recommendations

9.1 This section of the report sets out a summary of key findings and recommendations.

Forecast Employment Land Requirements

Small Area Forecasting Model

9.2 Chapter 7 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.

9.3 All forecasting models are extremely data hungry. Unfortunately, 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 7 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.

9.4 In simplistic terms, the base forecast is derived through applying site density information obtained through the business survey (and reflected in Tables 7.11 to 7.14 in Chapter 7). The high forecast uses (national) site density ratios as identified by the ODPM.

Table 9.1: Minimum Forecast Employment Land Requirements for Bromsgrove District (2008 – 2026)

Forecast	Office	Manu.	W&D	Total
Base Forecast	+7.6 ha	-3.4 ha	+1.8 ha	+6.0 ha
High Pop. Growth Forecast	+10.6 ha	-3.4 ha	+2.8 ha	+10.0 ha
Labour Productivity Change Forecast	+7.6 ha	-3.0 ha	+1.8 ha	+6.4 ha

9.5 In the Bromsgrove District there is an approximate 4 hectare difference between the base forecast and the population growth forecast, with the latter forecast assuming a high requirement for office and warehousing space.

9.6 As noted above, the forecasts represent the absolute minimum amount of land needed to accommodate the sectors' activities. This is because the figures 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.

9.7 On this basis, it is important that future provision substantially exceeds the total requirements in the above tables to robustly meet forecast change in addition to any identified demand considerations.

9.8 With specific regard to the forecast reduction 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 study period but due to the nature of modern automated manufacturing moving towards being less employee intensive, this ratio could change in the future. As such there needs to be flexibility in the amount of land available. Forecast decline in terms of space may therefore be larger than actual real reductions in needs as in some cases space requirements could remain the same but employee requirements decline. Thus, it will be important to plan positively for future manufacturing by ensuring that anticipated labour productivity gains are taken into account when allocating employment land.

Planning Policies and Strategies

National Level and Regional

9.9 At the National and Regional level, a number of key economic and planning strategy objectives can be summarised as follows:

Economic Strategy Objectives

- Diversifying and modernising the economy through Rural and Urban renaissance to ensure that major urban areas can meet their own economic and social needs and that rural areas can effectively deal with the changes to their traditional roles;
- Creating a diverse and dynamic business base which enables the region to become a global centre;
- Focusing on knowledge assets including high technology corridors; and
- Focusing resources in market towns and locations facing economic change.

Planning Policy Objectives

- Maximise the use of Brownfield land and promote economy in use of land, including through the restoration of derelict and neglected land and buildings. Promote the modernisation and diversification of older manufacturing industry and their premises;
- Adopt a sequential approach to meeting development needs to reduce the need to travel, particularly for uses which generate travel demand. For offices, this includes directing development within or adjoining main city, town or district centres and near to public transport interchanges in urban areas;
- Plan for warehousing and distribution uses to avoid the unnecessary movement of goods by road, also taking into account of the need for proximity of labour supply, access by road, rail and ports / airports and for sites to be of a sufficient scale to allow for flexible development and expansion; and
- Ability to accommodate mixed use development.

9.10 Draft PPS4 was published for public consultation in December 2007. Draft PPS4 includes a number of potentially significant policy changes relating to employment development, including:

- A flexible approach to the supply and use of land though planning polices to ensure increased competition and enterprise, enhanced skills and innovation, increased job opportunities and greater investment;
- Avoiding the designation of sites for single or restricted use classes wherever possible; and

- Local authorities should take a constructive approach to changes of use where there is no likelihood for demonstrable harm.

Sub Regional and Local

- Development will be focussed within the urban area of Bromsgrove, with only limited development to take place in the Green Belt;
- 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;
- Seek to focus on attracting higher paid, small scale and new businesses into main settlements, whilst existing sites will be re-used and developed;
- Seek to create sustainable, high quality built environments with open spaces and green corridors to create mixed use places in Longbridge; 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 White, Young & Green study.

Overview of Market Demand

9.11 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 Hagley Road, or by rail. 42% of available industrial accommodation in the district is located in the Bromsgrove sub area, and 80% of office accommodation.

9.12 Within the district as a whole, 7.7% of the total built office stock is currently vacant. The figure lies at 3.4% of industrial (manufacturing and warehouse) built stock (ONS statistics).

9.13 Primarily, within the Bromsgrove sub area, the strength of demand lies in industrial premises, demonstrated by a low vacancy rate of 5.75%, (albeit higher than the district as a whole). There are few premises available above 5,000 sq ft, which could restrict opportunities for some sectors.

9.14 The remainder of the district has very few premises, of either industrial or office accommodation, currently available and it is likely that the majority of premises are of such small size that these opportunities are not widely advertised.

9.15 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.

9.16 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.

9.17 Bromsgrove is not an established office location, catering primarily for small, local occupiers, and the vacancy rate in the sub area is 22.5%.

9.18 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.

9.19 Market conditions have been slowing over recent months, a result of the well documented credit crunch. Many businesses are currently holding back on moving premises and incurring additional costs until the market stabilises.

9.20 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

9.21 The main conclusions that can be drawn from the findings from the employer survey are:

- Bromsgrove District is considered generally to be a good place in which to do business. The main drivers of this are the effectiveness, quality and space of premises, the local environment for staff and customers and IT infrastructure.
- The main disadvantages of the area for business are access by public transport and the affordability of housing. Business rates are a common complaint in this type of survey and should not be taken as a problem exclusive to 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.
- Businesses operating across all sectors have tended to relocate into Bromsgrove District from elsewhere with the biggest locational decision-making factors being related to proximity to key staff, access to the motorway network and the cost and size of premises available. This is a positive finding in terms of retention of existing firms and attracting new ones into the District.
- 41% of businesses plan to expand, 38% plan to increase staff numbers and 22% will require increased floorspace to meet these requirements. Evidence suggests that the majority of businesses would prefer to stay operating within the District but there may not be suitable buildings to meet these requirements. A number of businesses stated that their site has no capacity to accommodate expansion.
- Site densities in the District are relatively high and in some cases over ODPM guidelines, especially in the case of wholesale/warehousing uses. This is supported by the fact that a common problem for businesses was a lack of expansion space.
- A considerable proportion of floorspace in the District is used for office accommodation, even within firms operating in the construction and wholesale sectors, for example. This suggests that these companies are administration centres for wider activities.
- There is an overall short-term requirement for a net increase in floorspace in the District of around 29% according to the survey findings. Around half of this increase is required for office use and the greatest increases are required in the Bromsgrove area.

Overview of Supply

9.22 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 9.5** 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 9.1**.

Table 9.5: 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 9.1: Broad Extent and Location of Study Sub Areas

9.23 **Table 9.7** provides an overview of vacant land across the Bromsgrove District (potentially) available for employment development, arising from extant planning permissions and local plan allocations 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 9.6**:

Table 9.6: 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 Development Plan	Chapter 4 (Table 4.5)
Local Plan Commitments	Local Plan employment allocations with extant planning permission or with development under construction at the time of the study for B1, B2 and / or B8 uses	Chapter 4 (Table 4.6)
Other Commitments	Land and buildings outside of employment allocations with extant planning permission at the time of the study for B1, B2 and / or B8 uses	Chapter 4 (Table 4.7)
Commitments under Construction	Land and buildings with development under construction at the time of the study for B1, B2 and/ or B8 uses	Chapter 4 (Table 4.8)
Pending Losses	Land allocated for B Class employment use but with planning permission or with development under construction for alternative forms of development; or extant planning permissions or development under construction at the time of the study which would result in the loss of an existing employment use or premises.	Chapter 4 (Table 4.10)
Commitments (Net)	Employment allocations and other land with extant planning permission or under construction for B1, B2 and / or B8 uses (i.e. Gains) minus Pending Losses	-
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 4 (Table 4.9)

Table 9.7: 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	Aston Fields Industrial and Trading Estate	G	Immediate - Short	0.7	0.4	0.3	0
	Bromsgrove (BROM 8A) Land at Buntsford Hill Phase 3/ Buntsfordgate	G	Immediate - Short	0.73 (plus 2.47 ha under construction)	0.2	0.23	0.3
	Sugarbrook Mill (now under construction)	M	Immediate to Short	1.06	0.16	0.7	0.2
	Bromsgrove Technology Park	B	Immediate - Short	2.3 (plus 8.95 ha under construction)	0.7	1.6	0
North	Cofton Hackett	G	Immediate – Short	4.9	0.8	2.4	1.7
Rural East	Wythall Green Business Park	G	Immediate - Short	6.5	6.5	0	0
	Ravensbank Business Park	G	Immediate - Short	4.18	1.0	2	1.18
	Saxon and Harris Business Parks	G	Short – Medium Term	1.8 (allocated without permission) 1.68 (allocated with permission)	0.3 0.33	0.9 0.7	0.6 0.65

Table 9.8: Overview of Vacant Employment Land Availability within Bromsgrove District (Other Qualitative Assessment Sites)

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 (HAG 2B)	M	Medium – Long Term	9.1	1.52	4.55	3.03
	Wildmoor Farm	M	Immediate – Short Term	0.76	0.3	0.46	0
Bromsgrove	Bromsgrove ADR (BROM 5B) – Land to the north of Perryfields Road	G	Medium –Long Term	15.8	2.63	7.90	5.27
	Lower Shepley Farm	P	Short – Medium Term	0.2	0	0.2	0
North	–	–	–	–	–	–	–
Rural East	Ravensbank ADR	G	Medium – Long Term	10.3	1.72	5.15	3.43
	High House Farm	M	Immediate – Short Term	0.49	0	0.49	0

Bromsgrove District Overall

Existing Stock

9.24 Within Bromsgrove District as a whole, the District has a total of almost 500,000 sq m of built employment floorspace. This is broadly split across the three main sectors but with floorspace within the manufacturing sector [use classes B1(b), B1 (c) and B2] being most pronounced, accounting for 42% of the total as illustrated in **Table 9.9** below.

Table 9.9: Existing Floorspace by Sector in Bromsgrove District

Office A2 and B1 (a)	Manufacturing/ Industrial B1 (b), B1 (c) and B2	Warehouse & Distribution B8
120,000 sq.m. (24%)	210,000 sq.m. (42%)	166,000 sq.m. (34%)

9.25 Based on information collected by the ONS, as at 2004/05, the average vacancy rate for the types of employment premises included in the above table was 8%, which was lower than the equivalent average vacancy rate for the West Midlands and for England as a whole. Our assessment of vacancies (as at mid 2008) shows a lower vacancy rate for Bromsgrove of 4.5%. Although the vacancy rate has likely fallen slightly since 2004/05, it is also likely that our figure does not capture all vacant premises such as those which are not actively marketed through main stream commercial agents.

Employment Land Supply

9.26 Gross employment land supply within Bromsgrove District equates to just under 79 hectares. However, this figure includes Areas of Development Restraint (which are currently not available for development) and also existing commitments at Ravensbank Business Park (which are intended to meet the employment development needs of Redditch). Excluding the contribution made by these sources, available net supply serving Bromsgrove District as a whole is approximately 39 hectares.

9.27 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 supply is made up of land within Local Plan allocations with planning permission and also development which is under construction. Taking development under construction out of the assessment of supply, net land supply in the District would decrease to 25.7 hectares.

9.28 Committed developments outside of allocated sites which is yet to start construction (i.e. unimplemented 'windfall' sites) makes up less than 2.5 hectares of current supply.

Table 9.10: Bromsgrove District – Overview of Employment Land Supply

Supply Component	Office (B1a) m² [hectares]	Manu. (B1b,c & B2) m² [hectares]	Warehousing (B8) m² [hectares]
Employment Allocations	1200 [0.3]	3600 [0.9]	3000 [0.6]
Local Plan Commitments (Gains – not started)	36407 [10.09]	30577 [8.13]	19585 [4.36]
Other Commitments (Gains – not started)	4200 [1.07]	4520 [1.42]	0 [0]
Commitments (Gains – under construction)	15400 [3.85]	33050 [8.34]	6750 [1.35]
Commitments – Ravensbank BP	3000 [1.0]	6000 [2.0]	4535 [1.18]
Pending Losses	-305 [-0.1]	-3000 [-0.92]	-325 [-0.14]
Commitments (Net)	58702 [15.91]	71147 [18.97]	30545 [6.57]
Commitments (Net) – also excluding Ravensbank BP	55702 [14.91]	65147 [16.97]	26010 [5.57]
Other QA Sites (1)	23467 [5.87]	70400 [17.6]	58667 [11.73]
Total	83369 [22.08]	145147 [37.47]	92212 [19.08]
Total (excl other QA sites)	59902 [16.21]	74747 [19.87]	33545 [7.35]
Total (excl Ravensbank & other QA sites)	56902 [15.21]	68747 [17.87]	29010 [6.17]

(1): Other QA Sites include Areas of Development Restraint assessed as part of this study

Rural West Sub Area

Existing Stock

9.29 Along with the North sub area, the Rural West sub area was the smallest area assessed in terms of the amount of existing built floorspace, providing just 42,000 sq m of floorspace or just over 8% of overall built stock in the District.

9.30 Vacancies are also very limited in this sub area, with no available industrial / warehousing premises identified.

Employment Land Supply

9.31 The Rural West sub area only provides 1.69 hectares of employment land supply, predominantly made up of small commitments outside of allocated employment sites including Nash Works and Hagley Mews.

9.32 This is the smallest sub area in terms of its contribution to employment land supply, accounting for less than 5% of the District's net supply of employment land. If considering the Hagley ADR located within this sub area, supply would increase up to 10.79 hectares.

Table 9.11: Rural West Sub Area – Overview of Employment Land Supply

Supply Component	Office (B1a) m² [hectares]	Manu. (B1b,c & B2) m² [hectares]	Warehousing (B8) m² [hectares]
Employment Allocations	0 [0]	0 [0]	0 [0]
Local Plan Commitments (Gains – not started)	0 [0]	0 [0]	0 [0]
Other Commitments (Gains – not started)	2200 [0.55]	2950 [0.73]	0 [0]
Commitments (Gains – under construction)	0 [0]	3000 [0.76]	0 [0]
Pending Losses	0 [0]	-1400 [-0.35]	0 [0]
Commitments (Net)	2200 [0.55]	4550 [1.14]	0 [0]
Other QA Sites (1)	6067 [1.52]	18200 [4.55]	15167 [3.03]
Total	8267 [2.07]	22750 [5.69]	15167 [3.03]
Total (excl other QA sites)	2200 [0.55]	4550 [1.14]	0 [0]

(1): Other QA Sites include Areas of Development Restraint assessed as part of this study

Bromsgrove Sub Area

Existing Stock

9.33 The Bromsgrove sub area has an existing employment floorspace of 127,500 sq m, which accounts for just over one quarter of the District's total. In line with the trend for the District overall, the split between sectors is relatively broadly split but with a slight bias towards manufacturing, followed by warehousing. Office space is more limited in comparison although it still makes up a relatively significant component of existing floorspace providing approximately 26% of the total for the Bromsgrove sub area.

9.34 The total amount of available accommodation in the Bromsgrove sub area equates to 58% of all available floorspace in the District. This level is therefore significant, particularly in terms of available office supply, which accounts for 80% of vacant office accommodation across the District.

Employment Land Supply

9.35 Net employment land supply within the Bromsgrove Sub Area is approximately 17 hectares. About two thirds of this supply is made up of development under construction, most notably development of the Bromsgrove Technology Park (the former Garringtons / UEF works site). Other supply comes from a range of unimplemented Local Plan commitments which cumulatively provide a little in excess of 5 hectares. The contribution in the sub area from committed windfall development is small at 0.72 hectares.

9.36 The assessed Area of Development Restraint within this sub area [Land at Perryfields (BROM5B)] could add a further 16 hectares to current supply.

Table 9.12: Bromsgrove Sub Area – Overview of Employment Land Supply

Supply Component	Office (B1a) m² [hectares]	Manu. (B1b,c & B2) m² [hectares]	Warehousing (B8) m² [hectares]
Employment Allocations	0 [0]	0 [0]	0 [0]
Local Plan Commitments (Gains – not started)	5957 [1.46]	11777 [3.03]	4440 [0.83]
Other Commitments (Gains – not started)	2000 [0.52]	800 [0.2]	0 [0]
Commitments (Gains – under construction)	14000 [3.5]	27400 [6.92]	5000 [1.0]
Pending Losses	-305 [-0.1]	-1275 [-0.43]	0 [0]
Commitments (Net)	21652 [5.38]	38702 [9.72]	9440 [1.83]
Other QA Sites (1)	10533 [2.63]	31600 [7.9]	26333 [5.27]
Total	32,185 [8.01]	70,302 [17.62]	35,773 [7.1]
Total (excl other QA sites)	21652 [5.38]	38702 [9.72]	9440 [1.83]

(1): Other QA Sites include Areas of Development Restraint assessed as part of this study

North Sub Area

Existing Stock

9.37 The North sub area is the smallest sub area assessed, providing just under 7% of Bromsgrove District's existing employment floorspace. Unlike other sub areas, manufacturing floorspace makes the least contribution to overall stock, accounting for only 16% of total floorspace in the North sub area.

9.38 Vacant premises are also limited in this sub area, with only 2 relatively small industrial premises and no available office accommodation identified.

Employment Land Supply

9.39 The North sub area provides approximately 5 hectares of employment land supply, made up exclusively of land at the Cofton Centre at Grovely Lane. A proportion of this site, which is owned by St Modwen, has recently been developed although outline planning permission exists to provide in the region of 20,900 sq m of employment floorspace over the remaining 4.9 hectares of the site.

9.40 This sub area also includes the vacant former Longbridge East Works site extending to approximately 16 hectares. This is allocated for employment in the Bromsgrove District Local Plan although this area is now identified for residential development in the Longbridge Action Area Plan and as such, it is not included as forming part of employment land supply for the purposes of this study.

Table 9.13: North Sub Area – Overview of Employment Land Supply

Supply Component	Office (B1a) m² [hectares]	Manu. (B1b,c & B2) m² [hectares]	Warehousing (B8) m² [hectares]
Employment Allocations	0 [0]	0 [0]	0 [0]
Local Plan Commitments (Gains – not started)	3500 [0.8]	10000 [2.4]	7400 [1.7]
Other Commitments (Gains – not started)	0 [0]	0 [0]	0 [0]
Commitments (Gains – under construction)	0 [0]	0 [0]	0 [0]
Pending Losses	0 [0]	0 [0]	0 [0]
Commitments (Net)	3500 [0.8]	10000 [2.4]	7400 [1.7]
Other QA Sites (1)	0 [0]	0 [0]	0 [0]
Total	3500 [0.8]	10000 [2.4]	7400 [1.7]
Total (excl other QA sites)	3500 [0.8]	10000 [2.4]	7400 [1.7]

(1): Other QA Sites include Areas of Development Restraint assessed as part of this study

Rural East Sub Area

Existing Stock

9.41 The Rural East sub area is the largest of all sub areas, providing 292,000 sq m of floorspace, which represents 59% of all existing floorspace in Bromsgrove District. Its contribution in terms of the level of built stock is substantial across all sectors.

9.42 At the time of assessment, a total of 28 vacant premises were identified in this sub area. This included a number of relatively small office premises (all less than 500 sq m) and industrial / warehousing premises concentrated mainly between 100 sq m and 2,000 sq m.

Employment Land Supply

9.43 Excluding Areas of Development Restraint and also commitments at Ravensbank Business Park, total net employment land supply in the Rural East sub area is around 16 hectares. If also taking into account available land at Ravensbank Business Park, total supply increases to 20 hectares. Additionally, the Ravensbank ADR (BE3) within this sub area could increase supply by a further 10.3 hectares.

9.44 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. As with many other sub areas, the contribution to supply from unimplemented 'windfall' sites is minimal.

Table 9.14: Rural East Sub Area – Overview of Employment Land Supply

Supply Component	Office (B1a) m² [hectares]	Manu. (B1b,c & B2) m² [hectares]	Warehousing (B8) m² [hectares]
Employment Allocations	1200 [0.3]	3600 [0.9]	3000 [0.6]
Local Plan Commitments (Gains – not started)	26950 [7.83]	8800 [2.7]	7785 [1.83]
Other Commitments (Gains – not started)	0 [0]	770 [0.49]	0 [0]
Commitments (Gains – under construction)	1400 [0.35]	2650 [0.66]	1750 [0.35]
Commitments – Ravensbank BP	3000 [1.0]	6000 [2.0]	4535 [1.18]
Pending Losses	0 [0]	-325 [-0.14]	-325 [-0.14]
Commitments (Net)	31350 [9.18]	17895 [5.71]	13745 [3.22]
Commitments (Net) – also excluding Ravensbank BP	28350 [8.18]	11895 [3.71]	9210 [2.04]
Other QA Sites (1)	6867 [1.72]	20600 [5.15]	17167 [3.43]
Total	39417 [11.02]	42095 [11.76]	33912 [7.25]
Total (excl other QA sites)	32550 [9.48]	21495 [6.61]	16745 [3.82]
Total (excl Ravensbank & other QA sites)	29550 [8.48]	15495 [4.61]	12210 [2.46]

(1): Other QA Sites include Areas of Development Restraint assessed as part of this study

Conclusions and Recommendations

Headline Conclusions and Recommendations

9.45 The overarching headline conclusions are:

- 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. 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)]. Also, the supply of land likely to be available for offices and warehousing appears more restricted by comparison to manufacturing (which as a sector is predicted to decline slightly in the amount of land it occupies over the study period).
- Projecting past completion rates forward provides a very different picture of requirements. Using this approach suggests a significant shortfall in employment land supply for the District over the period to 2026, 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;
- Supply across the District is not always evenly distributed and there are particularly limited levels of available land supply in the Rural West and North sub

areas. Office supply in certain central urban areas, including Bromsgrove, would benefit from increased provision.

9.46 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 any 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'); and
- Consideration should be given to enhancing the supply of land for offices and warehousing 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.

Quantitative Supply Versus Forecast Requirements

9.47 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 2026. Supply totals against different employment forecasts are reproduced in **Tables 9.15 and 9.16** below.

Table 9.15: Bromsgrove District: Total Supply versus Forecast Requirements to 2026 (Base Forecast)

	Office (B1a)	Manu. (B1b,c & B2)	Warehousing (B8)	Total (B1 to B8)
A. Total Employment Land Supply (excluding 'Other QA' sites) (1)	16.21 ha	19.87 ha	7.35 ha	43.4 ha
B. Total Employment Land Supply (excluding 'Other QA' sites and Ravensbank sites) (1)	15.21 ha	17.87 ha	6.17 ha	39.3 ha
C. Base Forecast Requirement 2008 – 2026 (2)	7.6 ha	-3.4 ha	1.8 ha	6.0 ha
Surplus or Deficit (based on Gross Total ELS) (i.e. A minus C)	8.61 ha	23.27 ha	5.55 ha	37.4 ha
Surplus or Deficit (based on Net Total ELS) (i.e. B minus C)	7.61 ha	21.37 ha	4.37 ha	33.3 ha

(1) Figures total corresponding rows in Table 9.10
(2) Figures extracted from Table 9.1 (base forecast)

Table 9.16: Bromsgrove District: Total Supply versus Forecast Requirements to 2026 (High Population Forecast)

	Office (B1a)	Manu. (B1b,c & B2)	Warehousing (B8)	Total (B1 to B8)
A. Total Employment Land Supply (excluding 'Other QA' sites) (1)	16.21 ha	19.87 ha	7.35 ha	43.4 ha
B. Total Employment Land Supply (excluding 'Other QA' sites and Ravensbank sites) (1)	15.21 ha	17.87 ha	6.17 ha	39.3 ha
C. High Population Forecast Requirement 2008 – 2026 (2)	10.6 ha	-3.4 ha	2.8 ha	10.0 ha
Surplus or Deficit (based on	5.61 ha	23.27 ha	4.55 ha	33.4 ha

	Office (B1a)	Manu. (B1b,c & B2)	Warehousing (B8)	Total (B1 to B8)
Gross Total ELS) (i.e. A minus C)				
Surplus or Deficit (based on Net Total ELS) (i.e. B minus C)	4.61 ha	21.37 ha	3.37 ha	29.3 ha

(1) Figures total corresponding rows in Table 9.10
(2) Figures extracted from Table 9.1 (high population forecast)

9.48 The snapshot of quantitative supply included in the above tables 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. 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.

9.49 It is important to plan for new manufacturing development even though as a sector it is forecast to decline. There will still continue to be requirements for new manufacturing development and decline will also likely vary across the study area. It will still be necessary to maintain an appropriate supply of land to accommodate change in industrial requirements and new development.

9.50 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 sector over the period to 2026. 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

9.51 **Table 9.17** 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 9.17: Employment Land Supply versus Past Completion Rates

<table>
<tr><th></th><th>Rural West Sub Area</th><th>North Sub Area</th><th>Bromsgrove Sub Area</th><th>Rural East Sub Area</th><th>Bromsgrove District</th></tr>
<tr><td>A. Total Employment Land Supply (excluding 'Other QA' sites) (1)</td><td rowspan="2">1.69 ha</td><td rowspan="2">4.9 ha</td><td rowspan="2">16.93 ha</td><td>19.91</td><td>43.3 ha</td></tr>
<tr><td>B. Total Employment Land Supply (excluding 'Other QA' sites <u>and</u> Ravensbank sites) (1)</td><td>15.55 ha</td><td>39.3 ha</td></tr>
<tr><td>C. Previous completion rate per annum (2000/01 – 2006/07) (<u>including</u> Ravensbank) (2)</td><td rowspan="2">0.14 ha</td><td rowspan="2">0.06 ha</td><td rowspan="2">0.78 ha</td><td>4.65 ha</td><td>5.6 ha</td></tr>
<tr><td>D. Previous completion rate per annum (2000/01 – 2006/07) (<u>excluding</u> Ravensbank) (2)</td><td>2.0 ha</td><td>2.98 ha</td></tr>
<tr><td>E. Need 2008 – 2026 (<u>including</u> Ravensbank) (3)</td><td>2.66 ha</td><td>1.14 ha</td><td>14.82 ha</td><td>88.35 ha</td><td>106.4 ha</td></tr>
</table>

<table>
<tr><th></th><th>Rural West Sub Area</th><th>North Sub Area</th><th>Bromsgrove Sub Area</th><th>Rural East Sub Area</th><th>Bromsgrove District</th></tr>
<tr><td>F. Need 2008 – 2026 (excluding Ravensbank) (3)</td><td></td><td></td><td></td><td>38 ha</td><td>56.62 ha</td></tr>
<tr><td>Extra Allocation Required (including Ravnesbank)
(E – A)</td><td rowspan="2">0.97 ha</td><td rowspan="2">-3.76 ha</td><td rowspan="2">-2.11 ha</td><td>68.44 ha</td><td>63.1 ha</td></tr>
<tr><td>Extra allocation Required (excluding Ravnesbank)
(F – B)</td><td>22.45 ha</td><td>17.32 ha</td></tr>
</table>

(1) Figures taken from Table 9.10 to 9.14.
(2) Figures are gross completion rates taken from Chart 4.1 in Chapter 4.
(3) Based on multiplying past average annual completion levels by the number of years to the end of the study period (i.e. 19)

9.52 Completion rates included in the Table (extracted from relevant annual monitoring reports) are understood to be gross average completion rates. As such, the average annual net change in employment land could be less when also considering losses to other uses.

9.53 Accepting this caveat, the employment land requirements obtained using the above approach delivers significantly 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.

9.54 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. 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 2026, there would be a need to increase total (net) 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

9.55 In order to provide a broad indication of the distribution and qualitative nature of supply across Bromsgrove District, **Table 9.18** 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 9.7) by study sub area.

Table 9.18: 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			2.3 ha	
	Medium - Long				
Good	Immediate – Short		4.9 ha	1.43 ha	14.16 ha
	Medium - Long				
Moderate	Immediate – Short			1.06	
	Medium - Long				
Poor	Immediate – Short				
	Medium - Long				

9.56 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, Ravenbank Business Park and, Saxon and Harris Business Parks.

9.57 In terms of the contribution made by those sites listed in Table 9.7, with the exception of the Rural East sub area, all other sub areas have less than 5 hectares of available land supply and the Rural West sub area has no supply at all which can be attributed to the Districts employment allocations and main commitments. It should be noted however that with regards to the Bromsgrove sub area, supply is greater than that reported in the above table as the figures exclude circa 9 hectares of land at the Bromsgrove Technology Park which, for monitoring purposes, is all defined as being under construction.

Recommendations

9.58 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;

E: Local Planning Policy and Other Responses; and

F: Future Monitoring.

A: Addressing Obstacles to the Development of Employment Sites

9.59 Through this study a limited number of 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.

9.60 As a generic guide however, **Table 9.19** 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 9.19: Overview of Issues and Suggested Responses

Issue	General Response
Limited availability of sites / premises for expanding local businesses (as identified through the business survey) Site Constraints where these exist (such as access)	• 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 LDF policies to promote employment opportunities in and around appropriate settlements outside of Bromsgrove town itself; and • Influence through Economic Development and related strategies and promoting the intervention by AWM as required.
Potential for pressure for non-employment use such as residential	• Inclusion of policies in the LDF to prevent the inappropriate erosion of better-performing sites to other non-employment (generating) uses.
Certain poor quality sites and buildings which make a limited contribution to the local employment portfolio	• 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 LDF policy / associated SPD to guide decisions concerning the release of employment sites, including individual premises outside of employment allocations and established employment estates / areas.
Sustainability and environmental consideration	• Preparation of a Sustainability Plan and Green Travel Plan to guide future development on larger sites; and • Preparing AAPs, SPDs and Masterplans to guide site development to address sustainability and (site-specific) environmental issues.

B: Maintaining a Portfolio of Sites

9.61 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.

9.62 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 9.20 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 employment-generating (and also non-employment generating uses) through the development control process
Poor (P)	Potential for release to other forms of development

Best and Good Sites

9.63 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.

9.64 **Table 9.21 and 9.22** outlines the sites (excluding ADR's and sites defined in the WYG Study) recommended for inclusion within these classifications:

Table 9.21: Best Sites

	Site
Rural West	-
Bromsgrove	Bromsgrove (BROM 8A) - Land at Buntsford Hill Phase 3 / Buntsfordgate
	Bromsgrove Technology Park
North	-
Rural East	-

Table 9.22: 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
North	Cofton Hackett
Rural East	Wythall Green Business Park
	Ravensbank Business Park
	Saxon and Harris Business Parks

Moderate Sites

9.63 Those sites identified as 'Moderate' are generally of reasonable quality but may be constrained limiting their full current availability or market attractiveness. Certain 'Moderate' sites may be of interest mainly to local occupiers only. As a general policy approach to be reflected in the LDF, we would recommend that proposals for non B class employment generating uses (such as trade counter uses, vehicle sales and repairs etc) which may come forward on 'Moderate' sites through the development control 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 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. 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.
- These would not 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.
- There would be a net improvement in amenity – most relevant for 'non-conforming' uses close to residential areas 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.

9.64 For other uses such as housing, we would recommend that the following additional criteria are also applied:

- 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.
- Viability of employment development – details of redevelopment costs to justify that employment development is not viable in the first instance, and if a pure 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.

9.65 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.

9.66 The precise period of marketing will be influenced by prevailing market conditions at the time but a minimum period of 12 months would normally be appropriate. Marketing should be carried out by an established commercial property agent and should include on-site boards, adverts in the relevant publications (national property publications and / or local press) and inclusion on the Bromsgrove vacant property register. The extent of marketing required will vary from site to site depending on its size and type.

9.67 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.

9.68 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.

9.69 A list of the 'Moderate' sites identified through this study are included in **Table 9.23** below.

Table 9.23: Moderate Sites

	Site
Rural West	Wassell Grove Road
	Nash Works
	Wildmoor Farm
Bromsgrove	Bromsgrove town centre
	Sugarbrook Mill (now under construction)
North	The Avenue, Rubery
Rural East	Weights Farm
	High House Farm

Poor Sites

9.73 Sites classed as 'Poor' generally 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 9.24: Poor Sites

	Site
Rural West	-
Bromsgrove	Lower Shepley Farm
North	-
Rural East	Robin Hill Farm

Areas of Development Restraint

9.74 As these sites are not currently available, they have been excluded from our quantitative and spatial assessment of employment land supply at table 9.18. **Table 9.25** below identifies the ADR's assessed as part of this study, together with their associated ranking.

Table 9.25: Areas of Development Restraint

	Site	Ranking
Rural West	Hagley ADR (HAG 2B)	Moderate
Bromsgrove	Bromsgrove ADR (BROM 5B) – Land to the north of Pennyfields Road	Good
North	-	-
Rural East	Ravensbank ADR	Good

9.77 Given the generally limited level of supply in certain parts of the District, consideration should be given to bringing forward ADR's (or alternative opportunities) through the Council's emerging Local Development Framework as a means on enhancing choice and overall level of future employment land supply. 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 likely have a valuable role to play.

C: Vacant Premises

9.78 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.

9.79 The Bromsgrove sub area offers a range of industrial and office units although space tends to be focussed in properties of less than 500 sq m. There is a high current vacancy rate in the office sector in Bromsgrove, reflective of the nature and quality of available stock and also that fact that the area is not an established office location.

9.80 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 Council's 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

9.81 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.

9.82 To address this issue, we would recommend the inclusion of a suite of policies in the LDF 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).

9.83 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 LDF.

E: Local Planning Policy and Other Responses

Planning Policy Responses

9.84 We would recommend that a hierarchical policy approach towards the protection and promotion of the employment portfolio, as summarised in **Table 9.26** below, be considered for inclusion within the LDF:

Table 9.26: Suggested LDF 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 criteria generically to proposals which would result in the loss of premises not part of employment allocations or established estates.
'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 LDF).
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

9.85 For major sites and those with complex or numerous issues to be considered (such as Longbridge and ADR's or other larger opportunities which may be promoted through the LDF 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.

9.86 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.

Use of Other Planning Powers

9.87 Other powers such as the designation of Simplified Planning Zones and the making of Local Development Orders and Compulsory Purchase Orders could also be explored to assist in the delivery of specific sites where such actions are deemed necessary.

F: Monitoring

9.88 In order to maintain a robust basis for assessing proposals and keeping employment policies up to date, it is important that the Council monitors and keeps under regular review the following:

- Employment land supply, including commitments outside of identified local plan sites. Monitoring of site area and floorspace information should be carried out. Where possible B1 classes should be split between offices (B1a) and, research and development and light industrial sites (B1b&c) to allow for detailed monitoring of land take up and trend analysis. This allows for a more robust approach in terms of the assessment of land supply in the context of planning use class and importantly market sectors.
- Where possible business relocations and expansions into and out of the District (through planning applications).
- Discussions with local agents.

9.89 Implementation of monitoring recommendations will be important in order to properly assess proposals impacting on employment land supply (i.e. application of the above-mentioned assessment policy criteria). The Council already carries out reasonably extensive annual employment land monitoring and we would recommend that this process continues and that consideration be given to collecting additional details as suggested above to further enhance to usefulness of information collected.