



South Worcestershire Economic Development Needs Assessment

Final Report

September 2018

CONTENTS

1.0	INTRODUCTION	1
2.0	STRATEGIC CONTEXT	2
3.0	SOCIO-ECONOMIC CONTEXT	5
4.0	PROPERTY MARKET ASSESSMENT	8
5.0	STAKEHOLDER CONSULTATIONS	19
6.0	FUNCTIONAL ECONOMIC MARKET AREA	23
7.0	EMPLOYMENT LAND	25
8.0	OBJECTIVELY ASSESSED NEEDS	37
9.0	CONCLUSIONS AND RECOMMENDATIONS	52

Appendix 1 – Policy Documents Review

Appendix 2 – Socio Economic Profile

Appendix 3 – Property Transactions

Appendix 4 – Vacancy Schedule

Appendix 5 – Summary of Councils' Employment Areas Surveys

Appendix 6 – Property Agent Consultations

Appendix 7 – Stakeholder Consultations

Appendix 8 – List of Consultees

Appendix 9 – Site Scoring System

Appendix 10 – Site Scoring Results for Employment Allocations

Appendix 11 – Site Scoring Results for Existing Employment Areas

Appendix 12 – Employment Land Past Take-Up

Appendix 13 – Experian Model Analysis and Employment Land Forecasting

EXECUTIVE SUMMARY

- i. The South Worcestershire Economic Development Needs Assessment (EDNA) has been prepared by BE Group and Mickledore on behalf of Malvern Hills District Council, Worcester City Council and Wychavon District Council. The EDNA forms part of the South Worcestershire Development Plan (SWDP) review. It reviews employment land supply and demand to 2041.

Socio-Economic Profile

- ii. South Worcestershire has a population of some 303,600 persons, with population growth outstripping the West Midlands over the last 20 years. It has high levels of economic activity and the local workforce has above average skill levels.
- iii. There is net out-commuting (more commuting out for work than commuting into the area for work) in South Worcestershire. On average, those South Worcestershire residents who work outside of the area have higher earnings than those who work in South Worcestershire.
- iv. The employment sector characteristics of the area are typical of much of England. Health, education and retail make up three of the top four sectors of employment – but this overlooks the most important facet of employment in the area. Manufacturing is the sector which employs the 2nd largest number of people across the area and South Worcestershire employs twice the number of people as the English average across a large number of manufacturing sectors. Manufacturing employment has increased in recent years, against the trend in many areas in the UK.

Property Market

- v. The property market in South Worcestershire is relatively buoyant, although it is apparent that constraints in supply (e.g. Worcester City and Malvern Hills) have slowed take-up of premises. Transaction data shows that industrial units are more in demand than office units. For both property types, 2015 was the year in which the highest number of deals completed.
- vi. Demand for office and industrial premises is being seen for the smaller end of the market, although mid to larger industrial units also form an important aspect of the market. The available and marketed property is consistent with this demand, although

local commercial agents generally considered that there was a lack of choice in the market.

- vii. Occupancy levels are generally high in the market, particularly for good quality, well-located stock.

Stakeholder Consultations

- viii. Consultations with a sample of key businesses, developers and landholders were undertaken through a mix of one-on-one discussions and a publicly advertised business consultation event. The purpose of the consultations was to gain an in-depth understanding of the local issues and concerns relating to employment land.
- ix. A clear theme emerging during the consultations was the lack of suitable employment land and premises in South Worcestershire, including for a range of size requirements. Another concern was regarding recruitment (attracting skilled staff and availability of lower skilled staff post-Brexit).
- x. Overall there was positivity about operating businesses from the area. Respondents see it as an attractive place to live, centrally located in the UK.

Functional Economic Market Area

- xi. The primary functional economic market area for South Worcestershire can be approximated by the Worcestershire County boundary, with a broader area including Stratford-upon-Avon, Cotswold, Tewksbury, Cheltenham and Birmingham being an approximation of a secondary area.

Employment Land

- xii. A review of the current status of the employment land allocations in the adopted SWDP suggests that there is currently a developable area of approximately 131.9 ha across South Worcestershire, comprising 44.6 ha in Malvern Hills, 19.8 ha in Worcester and 67.5 ha in Wychavon. Critiquing these sites, they are generally considered deliverable, although there is some risk in a small number of sites that the landowners will landbank the sites in order to pursue alternative residential or retail development.
- xiii. The existing employment sites have also been reviewed. Mostly these sites are appropriate to continue their employment functions, however a small number of sites have been considered to be at the end of the economic life and it is recommended that they are not protected for employment uses. These sites are:

- Backfields Upton
- Sixways Industrial Estate
- Three Springs Trading Estate
- Orchard Street
- Gregory's Mill Industrial Estate
- Pope Iron Road
- Stanway Screens

Objectively Assessed Need

- xiv. The objectively assessed need for employment land has been analysed looking at past take-up of land and employment forecasts for South Worcestershire, which is summarised below

Table E1 – Comparison of Employment Land Forecasts (excluding buffers and B1 two-storeys)

Model	Employment Land Required, ha			
	Malvern Hills	Worcester	Wychavon	South Worcestershire
Model One – Historic Take Up base	25.7	26.5	191.7	243.9
Model Two – Employment Forecast	1.7	19.7	43.0	64.4
Model Two – Employment Forecast – Growth Sectors Only	3.0	21.3	43.2	67.5

Source: BE Group and Mickledore, 2018 analysis of Experian forecasts

- xv. From the analysis, it is considered that Model One represents the most appropriate employment land forecast for South Worcestershire. It is also appropriate to consider a level of spare capacity in the market, to allow for choice and continuity of supply. Therefore, a five-year buffer has been applied to the Model One objectively assessed need, increasing the total demand for additional land to 294.8 ha between 2016 and 2041.
- xvi. Comparing this demand to the level of supply results in a deficit of employment land of some 169.4 ha, which is summarised below for each of the three local authorities. As can be seen, the deficit is strongly concentrated in Wychavon District due to the past high levels of take up of premises in the district.

Table E2 – Supply vs Demand for Employment Land (including 5-year buffer)

Area	Available Supply	Land Demand 2016-41	Surplus/ Deficit
Malvern Hills	44.6	31.6	13.0
Worcester	19.8	32.1	-12.3
Wychavon	67.5	231.1	-163.6
South Worcestershire	131.9	294.8	-162.9

Source: BE Group, 2018

- xvii. There is a case to reapportion the deficit across South Worcestershire – to reduce the burden on Wychavon and to reflect the suppressed take-up in Malvern Hills and Worcester City due to the lack of existing supply of land. Therefore, a revised scenario has also been prepared, which maintains the total land demand across South Worcestershire, but relocates some of the demand from Wychavon to the other local authorities.

Table E3 – Revised Supply vs Demand for Employment Land

Area	Available Supply	Revised Land Demand 2016-41	Surplus/ Deficit
Malvern Hills	44.6	70.0	-25.4
Worcester	19.8	35.0	-15.2
Wychavon	67.5	189.8	-122.3
South Worcestershire	131.9	294.8	-162.9

Source: BE Group, 2018

1.0 INTRODUCTION

- 1.1 The South Worcestershire Economic Development Needs Assessment (EDNA) has been prepared by BE Group and Mickledore on behalf of Malvern Hills District Council, Worcester City Council and Wychavon District Council. The EDNA forms part of the South Worcestershire Development Plan (SWDP) review.
- 1.2 The three local authorities collaborated to prepare the current SWDP, adopted in February 2016. The collaboration is continuing with the review of the SWDP, including this EDNA. From an employment perspective it is appropriate to assess the supply and demand of employment land and premises over such a geography, recognising the overlapping and interrelated economies.
- 1.3 This EDNA will provide input into the review and update of the SWDP, to guide planning for employment sites to 2041, including considerations of the supply and demand for B-class employment uses (B1 offices, B2 industrial and B8 warehousing), understanding of the local property market, consideration of drivers of growth, forecasting of employment and implications for employment land and understanding of the need for employment land, including locations and types. The methodology of this EDNA is in line with requirements of the National Planning Policy Framework (NPPF).
- 1.4 This EDNA is a multi-stage study and document. The first stage (2018) is to identify the objectively assessed need (OAN) for employment land in South Worcestershire to 2041. The second stage (2019) is to update this OAN and provide policy recommendations to inform the SWDP. The study team will provide further assistance to the Councils throughout the Examination in Public process for the EDNA in regards to the employment land aspects.

2.0 STRATEGIC CONTEXT

2.1 This chapter provides an overview of the key policy documents in relation to South Worcestershire and the national level that may influence the planning and demand for employment land within South Worcestershire.

Table 1 – Planning Policy Documents

Strategy	Policy /Guidance	Details
National Planning Policy Framework, 2018	Building a strong, competitive economy	Planning policies should set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth. Policies should address potential barriers to investment, identify strategic sites and be flexible to accommodate needs not anticipated in the plan.
	Ensuring vitality of town centres	Policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation.
	Supporting a prosperous rural economy	Planning policies and decisions should enable the sustainable growth and expansion of all types of businesses in rural areas, enable development and diversification of the rural economy, support rural tourism and leisure and support local services.
	Making effective use of land	Strategic policies should set out a clear strategy for accommodating objectively assessed needs, in a way that makes as much use as possible of previously-developed or 'brownfield' land.
South Worcestershire Development Plan, 2016	Policy SWDP 3: Employment, Housing and Retail Provision Requirement and Delivery	South Worcestershire Councils (SWC) should plan, monitor and manage the delivery of employment land from 2006 to 2030, in accordance with Table A1.1 of Appendix 1 to this report and the site allocations set out in Policies SWDP 43 -59. The Policy states that new employment provision will be located primarily within/adjacent to main urban areas including employment provision at the new urban extensions.
	Policy SWDP 8: Providing the Right Land and Buildings for Jobs	Local authorities should provide the right land and buildings to maximise job creation. Other uses should be welcomed on employment land providing they support job creation.
	Policy SWDP 12: Employment in Rural Areas	To ensure adequate employment opportunities in rural areas, local authorities should ensure that rural employment land is retained, and that expansion of rural employment sites and farm diversification is supported.

Strategy	Policy /Guidance	Details
	Policies SWDP 43-54	These 7 policies below set out details of the sites that are allocated for mixed use/employment development by the SWDP. Each policy covers a different settlement, site or area of South Worcestershire. Where appropriate, these policies set out the specific requirements that apply to the individual sites/settlements/areas.
	Policy SWDP43: Worcester City	SWDP43 identifies residential, mixed-use and employment sites to meet growth requirements inside the City boundary. There are six sites with some employment element (four mixed use and two employment) and these are shown in Table 1.2, Appendix 1. In addition, 41 ha of employment land has been identified within Urban Extensions, detailed in Policy SWDP45.
	Policy SWDP45: Worcester Urban Extensions	SWDP45 outlines plans to develop five new urban extensions adjoining Worcester city to accommodate housing and mixed-use development. Two of the five include some employment element: •SWDP45/1 Broomhall Community and Norton Barracks Community (Worcester South urban extension) - 247.1ha of which 20ha is for employment use •SWDP45/2 Temple Laugherne (Worcester West urban extension) - 138.8ha, of which 5ha of employment use.
	Policy SWDP47: Pershore Urban Extensions	SWDP 47 outlines two Pershore Urban Extensions, one of which proposes employment land: •SWDP47/2 Land to the North-East of Pershore - On land to the north of Wyre Road, an allocation of 5ha of employment land for B1, B2 and B8 uses.
	Policy SWDP49: Droitwich Spa Urban Extensions	SWDP 49 outlines three Droitwich Spa Urban Extensions includes two with employment land: •SWDP49/1 Copcut Lane - Provision of 3.5ha of B1 and B2 employment uses •SWDP49/3: Stonebridge Cross Business Park - Provision of approximately 10ha of B1, B2 and B8 employment land
	Policy SWDP 51: Evesham Urban Extensions	Policy SWDP 51 outlines three Evesham Urban Extensions, including one which with new employment use: •SWDP51/3 Vale Industrial Park, Evesham Provision of approximately 34ha of B1, B2 and B8 employment land and landscaping
	Policy SWDP 53: Malvern Technology Centre (QinetiQ)	This states that a 15.4ha mixed-use development will be developed on the site at Malvern Technology Centre (QinetiQ), with at least 4.5ha for B1(b) employment. The site is seen as being critical in terms of securing high technology industry at Malvern to meet the economic vision for south Worcestershire. 10.6ha will also be safeguarded for B1 use class and associated development.
	Policy SWDP 54 – Blackmore Park	This Blackmore Park allocation is a 5.1ha extension to an existing employment site at for B1, B2 and B8 uses. It is proposed that the site is extended onto adjacent land that is part residual brownfield land and part greenfield land.

Strategy	Policy /Guidance	Details
	Policy SWDP56 – Development at North East Malvern	56.84ha is allocated for a sustainable, well-designed mixed-use urban extension. It is proposed that development within this area will include 10ha of employment-generating uses
South Worcestershire Development Plan - Authorities' Monitoring Report (AMR) 2017		The amount of new employment land provided / lost across South Worcestershire in the monitoring year is 33.41 ha gained, and 9.88 ha lost (so 23.53 ha net completed), both mainly in Wychavon District. Also, in terms of commitments, there is a further 174.96 ha, and 2.85 ha in losses (so 172.11 ha net proposed), again mainly in Wychavon District.

3.0 SOCIO-ECONOMIC CONTEXT

- 3.1 This chapter provides a summary of the socio-economic factors of the local community, with a particular focus on those factors that may influence employment land demand. Further details are provided in Appendix 2.
- 3.2 South Worcestershire has a population of 303,642 and this has grown by 12.5% over the last 20 years with the growth outstripping the West Midlands region. This growth has been partly as a result of inbound migration from elsewhere in the UK and partly driven by the ageing of the population, but the impact of international migration has been lower than elsewhere in the UK. South Worcestershire has a significantly higher proportion of people aged over 60 than the national average but a lower level of international migration.
- 3.3 The geographic area is characterised predominantly by farm land apart from the significant built environment of Worcester. The population lives in 135,210 dwellings and 85% of these dwellings are privately owned. Households have relatively low levels of deprivation and South Worcestershire is mid-ranking when compared to other UK Local Authorities apart from when measuring barriers to housing and services.
- 3.4 There are high levels of economic activity across the area with the working age population more likely to be economically active than in England as a whole. Overall self-employment is relatively high and unemployment low when compared to national rates. The working age population is also more likely to be degree qualified and more likely to work in higher skilled jobs.
- 3.5 As far as the resident population is concerned, however, higher wages are earned by working outside of South Worcestershire as seen in Table 2, for all of the Local Authorities, as well as regionally and nationally. The highest difference was seen in Malvern Hills where the average resident earnings is 27 percent higher than the average workplace earnings.
- 3.6 The net commuter position at the time of the last census, was net outbound migration of nearly 4,000 people. Despite the out -commuting figure, approximately 72% of jobs in South Worcestershire are filled from within the area which represents a relatively high degree of self-containment.

Table 2 – Annual Pay

	Malvern Hills	Worcester	Wychavon	West Midlands	England
Resident Earnings	32,621	28,671	28,813	26,857	29,085
Workplace Earnings	23,701	28,005	27,336	26,819	29,079

Source: Annual Survey of Hours and Earnings, 2017

- 3.7 Employment across the area in the period since the recessionary year of 2009 has increased – and increased in each of the Local Authority areas. The rise has not been consistent however – each of the Local Authorities has recorded a fall in employment at different times and as a result the employment growth since 2009 for South Worcestershire has been below the regional and national averages.
- 3.8 Whilst each Local Authority has recorded a slightly different trend in terms of sectors, overall, South Worcestershire employed (in 2016) the highest proportion of people in health (15%), retail (11%) and education (9%) and one other sector. These three sectors are typical of most UK Local Authorities. Unusually for the UK, however, manufacturing is the second largest sector in the area with 14% of employees.
- 3.9 Overall in the period 2009-2016 the manufacturing sector also increased employment. Over that period the largest employment gains for South Worcestershire were made in health (+3,000 jobs) followed by accommodation and food services (+1,250 jobs).
- 3.10 In the period 2009-2016 declines were recorded for South Worcestershire in public administration & defence (-1,300 jobs) and finance & insurance (-1,000 jobs).
- 3.11 The sectoral structure of the area can also be measured in terms of location quotients (the proportion of employment in a sector compared to the national average). For South Worcestershire the location quotients support the importance of manufacturing to employment (disproportionately important to employment in South Worcestershire) and also remediation activities.
- 3.12 Overall, South Worcestershire can be characterised as growing in terms of residents and employment – but an area which has not seen high levels of international migration and has a population which is ageing faster than the UK as a whole. The workforce is well educated, on average holds senior positions and this results in low levels of

deprivation – but the highest paid typically out-commute. In fact, the area as a whole, whilst reasonably self-contained, is an area of net out-commuting.

- 3.13 The employment characteristics of the area are typical of much of England. Health, education and retail make up three of the top four sectors of employment – but this overlooks the most important facet of employment in the area. Manufacturing is the sector which employs the 2nd largest number of people across the area and South Worcestershire employs twice the number of people as the English average across a large number of manufacturing sectors.

4.0 PROPERTY MARKET ASSESSMENT

Introduction

- 4.1 The current property market in South Worcestershire is discussed in this chapter based on an analysis of recorded information on commercial property transactions conducted within Worcester, Wychavon and Malvern, currently marketed commercial property and discussions with locally active property agents.

Deals

Industrial

- 4.2 Transactions of commercial stock in South Worcestershire have been reviewed to gauge interest in the market and performance levels over the past decade. Not all transactions are recorded, although the available data provides a good indication of types of transactions and market preferences.
- 4.3 621 industrial deals occurred in **South Worcestershire** between 2008 and 2018, with a floor area totalling approximately 1,106,800 sqm. The size band of 201-500 sqm saw the highest number of transactions, comprising 31 percent of all transactions.
- 4.4 2015 was the year with the highest number of transactions completed (110), contributing 18 percent of the decade total, with a total floor area of 95,600 sqm. There were five other years when total floorspace take-up was higher with fewer transactions. 2013 saw the largest amount of floorspace take-up in a single year with 229,700 sqm, which was 20 percent of the overall seen in the decade. This was led by seven transactions in excess of 10,000 sqm, six of these within Wychavon District totalling 155,981 sqm and predominantly within Droitwich Spa (Stonebridge Cross Business Park and Kidderminster Road) where five transactions totalling 118,819 sqm were completed within the year.
- 4.5 A full breakdown of transactions by year and size category can be seen in Appendix 3. A summary table is provided below:

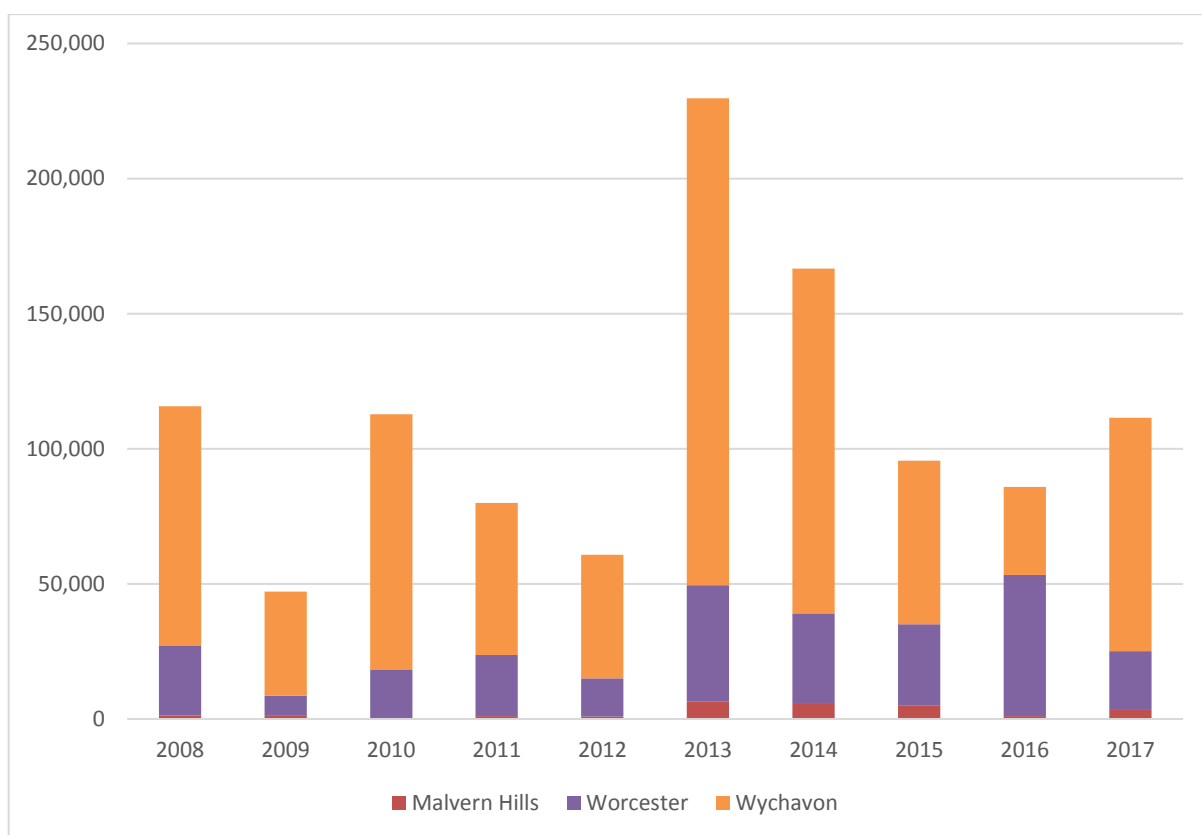
Table 3 – Summary of Industrial Transactions 2008-2018 by Size Band

		Size (sqm)								
		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001-10,000	10,000+	Unknown	Total
Malvern Hills	Floorspace (sqm)	269	2,815	5,223	5,073	13,778	~	~	~	27,158
	Total Properties	4	19	17	8	6	~	~	6	60
Worcester	Floorspace (sqm)	3,463	6,179	32,279	27,415	64,386	46,803	88,536	~	269,061
	Total Properties	56	43	93	42	31	6	5	5	281
Wychavon	Floorspace (sqm)	1,002	5,592	26,589	19,054	138,621	113,438	506,261	~	810,557
	Total Properties	15	36	83	26	60	16	24	20	280
South Worcestershire	Floorspace (sqm)	4,734	14,586	64,091	51,542	216,785	160,241	594,797	~	1,106,776
	Total Properties	75	98	193	76	97	22	29	31	621

Source: EGi, 2018

- 4.6 Figure 1 illustrates the relative sizes of the markets in the three South Worcestershire authorities in terms of industrial floorspace transacted.

Figure 1: Industrial Transactions in South Worcestershire



Source: EGi, 2018

- 4.7 Wychavon District recorded the highest share of industrial transactions in terms of total floorspace and recorded the largest individual floorspace transactions over the past decade. Malvern Hills District recorded a relatively small percentage of the total industrial floorspace transacted. The relative market shares of the three local authorities within South Worcestershire are functions of market attractiveness and the supply of stock (premises and land being developed). The availability of premises with quality A-road connectivity to the motorway network in Wychavon is relatively high, Worcester City is an attractive market, but lacks expansion capacity and quality premises, which has suppressed overall turnover of stock. Malvern Hills District is a more localised market (and therefore will have a lower turnover of stock) and is also constrained by a lack of supply.
- 4.8 60 industrial deals were completed in the last 10 years in **Malvern Hills**, with 72 percent of these being leasehold transactions, and in total comprising of 27,158 sqm of floorspace. There were no transactions over 5,000 sqm, with units of 101-200 sqm being the most popular with 19 deals completed (32 percent). Units in the size category of 201-500 sqm were also popular with 17 deals completed (28 percent).
- 4.9 2014, 2015 and 2017 all saw the most deals with nine industrial deals completed in each of these years. Whilst eight deals were completed in 2013, this year saw the highest amount of floorspace transacted, 6,435 sqm. This was almost 25 percent of the take-up for the decade. The turnover in 2013 included the sale of a 4,954 sqm industrial unit which contributed 77 percent of the year's total floorspace transacted.
- 4.10 281 industrial deals were completed in the last 10 years in **Worcester**, with 84 percent of these being leasehold transactions and in total comprising 267,851 sqm. With units of 201-500 sqm being the most popular with 93 deals completed (33 percent), units of 0-100 sqm were also popular with 56 deals completed (20 percent).
- 4.11 Whilst 2015 saw the highest number of deals completed (50 deals), which was 18 percent of the total for the whole decade. 2016 saw the largest amount of floorspace transacted in a single year, 52,243 sqm. This was 20 percent of the total seen over the ten years. One single letting of 33,975 sqm, contributed 65 percent of the total take-up and 13 percent of the total seen during the ten years.

- 4.12 280 industrial deals were completed in the last 10 years in **Wychavon**, with 70 percent of these being leasehold transactions, comprising 810,557 sqm of floorspace. With units of 201-500 sqm being the most popular with 83 deals completed (30 percent).
- 4.13 Whilst 2015 saw the highest number of deals completed (51 deals), which was 18 percent of the total for the whole decade. 2013 saw the largest amount of floorspace transacted in a single year, 34 deals with a floor area of 180,234 sqm (22 percent of the decade floorspace). Six units over 10,000 sqm sold in this year, contributing 87 percent of the total take-up and 19 percent of the total seen during the ten years.
- 4.14 The largest industrial deal completed between 2008 and 2018 was the investment sale of a 54,403 sqm unit in 2008, at Berry Hill Industrial Estate.

Office

- 4.15 The number of office units transacted in South Worcestershire between 2008-2018 was 534 with a floor area of 156,800 sqm. The most popular size band for office units was 0-100 sqm, with 207 deals in this size range. This was 39 percent of the transactions for the decade.
- 4.16 Like industrial units, 2015 saw the highest number of deals completed in a single year (93) which was 17.4 percent of the decade total. 2014 was the best year for take up with 27,600 sqm, this was 17.6 percent of the decade total.
- 4.17 A full breakdown of transactions by year and size category can be seen in Appendix 3, with a summary table below:

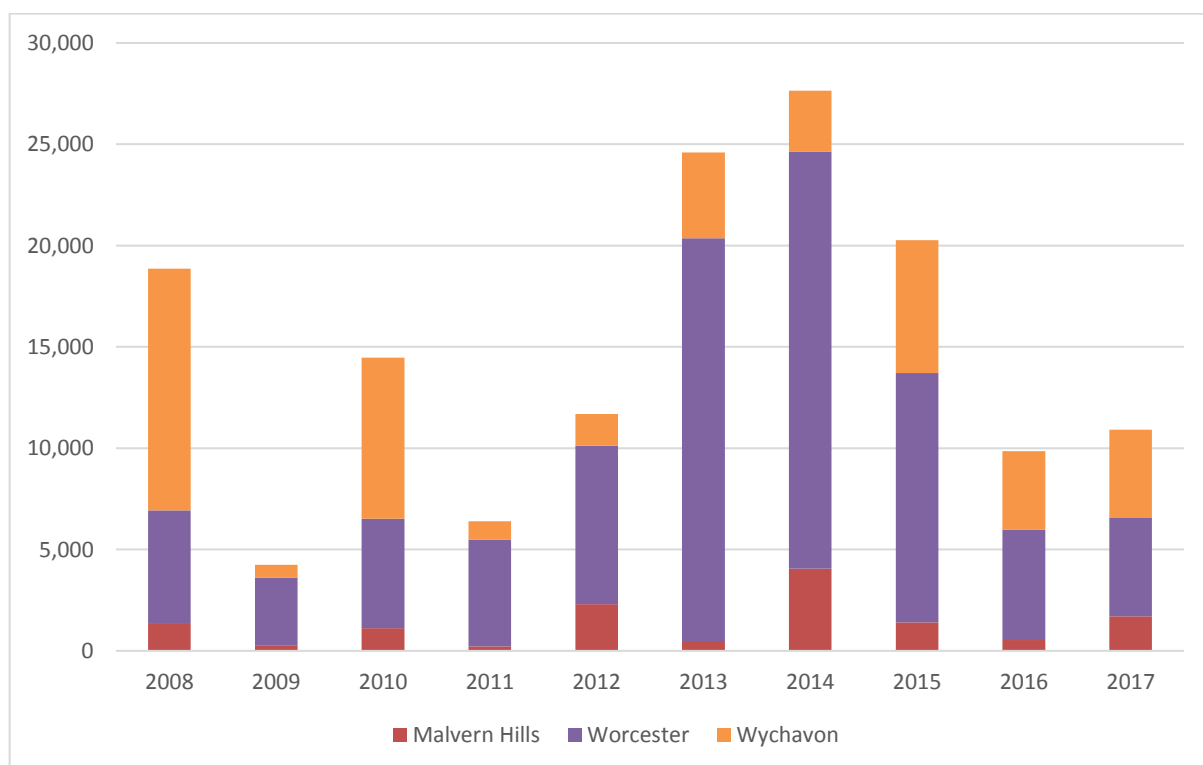
Table 4 – Summary of Office Transactions 2008-2017 by Size Band

		Size (sqm)								
		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001-10,000	10,000+	Unknown	Total
Malvern Hills	Floorspace (sqm)	1,332	2,365	3,087	3,087	3,742	~	~	~	13,613
	Total Properties	25	17	11	4	2	~	~	1	60
Worcester	Floorspace (sqm)	4,735	7,663	26,445	17,762	34,754	~	~	~	91,359
	Total Properties	89	53	84	24	16	~	~	7	273
Wychavon	Floorspace (sqm)	5,027	6,109	10,092	4,054	9,189	17,403	~	~	51,874
	Total Properties	93	43	35	7	4	3	~	16	201
South Worcestershire	Floorspace (sqm)	11,094	16,137	39,624	24,903	47,685	17,403	~	~	156,846
	Total Properties	207	113	130	35	22	3	~	24	534

Source: EGi, 2018

4.18 Figure 2 illustrates the relative sizes of the office markets in South Worcestershire in terms of floorspace transacted.

Figure 2: Office Transactions in South Worcestershire



Source: EGi, 2018

4.19 The data demonstrates that Worcester City is the main location for office demand across South Worcestershire, with Wychavon having a smaller percentage relative to

its industrial role. Malvern Hills has a higher proportion of the office market than its industrial market share.

- 4.20 Of the 60 office deals completed in the last ten years in **Malvern Hills**, 85 percent were leasehold and totalled 13,613 sqm. As with industrial deals, there were no deals over 5,000 sqm, with units of 0-100 sqm being the most popular with 25 deals completed. The number of deals completed reduces as the size of the office units increases.
- 4.21 2014 saw the highest number of office units transacted, 10, which was 17 percent of the total for the ten-year period. 2014 also saw the largest amount of floorspace transacted with 4,061 sqm of floorspace take-up. 58 percent of this take-up comprised a single 2,348 sqm unit, the largest office unit involved in a deal within the ten-year period.
- 4.22 273 office deals completed in the last ten years in **Worcester** involving 91,359 sqm of floorspace take-up. Similar to Malvern and Wychavon, the most popular deals were for offices of 0-100 sqm, with 89 deals totalling 4,735 sqm. Unlike the other two districts, which saw fewer transactions as floorspace size increases, Worcester saw more transactions for units between 201-500 sqm (84 deals) than for units between 101-200 sqm (53 deals).
- 4.23 2014 saw the highest number of office units transacted (46 deals), which was 17 percent of the total for the ten-year period. 2014 also saw the largest amount of floorspace transacted with 20,589 sqm of floorspace take-up. The largest single occupational sale was in 2014, 3,719 sqm at Bridgewater House, Blackpole Road. While classified as an occupational sale in the data, this building has since been converted to residential units.
- 4.24 201 office deals completed in the last ten years in **Wychavon**, totalling 51,874 sqm of floorspace. 153 leasehold, 30 sale, 8 investment and 10 auction. Similar to Malvern, the highest number of deals completed (93) were for units of 0-100 sqm, with the number of deals decreasing as the sizes of office units increased.
- 4.25 2015 saw the highest number of office units transacted (47 deals), which was 23 percent of the total for the decade. 2008 saw the largest amount of floorspace transacted with 11,930 sqm of floorspace take-up from 12 deals. This is 23 percent of

the total floor space transacted in the decade. The largest single letting was in 2018, 6,670 sqm at Worcester Six.

- 4.26 All three local authorities saw a dominance of leasehold deals occurring within the last decade. Smaller businesses tend to require low entry costs and location on small designated office schemes. These developments are usually, whilst high risk for the developer, let on short lease (3-5 years) and so suitable for small firms.
- 4.27 Larger companies are more likely to be looking for freehold options due to the need for control over build and design and with the capital to accommodate these needs. Developers may design and build to sell but also available on long leases. These patterns are not unique to South Worcestershire and are seen across the UK.

Property Supply

- 4.28 The commercial premises currently being marketed have been analysed as a proxy of the vacant premises within South Worcestershire. It is recognised that not all vacant premises are marketed, with landlords choosing not to market the premises for a variety of reasons (committed but not yet occupied, previously marketed and no occupiers found, strategic business planning, etc.). Furthermore, marketed premises may include some as yet unconstructed premises (i.e. being sold off plan) and thus would not be considered existing vacant stock. This is also a snapshot in time as marketed premises are constantly changing as leases and transactions are completed and further stock becomes available. The actively marketed stock provides a good indication however of the capacity for the market to absorb additional demand and would represent the choices available to businesses looking for new premises.

Industrial

- 4.29 There are 47 industrial units available in Worcester totalling approximately 53,700 sqm of floorspace, 16 available units in Malvern totalling 7,600 sqm and 28 available units in Wychavon totalling 100,300 sqm. The total for South Worcestershire of 91 available industrial units with a total floor area of 161,600 sqm.
- 4.30 There are a wide range of sizes of industrial units on offer across South Worcestershire, with the highest number within the 201-500 sqm size bracket, with 24 units (22 percent) being marketed. As seen in Figure 3, there are significant numbers of premises being marketed in the small to medium size ranges, but less so in the larger size bands. Stock above 1,000 sqm is more likely to be available in Wychavon.

Figure 3: Number of Industrial Units Marketed in South Worcestershire



4.31 In terms of overall current supply, the 47 available units comprising 161,600 sqm compares to the average of 62 units transacted per annum (111,000 sqm p.a.) over the last decade.

4.32 Of the available properties on the market in South Worcestershire, nine (10 percent) are being offered on freehold tenure, 70 (77 percent) leasehold tenure and 12 (11 percent) freehold or leasehold tenure. A breakdown by size can be found in Appendix 4.

Office

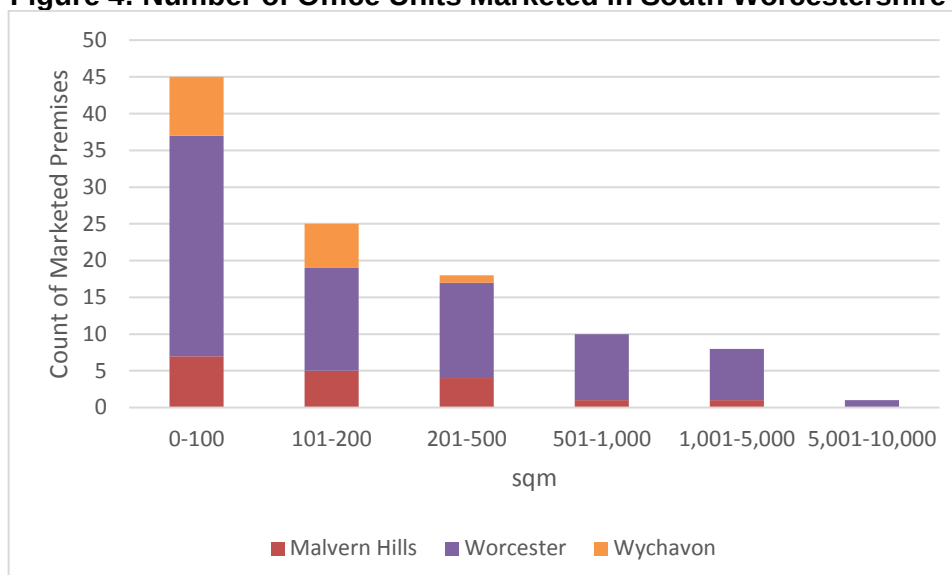
4.33 Worcester has the largest quantity of office premises being marketed, with 75 marketed office units totalling some 32,900 sqm. Malvern Hills has 19 available units which total 4,700 sqm and Wychavon has 17 available units which total 1,500 sqm. The total for South Worcestershire is 111 available office units with a total floor area of 39,100 sqm.

4.34 Comparing the current supply to typical annual take-up rates, the 111 office premises in South Worcestershire comprising 39,100 sqm, compares to an annual average over the last decade of 53 transactions comprising about 15,700 sqm.

4.35 Malvern Hills District currently has a higher level of marketed premises than Wychavon. The historic turnover of office stock however is higher in Wychavon than in Malvern Hills.

4.36 A clear pattern can be identified of more available units on the market of a smaller floorspace, with 45 units (41 percent) of 0-100sqm. Unsurprisingly the availability of floorspace decreases for larger premises. This is consistent with the transaction volumes in South Worcestershire over the past decade which saw higher volumes for smaller premises. Larger premises have been transacted and will need to be catered for in coming years, with the more limited availability indicating constraints for the mid to larger occupiers looking for premises. The breakdown of marketed office units is provided in Figure 4.

Figure 4: Number of Office Units Marketed in South Worcestershire



4.37 Of the available office units on the market, 12 units (11 percent) are being marketed freehold, 84 units (76 percent) leasehold and 15 units (14 percent) freehold or leasehold. A breakdown by size can be found in Appendix 4.

South Worcestershire Council's Survey of Employment Sites

4.38 The three Councils have undertaken on the ground surveys from April to June 2018 of the existing employment areas throughout South Worcestershire, which has been used as a resource for this EDNA. This survey has recorded unoccupied premises in each location. A summary of this survey can be found at Appendix 5. There are some significant differences in the recorded amount of unoccupied space, compared to the identified level of available and marketed units summarised above. This highlights the

difference between marketed space (which is typically unoccupied but may have an occupant with a lease running out or is being marketed off plan) and unoccupied space (which may or may not be being actively marketed and would always be built stock).

- 4.39 From the survey of employment sites data, the overall vacancy levels of the existing employment areas are low at:

Malvern Hills:	3.2 percent
Worcester:	7.3 percent
Wychavon	3.9 percent

- 4.40 Even Worcester, with a vacancy level over twice the other two areas would be considered to be performing well with a vacancy rate of 7.3 percent. Vacancy levels above 10 percent would indicate some levels of stress in the market. Vacancy levels of less than 5 percent indicate an overly tight market, with not enough choice for prospective tenants.

- 4.41 At the individual employment area level, there are some significant variations, with some areas recording substantially higher vacancy rates. These are generally the older areas, or those with a single, large unoccupied unit.

Property Agents Comments

- 4.42 Along with the above property data analysis, consultations with commercial property agents in all three districts have been carried out. Agents were asked about activity levels for office and industrial units in relation to rents, sizes and weaknesses of the market. A full description of these consultations can be found in Appendix 6, whilst the key information is discussed below:

- Current demand is for freehold properties, yet the majority of current stock is leasehold
- Demand is being seen for small units, below 230 sqm for industrial properties and below 140 sqm for offices.
- Offices are achieving higher rents than industrial units, with average office rents achieving £85-£175/sqm, whereas industrial rents can be seen as low as £45/sqm, although better stock was achieved around £65/sqm.
- A lack of available stock has been identified throughout South Worcestershire by local agents, in particular, a lack of industrial stock in Wychavon.

- Malvern Hills was identified as a small property market serving a local function. The Malvern Hills Science Park was seen as an exception to this, which has high occupancy and is in demand.
- The Worcester City Centre office market is less attractive to the market due to road congestion and difficulty with parking.
- Suggestions for development would be around the periphery of the urban area of Worcester for both office and industrial properties.

Summary

- 4.43 Transaction data shows there were more industrial units transacted over the last decade than office units. For both property types, 2015 was the year in which the highest number of deals completed.
- 4.44 Local property agents state that demand for office and industrial premises is being seen for the smaller end of the market. The available and marketed property is consistent with this demand, although the agents generally considered that there was a lack of choice in the market.
- 4.45 Information gathered through the Councils' site survey work indicates that occupancy levels are high in the existing employment areas, particularly in Malvern Hills and Wychavon, indicating tightness in the market.

5.0 STAKEHOLDER CONSULTATIONS

- 5.1 In addition to the property agents interviewed, further consultation was undertaken with existing occupiers and developers active within South Worcestershire. These consultations were undertaken in order to provide a further insight into the local market. Some business contacts were provided by the local authorities, with several selected because of known relocation issues.
- 5.2 Businesses were asked to discuss a number of topics including premises/land supply, the advantages/ disadvantages of operating businesses from each local authority area, key issues, and future operational plans. The discussions with local businesses were undertaken on a one-to-one basis, primarily as telephone interviews. Below is a summary of the key points from the consultations, with full detail in Appendix 7. A full list of the businesses and developers spoken to during the consultations can be found in Appendix 8.
- 5.3 Overall the clear primary concern for businesses is the lack of suitable employment land and premises in South Worcestershire. This was highlighted by a range of companies with varying size requirements. Recruitment of skilled staff was also a dominant theme throughout the consultations, with several citing concerns about attracting and retaining staff with technical skills. Related to this, uncertainty regarding Brexit was highlighted as a concern by several businesses, mostly in relation to how it would relate to being able to attract staff. However, rather than staff with technical skills, the concern surrounding Brexit related to attracting staff for lower skilled occupations.
- 5.4 The area was considered an attractive location to live, with desirable towns and rural areas. The area was also seen as an attractive location within the UK in which to do business due to its central location.
- 5.5 Digital connectivity was cited by some respondents as a key determinant in selecting premises for their business. As well as businesses looking for premises with access to excellent digital infrastructure, digital connectivity is also influencing the way businesses operate (remote working, etc.) which in turn affects decision making on premises. For example, one respondent cited that due to more staff working remotely, the urgency to find larger premises has been reduced.

- 5.6 **Developers** were generally positive about the area, particularly around the urban fringe of Worcester. They cited good demand for industrial units, with a shortage of stock, particularly for small to mid-sized units. New stock that has been developed has had good take-up rates and achieved reasonable rent levels of £60-65/sqm for larger industrial units and £85-110/sqm for smaller industrial units. Respondents stated that take-up has been constrained by a lack of supply of stock, rather than a lack of demand. One respondent noted that the Worcester 6 Technology Park could have a higher level of take-up if it was not limited to 'technology' firms, but available to a wider market. Generally, it was considered that the office market was softer than the industrial market, with weak demand for both town centre and business park type office space.
- 5.7 In **Malvern Hills**, respondents have struggled to find suitable land and/or property for expansion, with required sizes varying from 2,500 sqm and 10,000 sqm. Businesses have settled for suboptimal premises/locations, with one business reporting that they used to operate from Malvern Hills but have since moved to Wychavon District due to a lack of premises in Malvern Hills. While the business has been retained in South Worcestershire, the loss from Malvern Hills is important for this study and highlights the risk of potential losses of businesses due to operators not finding appropriate space locally. This is felt to be a worsening issue as more land is developed for housing. It was also voiced that the increase in housing means there is a need for more jobs in the area.
- 5.8 Opinion varies regarding Malvern Hills as a business location, with one respondent reporting that links to Worcester are improving. Two companies however stated that congestion is a big problem particularly between Worcester and Malvern, and this has had a knock on effect on recruitment from those living in Worcester.
- 5.9 **Worcester** companies provided generally positive comments, highlighting the city as a good business location, with good links to other areas. However, land and property options are felt to be very limited and companies have struggled to find suitable land for expansion. Two companies have also had issues with recruitment although one stated this is a national rather than a local issue.
- 5.10 While overall the office market remains relatively slow, there is some investment in the office market, including for some substantial premises. Worcester City centre

generated a range of opinions from the market, including being an attractive, central place for offices and having public transport and services available, but also it was highlighted that the car parking for staff is difficult and quality, new stock is very limited.

- 5.11 In **Wychavon**, availability of suitable employment land and premises has again been highlighted as an issue, with one specific company stating their search has been ongoing for over two years. Furthermore, recruitment is an ongoing concern, with two factors being highlighted – the need for skilled staff and difficulties in attracting staff to areas away from the M5 (e.g. Evesham). Congestion issues and a lack of workforce amenities were also mentioned. The access to the M5 corridor is a key consideration, with respondents from areas further away from this corridor citing local congestion concerns and access to markets.

Business Consultation Breakfast

- 5.12 Local businesses were invited to a consultation breakfast event in June, held at the Guildhall in Worcester. The purpose of the event was twofold – to inform participants on the EDNA and the wider SWDP programme and to receive input into the EDNA through round-table discussions and feedback forms. Emerging discussion themes included:

- Infrastructure requirements should form part of the considerations when assessing employment land growth
- The market is tight and further employment options need to be brought to the market
- Mixed use sites – one view was that they are important in providing places to live and work and another view was that the employment component ends up not being delivered and thus it is better to have separation of residential and employment schemes
- Employment land should be linked to the strategic highway network
- Further infill development opportunities in Worcester are limited and would be difficult
- Quality office space in Worcester city centre is in very short supply, particularly for businesses requiring larger spaces (e.g. for +20 workers)
- Out of town office space often does not have sufficient car parking
- Out-commuting (e.g. to Birmingham) was considered to be less problematic than in-commuting to Worcester

- New energy standards are likely to impact on older stock, which would require refurbishment to a more efficient level in order to be able to sell
- Fringes of Worcester urban area are attractive places for further employment development, with connectivity to the strategic road network, proximity to Worcester and building upon existing areas (e.g. Blackpole)
- Generally, it was considered that vacancy levels were low in South Worcestershire, particularly for quality stock

5.13 Specific questions were asked on the feedback forms available for attendees to complete, which are summarised below.

Table 5 – Responses on Business Consultation Feedback Forms

Question	Responses
How much land should the plan allocate for new offices factories and warehouses?	The responses were generally that there should be enough to allow choice in the market, more than just enough to match economic forecasts, with responses for 25-100% more than that based on the forecasts. Two responses commented that older stock could be redeveloped for non-employment purposes
What type of land should the plan allocate for new office, factories and warehouses?	The responses did not show a preference for particular land types, with respondents stating that all land types – land controlled by large developers, land available for sale to local businesses, land adjacent to major roads, adjacent to new homes, and small sites in all areas of S Worcestershire (1 exception). Respondents showed a preference for allocation of sites, rather than a strategic direction for growth.
Where within South Worcestershire should the priorities be for the allocation of further land for new offices, factories and warehouses?	Offices – Worcester City, Worcester west Factories – Evesham, Worcester, Worcester west Warehouses – Evesham, Worcester, Worcester west

Source: Business Consultation Breakfast – feedback forms (18th June 2018)

6.0 FUNCTIONAL ECONOMIC MARKET AREA

6.1 This chapter defines and reviews the functional economic market area of the South Worcestershire region, as a recognition that its economy does not operate in isolation, but rather it has crucial interrelationships with neighbouring local authority areas.

6.2 The guidance for Housing and Economic Development Needs Assessments produced by the Department for Communities and Local Government includes guidance for the definition and consideration of a functional economic market area. The guidance states:

“The geography of commercial property markets should be thought of in terms of the requirements of the market in terms of the location of premises, and the spatial factors used in analysing demand and supply – often referred to as the functional economic market area. Since patterns of economic activity vary from place to place, there is no standard approach to defining a functional economic market area, however, it is possible to define them taking account of factors including:

- *extent of any Local Enterprise Partnership within the area;*
- *travel to work areas;*
- *housing market area;*
- *flow of goods, services and information within the local economy;*
- *service market for consumers;*
- *administrative area;*
- *Catchment areas of facilities providing cultural and social well-being;*
- *transport network.”*

6.3 The functional economic market area is used to help illustrate the influences and potential impacts of the South Worcestershire economy on neighbouring authority areas and conversely the potential influences and impacts of neighbouring areas on South Worcestershire. This understanding can help to guide the Councils in discussions with neighbouring authorities and in cross-border planning.

6.4 All definitions of a functional economic market area are approximations of the interrelationships of a local economy with areas outside the local authority. The functional economic market area cannot account for all relationships in the economy, rather it is a representation of the key economic, workforce and consumer flows for the local economy. It provides an approximation of the main sphere of economic activity

for South Worcestershire.

6.5 In defining the functional economic area of South Worcestershire, the following factors have been considered:

- South Worcestershire has been considered as a single entity.
- The geography of South Worcestershire and the surrounding areas, in particular natural or engineered boundaries that affect people flows and perceptions of proximity (e.g. the Malvern Hills, the Cotswold, strategic road networks).
- Worcester's role as the centre of Worcestershire, which is reflected in net in-commuting to Worcester City from other areas in the County, including elsewhere in South Worcestershire. Furthermore, the administrative, higher-educational and cultural assets and institutions important for the County that are located in Worcester highlight its central role.
- The net out-commuting of workers in South Worcestershire (i.e. more residents commuting out for work elsewhere than workers commuting in to work in South Worcestershire). This net out-commuting is predominantly north to Birmingham (from all three local authorities) and south-east to Cheltenham, Cotswold and Stratford-upon-Avon (predominantly from Wychavon).
- The manufacturing focus of the South Worcestershire economy (second largest sector by employment numbers) is consistent with the wider West Midlands area.
- Consultations with businesses suggested a relatively tight network of business relationships within the South Worcestershire area. In terms of access to markets, the proximity to Worcester and access to the M5 were considered key, with the broader location central within the UK also cited as important.

6.6 **Therefore, on the basis of the above, it is concluded that the primary functional economic market area for the South Worcestershire area can be approximated by the Worcestershire County area. A broader area extending to Stratford-upon-Avon, Cotswold, Tewksbury and Cheltenham local authorities in the south and east and Birmingham in the north would be an approximation of a secondary functional economic market area for South Worcestershire.**

7.0 EMPLOYMENT LAND

7.1 The following table reviews the site allocations from the adopted SWDP, including an assessment of the development potential of the sites and reviewing any development or planning approvals that have occurred since the adoption of the SWDP.

Table 6 – Employment Land Allocations

Policy Reference	Site	Uses	Employment (ha)	Site area gross (ha)	Ownership	Comments from Local Plan	Development Potential
Malvern Hills							
SWDP45/1	Broomhall Community and Norton Barracks Community (Worcester South Urban Extension)	Mixed use including employment land and dwellings.	20	247.1	Several ownerships including Wellbeck Strategic Land LLP	This gross area includes land within the development boundary for the rural settlement of Norton Barracks/ Brockhill Village (27.5 ha).	Large site to the south of the Worcester urban area. Employment opportunities would be for B2/B8 units. The broader site would be for a residential led scheme, with potential for retail to service the population. Further infrastructure is required to deliver the employment use, with the infrastructure to be delivered by the residential components. Medium to longer term employment development opportunity. Summary: Requires infrastructure investment but likely medium to longer term B2/B8 uses
SWDP45/2	Temple Laugherne (Worcester West Urban Extension)	Mixed use including employment land and dwellings.	5	138.8	Hallam Land Management Ltd, University of Worcester	The site is to support some 2,150 dwellings. Timing of the delivery will be dependent on the Worcester Transport Strategy, in particular the dualling of the A4440 Southern Link Rd.	Residential led opportunity for the majority of the site. University of Worcester have an interest in part of the site for student accommodation and campus facilities. Employment uses should be in the southern area of the site, to service local Worcester and Malvern needs and businesses not requiring close proximity to motorways. Likely to be mix of B-class uses, though predominantly B2. Likely to be small to mid-size units. Would need to ensure that the employment aspects are delivered appropriately, rather than just a residential scheme. Summary: Requires masterplanning and would need monitoring to ensure employment aspects come forward. Medium to longer term opportunity.

Policy Reference	Site	Uses	Employment (ha)	Site area gross (ha)	Ownership	Comments from Local Plan	Development Potential
SWDP53	Malvern Technology Centre (QinetiQ), St Andrews Road, WR14 3PS	Mixed use development including B1 employment land	4.5	15.4 out of 26	QinetiQ	The remaining 10.6 ha will be safeguarded for B1 use class and associated development. Critical for anchoring high technology industries at Malvern to meet economic vision for area. Land here is under-utilised due to out of date premises that are currently occupied at low density. Owners are pursuing a masterplan to rationalise the site. North of site is Malvern Hills Science Park with limited space available for future expansion and the need to provide grow-on capacity for existing companies means that the land needs to be safeguarded for future business use.	QinetiQ control the site, although are looking to offload spare brownfield areas within the site. Potential for supporting or satellite employment opportunities around the core QinetiQ use. Pressures for residential should be resisted to enable long term growth of the area. Summary: Dependent on sale of site, but good potential for employment uses around the QinetiQ hub
SWDP54	Blackmore Park, WR13 6NN	B1, B2, B8 employment land uses	5.1	5.1	Blackmore Park Ltd	Brownfield site, proposed through the SWDP to be extended onto adjacent land that is part residual brownfield land and part greenfield land. Planning permission was granted for 84,000 sqm of mixed use business space and a 1,800 sqm high-technology workspace unit has now been completed. Area may also accommodate other B2 employment uses that would not be appropriately located on the high technology sector land at Malvern Technology Park.	Rural location east of Malvern Wells. Opportunities for the site would be secondary and smaller B2/B8 uses supporting the local Malvern Hills market. Uses could include those that need some separation from an urban population. Alongside the allocation, ESP Enigma have a site with further expansion room, which would be for their own purposes (B2/B8). Summary: Developable for smaller, rural based B2/B8 units.
SWDP56	Development at North East Malvern	Mixed use urban extension	10	56.84	Gleeson Developments Ltd and Wellbeck Strategic Land LLP	Comprehensive masterplan is required for this site to deliver 800 dwellings (up to 40% affordable), 10 ha of employment land in a location that is attractive to business interests, community infrastructure (primary school, community hall, cemetery, police), green infrastructure, neighbourhood shopping facilities, public transport facilities. Masterplan would need to consider access to A449.	Application for residential led scheme for 800 dwellings, B-class uses and local centre. Positioning of B-class uses in masterplan is surrounded by residential and is likely to have only limited appeal to the market, thus not ideally located for business. Narrow frontage reduces profile of site. Employment potential would be a mix of B1/B2/B8 uses, providing additional capacity to the local market. Potential to deliver the next wave of A-grade stock for Malvern. Summary: Further discussions with landholder would help ensure best outcomes for employment

Policy Reference	Site	Uses	Employment (ha)	Site area gross (ha)	Ownership	Comments from Local Plan	Development Potential
							component. Risk of residential being preferred to employment, though there is a market for further employment in locality.
Worcester City							
SWDP43/15	Worcester Woods Business Park, Newtown Road	B1, B2 employment, care home, car/motorbike showroom, hospital expansion	8.3	11.37	Berkeley Castle Estate/ Spetchley Estate		Majority of the site is vacant and grassed. Some sloping but developable for B-class uses. Partly occupied by staff car-parking for the neighbouring hospital. Access is likely to be joint with hospital. Potential for B1 business park or research park with links to Hospital, although owner interest is for other uses (retail). Summary: Developable for B1 offices but risk of retail being preferred (by the landowner).
SWDP43/16	Government Buildings, Whittington Road	B1 Office and Residential. Outline permission for 15,050 sqm office pk.	4	7.56	St Modwen		Most of this site is being redeveloped for residential by St Modwen Homes - Weogoran Park. The western portion of the site is yet to be redeveloped, which would be for B1 uses. While there are neighbouring commercial uses (pub, service station, ambulance depot), it is considered doubtful whether the office component would be delivered by the developer. Summary: Employment component unlikely to be developed.
SWDP43/18	University Park	Full and outline permission for mixed-use incl. medical centre, care home, C2 extra care	4	11	University of Worcester, Spenhill Developments		Site is partially developed, with St Johns House Medical Centre, Juniper House care home built on part of the site. Site has outline planning for a range of other uses, including B1, with the intent of the University of Worcester for a technology/science park. However, the University have changed focus for growth towards other sites and now consider this site to be extraneous to their needs. They do not plan to proceed with the approved development and have agreed to a land-swap with a residential developer to enable their campus at Temple Laugharne Farm (Oldbury Rd). Vacant areas are partially treed, with moderate sloping. Flatter and less treed in the south, at the end of the north/south spine through the site.

Policy Reference	Site	Uses	Employment (ha)	Site area gross (ha)	Ownership	Comments from Local Plan	Development Potential
							Application is with Malvern Hills DC for the western portion of the site for a residential scheme on the site (up to 150 dwellings). Opportunities would be for high quality B1 uses, although likely to be a longer term prospect. Pressure likely to continue for residential uses on remaining parcels, particularly southern area. Location of site is on the western side of Worcester, which is a disadvantage for employment and neighbouring sensitive uses would limit prospects. Summary: Approvals on surrounding parcels and University's changing investment priorities mean permitted employment unlikely to come forward.
SWDP43/20	Land East of Nunnery Way North of the A44	Mixed use B1, B2, B8 employment, vehicle showrooms, public house and restaurant	8	8.26	St Modwen	Planning permission for a football stadium and enabling development was approved on 27/04/2012 and will not lapse until 27/04/2019. This approved development includes land in the proposed area of significant gap between M5 and the area of easement for the overhead electricity lines. Planning permission for the mixed use listed in this policy was granted on 01/06/2015.	Currently being developed for B2/B8 uses. Built speculatively by St Modwen's, with 1 occupier at present but considerable interest. Further land is ready for construction of further units and is serviced and subdivided. Site also includes a pub/restaurant and fast food outlet. Key site for unit growth in short term. Summary: Currently being developed for employment
SWDP43/22	Midland Road, WR5 1DS	Employment	1	1.25	Fortis Living		Thin, flat site alongside railway, with neighbouring employment and residential uses. Northern part of site has been developed for Army Reserve building. Fortis Living developing offices for their own use and will develop another industrial building to lease to market. Some congestion issues along Midland Rd. Summary: Fortis Living developing B1 unit for their own use.
SWDP43/23	Land South of Warndon Wood	B1 - phased post-2019	5	6.95	Warndon Six Ltd	Up to 5 ha net of high-quality B1 employment development will be permitted.	Flat, partially treed site with frontage to M5. Access would be via roundabout at A4440/Plantation Dr. Planning permission granted for a mix of B1/B2/B8 units, with plans submitted detailing two B2/B8 units (10,690 sqm and 5,725 sqm) and one B1 unit (2,975 sqm) Summary: Attractive site likely to come forward in line with approval.

Policy Reference	Site	Uses	Employment (ha)	Site area gross (ha)	Ownership	Comments from Local Plan	Development Potential
SWDP44/4	Shrub Hill	Approx. 750 dwellings. Plus, other mixed use/ commercial development	~	19.72	several ownerships including St Modwen	Mixed use development should be developed both East and West of the railway line. Potential for significant amounts of new or refurbished commercial office space. A mixed-use development would create a new neighbourhood in the city. Existing businesses should not be lost as are an important element to the economy of the city.	Existing St Modwen industrial estate and commercial uses. Well positioned, inner-ring estate, though has older buildings and confusing layout. Some vacant premises on site, though is still providing a function for secondary/tertiary employment spaces in a near city location. Potential for a comprehensive redevelopment on the site, although landholder is not interested in an employment redevelopment at this stage, citing redevelopment costs. Would require masterplanning. Summary: Longer term redevelopment opportunity that may result in other uses forming part of a mixed-use development. Unlikely to be a net gain of employment floorspace on site.
Wychavon							
SWDP47/2	Land to the North-East of Pershore	Employment land for B1, B2 and B8 uses	5 (4 ha remaining)	5	Crown House Developments		Partially developed site, with 2 existing businesses taking up 1.0 ha of the land allocation. A further unit has been approved on a 0.56 ha site. Remainder of site has had site works and is serviced and is currently on the market. Appropriate for small to mid B2/B8 units. Summary: Currently being developed for employment.
SWDP49/1	Copcut Lane, WR9 0AH	Mixed use including employment land for B1 and B2 uses.	3.5	43.5	William Davis Ltd	Employment land is intended for high quality B1 and B2 uses.	Partially developed site for housing by William Davis Ltd. Outline permissioned for B1 uses (3.5 ha) but likely to be developer pressure for retail or further housing. B-class employment opportunities would be for low impact operations, predominantly B1 Summary: Developable for B1 offices in line with outline permission but risk of residential being preferred.
SWDP49/3	Stonebridge Cross Business Park, Pointon Way, WR9 0LW	Employment land for B1, B2 and B8 uses	10	10	Stoford, Aviva Life and Pensions	An extension of the current business park. A landscaping planting belt is included with the allocation to provide a landscape buffer due to the sensitivity of the site.	Vacant site adjoining existing Stonebridge Cross Business Park. Would form phase two of the business park. Developer expects up to 41,810 sqm of B2/B8 floorspace, although has not submitted a planning application. Summary: Developable as part of further phase of Stonebridge Cross Business Park

Policy Reference	Site	Uses	Employment (ha)	Site area gross (ha)	Ownership	Comments from Local Plan	Development Potential
SWDP51/3	Vale Industrial Park, Evesham, WR11 1GT	Employment land for B1, B2 and B8 uses	Approx. 34			Provision of public open space to serve as both a facility for employees and a setting for the development.	Opportunities for further expansions of the Vale Industrial Park, including B1, B2 and B8 uses. A key consideration in the roll out of the land will be the securing of access to the sites. Potential non-B-class uses on gateway site at the western portion of the industrial estate. Important employment site for the eastern portion of South Worcestershire.
SWDP45/6	Worcester Technology Park (South Phase)	Technology Park	Approx. 16	20.32	Stoford	Approximately 16 ha for research and development and manufacturing related to environmental and new technologies or associated businesses, to be integrated with the land to the North that has permission for business uses. North phase of development up to 140,000 sqm on 27 ha (net) next to Junction 6, M5.	Worcester Technology Park (North) is currently being developed as Worcester 6 by Stoford with two units fully constructed (one leased to Siemens, one available at 15,000 sqm). Two further units have been pre-let with construction in the early stages. Short term opportunity for larger B2/B8 units as a key strategic site for South Worcestershire. The South Phase (the employment site allocation) is within Spetchley Estate ownership with no development activity or planning application as yet, though with Stoford the landholder intends to lodge planning application in 2019. Would be appropriate for a complementary use to the North site. An R&D and manufacturing site, associated with environmental and new technologies would be complementary to the North site, however, there is likely to be pressures for a wider breadth of businesses able to be positioned within this high-profile site (e.g. general manufacturing, logistics). Summary: Development on South Phase likely to come forward in medium term. There is likely to be a push for a broader array of permissible employment uses, rather than Technology Park uses.
Total Malvern Hills District			44.6				
Total Worcester City			30.3				
Total Wychavon District			68.5				
Total South Worcestershire			143.4				

Source: SWDP, BE Group analysis, inputs from landholders/agents

7.2 From the table above it is possible to have a stocktake of the available site allocations and an understanding of the realistic chances of these sites coming forward to the market for employment purposes. Furthermore, some of the land has been developed since the adoption of the SWDP. It is important to understand the available land remaining for development.

7.3 The table below lists the sites with realistic prospects of development for employment uses, with the net available land areas also listed (i.e. excluding any land already developed).

Table 7 – Net Areas for Employment Land Allocations

Policy Reference	Site	Net Remaining Employment Area (ha)
SWDP45/1	Broomhall Community and Norton Barracks Community (Worcester South Urban Extension)	20
SWDP45/2	Temple Laugherne (Worcester West Urban Extension)	5
SWDP53	Malvern Technology Centre (QinetiQ), St Andrews Road, WR14 3PS	4.5
SWDP54	Blackmore Park, WR13 6NN	5.1
SWDP56	Development at North East Malvern	10
SWDP43/15	Worcester Woods Business Park, Newtown Road	8.3
SWDP43/18	University Park	4
SWDP43/20	Land East of Nunnery Way North of the A44	2.5
SWDP43/23	Land South of Warndon Wood	5
SWDP47/2	Land to the North-East of Pershore	4
SWDP49/1	Copcut Lane, WR9 0AH	3.5
SWDP49/3	Stonebridge Cross Business Park, Pointon Way, WR9 0LW	10
SWDP51/3	Vale Industrial Park, Evesham, WR11 1GT – allocations only	34
SWDP45/6	Worcester Technology Park (South Phase)	16
Total developable land Malvern Hills		44.6
Total developable land Worcester		19.8
Total developable land Wychavon		67.5
Total developable land South Worcestershire		131.9

Source: BE Group critique of SWDP sites

* total is for allocations only, some infill sites (e.g. Vale Industrial Park) have potential to provide further growth

7.4 The gross employment land site allocations are for 143.4 ha of employment land, although reviewing the sites, it is considered that a more realistic quantity of available employment land within the allocated employment land across South Worcestershire is 131.9 ha. It should be noted that even this more realistic quantity of available land

allocations has some risk of not being built out (e.g. Copcut Ln, North East Malvern, University Park).

- 7.5 Table 8 lists the sites in which the study team considers it unlikely that employment uses would be developed, or in the case of Shrub Hill, a net gain in employment uses would be achieved.

Table 8 – SWDP Employment Land Allocations Unlikely to be Developed for Employment

Policy Reference	Site	Net Remaining Employment Area (ha)
SWDP43/16	Government Buildings, Whittington Road	4
SWDP44/4	Shrub Hill	~

Source: BE Group critique of SWDP sites

- 7.6 Midland Road has also been removed from the available land as it is committed and under construction for the purposes of its landholder, Fortis Living.

Site Quality

- 7.7 All sites have been graded using a standard scoring system that consists of objective measures (as far as possible). Each site is scored out of 100, made up of ten individual measures, each scored out of ten. These are:

- proximity to the strategic highway network
- prominence
- access to public transport
- sequential testing
- planning status
- access to services
- constraints
- environmental setting
- flexibility
- availability.

- 7.8 The scoring system is provided in Appendix 9 and the scoring matrix is in Appendix 10.

- 7.9 Two scores are provided in Table 9, a total score and a market-led score, which reflects the locational strengths and weaknesses of each site. The market-led score is made up of just strategic highway proximity, prominence, sequential testing, environmental setting and flexibility. These are the characteristics that are very difficult to improve. The other five aspects (public transport, planning status, services, constraints and availability), which combine to make up the total score, are potentially easier to improve through specific interventions and hence provide the ability to raise the quality of a site.
- 7.10 The range of sites across South Worcestershire have a variety of attractiveness from an employment development perspective, as is reflected in the scores below.
- 7.11 Importantly, none of the sites could be considered to have performed poorly on this assessment. The leading sites were revealed to be Nunnery Way, Warndon Wood and North-East of Pershore – sites that have planning in place and are strategically placed.

Table 9 – Employment Sites Scoring

Name	Score, max 100	Market -led Sub-total (max 50)	Land Type
Broomhall Community and Norton Barracks Community (Worcester South Urban Extension)	65	44	Office/Industrial
Temple Laugharne (Worcester West Urban Extension)	62	41	Office/Industrial
Malvern Technology Centre (QinetiQ), St Andrews Road, WR14 3PS	60	31	Office/Laboratory
Blackmore Park, WR13 6NN	43	18	Industrial
Development at North East Malvern	61	36	Office/Industrial
Worcester Woods Business Park, Newtown Road	75	45	Office
Land East of Nunnery Way North of the A44	88	43	Industrial
Land South of Warndon Wood	83	45	Industrial
Land to the North-East of Pershore	78	35	Industrial
Copcut Lane, WR9 0AH	73	42	Office
Stonebridge Cross Business Park, Pointon Way, WR9 0LW	59	34	Industrial
Vale Industrial Park, Evesham, WR11 1GT – allocations (34) and developable in-fill sites (9.5)	77	41	Industrial
Worcester Technology Park (South Phase)	73	48	Office/Laboratory/Industrial

Source: BE Group 2018

Existing Employment Areas

- 7.12 The existing employment areas have also been critiqued based on a similar approach to scoring the allocated employment sites, with the scoring system also provided in Appendix 9. The results are found in Appendix 11.
- 7.13 The resources used to assess the existing sites are the survey database that the three

Councils provided as part of this study (summarised in Appendix 5 along with BE Group's commentary on each site) and on-the-ground inspections of the existing assets.

- 7.14 From the review and scoring of the existing employment areas, some sites scored poorly, and these are listed below, with recommendations as to the on-going potential uses of these sites.
- 7.15 Some of the areas scoring lowly, did so on the basis that they are remotely located, rural sites. The criteria relating to proximity to the road network, prominence and access meant that these sites scored low. While they would not be appropriate for the majority of potential B-class users, and it would be inappropriate to rely heavily on such assets to provide employment premises, these areas provide a local function important to the rural economy.

Table 10 – Poorly Performing Existing Employment Sites

Name	Score, max 90	Comments and Recommendation
Malvern Hills		
Backfields Upton	26	A small light industrial estate that is enclosed by residential uses. Access is very narrow, and premises do not have any frontage to a roadway. Recommendation: Area is not protected for employment.
KDO Business Centre	26	Remotely located business centre serving a rural economy function. Recommendation: Area is protected for employment.
Woodside Business Park	30	Remotely located industrial estate serving a rural economy function. Recommendation: Area is protected for employment.
Bruff Business Centre	32	Remotely located business centre serving a rural economy function. Recommendation: Area is protected for employment.
Sixways Industrial Estate, Barnards Green	33	A small industrial estate that is surrounded by retail and residential uses. Has a poor, narrow frontage. Recommendation: Area is not protected for employment.
Upton upon Severn Industrial Estate	34	Industrial estate in Upton upon Severn, surrounded by residential uses. Some potential for conflict between uses, including traffic and noise issues. Well-occupied and performing a local function. Recommendation: Area is protected for employment.
Buckman Works	35	Older premises in need of refurbishment removed from key markets. However, has good occupancy levels and current function expected to continue. Recommendation: Area is protected for employment.
Mill Pool Farm Industrial Estate, Main Road	35	Older premises in need of refurbishment removed from key markets. However, serving local function and is fully occupied. Recommendation: Area is protected for employment.
Worcester City		
Three Springs Trading Estate, Vincent Road	25	Poorly located light industrial estate, with very narrow access points, including approaches on local streets. Units are dated and in need of refurbishment.

Name	Score, max 90	Comments and Recommendation
		Recommendation: Area is not protected for employment.
Orchard Street	29	Poorly located industrial estate on a residential street. Narrow access points, including approaches on local streets. Poorly signed. Units are dated and in need of refurbishment. Recommendation: Area is not protected for employment.
Gregory's Mill Industrial Estate, Gregory Mill Street	30	Poorly located light industrial estate, with very narrow access points, including approaches on local streets. Units are dated and in need of refurbishment. Difficult to locate. Recommendation: Area is not protected for employment.
Pope Iron Road	30	Small number of industrial units on a residential street. Poor location for industrial premises, with potential for conflicts with neighbouring uses. Recommendation: Area is not protected for employment.
Diglis Industrial Estate, Navigation Road	41	Larger industrial estate, it is limited by narrow approach streets. Some buildings are derelict and in need of refurbishment, although others continue to be occupied and functioning adequately. Some regeneration has occurred on neighbouring sites for residential development. Landholder has interest in developing for residential, although there has been some third party interest in an employment based redevelopment of the site. Over the planning period to 2041, there is likely to be increasing pressures for a residential redevelopment of the site. However, it is considered that the estate is still appropriate for employment at this stage. Recommendation: Area is protected for employment.
Wychavon		
Stockwood Business Park	31	Remotely located business centre serving a rural economy function. Reasonable quality buildings but narrow road access. Recommendation: Area is protected for employment.
Murcot Turn Business Park	34	Rural industrial estate, fully occupied at time of inspection with small industrial occupiers. Narrow access point past residential dwellings, although actual units are separated from residential uses. Serves a rural economy function. Recommendation: Area is protected for employment.
Bennets Hill Business Park	34	Remotely located business centre serving a rural economy function, in area with significant horticultural production (greenhouses). Narrow access. Recommendation: Area is protected for employment.
Deer Park Business Centre, Woollas Hill	34	Remotely located business centre with small office units. Attractive buildings but narrow road access. Recommendation: Area is protected for employment.
Farncombe House, Farncombe Estate	34	Remotely located business centre with small office units. Attractive buildings but narrow and windy road access. Recommendation: Area is protected for employment.
Stanway Screens, Oilcroft Orchard	34	Single use building for an industrial operator. Neighbouring uses include residential, rail corridor and open space. Building is set back from the road. Beyond its current occupation, it would be difficult to see its on-going use as an industrial operation. Recommendation: Area is not protected for employment.
Strensham Business Park, Twyning Road	35	Close to M5/M50 junction, although not visible from motorways and access to/from motorways includes a significant detour through Twyning. Reasonable quality

Name	Score, max 90	Comments and Recommendation
		buildings for small light industrial and office users. No vacancies at time of inspection. Serving a local function. Recommendation: Area is protected for employment.
Holden and Charlotte Works, New Road	36	Medium sized industrial units on narrow New Road, which also serves a residential function. Units are surrounded by residential uses. Potential for significant conflicts between industrial operations and surrounding uses. Potential for regeneration to residential uses, although this would require the relocation of a significant quantity of floorspace and jobs. Recommendation: At this stage it is recommended to protect for employment, however, it is considered that in the planning timeframe, it should transition to residential uses and thus a regular review of the status of the site should be undertaken.
Ikon Trading Estate, Droitwich Road	37	Rural location within a reasonable proximity to Kidderminster. Would provide a secondary location for the Kidderminster economy and serve part of its demand. Surrounded by agricultural fields Recommendation: Area is protected for employment.
Field Barn Lane Industrial Estate, Field Barn Lane	38	Field Barn Lane is a very narrow thoroughfare, which restricts access to the industrial estate. Small number of occupiers in industrial units, serving a local function, including some rural economy occupiers. Recommendation: Area is protected for employment.
Wood Norton/ BBC Training Centre, Wood Norton	38	Specific, single use of the site, which requires a large footprint. Re-use of the site for B-class uses may be difficult and likely to involve a broader mix of uses, however current use is appropriate. Recommendation: Area is protected for employment.

Source: BE Group 2018

7.16 Sites not listed in the table above performed better in the scoring assessment and would be recommended to be retained for employment.

8.0 OBJECTIVELY ASSESSED NEEDS

Introduction

8.1 Planning Practice Guidance states that the assessment of future land needs should be determined by looking at both past trends and future forecasting methods. This chapter explains the approach used to take account of PPG. That methodology uses two models to assess land needs. None provide a definitive answer, but they provide influences to be understood. They must also be considered in light of the market overview undertaken as part of this study. The two models are:

- Historic land and floorspace take-up forecast

This approach reviews the actual take-up of employment floorspace in the three districts over a period of time. The method is not wholly reliable as there will be peaks and troughs, different time periods taken can also result in different outcomes and it relies on accurate recording of take-up over several years. A period of sustained growth may show a high average take-up whereas looking over a recessionary period could well reflect low or even nil take-up. Furthermore, some caution is needed if relying on historic trends only, and these should be considered in the context of current and projected market activity. It should also be noted that historic take-up rates may be influenced by other factors rather than just demand, such as a lack of available supply.

- Employment based forecast

This relies on the econometric forecasts which use a model that projects the likely jobs growth in different industry sectors. The jobs from individual sectors are then translated to land using a formula based on a jobs to floorspace density, which in turn can be translated into the projected land need. Again, viewing these figures in isolation can provide trends that do not reflect the market signals identified in this study. Thus, the employment data should be considered in the context of the market.

8.2 The forecast covers a 25 year period from 2016 to 2041.

Model One: Land and Floorspace Take-Up

8.3 The local authorities of Worcester, Malvern Hills and Wychavon record annual employment floorspace take-up in each of their respective areas. The data is summarised in the tables below for each area. Data has then been combined to

produce totals for South Worcestershire collectively. Historically, data has been collected over different time periods and with different methodologies, although over the past decade there has been good consistency of data collection.

- 8.4 The table below summarises the past employment land take up rates across South Worcestershire, taken from the SWDP Annual Monitoring Report.

Table 11 - Employment Land Completions and Commitments 2006-2017

Area	Completions (ha)				Commitments	Total Completions and Commitments
	2006-11	2011-16	2016/17	Total 2006-17	2016/17	
Malvern Hills^						
Gains	12.04	2.36	1.96	16.36	2.70	19.06
Losses	0.01*	0.64	0	0.65	0.01	0.66
Worcester						
Gains	8.98**	4.24**	1.61	14.83	27.16	41.99
Losses	20.04	13.07	0	33.11	0	33.11
Wychavon						
Gains	26.90	34.40	29.84	91.14	145.1	236.24
Losses	3.13	4.48	9.88	17.49	2.84	20.33

Source: Authorities' Monitoring Report 2017

^ Completions by net site area recorded from 2013/14

* 2010/11 only

** Taken from Worcester City Council Employment Land Monitor 2016 as figures in AMR 2017 did not add to total recorded

- 8.5 Points to note from the above table are:

- The three local authority areas have experienced different take-up trajectories over the past decade.
- Employment land losses are most pronounced in Worcester City, though also significant in Wychavon District.
- Consideration would need to be given to whether the substantial take-up in Wychavon District over the past decade is likely to be sustainable over the forecast period.

- 8.6 For the purposes of forecasting based on past take-up rates, the completions data is the most relevant as not all commitments are taken forward or could be rolled out over several years. Furthermore, it is the gains that are critical in forecasting additional land demands. The 2006-17 completion gain averages for the three areas are provided below.

Table 12 – Average Annual Employment Land Take-up 2006-17

Area	2006-17 Average (ha)
Malvern Hills	1.49
Worcester	1.35
Wychavon	8.29
South Worcestershire	11.13

Source: Analysis of Authorities' Monitoring Report 2017 data

- 8.7 Forecasting for employment land using the past take-up rates is based on extrapolating the historic trends over the forecast period. The table below provides an estimate of the employment land and floorspace requirements for each local authority area based on the assumption of keeping the same average land consumption as during the 2006-17 period. The floorspace estimate is based on a development assumption of 3,900 sqm of employment floorspace per hectare.
- 8.8 The ready availability of land is a critical component in the take-up of employment land over time. A constrained market will result in a latent demand that would not be evident in the take-up rates. This may result in underestimating the take-up rate potential in coming years. In the case of South Worcestershire, there is evidence of a constrained market in previous years in Worcester, which has led to higher take-up rates in Wychavon.

Table 13 – Forecast Employment Land Take-up 2016-41

Area	Change 2016-41 (ha)	Floorspace Growth 2016-41 (sqm)
Malvern Hills	37.25	145,300
Worcester	33.75	131,600
Wychavon	207.25	808,300
South Worcestershire	278.25	1,085,200

Source: BE Group, 2018

- 8.9 The above table suggests that continuing trends of the last decade would require some 278 ha of employment land to be available to the market over the period 2016 to 2041 to provide some 1,090,000 sqm of B-class employment floorspace.
- 8.10 Table 14 provides a breakdown by five-year intervals over the planning period, assuming a constant take up of land and floorspace. Generally, floorspace take up has

stronger and weaker periods of growth, influenced by overall market confidence and economic opportunities, but the table provides an indication of likely growth patterns.

Table 14 – Cumulative Employment Land Take-up 2016-41

Area	2016-20	2021-25	2026-30	2031-35	2036-41
Employment Land (ha)					
Malvern Hills	7.45	14.90	22.35	29.80	37.25
Worcester	6.75	13.50	20.25	27.00	33.75
Wychavon	41.45	82.90	124.35	165.80	207.25
South Worcestershire	55.65	111.30	166.95	222.60	278.25
Floorspace (sqm)					
Malvern Hills	29,100	58,100	87,200	116,200	145,300
Worcester	26,300	52,700	79,000	105,300	131,600
Wychavon	161,700	323,300	485,000	646,600	808,300
South Worcestershire	217,100	434,100	651,200	868,100	1,085,200

Source: BE Group, 2018

- 8.11 It is prudent to include a level of flexibility in the forecasts to provide for unexpected requirements. A buffer equivalent to a five-year take-up of land is recommended to be included to incorporate this flexibility. This is provided in the table below.

Table 15 – Forecast Employment Land Take-up 2016-41, including Buffer

Area	Change 2016-41 (ha)	Floorspace Growth 2016-41 (sqm)
Malvern Hills	44.70	174,300
Worcester	40.50	158,000
Wychavon	248.70	969,900
South Worcestershire	333.90	1,302,200

Source: BE Group, 2018

- 8.12 While the planning period is for 2016 to 2041, there is data of the completions for the 2016/17 period, as summarised in Table 11 for the land take-up and Appendix 12 for the floorspace take-up. It is noted that the completions data for 2016/17 is similar to the decadal average for Malvern Hills and Worcester, however for Wychavon the land gain recorded in 2016/17 was over three times the decadal average, although the recorded floorspace was only at an average level. Table 16 provides the employment land and floorspace take-up to 2041 (with and without the five-year buffer) excluding the actual completions levels for 2016/17. Completions information is recorded for both

land take-up and floorspace completions and thus the actual land and floorspace recorded has been taken off the forecast totals (rather than an assumption of average floorspace per hectare).

Table 16 – Forecast Employment Land Take-up 2016-41, excluding 2016/17 Completions

Area	Excluding Buffer		Including Buffer	
	Change 2016-41 (ha)	Floorspace Growth 2016-41 (sqm)	Change 2016-41 (ha)	Floorspace Growth 2016-41 (sqm)
Malvern Hills	35.29	125,600	42.74	154,600
Worcester	32.14	125,400	38.89	151,800
Wychavon	177.41	786,800	218.86	948,400
South Worcestershire	244.84	1,037,800	300.49	1,254,800

Source: BE Group, 2018

- 8.13 It is also important to consider what types of employment floorspace would be appropriate across South Worcestershire. Once again past trends can provide some measure of the market preferences for different B-class use types. The three local authorities have collected information on employment floorspace take-up by different types, although the database timeframes vary between the three areas. Details of the breakdown of floorspace take-up in previous years is provided in Appendix 12. It should also be noted that other factors such as the current market dynamics, overarching economy and potential future trends for the economy would also influence the mix of floorspace types in demand over the forecast period.
- 8.14 The average floorspace completions for the three local authority areas are provided below. Data for Malvern Hills and Worcester is available over a longer timeframe. Consistent with the land take-up, the floorspace completions show that over the past decade Wychavon has recorded higher levels of floorspace completions than the other two local authority areas. The year by year data in the Appendix shows that there can be substantial variation in the take up over the years. For example, an authority may experience zero growth for several years before a scheme is brought forward that provides a quantum of floorspace (e.g. 10,000 sqm). Importantly, when considering take-up, the average over the past period is considered, which can include several zero years and some high growth years. The average would reveal a moderate growth;

however, it is important to understand that the actual growth is more discrete and 'lumpy'.

- 8.15 The table below shows the averages for all years and the averages for just the years where there was a gain of employment floorspace. The total floorspace averages are alike in that there is no year within the three authorities where there was no recorded completions in any of the B-class use types.

Table 17 – Average Employment Floorspace Completions by B-Class Use

Local Authority	Floorspace, sqm				
	B1	B2	B8	B1/B2/B8	Total
Malvern Hills					
Average 96/97-16/17	6,009	672	1,057	2,911	10,649
Average 06/07-16/17	2,603	1,028	1,072	1,557	6,260
Average 06/07-16/17 (excl. 0 take-up years)	2,892	1,285	1,340	15,567	6,260
Worcester					
Average 96/97-16/17	3,323	1,488	932	2,992	8,735
Average 06/07-16/17	2,223	366	1,013	3,252	6,854
Average 06/07-16/17 (excl. 0 take-up years)	4,075	2,013	3,714	5,111	6,854
Wychavon					
Average 06/07-16/17	3,777	3,936	9,403	4,242	21,357
Average 06/07-16/17 (excl. 0 take-up years)	3,777	3,936	9,403	6,194	21,357
South Worcestershire					
Average 06/07-16/17	8,603	5,330	11,487	9,051	34,471
Average 06/07-16/17 (excl. 0 take-up years)	10,744	7,234	14,457	26,872	34,471

Source: Monitoring reports for South Worcestershire and individual local authorities

- 8.16 The forecast breakdown of the floorspace growth projections to 2041 is provided in Table 18 below. This is based on the overall floorspace projected in Table 16 and considers the historic breakdown of floorspace information above. It also considers factors emerging from the other aspects of this study, particularly from the property market review and stakeholder consultations. Principally among these themes are the strength of the manufacturing market and the resulting need for further B2 floorspace, the more moderate B1 office market and preferred locations around Worcester and in

Wychavon. This breakdown should be seen as indicative only, providing guidance as to the likely mix of uses, rather than representing a prescriptive floorspace outcome.

8.17 The floorspace projections are minus the completions recorded in 2016/17.

8.18 It should be noted that all of the B1 floorspace is assumed to be developed as two-storey premises, which therefore require less overall land requirements. Therefore, while the floorspace totals match to the previous Table 16, the land area totals have been adjusted to reflect this assumption.

Table 18 – Net Employment Floorspace Projections 2016-2041 by B-Class Use

Scenario	Projection of Floorspace requirement (2016-2041), sqm**			Projection of Land requirement (2016-2041), ha**			Total
	B1*	B2	B8	B1*	B2	B8	
Excluding Five-Year Buffer							
Malvern Hills	50,200	52,800	22,600	6.4	13.5	5.8	25.7
Worcester	43,900	47,700	33,900	5.6	12.2	8.7	26.5
Wychavon	78,700	314,700	393,400	10.1	80.7	100.9	191.7
South Worcestershire	172,800	415,200	449,900	22.1	106.4	115.4	243.9
Including Five-Year Buffer							
Malvern Hills	61,800	64,900	27,800	7.9	16.6	7.1	31.6
Worcester	53,100	57,700	41,000	6.8	14.8	10.5	32.1
Wychavon	94,800	379,400	474,200	12.2	97.3	121.6	231.1
South Worcestershire	209,700	502,000	543,000	26.9	128.7	139.2	294.8

Source: BE Group, 2018

* Assumed to be two-storey

** Excludes recorded completions in 2016/17

8.19 Employment premises may have several occupiers over their economic life, with differing B-class uses. Most commonly, a unit may house B2 and B8 occupiers over its lifetime with relatively modest fit-out (and planning) changes. As such, some of the space in the table above is likely to have planning permission for a mix of B1/B2/B8 uses.

Model Two: Employment Based Forecasting

- 8.20 While the previous model forecast employment land requirements based on past take-up of land in South Worcestershire, the second model looks at employment forecasts and the resulting implications for employment land and premises.
- 8.21 The scenario uses as its base an Experian econometric model. The forecast projects employment change by sector from the current date to 2038. In addition, the model also includes data from 1997 onwards and as a result past demand can be used to calculate the assumed land need over the historic period for comparison with actual land take-up over the same period.
- 8.22 The consulting team has then used the annualised growth rate for the sectors in the model to extrapolate the model for the last three years of the forecast (2039-2041).
- 8.23 There are a number of points that need to be considered when interpreting and using economic forecasts and the results drawn from them:
- The results are indicative rather than exact: While econometric modelling is carried out using the best available economic data the results are an indication of what is likely to happen, and they may of course vary dependent on unexpected events
 - The longer term the data the more variation is likely
 - There can be significant differences in the outcomes predicted by different forecasters. Typically, forecasters start with their assumptions on the national growth position and break it down to a local level using a range of assumptions.

Clearly the headline growth expectations and the assumptions will differ.

- 8.24 The overall employment trend and forecasts from the Experian Model are illustrated in Appendix 13.

Summary of Model Projections

- 8.25 It is useful to consider the model projections over the forecast timeframe in terms of business space and in order to do so the following allocations are made:

Table 19: Building type allocation by category

Category	Type of space
Accommodation & Food Services	Leisure
Administrative & Supportive Services	Office
Agriculture, Forestry & Fishing	~
Civil Engineering	Office
Computer & Electronic Products (manufacture of)	Manufacturing
Computing & Information Services	Office
Construction of Buildings	Office
Education	Specialist public sector
Finance	Office
Food, Drink & Tobacco (manufacture of)	Manufacturing
Health	Specialist public sector
Land Transport, Storage & Post	Warehousing
Machinery & Equipment (manufacture of)	Manufacturing
Media Activities	Office
Metal Products (manufacture of)	Manufacturing
Non-Metallic Products (manufacture of)	Manufacturing
Other Manufacturing	Manufacturing
Other Private Services	Office
Printing and Recorded Media (manufacture of)	Manufacturing
Professional Services	Office
Public Administration & Defence	Office
Real Estate	Office
Recreation	Leisure
Residential Care & Social Work	Specialist public sector
Retail	Retail
Specialised Construction Activities	Office
Telecoms	Office
Transport Equipment (manufacture of)	Manufacturing
Utilities	Office
Wholesale	Warehouse
Wood & Paper (manufacture of)	Manufacturing

Source: BE Group and Mickledore, 2018

8.26 By allocating these building types to the change in employment data the following findings can be drawn from the Experian forecast data:

Table 20: Changes in Full Time Equivalent Employment (1,000s) by building type

Category	Planning status	2016-20	2021-25	2026-30	2031-35	2036-41	Change 2016-2041
Leisure	Non 'B'	0.90	0.40	0.10	0.00	0.10	1.70
Office	Office	0.70	0.00	-0.50	0.00	-0.30	-0.20
Agriculture		0.90	-0.10	-0.10	-0.10	-0.10	0.20
Manufacture	Industrial	0.90	0.10	0.60	0.70	1.20	4.30
Specialist public sector	Non 'B'	1.10	0.80	0.20	0.10	0.40	2.90
Financial and business	Office	0.50	0.10	0.00	0.10	0.30	1.20
Warehousing	Warehousing	0.10	0.30	0.20	0.20	0.20	1.20
Government and other services	Office	-0.40	0.00	-0.20	-0.10	-0.10	-0.90
Retail	Non 'B'	-0.70	-0.10	-0.20	-0.10	-0.20	-1.30

Source: Interpretation of Experian data

8.27 These should be interpreted as approximations, as employment within several industry sectors would operate from more than one building type. For example, workers employed in the education sector would predominantly be in schools and other institutions (specialist public sector) but a small percentage would also be incorporated in office space (e.g. education administration and corporate training).

8.28 The result, taking Experian data at face value therefore suggests that employment in manufacturing facilities will increase by 4,300, employment in warehousing type uses will increase by 1,200 and employment in specialist public sector facilities will increase by 2,900. Employment in an office environment is forecast to decrease by 200 and employment in government and other services buildings will also decline by 900.

8.29 Only certain sectors will translate jobs into a requirement for employment land. The model assesses what percentage of jobs in each sector translates into floorspace. For example, in transport and storage a percentage of jobs will be warehouse based, whilst the remainder will be drivers not operating on site. Thus, such a model is likely to be influenced by a number of key factors:

- The future mix of activities in respect of office, manufacturing and warehousing employment within different sectors. It is not possible to predict the impact of evolving technical change over the period to 2041, and we have therefore assumed that this mix will not change over the period
- The percentage of employees in each sector that will translate to floorspace

- The proportion of people in each industry sector that occupy B1, B2 or B8 space conforms to those ratios used in other studies and accepted in comparable locations and are sourced from the South East Regional Planning Conference's 'The Use of Business Space'
- The average space each employee occupies – the employment density. We have assumed no variation in the density rates through to 2041 and have used those densities identified in the HCA 2015 published Employment Densities Guide 3rd Edition. These density rates are averages, and as they were reviewed some years ago can only be viewed as a guide. With changing work practices, the densities will vary, but in the absence of more locally sourced data this industry accepted data has been used
- As an average development floorspace per ha for office, manufacturing and warehousing activities, we have applied a uniform amount of 3,900 sqm per ha.

8.30 These assumptions are summarised in Table 21.

Table 21 – Model Assumptions

Industry Sector	Employees		
	Percentage of staff occupying B1, B2, B8 Floorspace (percent)	Floorspace occupied per person (sqm)	Other Comments
Agriculture*	5	12	Managerial, admin, thus B1 office space (Net Internal Area)
Manufacturing	100	36	HCA gives a range from 36-47 sqm/job. More dense employment reflects largely B2; a lower density can be applied to B1 light industry. Given the manufacturing mix in S Worcestershire, the general industrial density has been adopted (36 sqm/job) (Net Internal Area)
Utilities	26	12	Managerial, admin, thus B1 office space. (Net Internal Area)
Construction	26	12	Managerial, admin, thus B1 office space. (Net Internal Area)
Distribution	48	70	Warehouses, offices- possibly large scale/high bay facilities (Gross External Area)
Transport	48	70	Warehouses, offices- possibly large scale/high bay facilities (Gross External Area)
Financial & Business	100	12	B1 offices (Net Internal Area)
Government & Other Services	22	12	Local Government, Public Administration B1 offices (Net Internal Area)

Source: SERPLAN and HCA, 2015

*not updated in the 3rd edition (2nd edition numbers applied)

8.31 Using the adjustments shown in Table 21, the net job figure for each sector is calculated to reflect the proportion of jobs occupying 'B' floorspace. That figure is then multiplied by the floorspace per person to give total floorspace for each sector. The detailed calculations for this are shown below.

8.32 Once a total floorspace is calculated, the figures are then translated to a land requirement using the ratio of 3,900 sqm per hectare. This applies to all use classes. Table 22 show these calculations for South Worcestershire. Sectors showing jobs growth resulting in a positive land requirement are shown separately from jobs reductions.

8.33 The floorspace requirements for South Worcestershire are shown below:

Table 22 – Forecast Employment Land and Floorspace Demand based on Experian Forecasts 2016-2041 – South Worcestershire

SIC Group	Workforce Growth 2016-41	Percentage Occupying B1/2/8 Space	Growth Number of Jobs on B1/2/8 Space	Floorspace Per Job, sqm	Floorspace Required, sqm
Agriculture, Forestry & Fishing	-300	5	-15	12	-180
Accommodation, Food Services & Recreation	3,000	0	0		0
Construction	-300	26	-78	12	-936
Wholesale & Retail	-400	5	-20	70	-1,400
Extraction & Mining	0	5	0	12	0
Finance & Insurance	400	100	400	12	4,800
Information & Communication	500	100	500	12	6,000
Manufacturing	5,000	100	5,000	36	180,000
Professional & Other Private Services	1,800	100	1,800	12	21,600
Public Services	2,800	22	616	12	7,392
Transport & storage	1,600	48	768	70	53,760
Utilities	-400	26	-104	12	-1,248
Total	13,700		8,867		
Increase in Floorspace – Growth Sectors (sqm)					273,552
Decline in Floorspace – Declining Sectors (sqm)					-3,764
Net Change in Floorspace Demand (sqm)					269,788
Assumed Developable Floorspace per Hectare (sqm/ha)					3,900
Equivalent Employment Land Needed – Growth Sectors (ha)					70.1
Equivalent Employment Land Needed – Declining Sectors (ha)					-1.0
Equivalent Employment Land Needed – Net (ha)					69.2

Source: BE Group and Mickledore, 2018 analysis of Experian forecasts

- 8.34 The above assumes that all floorspace is developed as single storey developments. This is a reasonable assumption for manufacturing and warehousing spaces, but office spaces are commonly multi-storey. If it is assumed that office space averages two storeys, then the land area requirements would be as follows (floorspace requirements would be unchanged):

Table 23 – Forecast Employment Land Assuming Two-Storey Offices, South Worcestershire

Land Area Requirements 2016 to 2041 Assuming two-storey Office Buildings	Floorspace Required, sqm
Equivalent Employment Land Needed – Growth Sectors (ha)	65.0
Equivalent Employment Land Needed – Declining Sectors (ha)	-0.7
Equivalent Employment Land Needed – Net (ha)	64.4

Source: BE Group and Mickledore, 2018 analysis of Experian forecasts

- 8.35 In total therefore, the Model 2 figures suggest a net gain of some 270,000 sqm of B-class floorspace over the forecast period (2016-41) in South Worcestershire. This would amount to some 69.2 ha of employment land.
- 8.36 When just considering the growth sectors, the floorspace demand is approximately 274,000 sqm, which equates to 70.1 ha of land. Often it is prudent just to consider the growth sector requirements as a net requirement necessitates that declining employment sectors release their land for growing sectors in a timely and efficient manner, which is often not the case.
- 8.37 The largest drivers of floorspace growth are manufacturing (180,000 sqm across South Worcestershire), transport and storage (53,800 sqm) and professional and other private services (21,600 sqm).
- 8.38 The equivalent tables for the three individual local authorities are provided in Appendix 13, with the summary numbers in the table below.

Table 24 – Forecast Employment Land Assuming Two-Storey Offices, Three South Worcestershire Authorities

	Employment Land Required, ha		
Land Area Requirements to 2041 Assuming two-storey Office Buildings	Malvern Hills	Worcester	Wychavon
Equivalent Employment Land Needed – Growth Sectors (ha)	3.0	21.3	43.2
Equivalent Employment Land Needed – Declining Sectors (ha)	-1.3	-1.6	-0.3
Equivalent Employment Land Needed – Net (ha)	1.7	19.7	43.0

Source: BE Group and Mickledore, 2018 analysis of Experian forecasts

Comparison of the Two Models

- 8.39 The summary land and floorspace requirements estimated through the two models is provided below. Clearly there is a substantial difference in the two models' outputs, which have implications for planning for employment growth. The five-year buffer calculated for Model One earlier in this chapter is excluded for direct comparison of the employment land requirements under both models. Each line assumes that B1 offices are two-storey, with B2 and B8 uses single storey.

Table 25 – Comparison of Employment Land Forecasts (excluding buffers and B1 two-storeys)

	Employment Land Required, ha			
Model	Malvern Hills	Worcester	Wychavon	South Worcestershire
Model One – Historic Take Up base (from Table 18)	25.7	26.5	191.7	243.9
Model Two – Employment Forecast (from Table 24)	1.7	19.7	43.0	64.4
Model Two – Employment Forecast – Growth Sectors Only (from Table 24)	3.0	21.3	43.2	67.5

Source: BE Group and Mickledore, 2018 analysis of Experian forecasts

- 8.40 Firstly, in regards to the Model Two outputs, it is recommended that the Growth Sectors option be adopted as the preferred Model Two output. As mentioned above, this is due to the fact that a net assessment assumes that 'spare' capacity in declining sectors can easily be transferred to growth sectors, which may not be the case for a myriad of reasons, including declining sector businesses continuing to operate from the same premises despite a shrinking workforce and the floorspace that may become available may not be appropriate (size, type, location) for the growing sectors. Therefore, it is

recommended to adopt the 67.5 ha requirement for South Worcestershire as the Model Two output.

- 8.41 Secondly, it is noted that for Worcester City the two models provide quite similar outputs and thus which one is adopted is of minor concern.
- 8.42 Thirdly, for Malvern Hills a requirement of only 3.0 ha of the forecast period does not equate with the primary research, including consultations with businesses unable to find adequate premises and low vacancy rates observed in Malvern Hills. Therefore, it is considered that Model One output would represent the preferred trajectory to adopt.
- 8.43 Fourthly, for Wychavon, the Model Two output also appears low, based on previous high take-up levels, particularly for land hungry uses such as larger manufacturing and logistics.
- 8.44 It is recommended that the Model One outputs be adopted for all local authority areas for the forecast period. **Therefore, the objectively assessed need for employment land between 2016 and 2041 in South Worcestershire is estimated to be 243.9 ha (excluding buffer). Including a five-year buffer to allow for choice in the market increases the demand to 294.8 ha.**

9.0 CONCLUSIONS AND RECOMMENDATIONS

Main Findings

9.1. The key findings of this Economic Development Needs Assessment are stated below:

Economic Profile

- South Worcestershire has a population of 303,600 persons and has experienced higher population growth than the West Midlands region.
- The sub-region is an economically active area, with manufacturing employment being of particular importance to south Worcestershire.
- Importantly, manufacturing employment has grown in recent years, bucking the trends of many other areas in the UK.
- While there is a net out-commuting from South Worcestershire, Worcester City itself has a net in-commuting workforce, with its role as the County Town.

Property Market

- The property market has significant variations across the area.
- For industrial, Wychavon and Worcester have recorded similar numbers of total transactions over the past decade, although the total floorspace transacted in Wychavon is substantially higher, reflecting its role in providing mid to larger industrial premises. Malvern Hills has a significantly smaller industrial market, although importantly has high levels of occupancy, which suggest that there is a latent demand for space that is not being met at present.
- For offices, there is a somewhat smaller market in terms of transactions volumes than the industrial market. Average unit sizes transacted are significantly smaller, which is typical of the national commercial property market. Worcester City is the primary location for offices in South Worcestershire. Malvern Hills, while having a small market share, has a larger office market share than for industrial premises.
- Vacancy levels are generally low across South Worcestershire, particularly in Wychavon and Malvern Hills, indicating a tightness in the market.
- This is corroborated by comments by the local commercial property agents, which have identified a lack of available stock as the key factor in transaction volumes (i.e. rather than a lack of demand).

Stakeholder Consultations

- The stakeholder consultations also highlighted the lack of appropriate stock for businesses in the market, most notably around Malvern Hills. Business

representatives have reported taking suboptimal stock in order to secure some place for their business.

- There is positivity about the sub-region, from a liveability perspective, as a place to do business and as a commercial development location.
- Generally, the market gaps appear to be for small to mid-sized industrial units. However, a lack of larger, quality office space was also cited in the consultations.

Functional Economic Market Area

- The primary functional economic market area for South Worcestershire can be approximated by the Worcestershire County boundary, with a broader area including Stratford-upon-Avon, Cotswold, Tewksbury, Cheltenham and Birmingham being an approximation of a secondary area.

Employment Land Supply

- A review of the current status of the employment land allocations in the adopted SWDP suggests that there is currently a developable area of approximately 131.9 ha across South Worcestershire, comprising 44.6 ha in Malvern Hills, 19.8 ha in Worcester and 67.5 ha in Wychavon. Critiquing these sites, they are generally considered deliverable, although there is some risk in a small number of sites that the landowners will landbank the sites in order to pursue alternative residential or retail development.
- The existing employment sites have also been reviewed. Mostly these sites are appropriate to continue their employment functions, however a small number of sites have been considered to be at the end of the economic life and it is recommended that they are not protected for employment uses.

Objectively Assessed Needs

- The objectively assessed need for employment land was modelled using two approaches. From a critique of the approaches it was considered that the model based on historic land take-up is the most appropriate for South Worcestershire. This model forecasts a demand for some 243.9 ha of employment land (excluding five-year buffer and assuming two-storey B1 building) in South Worcestershire between 2016 and 2041. Including a five-year buffer to allow for choice in the market increases the demand to 294.8 ha.
- The nature of the employment growth that is forecast in the jobs projections remains relevant to the study. Of particular note, is the projected growth in the manufacturing sector, driven by growth in Wychavon and Worcester, although such growth would benefit the entire South Worcestershire area.

Supply vs Demand – Meeting the Need for Employment Land

- 9.2. The available supply of allocated employment land for South Worcestershire has been estimated at 131.9 ha. The demand for additional land (including five-year buffer) has been forecast to be 294.8 ha, suggesting a **deficit of employment land of approximately 162.9 ha** over the forecast period.
- 9.3. The surplus/deficit of employment land over the forecast period for the individual local authorities is summarised in the table below.

Table 26 – Supply vs Demand for Employment Land (including 5-year buffer)

Area	Available Supply	Land Demand 2016-41	Surplus/ Deficit
Malvern Hills	44.6	31.6	13.0
Worcester	19.8	32.1	-12.3
Wychavon	67.5	231.1	-163.6
South Worcestershire	131.9	294.8	-162.9

Source: BE Group, 2018

- 9.5 Clearly the deficit is due to the high demand projected for Wychavon District, which has a deficit of some 164 ha. It would not be necessary however to provide all of any additional land to make good the deficit within the boundaries of Wychavon. Rather location decisions should focus on what would advantage the market as a whole. Furthermore, Wychavon's high take-up rates in recent years, which have influenced the high land demand level projected, have in part been because of a lack of supply in Malvern Hills and Worcester, which has seen businesses choose locations in Wychavon. Therefore, the further roll out of employment land in South Worcestershire to 2041 should seek to rebalance this provision, through Malvern Hills and Worcester providing for some of Wychavon's demand. Any new site allocations to achieve a better distribution of employment site supply across South Worcestershire will need to support the preferred spatial strategy of a revised South Worcestershire Development Plan.
- 9.4. It is apparent that the geography of Worcester City is such that a higher level of employment land provision is unlikely to be easily realised. Therefore, Malvern Hills is the more likely candidate to attempt to rebalance the employment land provision. These would need to have locational attributes that are similar to that offered in Wychavon and focused around good access to the motorway corridor and proximity to

the Worcester urban area. Through the business consultations it was identified that there were some examples of businesses moving from Great Malvern to Wychavon due to the tightness in the Great Malvern market and thus a broader array of sites across the key Malvern Hills areas would seem appropriate.

- 9.5. Therefore, while it would be a valid solution to provide for the land demand of the three local authorities within the same local authority, it is recommended that the land demand distribution in South Worcestershire be revised. It would still accommodate the full 294.8 ha of land demand (including buffer); however, the distribution within South Worcestershire would include a higher demand for Malvern Hills and slightly higher for Worcester, offsetting some of Wychavon's demand, as summarised in Table 27 below.

Table 27 – Revised Supply vs Demand for Employment Land

Area	Available Supply	Revised Land Demand 2018-41	Surplus/ Deficit
Malvern Hills	44.6	70.0	-25.4
Worcester	19.8	35.0	-15.2
Wychavon	67.5	189.8	-122.3
South Worcestershire	131.9	294.8	-162.9

Source: BE Group, 2018

- 9.6. This has resulted in all three local authority areas having a forecast deficit of employment land when considering current available supply.
- 9.7. This Supply vs Demand analysis has thus far only considered overall B-class employment land. However, not all employment land will be developed in the same manner. Therefore, further considerations as to the types of sites and premises in demand are considered below.

Types of Sites and Premises

- 9.8. The broad array of geographies, settlements and sub-economies across the South Worcestershire region means that a broad array of sites and premises is also appropriate. This study has identified that the following markets would need to be catered for.

- **Smaller industrial operators:** manufacturing businesses that typically employ less than 20-30 people but are important to the overall economy. Requires premises of about 200-1,000 sqm (2,150-10,740 sqft). Importantly, these operators would be looking for built premises and generally have a preference for leasehold rather than freehold. Therefore, it would be important to consider how and who would develop such spaces to provide it to the market. Such premises should be available in multiple locations, including options in all key settlements.
- **Mid-sized industrial operators:** businesses taking 2,000-3,000 sqm premises, the mid-sized businesses would have a larger network of suppliers and markets and thus location is increasingly important (e.g. proximity to strategic road network, closer to larger urban settlements). Such users would have a mix of premises requirements, including leasehold and freehold, hybrid type premises (mix of engineering floorspace with quality office premises), bespoke design and build schemes, etc. Therefore, the rolling out of floorspace to provide for this market would be a mix of developing standard units to be available for the leasehold market and providing sites for new build arrangements.
- **Larger industrial and warehouse operators:** the key consideration for such operators is the location of sites, which is an optimisation of access to markets, suppliers and workforce and thus would require being on the strategic road network. Provision of sites, rather than built premises, is the priority, with the operators looking to build bespoke premises. Investment in this sector is generally more secure due to the operators being larger enterprises and thus developer interest is often strong, sometimes at the expense of developer interest in the smaller markets.
- **Corporate offices:** while a slower market than the industrial markets, the office sector remains important to the region. The corporate office market is focussed in Worcester, as the centre of the County. The market preference would remain for business park type space for the foreseeable future, although the city centre market is a preferred location for sections of the market, drawn to the public transport links, array of services and colocation with key institutions (university, courts, civic).
- **Small offices:** small B1 office space should be provided for office based SMEs in multiple locations throughout the three local authority areas.

- 9.9. Therefore, from a demand perspective, the small to mid-sized units (predominantly industrial) are likely to have the highest level of demand in South Worcestershire over the planning period. It is important that there is a range of sites that would be appropriate and developable for such uses throughout the three local authority areas.
- 9.10. Smaller industrial units are less likely to be developed speculatively (although some developers are prepared to do this) and are also less likely to be developed on a design and build basis, commissioned by the end occupier. This is because the end occupiers of smaller units are less likely to have sufficient capital to commission such a project and are thus more likely to be seeking built premises. As such, it may be appropriate to offer some level of incentive to developers to build smaller units speculatively, in order to ensure that there is on-going supply of premises for prospective occupiers. Such incentives may be relaxations through the planning process, negotiated infrastructure contributions or investment by the local authorities or the LEP in particular projects. For example, the local authorities may choose to take the head lease of a portion of a development in order for it to be commenced, which in turn could be subleased to occupiers. This would provide a guarantee of income for the developer, which would reduce their risk (which would be transferred to the local authority) and thereby make it a more attractive project for the developer and its financiers.
- 9.11. The roll out of employment land and premises is also dependent on the ability to deliver required infrastructure to the sites in a viable manner. This will include appropriate access routes as well as utilities infrastructure for the sites. Linking the employment uses to mixed-use developments is seen as a means of providing additional income streams to fund the infrastructure delivery, although this introduces the risk of the non-employment uses being the priority and focus of the project at the detriment of the roll out of the employment land.

Deallocation of Employment Areas

- 9.12. As discussed in Chapter 7.0, some of the existing employment areas are no longer fit for purpose, which have been identified through a review and critique of the areas. The following existing employment areas are recommended to be not protected for employment.
- Backfields Upton
 - Sixways Industrial Estate

- Three Springs Trading Estate
- Orchard Street
- Gregory's Mill Industrial Estate
- Pope Iron Road
- Stanway Screens

9.13. Furthermore, it is considered that the following employment land allocation does not have a realistic prospect of coming forward for employment.

- Government buildings, Whittington Road

Protection from Redevelopment to Residential

9.14. It is important that remaining employment areas are protected from redevelopment to non-B-class uses, with residential development the most likely prospect. Older stock in inner-urban areas is the most vulnerable to such redevelopment. While this may be appropriate for some areas, such as those recommended to be not protected for employment moving forward, it is important that the Council's manage this process.

9.15. The Government directions to encourage residential development on uneconomic employment sites has given impetus to landholders to try and get a higher value out their sites. It also limits Councils' ability to protect existing employment areas.

9.16. The employment area scoring within this study has helped to identify the next suite of employment areas that may be considered vulnerable for redevelopment. The approach to these areas as employment nodes could be to:

- Encourage employment based redevelopment and renewal of the sites to more modern and economically viable premises. This would ensure the long-term survival of the areas as employment nodes. The viability of such an approach can be difficult to achieve in many instances and thus input of the economic development arms of the Councils as well as the Worcestershire LEP would be advantageous.
- Manage the redevelopment of the sites to non-B-class employment uses in a timeframe acceptable to the Councils. This may include encouraging small interventions to help the employment uses remain appropriate for the estate for a few more years.

- 9.17. Either approach would require early engagement with the landholders of the employment areas identified to be vulnerable to redevelopment.

Future Reviews and Monitoring

- 9.18. This document includes forecasting over a 25-year period, which necessarily involves uncertainties and assumptions. Furthermore, economic conditions can change substantially in such a period, impacting on the take-up of employment land and premises. Therefore, regular reviews of the supply and demand dynamics of employment land in South Worcestershire should be undertaken, about every three to five years, depending on market activity. Annual monitoring of employment floorspace and land take-up should continue and be consistent across the three local authorities.

Phase Two of this Study

- 9.19. Phase Two of the EDNA will commence in the first half of 2019 and will revise the forecasts based on the latest available information. From this it will expand on the recommendations outlined above to guide policy options for Council.

Appendix 1

Policy Documents Review

Appendix 1 – Detailed Policy Review

- A1.1 This appendix provides an overview of the key policy documents in relation to South Worcestershire and the national level that may influence the planning and demand for employment land within South Worcestershire.

National

National Planning Policy Framework (NPPF) – Ministry of Housing, Communities and Local Government (2018)

- A1.2 The NPPF sets out the Government's economic, environmental and social planning policies for England, articulating the Government's vision of sustainable development. It provides a framework for the production of local and neighbourhood plans. It has been revised and updated in 2018, the first revision of the NPPF since 2012. This document and the changes it makes on the 2012 NPPF, are discussed here.
- A1.3 The main economic objective of the NPPF is *"to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure."*
- A1.4 At the heart of the new NPPF is the 'presumption in favour of sustainable development' (Paragraph 11). For plan making, this means:
- a. *"Plans should positively seek opportunities to meet the development needs of their area, and be sufficiently flexible to adapt to rapid change"*
 - b. *Strategic policies should, as a minimum, provide for objectively assessed needs for housing and other uses, as well as any needs that cannot be met within neighbouring areas, unless:*
 - i. *The application of policies in this Framework that protect areas or assets of particular importance [AONB, National Park, etc.] provides a strong reason for restricting the overall scale, type or distribution of development in the plan area; or*
 - ii. *Any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole."*

- A1.5 In drawing up local plans, the NPPF requires local authorities to:

- Be prepared with the objective of contributing to sustainable development
- Be prepared in a way that is aspirational but deliverable
- Be shaped by early, proportionate and effective engagement with communities, local organisations, businesses, infrastructure providers and operators and statutory consultees
- Contain policies that are clearly written and unambiguous
- Be accessible using digital tools

- Serve a clear purpose, avoiding unnecessary duplication of policies that apply to a particular area.
- A1.6 Strategic policies should be produced which look ahead for at least 15 years (Paragraph 22). The NPPF recommends plan reviews every five years (Paragraph 33).
- A1.7 Paragraph 57 indicates that there will be no requirement for viability assessments at the application stage where developments accord with all relevant policies. But viability testing is still required in Plan Making and a Practice Guidance note, which provides new methodologies for Viability Testing and was issued alongside the new NPPF.
- A1.8 In terms of employment uses, Paragraph 81 states that local plans should:
- a. *“Set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to Local Industrial Strategies and other local policies for economic development and regeneration;*
 - b. *Set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;*
 - c. *Seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment; and*
 - d. *Be flexible enough to accommodate needs not anticipated in the plan, allow for new and flexible working practices (such as live-work accommodation), and to enable a rapid response to changes in economic circumstances.”*
- A1.9 Policies should address the specific locational requirements of different sectors (Paragraph 82). Policy should also support a growing and diversified rural economy (Paragraph 83). *“Planning policies and decisions should recognise that sites to meet local business and community needs in rural areas may have to be found adjacent to or beyond existing settlements, and in locations that are not well served by public transport.”*
- A1.10 Key for employment, and other sites, will be Section 11 on ‘Making Effective Use of Land.’ Para 120 encourages reallocating land where there is no reasonable prospect of an application coming forward for the allocated use, specifically Local Planning Authorities should:
- a. *“... as part of plan updates, reallocate the land for a more deliverable use that can help to address identified needs (or, if appropriate, deallocate a site which is undeveloped) and*
 - b. *in the interim, prior to reviewing the plan, applications for alternative uses on the land should be supported, where the proposed use would contribute to meeting an unmet need for development in the area.”*
- A1.11 *“Local planning authorities should also take a positive approach to applications for alternative uses of land which is currently developed but not allocated for a specific purpose in plans, where this would help to meet identified development needs. In particular, they should... support proposals to use retail and employment land for homes in areas of high housing demand, provided this would not undermine key*

economic sectors or sites or the vitality and viability of town centres, and would be compatible with other policies in this Framework.” (Para 121).

- A1.12 Additionally, planning policy should “...support the development of under-utilised land and buildings, especially if this would help to meet identified needs for housing where land supply is constrained...(for example converting space above shops, and building on or above service yards, car parks, lock-ups and railway infrastructure.)” (Para 118).
- A1.13 The above paragraphs update the 2012 NPPF, which similarly discouraged Local Planning Authorities from holding onto sites over the long term, where deliverability prospects were unclear (Paragraph 22). Experience of some six years of that policy was that it increased pressure from land and property owners (and their advisors) for non-B class uses in existing employment areas as well as on allocated sites that have remained undeveloped.
- A1.14 To address the increased pressure from alternative uses, local authorities need to be more prescriptive in their planning policies to ensure the protection of employment areas and sites. This includes defining the key sites to be protected, and clearly stating the process and conditions under which non-key sites could be released to non-employment uses.

Sub-regional

Worcestershire LEP: Our Strategic Economic Plan 2014

- A1.15 This ten-year plan for economic growth sets out the aim to create 25,000 new jobs in the area and bring an additional £2.9 billion into the local economy by 2025.
- A1.16 The primary purpose of the document is to underline the LEP’s bid to the government for £250 million in investment through the Local Growth Fund. The LEP also aims to attract additional private sector investment of £1.3billion to Worcestershire through world class companies moving and investing in the area over the course of the next ten years.
- A1.17 To achieve this economic growth, the plan focuses upon the place, people and businesses of Worcestershire to achieve their desired growth through mostly short term asks of the government. Ensuring that the place of Worcestershire is a successful business destination through the focus of development on four key sites:
- Redditch Eastern Gateway*
South Kidderminster Enterprise Park
Malvern Hills Science Park Expansion
Worcester Technology Park
- A1.18 The skills of the people of Worcestershire aim to be developed with focus upon key sectors of science, technology, engineering and manufacturing being ‘*the lynchpin of our economic growth in the future.*’ Whilst the majority of businesses are small and so lower the GVA of the area, ensuring they have the support to enable growth, particularly in the key growth sectors of advanced manufacturing, agricultural

technology and cyber security, defence and IT, will overall help to improve the economy.

South Worcestershire Development Plan, 2016

- A1.19 The South Worcestershire Development Plan (SWDP) is a long-term plan for south Worcestershire that is based on local economic and housing requirements (covering the period from 1 April 2006 - 31 March 2030). Although not a formal sub-region or administrative area, the partner authorities of Worcester, Wychavon and Malvern Hills consider that there are strong functional, economic, infrastructure and cross-boundary relationships that mean preparing a joint development plan makes good strategic sense. The SWDP aims to provide a context for development decisions up to the year 2030 - including the allocation of land for employment.
- A1.20 Policy SWDP 3: Employment, Housing and Retail Provision Requirement and Delivery states that the South Worcestershire Councils (SWC) will plan, monitor and manage the delivery of employment land from 2006 to 2030, in accordance with Table A1.1 below, and the site allocations set out in Policies SWDP 43 to SWDP 59. A comprehensive portfolio of employment land is vital in securing economic prosperity, and this forecast supply encompasses completions 2006 to 2011, commitments at 2011 and future supply from site allocations. It also includes the forecast net land equivalent due to intensification at the four Major Developed Sites - Hartlebury Trading Estate, Potter Group – Site 7, Hindlip Park and Sixways.

Table A1.1 – Employment Land Provision 2006-2030

Employment Land Provision 2006-2030	Sub-Area Totals (Ha)
Wider Worcester Area (WWA)*	120
Malvern Hills (excluding WWA)	40
Wychavon (excluding WWA)	120
South Worcestershire TOTAL*	280
*of which Worcester City	80

Source: SWDP, 2016

- A1.21 The Policy states that new employment provision will be located primarily within or adjacent to the main urban areas. In order to meet these needs, this includes the additional job opportunities provided at the urban extensions, which will help to reduce commuting distances and ensure new workplaces are accessible by a range of travel modes.
- A1.22 Policy SWDP 8 outlines how the authorities can provide the right land and buildings to maximise job creation and sets out how other uses should be welcomed on employment land providing they support job creation. To ensure adequate employment opportunities in rural areas. Policy SWDP12 highlights the importance of retaining rural employment land and supporting the expansion of rural employment sites and farm diversification.

A1.23 Policies SWDP 43 to 59 set out details of the sites that are allocated for development by the SWDP. Each policy covers a different settlement, site or area of South Worcestershire. Where appropriate, these policies set out the specific requirements that apply to the individual sites/settlements/areas.

A1.24 Within SWDP43, four of the ten sites allocated for mixed-uses in Worcester contain some employment element. Furthermore, there are two employment sites. These are detailed in Table A1.2 below:

Table A1.2 – Worcester Allocated Sites

Mixed-Use Allocations				
Policy Reference	Site	Use	Employment (ha)	Site Area Gross (ha)
SWDP43/15	Worcester Woods Business Park, Newtown Road	B1, B2 employment, care home, car showroom, hospital expansion	11	11.37
SWDP43/16	Government Buildings, Whittington Road	B1 office and residential	4	7.56
SWDP43/18	University Park	University campus, health and well-being campus (medical centre / care home / close care and extra care housing), business uses, including business innovation centre, research and development	11	15.18
SWDP43/20	Land at Nunnery Way	Mixed use B1, B2, B8 employment, vehicle showrooms, public house and restaurant	8	8.26
Total			34	42.37
Employment Allocations				
SWDP43/22	Midland Road	Employment	1	1.25
SWDP43/23	Land south of Warndon / Wood (B1; phased post-2019)	Employment	6.95/ 5 net	6.95
Total			6	8.20

Source: SWDP, 2016

A1.25 SWDP3 shows that about 120ha of additional employment land will be required at Worcester, 80ha within Worcester City and the rest within the districts of Malvern Hills and Wychavon. Urban concentration will enable this new development to be sustainable, and the SWDP45 outlines plans to develop five new urban extensions

adjoining Worcester city to accommodate housing and mixed-use development. Two of the five include some employment element:

- SWDP45/1 Broomhall Community and Norton Barracks Community (Worcester South urban extension) - 247.1ha of which 20ha is for employment use
- SWDP45/2 Temple Laugherne (Worcester West urban extension) - 138.8ha, of which 5ha of employment use.

A1.26 In addition, the evidence supports allocating a sub-regional employment site as a sixth urban extension to meet Worcester's employment needs. This site is SWDP45/6 Worcester Technology Park (South Phase) - and 16ha (of 20.32ha total) is for employment use. It lies within Wychavon District, but abuts Worcester city boundary and will therefore provide serviced employment land to meet the growth of Worcester.

A1.27 Whereas there are no employment only sites in Wychavon, four of the eight proposed Urban Extensions have an employment element. SWDP 47 outlines two Pershore Urban Extensions, one of which proposes employment land:

- SWDP47/2 Land to the North-East of Pershore - On land to the north of Wyre Road, an allocation of 5ha of employment land for B1, B2 and B8 uses.

A1.28 SWDP 49 outlines three Droitwich Spa Urban Extensions includes two with employment land:

- SWDP49/1 Copcut Lane - Provision of 3.5ha of B1 and B2 employment uses
- SWDP49/3: Stonebridge Cross Business Park - Provision of approximately 10ha of B1, B2 and B8 employment land

A1.29 Policy SWDP 51 outlines three Evesham Urban Extensions, including one which with new employment use:

- SWDP51/3 Vale Industrial Park, Evesham Provision of approximately 34ha of B1, B2 and B8 employment land and landscaping

A1.30 Policy SWDP53 is a 15.4ha mixed-use development on the site at Malvern Technology Centre (QinetiQ), which is seen as being critical in terms of anchoring high technology industry at Malvern to meet the economic vision for south Worcestershire. On this site at least 4.5ha will be developed for B1(b) (or associated uses). A further 10.6 ha is safeguarded for B1 use class and associated development.

A1.31 SWDP 54 sets out a 5.1ha extension to an existing employment site at Blackmore Park, for B1, B2 and B8 uses. It is proposed that the site is extended onto adjacent land that is part residual brownfield land and part greenfield land.

A1.32 Within the area of North-East Malvern, SWDP56, 56.84ha is allocated for a sustainable, well-designed mixed-use urban extension. It is proposed that development within this area will include 10ha of employment-generating uses.

South Worcestershire Development Plan - Authorities' Monitoring Report (AMR) 2017

- A1.33 This Authorities' Monitoring Report (AMR) has been jointly prepared by South Worcestershire Councils to monitor the policies of the South Worcestershire Development Plan (SWDP) which was adopted on 25th February 2016. This is the first annual monitoring report for the adopted South Worcestershire Development Plan and covers the period 1st April 2016 to 31st March 2017.
- A1.34 The amount of new employment land provided / lost across South Worcestershire in the monitoring year is 33.41 ha gained, and 9.88 ha lost (so 23.53 ha net completed), both mainly in Wychavon district. Also, in terms of commitments, there is a further 174.96 ha, and 2.85 ha in losses (so 172.11 ha net proposed), again mainly in Wychavon district.

Malvern Hills

Malvern Hills Economic Development Strategy 2013-2018

- A1.35 The Economic Strategy for Malvern Hills aims to create the conditions for sustained economic and jobs growth and to ensure Malvern Hills is accommodating to business and able to match the requirements of potential inward investors.
- A1.36 It set out detailed actions under five priorities, one of which is 'land and premises'. This highlights the need for Malvern Hills District to provide a readily available supply of buildings and sites in order to:
- Ensure a balanced portfolio of sites is available and deliverable across the District to accommodate a range of business uses.*
 - Provide the sites required to support the growth and development of the high technology sector.*
 - Ensure that SWDP and planning practice reflect the broad economic needs and the role of the District in the sub-region.*
 - Allow for appropriate business premises and their location within the District to address business needs for existing and new business (e.g. by size, appropriate locations, tenure and proximity to suppliers).*
- A1.37 As most existing business parks and industrial sites are fully occupied there is a limited supply of suitable 'shovel ready' sites or speculative premises to support future growth in Malvern Hills District. It is known that there is demand from businesses for readily available sites, (preferably freehold), to enable them to build bespoke premises and stay in Malvern Hills. Furthermore suitable/accessible land and premises will allow key employment initiatives such as further growth of Malvern Hills Science Park and Worcestershire LEP objectives for growth in the Cyber sector to be accomplished. The availability of land and premises will also ensure that Malvern Hills can compete with neighbouring areas.
- A1.38 The Economic Strategy also highlights the need to address rural employment and business needs, with one potential strength being the district's food production and manufacturing employment sector, which is currently poorly understood/underestimated. There is potential for the sector to link in with the tourism, hospitality

and leisure sector across the district and provide much needed rural employment across a range of industries.

Employment Land Allocation at QinetiQ, Malvern (2015)

- A1.39 Malvern Hills District Council appointed AMION Consulting and Thomas Lister in order to review the evidence in support of the adopted Local Plan target of 4.5 ha of specialist employment land on the QinetiQ site in Malvern. This is being sought after for Class B1(b) employment uses in order to support the growth of the cyber/IT sector.
- A1.40 QinetiQ however *“has recently consulted on proposals that would bring forward 3.1 ha rather than the allocated 4.5 ha of employment land as part of the redevelopment of surplus land totalling 14 ha and contend that this is all that is required up to 2030 – although no evidence to support this contention has so far been supplied.”*
- A1.41 Overall, the report highlights that there is a strong enough policy context to allow a provision of at least 4.5 ha of Class B1(b) employment land on the QinetiQ site. This is provided under Policies DS.9 and DS.10 of the Malvern Hills District Local Plan and in the emerging SWDP under draft Policy 53. This is based on a number of key factors:
*“The on-going need for specialist employment use in this location;
The designation of the site as a ‘Game changer’ of strategic significance;
The opportunity provided by its brownfield condition;
The expansion proposals for activity at MHSP;
Support for the nationally significant cyber security and defence cluster; and
Current Examination has not sought to reduce the allocation of employment land and, as such, it has been treated as a minimum provision.”*
- A1.42 The report identifies that the Science Park landholding will be fully developed out with the completion of Phase 4, therefore the 4.5 ha at QinetiQ will be invaluable in providing additional capacity for complementary grow-on space. The report concludes that *“the total additional employment land requirements to 2030 within MHSP relevant sectors and use classes are within the range of 4.6 ha to 5.4 ha.”* This is larger than the QinetiQ proposal of 3.1 ha of employment land.
- A1.43 In summary, there have been significant policy changes since the development of the 2004 Masterplan. Importantly, in the recent policy documents, the MHSTP site is recognised and supported as a key ongoing employment site. However, there is recognition that residential uses will form part of a regeneration of disused land at QinetiQ.

Worcester

Worcester Employment Land Monitor 2017

- A1.44 This report provides information on the supply of employment land in Worcester for the period 1st April 2016 – 31st March 2017 and forms part of the City Council’s annual monitoring programme.
- A1.45 In the year 1st April 2016 to 31st March 2017 1.61 hectares of land (on a single site - Great Western Business Park) was developed for new B use class employment space. This is an increase on the rate of development in 2015/16 and above the average rate

of development over the past five years. While one significant site is currently under construction and likely to deliver completed units in the next year it is unlikely that the city will achieve any sustained growth in employment space in future years. There is 32.16 hectares of supply outstanding - 27.16 ha of committed employment sites and 5 ha of allocated employment land without planning consent (see Table A1.3 below). Worcester failed to meet the Local Plan target between 1996 and 2011 of delivering 75 hectares of additional employment land.

Table A1.3 – Employment Land in Worcester 2006-2017

	Ha
Employment Land Built (since 2006)	14.83
Employment Land Under Construction on 31st March 2017	3.14
Commitments for Employment Uses Including Allocated Sites	24.02
Employment Land Allocated without planning permission	5.0
Total Land Supply	32.16
Loss of Employment Land (2006-2017) (Schedule 6)	33.11

Source: Worcester City Employment Land Monitor, 2017

- A1.46 The South Worcestershire Development Plan includes within policy SWDP3 a requirement for about 80 hectares of land for employment uses for the Local Plan period 2006-2030 within Worcester. The employment land supply total for 2006-2030 includes completions, commitments (identified through planning permissions), and allocations identified through the Local Plan. The South Worcestershire Development Plan Policy SWDP43 allocates six sites for future employment use.
- A1.47 The requirement for the plan period equates to an annual average of 3.3 hectares per year. This is a useful target to compare with completions in recent years. The five year supply requirement would be 16.5 hectares.

Table 1.4 – Status of Local Plan Employment Sites Local Plan Employment Sites

Site	Ha	Comments
Employment land with permission and/or under construction at 01/04/2017		
SWDP43/15 Worcester Woods	8.3	Approved office park unlikely to be developed
SWDP43/18 University Park	8.5	Unlikely that the whole 8.5 ha will be developed for B use class development
SWDP43/20 Land at Nunnery Way	3.14	Development under construction
SWDP43/16 Whittington Road	4	Outline approval for 15,050 sqm of B1a (offices)
SWDP43/22 Midland Road	1	4 units totalling 3,727 sqm for B1, B2 or B8 use approved
Local Plan Employment Land Allocations		
SWDP43/23 Land South of Warndon Wood	5	Pre application discussions

Source: Worcester City Employment Land Monitor, 2017

A1.48 The provision of employment land within the City of Worcester has been monitored against the requirements of the adopted South Worcestershire Development Plan and is shown in Table A1.5. In the past year the deficit against the Local Plan target has decreased by 1.5ha to 33.01ha compared to 34.51ha in April 2016. This is principally the result of one additional windfall site (1.88ha) at Berkeley Way gaining approval in the past year together with some minor loss of supply as a result of approved development not being implemented and planning approvals lapsing.

Table A1.5 – Worcester City Employment Land Supply March 2017

	Ha
SWDP 2006-2030 Requirement	80
Completions 2006-2017	14.83
Commitments at March 2017	27.16
Residual Balance (Completions + Commitments) – Local Plan Requirement	(14.83 + 27.16) - 80 = -38.01
Local Plan Employment Allocations (excluding commitments) at March 2017	5
Surplus/Deficit against Local Plan target	-33.01

Source: Worcester City Employment Land Monitor, 2017

A1.49 There is a significant deficit in the supply of employment land within Worcester compared to the target set in the adopted Local Plan

A1.50 In the year 1st April 2016 to 31st March 2017, 1.61 hectares of employment land was developed, and 6,236 square meters of additional floor space was completed. In only three other years since 2006 has more land been developed for new employment uses. The rate of development in the past year is above the annual average for the last ten years of 1.35 ha and above the short term average over the past five years of 1.11 ha. The average rates of development do not compare favourably against the Local Plan target of 3.3 hectares per year within the City

A1.51 An assessment of current employment site availability within the City of Worcester shows that 26.82 hectares of land is available for B-use class development within the next five years. This is above the 16.5 hectare target proposed by the South Worcestershire Development Plan and the 22.93 hectares recorded in March 2016.

A1.52 There is insufficient allocated employment land within the Worcester City Area to match the overall target within the South Worcestershire Development Plan of 80 hectares. If the assessment is expanded to include all the proposed allocations in the Wider Worcester Area then the target in the South Worcestershire Development Plan is 120 hectares. The potential future supply of employment land in the Wider Worcester Area is also insufficient to match this target, the short fall of 4.81ha is four percent below the 120 hectare target. If the losses of employment land experienced since the start of the plan period continues in future years it will be very unlikely that the targets

set in the South Worcestershire Development Plan for additional B use class development could be achieved.

Appendix 2

Socio Economic Profile

Appendix 2 – Socio-Economic Profile

Introduction

A2.1 This appendix sets out the socio-economic baseline for the three Local Authorities of Malvern Hills, Worcester and Wychavon (known as South Worcestershire). The characteristics of the area are considered alongside national and regional comparators.

A2.2 The purpose of the socio-economic profile is to understand the current characteristics and recent trends that may influence the demand for employment within South Worcestershire, including its recent performance, specific opportunities and strengths and how economic activity within the three Authorities interacts with the wider sub-region.

Population

A2.3 The estimated population of South Worcestershire in 2016 (ONS) was 303,642 and over the period of the last 20 years the population has increased by 12.5%; equating to around 33,600 residents. Population growth has been ahead of that measured across the West Midlands as a whole (10.4%).

Table A2.1 – Population 1996 - 2016

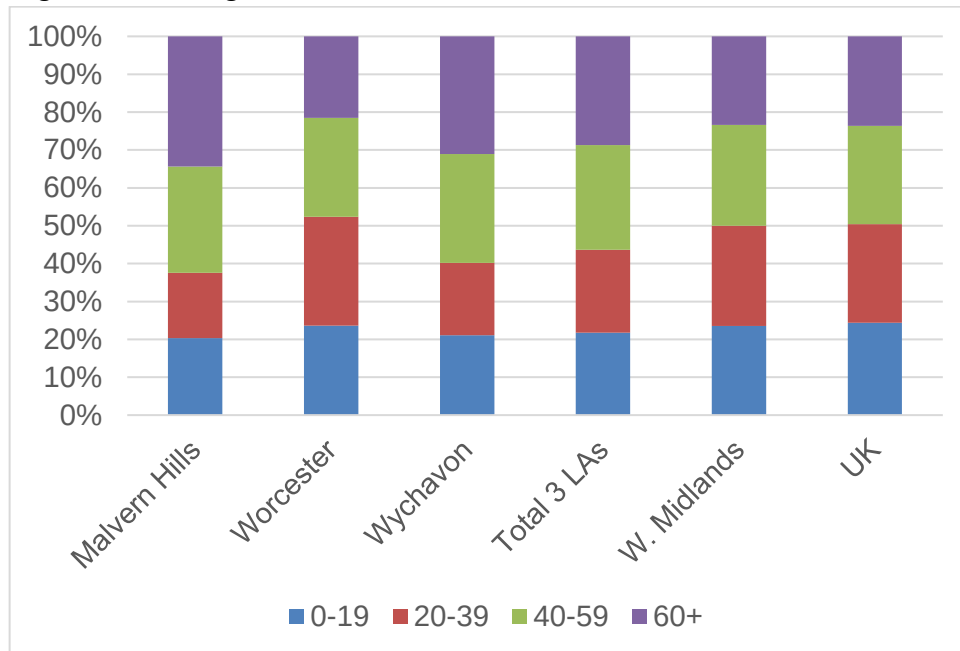
	1996	2016	Change 1996-2016	
			No.	Percent
Malvern Hills	71,248	76,555	5,307	7.4
Worcester	89,778	101,927	12,149	13.5
Wychavon	106,987	123,144	16,157	15.1
Total South Worcestershire	270,009	303,642	33,633	12.5
West Midlands	5,263,046	5,810,773	547,727	10.4
England & Wales	58,164,374	65,648,054	7,483,680	12.9

Source: ONS Population Estimates, 2016

A2.4 Population change is influenced by two factors – natural change (births and deaths) and migration. The age profile of South Worcestershire compared to the UK and the West Midlands region is shown below. Age profiles between areas tend not to show extremes of variability. The greatest proportion of the population in South Worcestershire (29%) is now aged 60+ and this is a greater proportion than recorded across the West Midlands or the UK (both 23%). Malvern Hills has the highest proportion of residents aged 60+

(34%) while Worcester has a lower proportion of residents aged 60+ (21.5%) than the UK average.

Figure A2.1 – Age Profile



Source: ONS Population Estimates

A2.5 In 2017 it was estimated that 7.4% of the South Worcestershire population had been born outside of the UK (22,000 people). This is lower than the proportion in the West Midlands (14%) and nationally (14%).

A2.6 In recent years South Worcestershire has been the net recipient of internal UK migration as shown in Table A2.2 below. The largest flows have been recorded in Wychavon.

Table A2.2 – Internal (within the UK) Migration Flows 2013-2016

	Inflow	Outflow	Net
Malvern Hills			
2013/14	5,114	4,242	872
2014/15	4,578	4,312	266
2015/16	4,814	4,001	813
Total	14,506	12,555	1,951
Worcester			
2013/14	6,327	6,372	-45
2014/15	6,355	6,313	42
2015/16	6,750	6,148	602
Total	19,432	18,833	599
Wychavon			
2013/14	6,987	5,825	1,162
2014/15	7,354	5,441	1,913
2015/16	7,143	5,637	1,506
Total	21,484	16,903	4,581
Total for 3 LAs	55,422	48,291	7,131

Source: ONS

A2.7 The result is that South Worcestershire has a growing but ageing population, which remains attractive to residents of other areas of the country as a place to live. There is a lower proportion of non-UK born residents than at a regional or national level.

Deprivation

A2.8 The latest edition of the English Indices of Deprivation was published by the Department of Communities and Local Government on 30 September 2015. The indices include the Index of Multiple Deprivation (IMD). Most of the data underpinning the IMD 2015 relates to 2012/13.

A2.9 IMD 2015 uses 37 separate indicators, organised across seven distinct domains of deprivation (income, employment, education skills and training, health and disability, crime, barriers to housing and services, and living environment) which are weighted and combined to calculate the IMD 2015.

A2.10 IMD 2015 is based on the small area geography of Lower Super Output Areas (LSOAs). There are 32,844 LSOAs in England and they are designed to be of a similar population size with each one containing around 1,500 residents. There are 45 LSOAs in Malvern Hills; 63 in Worcester; and 78 in Wychavon.

A2.11 IMD 2015 ranks all 32,844 LSOAs in England. 1 is the most deprived and 32,844 is the least deprived. Once ranked these are generally grouped into bands with the worse 10% generally used to define the most deprived areas.

A2.12 Worcester ranks as the 159th most deprived local authority in England (where 1 is the worst deprived local authority and 326 is the least deprived). Both Malvern Hills (ranked 188th) and Wychavon (ranked 191st) are less deprived than Worcester and all of the Authorities can be considered mid-ranking and less deprived than neighbouring Authorities – Redditch is ranked 136th and Wyre Forest 123rd although Bromsgrove is ranked as the 282nd most deprived.

A2.13 When looking at the individual elements of deprivation, all three of the South Worcestershire Local Authorities are considered most deprived (relative to other aspects) in terms of access to housing and services. On this measure, Wychavon is measured as the 29th most deprived local authority area in England.

Table 2.3 – Areas of Deprivation, Comparison to Neighbouring Authorities

Local Authority	IMD	Income	Employment	Education, Skills and Training	Health Deprivation and Disability	Crime	Barriers to Housing and Services	Living Environment
Bromsgrove	282	276	244	283	250	219	166	234
Malvern Hills	188	217	198	285	223	278	46	91
Redditch	136	138	142	76	103	161	31	310
Worcester	159	168	173	199	138	160	87	107
Wychavon	191	223	214	188	217	225	29	168
Wyre Forest	123	123	101	101	151	123	102	114

Source: English indices of deprivation 2015, Ministry of Housing, Communities and Local Government

Housing Stock and Land Use

A2.14 South Worcestershire is estimated to have a total of 135,210 dwellings (including empty homes). Of this the vast majority are in the private sector (85%); and this represents a slightly higher proportion than for England overall.

Table A2.4 – Housing Stock Tenure

Tenure	Malvern Hills		Worcester		Wychavon		Total		England
	No.	%	No.	%	No.	%	No.	%	
Local Authority	0	0	10	0	20	0	30	0	7
Private Registered Provider	4,680	13	7,350	16	8,000	14	20,030	15	11
Other public sector	0	0	10	0	30	0	40	0	0
Private sector	30,180	87	37,710	84	47,250	85	115,140	85	82

Source: Local Authority Housing Statistics year ending March, 2016

A2.15 The University of Sheffield has created a series of land use summaries for different areas in England, based on amalgamated data from the 44 different land use codes used by the Co-ordination of Information on the Environment (Corine) project initiated by the European Commission in 1985. Based on this it is estimated that 58% of Worcester's land is built on; a much higher proportion than the majority of its neighbouring areas – with Malvern Hills recording 3% and Wychavon 5%. Little of the land area of South Worcestershire is 'natural' however and the proportion is lower than for England as a whole. The land not built upon in Wychavon and Malvern Hills is typically farmland.

Table A2.5 – Land Use Split, Local Authorities

Local Authority Area	Built on %	Green urban %	Farmland %	Natural %
Malvern Hills	3	1	89	6
Worcester	58	21	20	<1
Wychavon	5	2	90	3
England	6	3	57	35

Source: BBC Analysis of Corine Land Cover Statistics 2012 (released 2017)

Key Market Indicators

A2.16 South Worcestershire has 148,000 economically active residents; this represents 82% of the workforce. This is a higher rate of economic activity than the region (76%) or England as a whole (78%). This is also true of each of the Local Authorities individually – the economic activity rate in Wychavon is the highest with 84% of the population recorded as economically active.

Table A2.6 – Economic Indicators

	Malvern Hills		Worcester		Wychavon		Total		West Midlands	England
	No.	%	No.	%	No.	%	No.	%		
Economically active	34	79	54	82	61	84	148	82	76	78
Employment	26	61	48	73	46	64	120	66	62	63
Self-employment	5	12	4	6	12	17	21	12	9	11
Un-employment	2	7	2	3	2	4	6	4	6	5
Inactive	9	21	12	18	12	16	33	18	24	22

Source: Annual Population Survey – results for March, 2017

Self-Employment and Home Working (working age population)

A2.17 A total of 12% of the South Worcestershire workforce is self-employed, this is somewhat higher than for the region (9%) and nationally (11%). This proportion is made up of significant variation at the Local Authority level with 6% self-employed in Worcester and 17% self-employed in Wychavon (Malvern Hills recorded 12% as self-employed). At the time of the last census 9% of the working population in South Worcestershire worked from home – this is higher than the proportion for the region (6%) and nationally (7%). Whilst current levels are higher than average, it is to be expected that the trend in flexible working practices continues, both self-employment and home working will rise in South Worcestershire and as such needs to be taken into account when designing and planning workspaces.

A2.18 It is clear from the data that the area has also variable levels of unemployment. In March 2017 the overall average for South Worcestershire was 4%. Whilst Wychavon (4%) and Worcester (3%) were below the regional (6%) and national average (5%), Malvern Hills recorded a rate of 7%.

Skills and Qualifications

A2.19 Close to half (46%) of the South Worcestershire working population is educated to NVQ level 4 or above (equivalent to degree level). This is higher than the national average of 43%. Conversely, whilst only 6% of the working age population in South Worcestershire have no qualifications at all; this is slightly higher than the national average (5%).

Table A2.7 - Qualifications

	Malvern Hills		Worcester		Wychavon		Total		England
	No.	%	No.	%	No.	%	No.	%	
% of economically active with NVQ4+ - aged 16-64	15	47	25	47	28	45	68	46	43
% of economically active with NVQ3 only - aged 16-64	8	25	10	19	9	15	27	18	17
% of economically active with Trade Apprenticeships - aged 16-64	1	3	1	2	2	3	4	3	3
% of economically active with NVQ2 only - aged 16-64	3	9	8	14	10	16	20	14	15
% of economically active with NVQ1 only - aged 16-64	2	7	4	8	7	12	14	9	10
% of economically active with other qualifications (NVQ) - aged 16-64	NA	NA	3	6	2	4	NA	NA	7
% of economically active with no qualifications (NVQ) - aged 16-64	3	8	2	5	3	5	8	6	5

Source: Annual Population Survey – results for December, 2017

Occupations

A2.20 48% of South Worcestershire's workforce are occupied in senior managerial, professional or associated professional or technical occupations (the first three rows from Table 2.8)– this is higher than the national average which stands at 45%.

A2.21 Within this, 34,000 people are employed in what are known as “professional occupations”; at 24% of the workforce this is the largest single occupational cohort and higher than the national average (20%).

Table 2.8 – Occupations

	Malvern Hills		Worcester		Wychavon		South Worcestershire		England
	No.	%	No.	%	No.	%	No.	%	
% all in employment who are - 1: managers, directors and senior officials (SOC2010)	6	17	5	10	10	17	20	14	11
% all in employment who are - 2: professional occupations (SOC2010)	9	28	15	27	10	18	34	24	20
% all in employment who are - 3: associate prof & tech occupations (SOC2010)	3	8	6	10	7	12	15	10	14
% all in employment who are - 4: administrative and secretarial occupations (SOC2010)	3	9	5	9	3	5	11	7	10
% all in employment who are - 5: skilled trades occupations (SOC2010)	3	9	5	9	8	14	15	11	10
% all in employment who are - 6: caring, leisure and other service occupations (SOC2010)	2	7	3	6	8	14	13	9	9
% all in employment who are - 7: sales and customer service occupations (SOC2010)	2	6	6	11	3	5	11	8	8
% all in employment who are - 8: process, plant and machine operatives (SOC2010)	3	10	4	7	5	8	11	8	6
% all in employment who are - 9: elementary occupations (SOC2010)	2	7	6	11	5	8	13	9	11

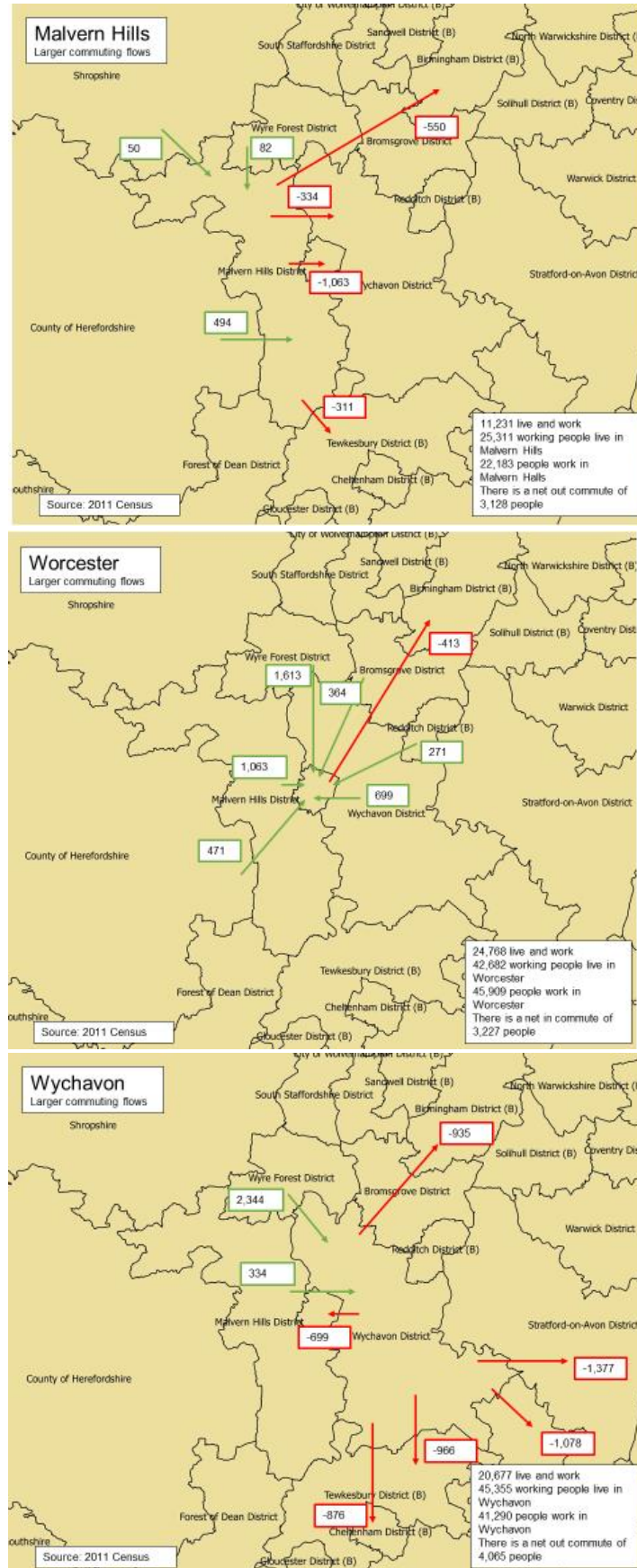
Source: Annual Population Survey – results for December, 2017

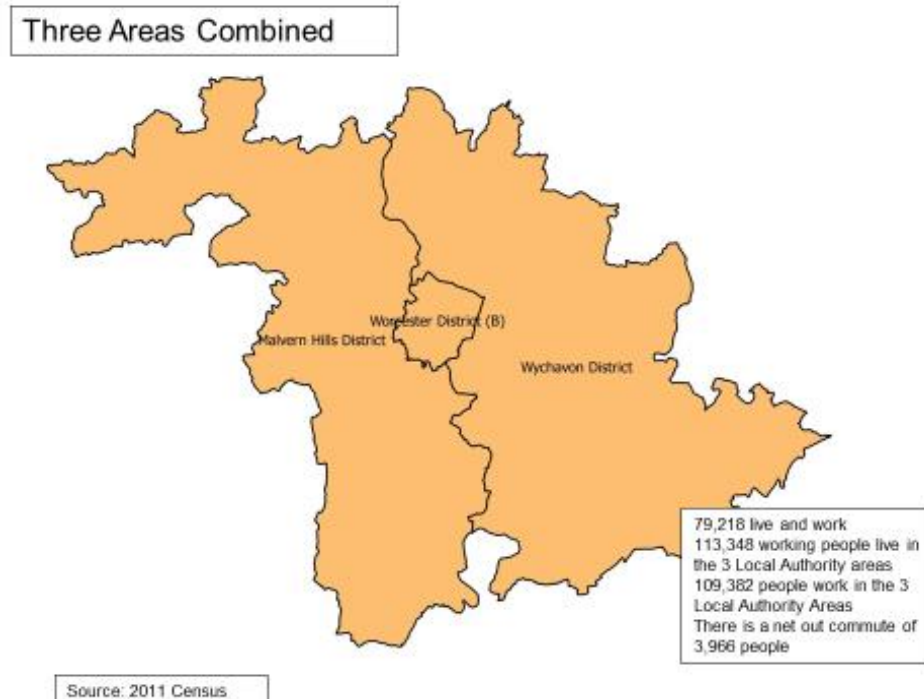
Containment and Travel to Work Patterns

A2.22 South Worcestershire is an area with a reasonably high degree of self-containment. Within the area, and at the time of the last census, 79,218 people worked and lived in South Worcestershire. This was 72% of the total 109,382 people working within South Worcestershire. There were however, 113,348 working aged residents living in South Worcestershire (70% whom work and live locally) resulting in a small net out-commute of 3,966.

A2.23 This represents a relatively high degree of self-containment but the diagrams below show the most significant inbound and outbound flows for each Local Authority area.

Figure A2.2 – Net Commuter Outflow

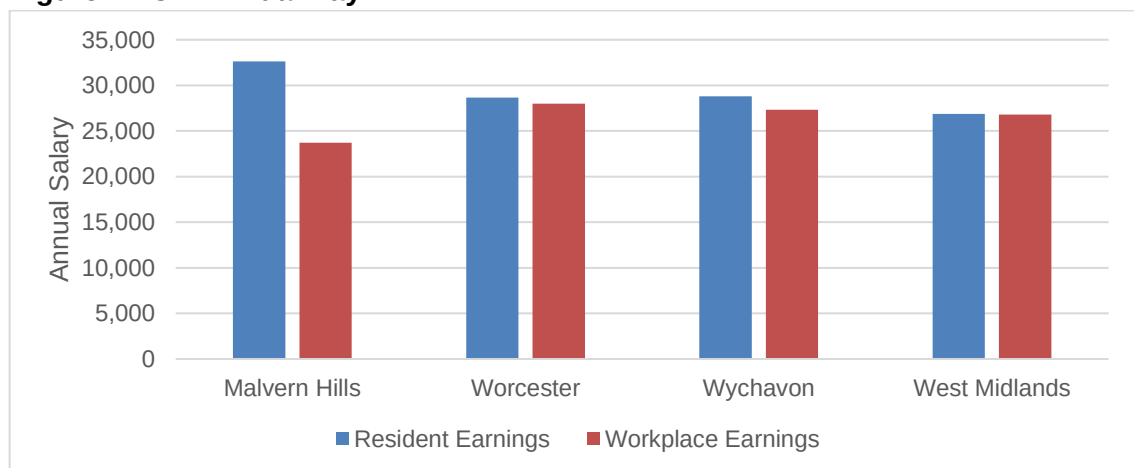




Annual Pay

A2.24 In all of the three Local Authorities of South Worcestershire, residents appear to be able to earn more (on average) by out-commuting than by remaining in the Local Authority for their employment. Resident based earnings are higher in each of Malvern Hills, Worcester and Wychavon than workplace earnings. The average earnings for a resident in Worcester is £28,671 whereas for those working in Worcester the average workplace earnings are lower at £28,005 (2% lower). The average earnings for a resident in Wychavon is £28,813 whereas for those working in Wychavon the average workplace earnings are lower at £27,336 (5% lower). Most strikingly of all, however, is that the average earnings for a resident in Malvern Hills is £32,621 whereas for those working in Malvern Hills the average workplace earnings are lower at £23,701 (27% lower).

Figure A2.3 – Annual Pay

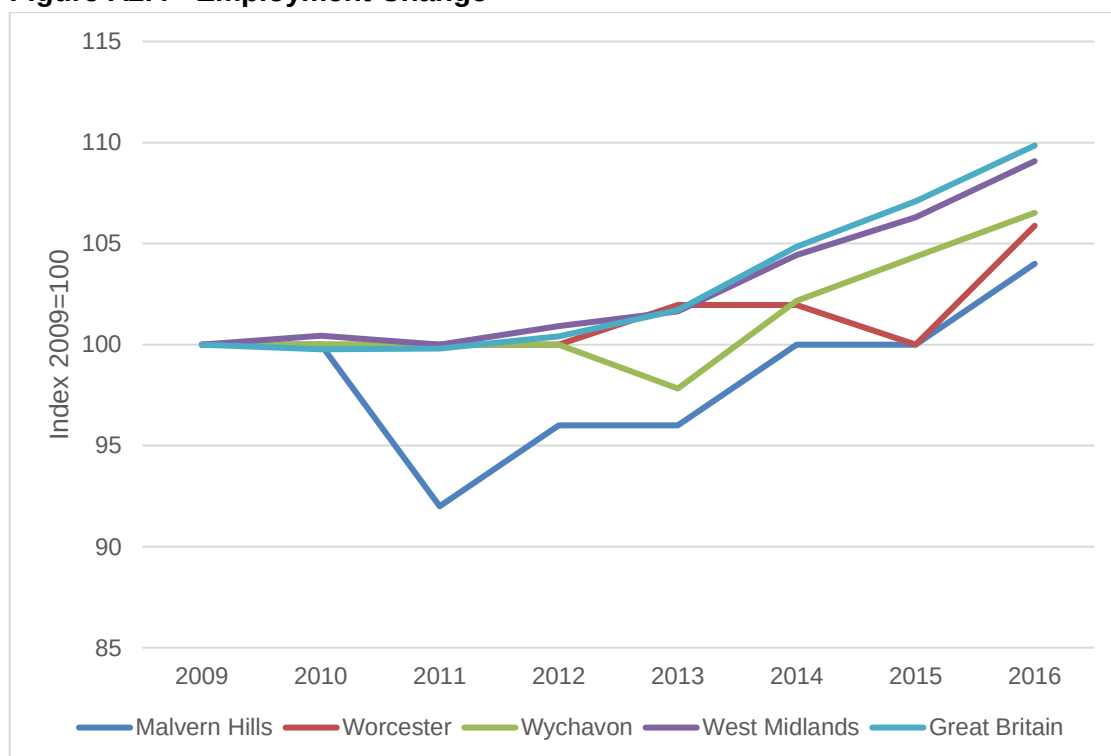


Source: Annual Survey of Hours and Earnings, 2017

Employment Trends

A2.25 In absolute terms, the number of people employed in South Worcestershire has increased since 2009 when 122,000 were employed to now (latest figures in 2016 report 129,000 employed). The graph below suggests that the three Local Authorities have been subject to greater fluctuations in their employment than the region and nationally Employment growth has been lower. Whilst the trend is clear, the volatility in the graph for the areas may reflect survey/data issues over smaller geographical areas. Each Local Authority appears to have suffered a decline in employment, but in different years. In Malvern Hills the downturn was recorded in 2011, in Wychavon in 2013 and in Worcester in 2015. All three Local Authorities ended the period ahead of their opening position.

Figure A2.4 - Employment Change

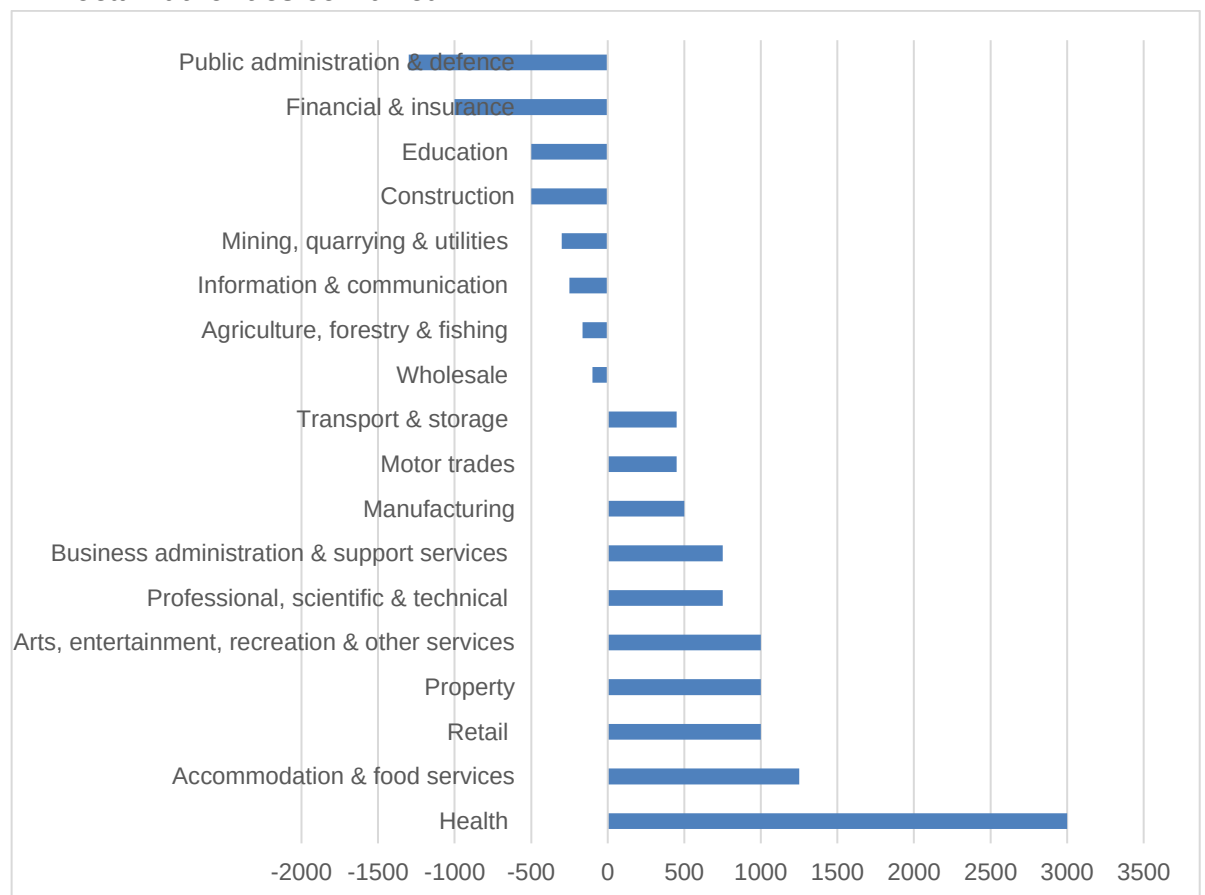


Source: BRES, 2018

A2.26 Looking at employment patterns in absolute terms over the last 7 years for the three Local Authorities, a different picture emerges. Equivalent data from Experian, which is in line with forecast data is presented in a later chapter. From the perspective of ONS data the three Local Authorities combined recorded an employment decline in public administration (-1,300); financial & insurance (-1,100), education (-500) and construction (-500) but they recorded an increase in health (+3,000), accommodation & food service (+1,250), retail (1,000), property (1,000) and arts, entertainment, recreation and other services (1,000).

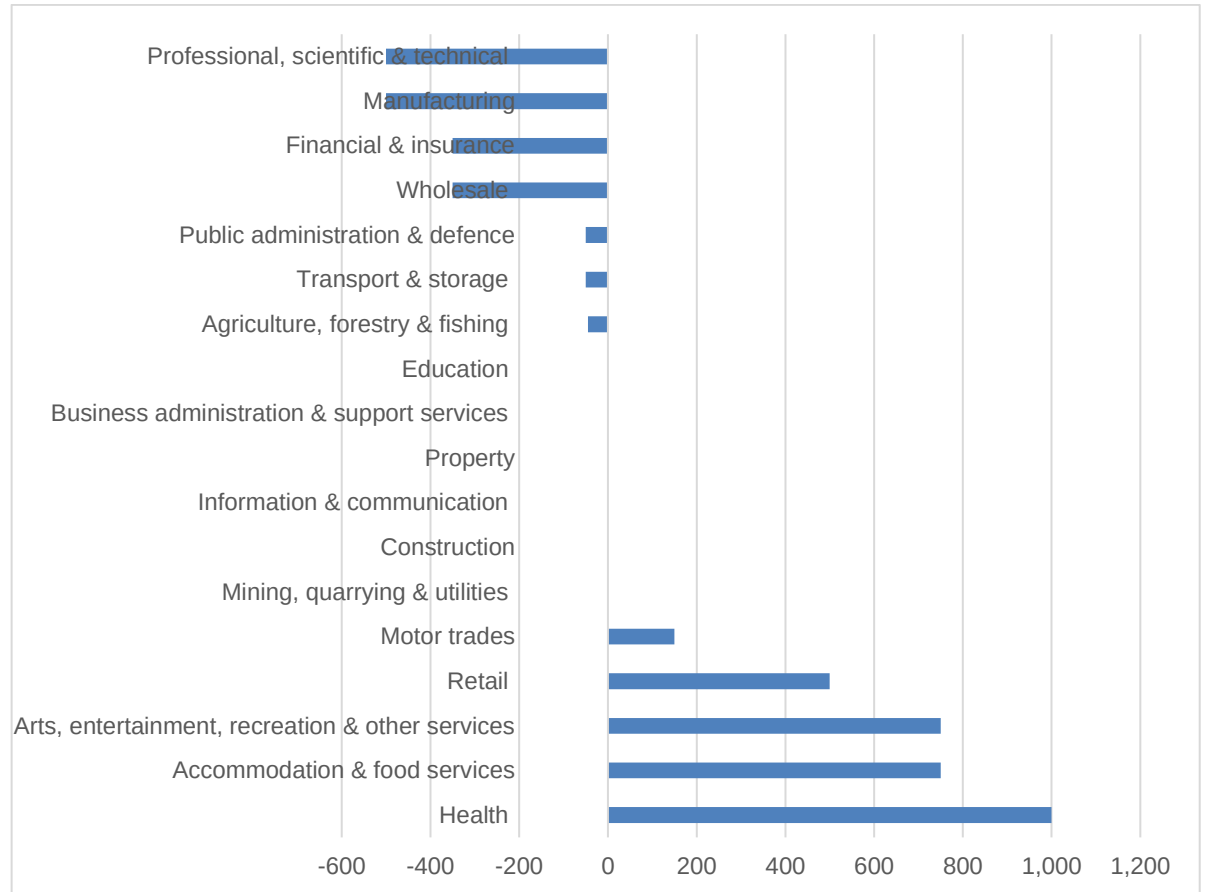
A2.27 Each Local Authority shows a slightly different pattern, but in Worcester and Wychavon the largest employment declines were recorded in public administration. In Malvern Hills the largest declines were recorded in professional, scientific and technical as well as manufacturing. This was the reverse of Wychavon where these sectors grew the most rapidly. Health grew strongly in employment terms across all 3 Local Authorities.

Figure A2.5 – Employment change by broad industry sectors 2009-2016
All Local Authorities combined



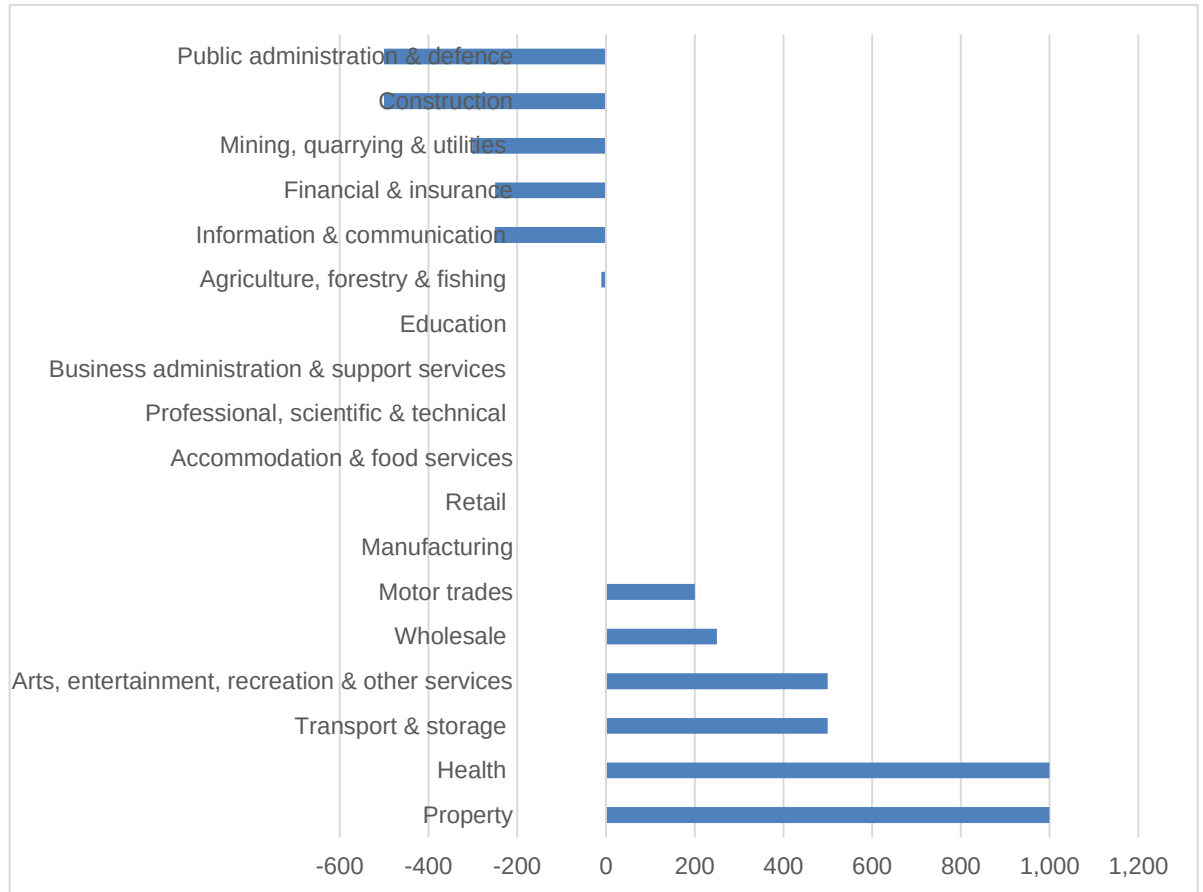
Source: BRES, 2018

Malvern Hills



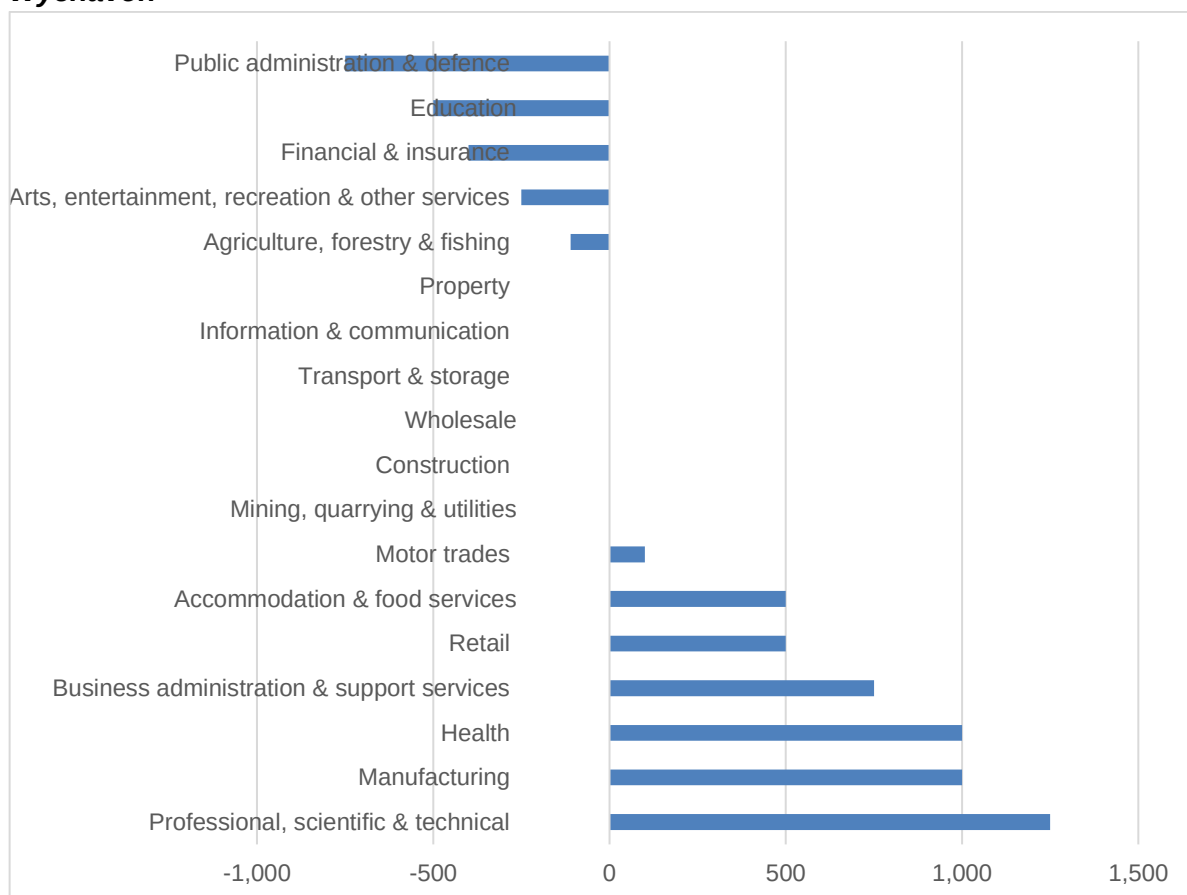
Source: BRES, 2018

Worcester



Source: BRES, 2018

Wychavon



Source: BRES, 2018

Current Sectoral Composition

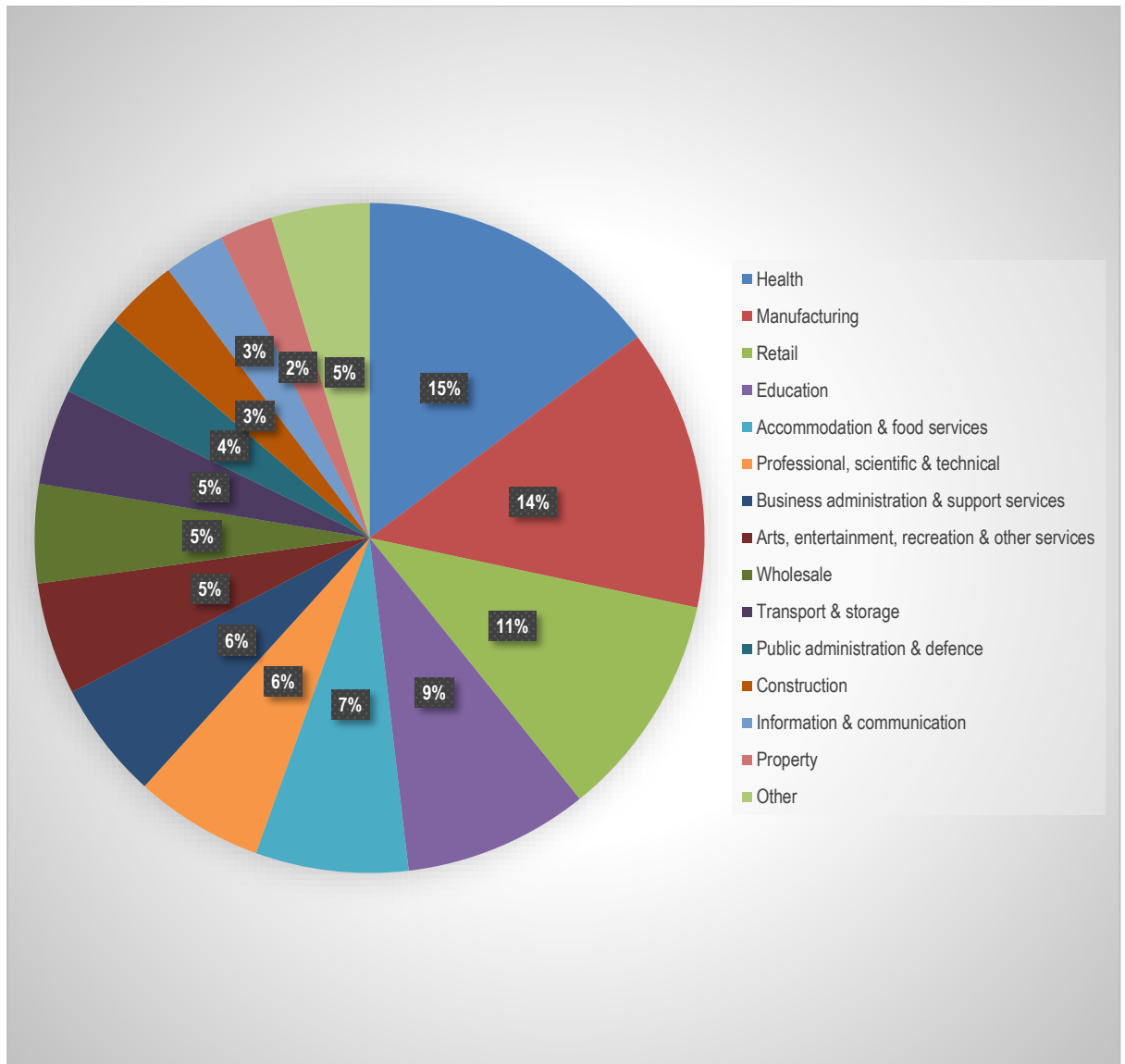
A2.28 The data presented in this section is also collated from the Business Register and Employment Survey (BRES 2016). BRES is the official source of employee and employment estimates by detailed geography and industry. The survey collects employment information from businesses across the whole of the UK economy for each site that they operate. This allows ONS to produce workplace based employee and employment estimates by detailed geography and industry. It is worth noting that BRES does not cover the micro businesses neither registered for VAT nor PAYE, which make up a small part of the economy.

A2.29 This section considers the overall scale of current employment rather than the changes in employment set out above. In 2016 (according to BRES data) there were 129,000 people in employment in South Worcestershire. The largest cohorts, similar to other local authority areas in England, are health (15%), retail (11%), and education (9%). In the case of South Worcestershire, however, (and relatively unusually in the UK) the manufacturing industry represents the second largest cohort at 14%. Following these, the next biggest sector is the accommodation and food services industry.

A2.30 The top 4 sectors are not the same in each Local Authority. There are the following variations away from health, manufacturing, retail and education. In both Malvern and Wychavon, the accommodation and food services industry push the proportion

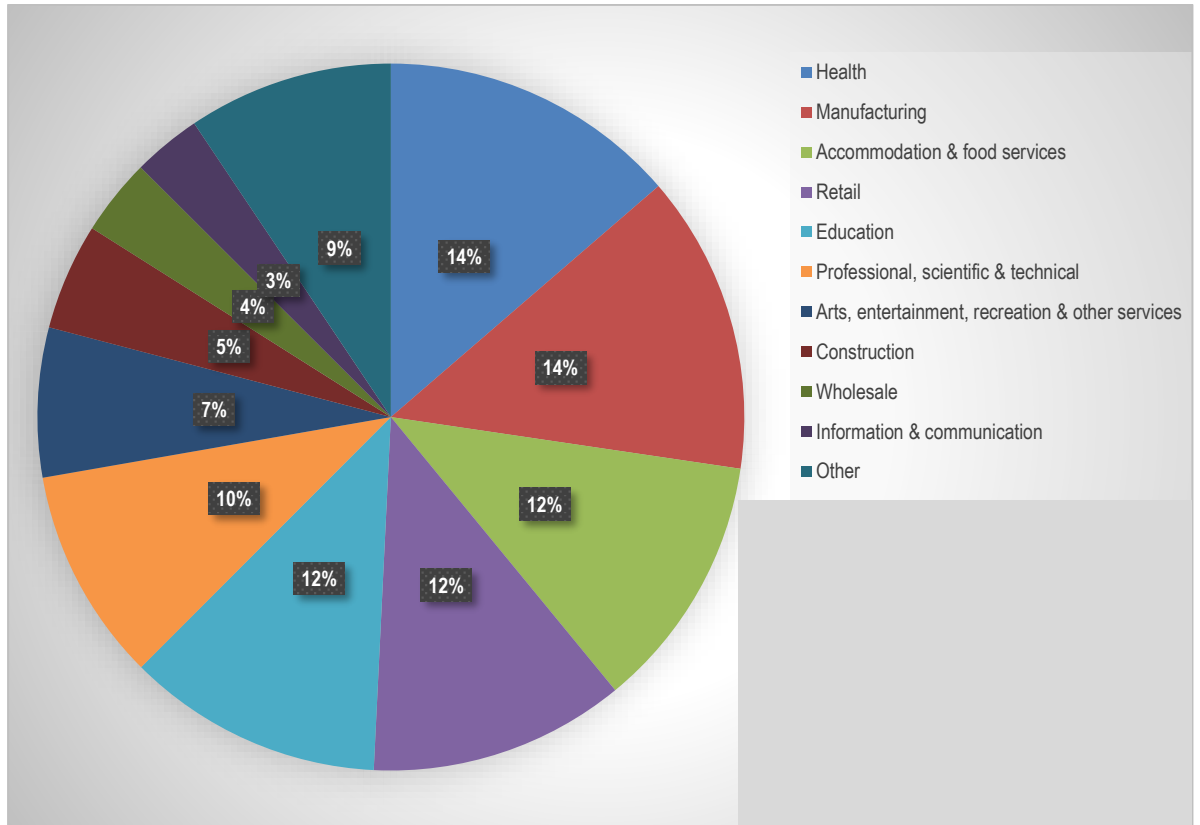
employed in education into the fifth ranked sector. In Worcester the four highest ranked sectors are the same as the whole of South Worcestershire.

Figure A2.6 – Proportion of Employment 2016
All Authorities



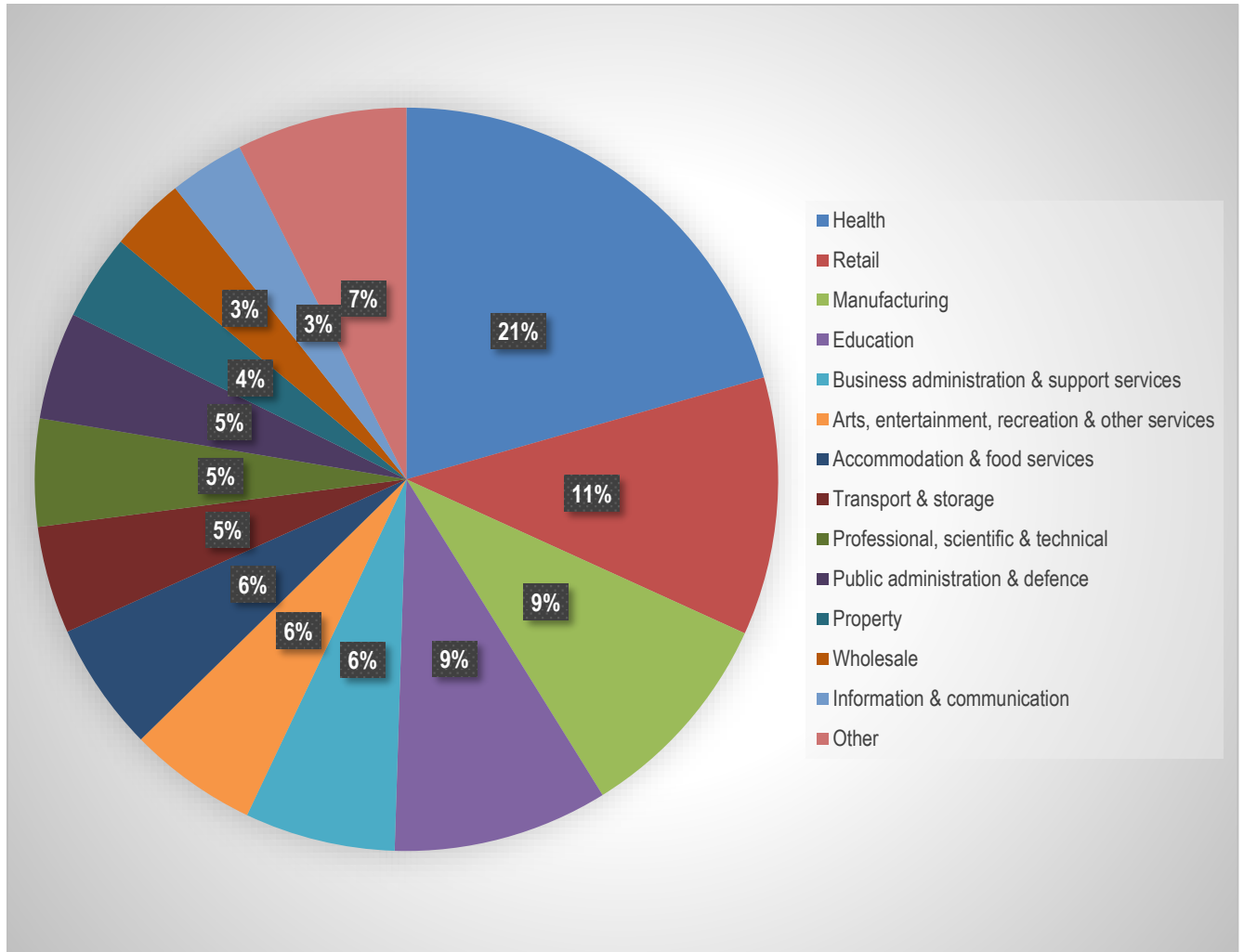
Source: BRES, 2016

Malvern Hills



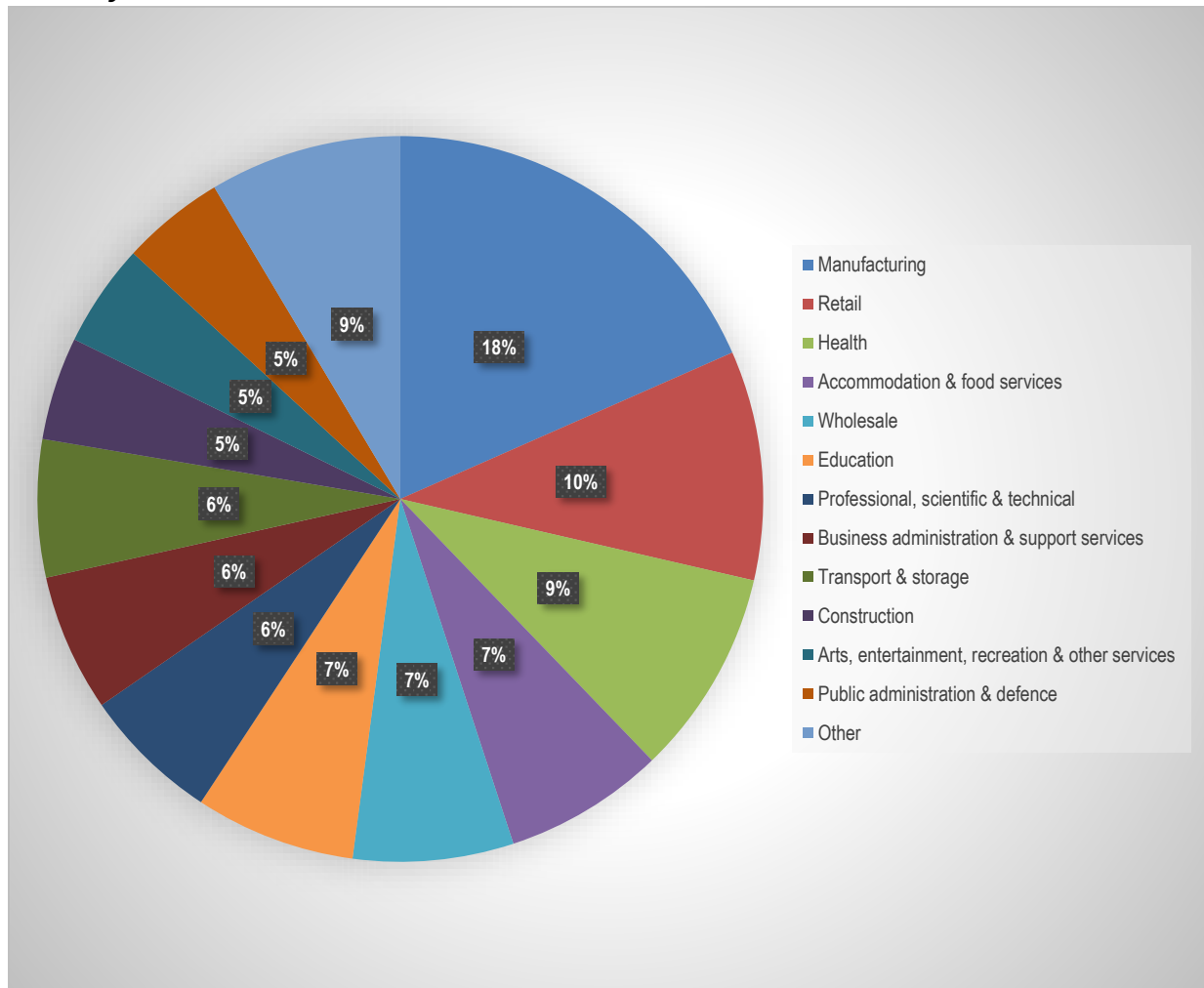
Source: BRES, 2016

Worcester



Source: BRES, 2016

Wychavon



Source: BRES, 2016

A2.31 Location Quotients (LQs) are used to consider how sectoral employment in South Worcestershire differs from the national average. A LQ of 1 indicates that the proportion of employment is the same as the national average and a LQ of 2 shows a proportion double the national average.

A2.32 The table below highlights the industry sectors (at 2 digit SIC code) in South Worcestershire where the proportion is at least twice the national average. The table clearly shows the importance of manufacturing in the area.

Table A2.9 – Major Industry Sectors (as measured by LQ of 2+) by LA 2016
All Authorities

Industry Sector	LQ
Remediation activities and other waste management services. This division includes the provision of remediation services, i.e. the clean-up of contaminated buildings and sites, soil, surface or ground water.	6.8
Sewerage	3.7
Manufacture of machinery and equipment n.e.c.	2.8
Manufacture of food products	2.8
Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	2.5
Manufacture of rubber and plastic products	2.4
Manufacture of basic metals	2.4
Manufacture of computer, electronic and optical products	2.3
Manufacture of fabricated metal products, except machinery and equipment	2.2
Manufacture of other transport equipment	2.0

Source: BRES, 2016

Malvern Hills

Industry Sector	LQ
Manufacture of computer, electronic and optical products	8.0
Scientific research and development	6.6
Manufacture of paper and paper products	4.9
Manufacture of leather and related products	4.0
Remediation activities and other waste management services. This division includes the provision of remediation services, i.e. the clean-up of contaminated buildings and sites, soil, surface or ground water.	3.8
Manufacture of rubber and plastic products	3.4
Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	2.6
Veterinary activities	2.6
Manufacture of food products	2.5
Residential care activities	2.4
Creative, arts and entertainment activities	2.3
Activities of membership organisations	2.0

Source: BRES, 2016

Worcester

Industry Sector	LQ
Sewerage	7.7
Manufacture of basic metals	5.6
Manufacture of fabricated metal products, except machinery and equipment	3.6
Manufacture of machinery and equipment n.e.c.	3.3
Libraries, archives, museums and other cultural activities	2.6
Real estate activities	2.3

Source: BRES, 2016

Wychavon

Industry Sector	LQ
Remediation activities and other waste management services. This division includes the provision of remediation services, i.e. the clean-up of contaminated buildings and sites, soil, surface or ground water.	14.9
Manufacture of food products	5.7
Manufacture of electrical equipment	4.8
Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	4.8
Manufacture of other transport equipment	3.5
Manufacture of machinery and equipment n.e.c.	3.3
Manufacture of rubber and plastic products	3.2
Rental and leasing activities	2.8
Waste collection, treatment and disposal activities; materials recovery	2.3
Manufacture of furniture	2.1

Source: BRES, 2016

Appendix 3

Property Transactions

Appendix 3 – Summary of transactions for commercial space for South Worcestershire and three local authorities

Table A3.1 – Industrial Transactions, South Worcestershire

Industrial		Size (sqm)								Total
		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001-10,000	10,000+	Unknown	
2018	Floorspace (sqm)	108	149	~	735	~	~	~	~	992
	Total Properties	2	1	~	1	~	~	~	~	4
2017	Floorspace (sqm)	648	2,652	8,599	8,432	5,164	~	85,990	~	111,485
	Total Properties	12	18	27	12	3	~	4	~	76
2016	Floorspace (sqm)	647	1,689	10,469	3,254	24,202	~	45,614	~	85,875
	Total Properties	9	13	31	5	12	~	2	6	78
2015	Floorspace (sqm)	1,038	3,428	13,577	6,834	16,594	24,130	30,037	~	95,638
	Total Properties	17	23	42	11	7	3	2	5	110
2014	Floorspace (sqm)	677	1,171	6,365	3,426	19,306	30,093	105,696	~	166,734
	Total Properties	10	8	20	5	9	4	7	5	68
2013	Floorspace (sqm)	507	1,513	6,527	5,995	40,596	~	174,581	~	229,719
	Total Properties	8	11	17	9	19	~	7	1	72
2012	Floorspace (sqm)	595	542	5,059	7,723	15,934	12,761	18,114	~	60,728
	Total Properties	9	4	15	11	7	2	1	1	50
2011	Floorspace (sqm)	189	1,375	3,321	6,668	38,095	30,329	~	~	79,977
	Total Properties	3	8	11	10	17	4	~	4	57
2010	Floorspace (sqm)	160	349	3,262	3,644	22,961	44,971	37,488	~	112,835
	Total Properties	2	2	9	6	11	6	2	6	44
2009	Floorspace (sqm)	72	1,034	4,468	3,586	20,538	5,259	12,140	~	47,097
	Total Properties	2	6	13	4	7	1	1	1	35
2008	Floorspace (sqm)	93	684	2,444	1,245	13,395	12,698	85,137	~	115,696
	Total Properties	1	4	8	2	5	2	3	2	27
Total	Floorspace (sqm)	4,734	14,586	64,091	51,542	216,785	160,241	594,797	~	1,106,776
	Total Properties	75	98	193	76	97	22	29	31	621

Source: EGi, 2018

Table A3.2 – Office Transactions, South Worcestershire

Office		Size (sqm)								
		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001-10,000	10,000+	Unknown	Total
2018	Floorspace (sqm)	190	482	~	579	~	6,670	~	~	7,921
	Total Properties	3	3	~	1	~	1	~	1	9
2017	Floorspace (sqm)	1,072	4,530	4,373	3,148	~	~	~	~	13,123
	Total Properties	23	30	13	5	~	~	~	2	73
2016	Floorspace (sqm)	2,375	840	3,096	1,334	~	~	~	~	7,645
	Total Properties	46	6	13	2	~	~	~	6	73
2015	Floorspace (sqm)	2,067	2,148	6,085	3,869	6,099	~	~	~	20,268
	Total Properties	43	15	20	6	3	~	~	6	93
2014	Floorspace (sqm)	1,601	2,121	4,681	4,717	14,523	~	~	~	27,643
	Total Properties	30	16	15	7	6	~	~	2	76
2013	Floorspace (sqm)	1,243	2,621	4,226	2,982	13,520	~	~	~	24,592
	Total Properties	20	18	13	4	6	~	~	2	63
2012	Floorspace (sqm)	853	1,415	6,040	726	2,662	~	~	~	11,696
	Total Properties	14	10	19	1	2	~	~	2	48
2011	Floorspace (sqm)	733	949	2,548	967	1,196	~	~	~	6,393
	Total Properties	12	7	9	1	1	~	~	~	30
2010	Floorspace (sqm)	203	390	2,871	2,993	8,004	~	~	~	14,461
	Total Properties	4	3	10	3	3	~	~	~	23
2009	Floorspace (sqm)	290	248	2,184	1,519	~	~	~	~	4,241
	Total Properties	4	2	7	2	~	~	~	1	16
2008	Floorspace (sqm)	467	393	3,520	2,069	1,681	10,733	~	~	18,863
	Total Properties	8	3	11	3	1	2	~	2	30
Total	Floorspace (sqm)	11,094	16,137	39,624	24,903	47,685	17,403	~	~	156,846
	Total Properties	207	113	130	35	22	3	~	24	534

Source: EG, 2018

Table A3.3 – Industrial Transactions, Malvern Hills

Industrial		Size (sqm)								
		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001-10,000	10,000+	Unknown	Total
2018	Floorspace (sqm)	~	149	~	~	~	~	~	~	149
	Total Properties	~	1	~	~	~	~	~	~	1
2017	Floorspace (sqm)	~	567	696	1,199	1,221	~	~	~	3,683
	Total Properties	~	4	2	2	1	~	~	~	9
2016	Floorspace (sqm)	~	~	1,087	~	~	~	~	~	1,087
	Total Properties	~	~	4	~	~	~	~	1	5
2015	Floorspace (sqm)	176	~	771	1,487	2,693	~	~	~	5,127
	Total Properties	3	~	3	2	1	~	~	~	9
2014	Floorspace (sqm)	~	260	452	~	4,910	~	~	~	5,622
	Total Properties	~	2	2	~	3	~	~	2	9
2013	Floorspace (sqm)	~	844	~	637	4,954	~	~	~	6,435
	Total Properties	~	6	~	1	1	~	~	~	8
2012	Floorspace (sqm)	~	139	279	548	~	~	~	~	966
	Total Properties	~	1	1	1	~	~	~	~	3
2011	Floorspace (sqm)	~	334	~	687	~	~	~	~	1,021
	Total Properties	~	2	~	1	~	~	~	1	4
2010	Floorspace (sqm)	~	~	307	~	~	~	~	~	307
	Total Properties	~	~	1	~	~	~	~	1	2
2009	Floorspace (sqm)	~	~	1,399	~	~	~	~	~	1,399
	Total Properties	~	~	3	~	~	~	~	~	3
2008	Floorspace (sqm)	93	522	232	515	~	~	~	~	1,362
	Total Properties	1	3	1	1	~	~	~	1	7
Total	Floorspace (sqm)	269	2,815	5,223	5,073	13,778	~	~	~	27,158
	Total Properties	4	19	17	8	6	~	~	6	60

Source: EGi, 2018

Table A3.4 – Office Transactions, Malvern Hills

Office		Size (sqm)								Total
		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001-10,000	10,000+	Unknown	
2018	Floorspace (sqm)	~	163	~	~	~	~	~	~	163
	Total Properties	~	1	~	~	~	~	~	~	1
2017	Floorspace (sqm)	111	677	269	648	~	~	~	~	1,705
	Total Properties	2	4	1	1	~	~	~	~	8
2016	Floorspace (sqm)	290	~	238	~	~	~	~	~	528
	Total Properties	6	~	1	~	~	~	~	1	8
2015	Floorspace (sqm)	210	105	1,088	~	~	~	~	~	1,403
	Total Properties	4	1	4	~	~	~	~	~	9
2014	Floorspace (sqm)	142	360	566	645	2,348	~	~	~	4,061
	Total Properties	3	3	2	1	1	~	~	~	10
2013	Floorspace (sqm)	92	403	~	~	~	~	~	~	495
	Total Properties	2	3	~	~	~	~	~	~	5
2012	Floorspace (sqm)	202	~	714	~	1,394	~	~	~	2,310
	Total Properties	3	~	2	~	1	~	~	~	6
2011	Floorspace (sqm)	~	~	212	~	~	~	~	~	212
	Total Properties	~	~	1	~	~	~	~	~	1
2010	Floorspace (sqm)	28	261	~	827	~	~	~	~	1,116
	Total Properties	1	2	~	1	~	~	~	~	4
2009	Floorspace (sqm)	~	248	~	~	~	~	~	~	248
	Total Properties	~	2	~	~	~	~	~	~	2
2008	Floorspace (sqm)	257	148	~	967	~	~	~	~	1,372
	Total Properties	4	1	~	1	~	~	~	~	6
Total	Floorspace (sqm)	1,332	2,365	3,087	3,087	3,742	~	~	~	13,613
	Total Properties	25	17	11	4	2	~	~	1	60

Source: EGi, 2018

Table A3.5 – Industrial Transactions, Worcester

Industrial		Size (sqm)								Total
		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001-10,000	10,000+	Unknown	
2018	Floorspace (sqm)	108	~	~	735	~	~	~	~	843
	Total Properties	2	~	~	1	~	~	~	~	3
2017	Floorspace (sqm)	433	1,256	3,475	3,289	~	~	13,020	~	21,473
	Total Properties	9	8	10	5	~	~	1	~	33
2016	Floorspace (sqm)	396	889	4,391	1,298	11,294	~	33,975	~	52,243
	Total Properties	6	7	13	2	6	~	1	1	36
2015	Floorspace (sqm)	773	1,593	6,756	2,216	10,928	7,707	~	~	29,973
	Total Properties	12	11	18	4	4	1	~	~	50
2014	Floorspace (sqm)	439	540	3,585	1,210	~	16,925	10,788	~	33,487
	Total Properties	7	4	11	2	~	2	1	2	29
2013	Floorspace (sqm)	370	163	2,531	4,376	17,010	~	18,600	~	43,050
	Total Properties	6	1	6	7	9	~	1	~	30
2012	Floorspace (sqm)	595	403	2,450	5,735	4,940	~	~	~	14,123
	Total Properties	9	3	7	8	3	~	~	~	30
2011	Floorspace (sqm)	189	288	2,759	2,912	8,868	7,607	~	~	22,623
	Total Properties	3	2	9	5	4	1	~	1	25
2010	Floorspace (sqm)	160	194	2,249	3,019	5,041	7,440	~	~	18,103
	Total Properties	2	1	6	5	2	1	~	1	18
2009	Floorspace (sqm)	~	691	2,718	2,625	1,255	~	~	~	7,289
	Total Properties	~	5	9	3	1	~	~	~	18
2008	Floorspace (sqm)	~	162	1,365	~	5,050	7,124	12,153	~	25,854
	Total Properties	~	1	4	~	2	1	1	~	9
Total	Floorspace (sqm)	3,463	6,179	32,279	27,415	64,386	46,803	88,536	~	269,061
	Total Properties	56	43	93	42	31	6	5	5	281

Source: EGi, 2018

Table A3.6 – Office Transactions, Worcester

Office		Size (sqm)								Total
		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001-10,000	10,000+	Unknown	
2018	Floorspace (sqm)	107	135	~	579	~	~	~	~	821
	Total Properties	2	1	~	1	~	~	~	~	4
2017	Floorspace (sqm)	475	986	1,533	1,887	~	~	~	~	4,881
	Total Properties	11	6	5	2	~	~	~	2	26
2016	Floorspace (sqm)	938	840	2,858	818	~	~	~	~	5,454
	Total Properties	18	6	9	1	~	~	~	2	36
2015	Floorspace (sqm)	692	939	3,319	2,804	4,560	~	~	~	12,314
	Total Properties	14	6	10	4	2	~	~	1	37
2014	Floorspace (sqm)	807	1,345	2,706	3,556	12,175	~	~	~	20,589
	Total Properties	16	10	9	5	5	~	~	1	46
2013	Floorspace (sqm)	564	1,183	2,718	2,982	12,420	~	~	~	19,867
	Total Properties	10	8	8	4	5	~	~	1	36
2012	Floorspace (sqm)	341	1,304	4,175	726	1,268	~	~	~	7,814
	Total Properties	5	9	14	1	1	~	~	~	30
2011	Floorspace (sqm)	434	683	1,992	967	1,196	~	~	~	5,272
	Total Properties	7	5	7	1	1	~	~	~	21
2010	Floorspace (sqm)	135	129	2,871	822	1,454	~	~	~	5,411
	Total Properties	2	1	10	1	1	~	~	~	15
2009	Floorspace (sqm)	214	~	1,642	1,519	~	~	~	~	3,375
	Total Properties	3	~	5	2	~	~	~	~	10
2008	Floorspace (sqm)	28	119	2,631	1,102	1,681	~	~	~	5,561
	Total Properties	1	1	7	2	1	~	~	~	12
Total	Floorspace (sqm)	4,735	7,663	26,445	17,762	34,754	~	~	~	91,359
	Total Properties	89	53	84	24	16	~	~	7	273

Source: EGi, 2018

Table A3.7 – Industrial Transactions, Wychavon

Industrial		Size (sqm)								Total
		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001-10,000	10,000+	Unknown	
2018	Floorspace (sqm)	~	~	~	~	~	~	~	~	0
	Total Properties	~	~	~	~	~	~	~	~	0
2017	Floorspace (sqm)	215	829	4,428	3,944	3,943	~	72,970	~	86,329
	Total Properties	3	6	15	5	2	~	3	~	34
2016	Floorspace (sqm)	251	800	4,991	1,956	12,908	~	11,639	~	32,545
	Total Properties	3	6	14	3	6	~	1	4	37
2015	Floorspace (sqm)	89	1,835	6,050	3,131	2,973	16,423	30,037	~	60,538
	Total Properties	2	12	21	5	2	2	2	5	51
2014	Floorspace (sqm)	238	371	2,328	2,216	14,396	13,168	94,908	~	127,625
	Total Properties	3	2	7	3	6	2	6	1	30
2013	Floorspace (sqm)	137	506	3,996	982	18,632	~	155,981	~	180,234
	Total Properties	2	4	11	1	9	~	6	1	34
2012	Floorspace (sqm)	~	~	2,330	1,440	10,994	12,761	18,114	~	45,639
	Total Properties	~	~	7	2	4	2	1	1	17
2011	Floorspace (sqm)	~	753	562	3,069	29,227	22,722	~	~	56,333
	Total Properties	~	4	2	4	13	3	~	2	28
2010	Floorspace (sqm)	~	155	706	625	17,920	37,531	37,488	~	94,425
	Total Properties	~	1	2	1	9	5	2	4	24
2009	Floorspace (sqm)	72	343	351	961	19,283	5,259	12,140	~	38,409
	Total Properties	2	1	1	1	6	1	1	1	14
2008	Floorspace (sqm)	~	~	847	730	8,345	5,574	72,984	~	88,480
	Total Properties	~	~	3	1	3	1	2	1	11
Total	Floorspace (sqm)	1,002	5,592	26,589	19,054	138,621	113,438	506,261	~	810,557
	Total Properties	15	36	83	26	60	16	24	20	280

Source: EGi, 2018

Table A3.8 – Office Transactions, Wychavon

Office		Size (sqm)								
		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001-10,000	10,000+	Unknown	Total
2018	Floorspace (sqm)	83	184	~	~	~	6,670	~	~	6,937
	Total Properties	1	1	~	~	~	1	~	1	4
2017	Floorspace (sqm)	486	1,491	1,742	613	~	~	~	~	4,332
	Total Properties	10	11	7	1	~	~	~	~	29
2016	Floorspace (sqm)	1,147	1,376	829	516	~	~	~	~	3,868
	Total Properties	22	9	3	1	~	~	~	3	38
2015	Floorspace (sqm)	1,165	1,104	1,678	1,065	1,539	~	~	~	6,551
	Total Properties	25	8	6	2	1	~	~	5	47
2014	Floorspace (sqm)	652	416	1,409	516	~	~	~	~	2,993
	Total Properties	11	3	4	1	~	~	~	1	20
2013	Floorspace (sqm)	587	1,035	1,508	~	1,100	~	~	~	4,230
	Total Properties	8	7	5	~	1	~	~	1	22
2012	Floorspace (sqm)	310	111	1,151	~	~	~	~	~	1,572
	Total Properties	6	1	3	~	~	~	~	2	12
2011	Floorspace (sqm)	299	266	344	~	~	~	~	~	909
	Total Properties	5	2	1	~	~	~	~	~	8
2010	Floorspace (sqm)	40	~	~	1,344	6,550	~	~	~	7,934
	Total Properties	1	~	~	2	2	~	~	~	5
2009	Floorspace (sqm)	76	~	542	~	~	~	~	~	618
	Total Properties	1	~	2	~	~	~	~	1	4
2008	Floorspace (sqm)	182	126	889	~	~	10,733	~	~	11,930
	Total Properties	3	1	4	~	~	2	~	2	12
Total	Floorspace (sqm)	5,027	6,109	10,092	4,054	9,189	17,403	~	~	51,874
	Total Properties	93	43	35	7	4	3	~	16	201

Source: EGi, 2018

Appendix 4

Vacancy Schedule

Malvern Hills

Address		Size (sqft)	Size (sqm)	Rent (£/sqft)	Rent (£/sqm)	Rent (per annum)	Tenure	Agent
Industrial								
Unit 8	The Park, Spring Lane South, Malvern, WR14 1AT	5,588	519	4.47	48.16	25,000	LH	Fisher German
Building 2	Enigma Business Park, Sentinel House, Bethony Road, Malvern, WR14 1GL	24,047	2,234	Not Available	Not Available	Not Available	LH	Harris Lamb
Building 1	Enigma Business Park, Sentinel House, Bethony Road, Malvern, WR14 1GL	25,532	2,372	Not Available	Not Available	Not Available	LH	Bruton Knowles LLP
Industrial Unit	Britannia Business Centre, Britannia Way, Malvern, WR14 1GZ	3,030	281	5.78	62.17	17,500	LH	John Goodwin Limited
Unit 18	Link Business Centre, Link Way, Malvern, WR14 1UQ	1,725	160	5.94	63.97	10,250	LH	John Goodwin Limited
Unit 23 and Unit 24	Link Business Centre, Link Way, Malvern, WR14 1UQ	5,036	468	6.21	66.80	31,250	LH	John Goodwin Limited
Ground	Development Site, North End Lane, Townsend Way, Malvern, WR14 2WL	Not Available	Not Available	Not Available	Not Available	Not Available	FH	Harris Lamb
Ground and 1st	Print Building, Barnards Green Road, Malvern, WR14 3LY	2,755	256	4.72	50.80	13,000	LH	John Goodwin Limited
Industrial Unit	Six Ways Industrial Estate, Barnards Green Road, Malvern, WR14 3NB	1,058	98	7.56	81.40	8,000	LH	John Goodwin Limited
Workshop	Underhill Farm, Little Malvern, Malvern, WR14 4JN	850	79	3.82	41.16	3,250	LH	John Goodwin Limited
Entire Building	Former Tyre Depot, Edith Walk, Malvern, WR14 4QH	565	52	Not Available	Not Available	Not Available	FH	John Goodwin Limited
Industrial Units	Hanley Workshops, Hanley Swan, Worcester, WR8 0DX	Not Available	Not Available	Not Available	Not Available	Not Available	LH	Martin Atkins Associates
Warehouse	Blackmore Park Industrial Estate, Blackmore Park, Worcester, WR8 0EF	3,417	317	Not Available	Not Available	Not Available	LH	John Goodwin Limited
Ground	Walnut Tree Cottage, Gloucester Road, Malvern, WR13 6BS	2,060	191	9.71	104.51	20,000	LH	John Goodwin Limited
Warehouse	Upton Business Centre, Welland Road, Malvern, WR8 0SW	1,260	117	5.16	55.55	6,500	LH	John Goodwin Limited
Unit 4	Beauchamp Business Centre, Sparrowhawk Close, Malvern, WR14 1GL	4,475	416	3.91	42.10	17,500	LH	Bruton Knowles
Total		16	7,562					

Address		Size (sqft)	Size (sqm)	Rent (£/sqft)	Rent (£/sqm)	Rent (per annum)	Tenure	Agent
Office								
1st	Enigma Business Park, Byre Court, Sandys Road, Malvern, WR14 1JJ	2,023	188	7.91	85.14	16,000	LH	GJS Dillon Limited
Entire Building	Brunel House, Portland Road, Malvern, WR14 2TB	7,040	654	Not Available	Not Available	Not Available	LH	GJS Dillon Limited
Ground and 1st	Office At, Court Road, Malvern, WR14 3BL	2,050	190	12.20	131.28	25,000	LH	John Goodwin Limited
1st	93, Barnards Green Road, Malvern, WR14 3LT	1,400	130	6.61	71.13	9,250	LH	John Goodwin Limited
Bernard Lovell Building	Malvern Technology Centre, St Andrews Road, Malvern, WR14 3PS	16,454	1,529	Not Available	Not Available	Not Available	LH	Cushman & Wakefield
Unit A	Willow End Park, Blackmore Park Road, Malvern, WR13 6NN	2,022	188	8.51	91.57	17,200	LH	Andrew Grant
Ground (part)	Edgar House, Berrow Green Road, Adj. Laugharne Villa, Worcester, WR6 6QA	943	88	8	86.12	Not Available	LH	GJS Dillon Limited
1st (part)	Edgar House, Berrow Green Road, Adj. Laugharne Villa, Worcester, WR6 6QA	2,619	243	8	86.12	Not Available	LH	GJS Dillon Limited
Ground (part)	Edgar House, Berrow Green Road, Adj. Laugharne Villa, Worcester, WR6 6QA	1,437	133	8	86.12	Not Available	LH	GJS Dillon Limited
Ground	Hope House Farm, Hope House Lane, Worcester, WR6 6QF	570	53	8.00	86.12	4,560	LH	Fisher German
Office Unit	Blackfinch House, Chequers Close, Malvern, WR14	4,372	406	13.72	147.74	60,000	LH, FH	Fisher German
Suite 202	Worcester Road, Malvern	240	22	19.00	204.54	4,560	LH	Kimberley's Estate Agents
Office Unit	Bank Street Business Centre, Malvern, WR14 2JN	Not Available	Not Available	Not Available	Not Available	9,000	LH	Property Plus
Office Unit	Sandy Road, Malvern, WR14 1JJ	480	44	Not Available	Not Available	Not Available	LH	Search Office Space
Parts of building	39 Pickersleigh Road, Malvern, WR14 2RP	3,500	325	214.29	2,306.83	750,000	FH	John Goodwin Limited
Office and Site	Edith Walk, Malvern, WR14 4QH	565	52	389.38	4,191.68	220,000	FH	John Goodwin Limited
Ground and 1st	84 Cowleigh Road, Malvern, WR14 1QN	2,812	261	53.34	574.21	150,000	FH	John Goodwin Limited
Entire Building	16a Cowleigh Road, Malvern, WR14 1QD	720	67	6.25	67.28	4,500	LH	John Goodwin Limited
Entire Building	Sixways, Barnards Green, Malvern, WR14 3NB	1,058	98	7.56	81.38	8,000	LH	John Goodwin Limited
Total		19	4,672					

Worcester

	Address	Size (sqft)	Size (sqm)	Rent (£/sqft)	Rent (£/sqm)	Rent (per annum)	Tenure	Agent
Industrial								
Rear building and Front building	77, Waterworks Road, Worcester, WR1 3EZ	2,858	266	Not Available	Not Available	Not Available	FH	Fisher German
Ground (part)	Everoak Industrial Estate, Oak House, Bromyard Road, Worcester, WR2 5HP	521	48	4.99	53.72	2,600	LH	Fisher German
Warehouse Unit	Checketts Lane Industrial Estate, Checketts Lane, Worcester, WR3 7JW	3,945	366	4.06	43.66	16,000	LH	Bruton Knowles
Unit 6A	Checketts Lane Industrial Estate, Checketts Lane, Worcester, WR3 7JW	1,250	116	8.80	94.73	11,000	LH	GJS Dillon Limited
Unit 96C&D	Blackpole Trading Estate West, Blackpole Trading Estate West, Blackpole Road, Worcester, WR3 8PQ	3,852	358	6.49	69.87	25,000	LH	GJS Dillon Limited
Unit J2a	Blackpole Trading Estate East, Blackpole Trading Estate East, Blackpole Road, Worcester, WR3 8SG	3,206	298	5.93	63.80	19,000	LH	Timothy Lea & Griffiths
Unit J1	Blackpole Trading Estate East, Blackpole Trading Estate East, Blackpole Road, Worcester, WR3 8SG	2,976	276	6.05	65.11	18,000	LH	Timothy Lea & Griffiths
Unit F7 & F8	Blackpole Trading Estate East, Blackpole Trading Estate East, Blackpole Road, Worcester, WR3 8SG	6,200	576	5.10	54.90	31,620	LH	Timothy Lea & Griffiths
Unit G7-G9	Blackpole Trading Estate East, Blackpole Trading Estate East, Blackpole Road, Worcester, WR3 8SG	4,868	452	7.81	84.03	38,000	LH	Timothy Lea & Griffiths
Unit E6 & E7	Blackpole Trading Estate East, Blackpole Trading Estate East, Blackpole Road, Worcester, WR3 8SG	4,940	459	5.00	53.83	24,700	LH	Timothy Lea & Griffiths
Unit E8 & E9	Blackpole Trading Estate East, Blackpole Trading Estate East, Blackpole Road, Worcester, WR3 8SG	5,930	551	5.00	53.83	29,650	LH	Timothy Lea & Griffiths
Units G1-G3	Blackpole Trading Estate East, Blackpole Trading Estate East, Blackpole Road, Worcester, WR3 8SG	12,555	1,166	Not Available	Not Available	Not Available	FH	Timothy Lea & Griffiths
Unit 74	Blackpole Trading Estate East, Blackpole Trading Estate East, Blackpole Road, Worcester, WR3 8SG	560	52	803.57	8650.45	450,000	FH	Halls Commercial
Unit 1	Sixways Park, Junction 6, M5, Worcester, WR4 0QB	126,999	11,798	Not Available	Not Available	Not Available	LH, FH	Cushman & Wakefield
Unit 2	Sixways Park, Junction 6, M5, Worcester, WR4 0QB	66,599	6,187	Not Available	Not Available	Not Available	LH, FH	Cushman & Wakefield
Unit 16 and Unit 17	Sherriff Street Industrial Estate, Worcester Trade Park, Sherriff Street, Worcester, WR4 9AB	10,711	995	Not Available	Not Available	Not Available	LH	Colliers International
Unit 13A	Shrub Hill Industrial Estate, Shrub Hill Road, Worcester, WR4 9EL	725	67	6.50	69.97	4,712	LH	Fisher German
Unit 10A	Shrub Hill Industrial Estate, Shrub Hill Road, Worcester, WR4 9EL	4,558	423	4.75	51.13	21,650	LH	Fisher German
Unit 13C	Shrub Hill Industrial Estate, Shrub Hill Road, Worcester, WR4 9EL	829	77	6.47	69.63	5,362	LH	Fisher German
Unit 1D	Shrub Hill Industrial Estate, Shrub Hill Road, Worcester, WR4 9EL	2,063	192	4.75	51.14	9,800	LH	Fisher German
Unit 2A	Shrub Hill Industrial Estate, Shrub Hill Road, Worcester, WR4 9EL	277	26	9.03	97.16	2,500	LH	Fisher German
Unit 10B	Shrub Hill Industrial Estate, Shrub Hill Road, Worcester, WR4 9EL	8,237	765	2.85	30.68	Not Available	LH	Halls Commercial
Unit WEC 7	Shrub Hill Industrial Estate, Shrub Hill Road, Worcester, WR4 9EL	703	65	6.50	69.98	4,570	LH	Fisher German
Unit 17G	Shrub Hill Industrial Estate, Shrub Hill Road, Worcester, WR4 9EL	122	11	8.20	88.24	1,000	LH	Fisher German
Unit 17C	Shrub Hill Industrial Estate, Shrub Hill Road, Worcester, WR4 9EL	905	84	5.97	64.29	5,405	LH	Fisher German
Unit 13S	Shrub Hill Industrial Estate, Shrub Hill Road, Worcester, WR4 9EL	700	65	6.50	69.97	4,550	LH	Fisher German
Unit 8	Shrub Hill Industrial Estate, Shrub Hill Road, Worcester, WR4 9EL	3,933	365	4.50	48.45	17,700	LH	Fisher German
Unit 13F	Shrub Hill Industrial Estate, Shrub Hill Road, Worcester, WR4 9EL	750	70	6.50	69.93	4,872	LH	Fisher German
Unit WEC 3	Shrub Hill Industrial Estate, Shrub Hill Road, Worcester, WR4 9EL	592	55	5.74	61.83	3,400	LH	Fisher German
Unit 13D	Shrub Hill Industrial Estate, Shrub Hill Road, Worcester, WR4 9EL	267	25	6.52	70.15	1,740	LH	Fisher German
Entire Building	Shire Business Park, Former Nutricia Unit, Wainwright Road, Worcester, WR4 9FA	110,344	10,251	Not Available	Not Available	Not Available	LH	McGuinness Waddington Real Estate
Unit 2C	Industrial Premises, Derwent Close, off Brickfields Road, Worcester, WR4 9TY	2,670	248	3.56	38.30	9,500	LH	GJS Dillon Limited
Units 13-14	Cranham Industrial Estate, Shipston Close, Worcester, WR4 9XN	3,200	297	Not Available	Not Available	Not Available	LH	Not Available
Unit 6	Cranham Industrial Estate, Shipston Close, Worcester, WR4 9XN	6,652	618	5.64	60.69	37,500	LH	John Truslove
Unit 10	Three Springs Trading Estate, Three Springs House, Vincent Road, Worcester, WR5 1BW	2,281	212	3.73	40.12	8,500	LH	Andrew Grant Commercial
Industrial Units	Fortis Business Park, Midland Road, Worcester, WR5 1DS	Not Available	Not Available	Not Available	Not Available	Not Available	LH	Harris Lamb
Unit 3	Nunnery Park, Nunnery Lane, Worcester, WR5 1RG	4,750	441	Not Available	Not Available	Not Available	LH, FH	Ramsdens Chartered Surveyors
Unit 8	Nunnery Park, Nunnery Lane, Worcester, WR5 1RG	6,300	585	Not Available	Not Available	Not Available	LH, FH	Fisher German
Unit 5	Nunnery Park, Nunnery Lane, Worcester, WR5 1RG	7,150	664	Not Available	Not Available	Not Available	LH, FH	Ramsdens Chartered Surveyors
Unit 4	Nunnery Park, Nunnery Lane, Worcester, WR5 1RG	4,750	441	Not Available	Not Available	Not Available	LH, FH	Ramsdens Chartered Surveyors
Unit 2	Nunnery Park, Nunnery Lane, Worcester, WR5 1RG	4,750	441	Not Available	Not Available	Not Available	LH, FH	Ramsdens Chartered Surveyors
Unit 1	Nunnery Park, Nunnery Lane, Worcester, WR5 1RG	4,750	441	Not Available	Not Available	Not Available	LH, FH	Halls Commercial
Unit 7	Nunnery Park, Nunnery Lane, Worcester, WR5 1RG	6,300	585	Not Available	Not Available	Not Available	LH, FH	Ramsdens Chartered Surveyors and Fisher German
Unit 6	Nunnery Park, Nunnery Lane, Worcester, WR5 1RG	9,900	920	Not Available	Not Available	Not Available	LH, FH	Ramsdens Chartered Surveyors and Fisher German
Unit 1, Unit 2 and Unit 3	Diglis Trading Estate, Navigation Road, Worcester, WR5 3DE	107,947	10,028	Not Available	Not Available	Not Available	FH	FHP Property Consultants and Savills and Colliers
Warehouse Unit	13-17 Carden Street, Worcester, WR1 2AT	7,893	733	4.12	44.33	32,500	LH, FH	Fisher German
Phase 3	Great Western Business Park, Tolladine Road, Worcester, WR4	5,765	536	Not Available	Not Available	POA	LH	Fisher German
Total		47	53,699					

	Address	Size (sqft)	Size (sqm)	Rent (£/sqft)	Rent (£/sqm)	Rent (per annum)	Tenure	Agent
Office								
Entire Building	Citation House, Foregate Street, Worcester, WR1 1DB	12,699	1,180	Not Available	Not Available	Not Available	FH	Not Available
Ground	29, Foregate Street, Worcester, WR1 1DS	1,261	117	9.91	106.71	12,500	LH	Fisher German
Entire Building	54-55, Foregate Street, Worcester, WR1 1DX	1,493	139	6.03	64.89	9,000	LH	Harris Lamb
Entire Building	County House, St Marys Street, Worcester, WR1 1HB	400	37	Not Available	Not Available	Not Available	LH	Fisher German
Suite D	1857, 23, The Tything, Worcester, WR1 1HD	1,593	148	Not Available	Not Available	Not Available	FH	Fisher German and Andrew Grant
Suite B	1857, 23, The Tything, Worcester, WR1 1HD	1,857	173	Not Available	Not Available	Not Available	FH	Fisher German and Andrew Grant
Entire Building	14, The Tything, Worcester, WR1 1HD	2,853	265	Not Available	Not Available	Not Available	FH	GJS Dillon Limited
1st	60, Barbourne Road, Worcester, WR1 1JA	878	82	10.25	110.35	9,000	LH	GJS Dillon Limited
Ground (part)	Arboretum Lodge, 24, Sansome Walk, Worcester, WR1 1LX	191	18	8.69	93.56	1,660	LH	GJS Dillon Limited
1st	30, Sansome Walk, Worcester, WR1 1LX	700	65	11.43	123.03	8,000	LH	GJS Dillon Limited
Entire Building	5, Pierpoint Street, Worcester, WR1 1TA	856	80	17.52	188.64	15,000	LH, FH	Andrew Grant Commercial
Entire Building	8, Sansome Place, Worcester, WR1 1UA	1,066	99	9.38	100.98	Not Available	LH	GJS Dillon Limited
1st, Ground, 2nd and 3rd	Haswell House, St Nicholas Street, Worcester, WR1 1UW	12,765	1,186	Not Available	Not Available	Not Available	LH	Harris Lamb
Ground	Amber Gate, City Walls Road, Worcester, WR1 2AH	197	18	Not Available	Not Available	Not Available	FH	Fisher German
Ground	13-17, Carden Street, Worcester, WR1 2AX	733	68	44.34	477.30	32,500	LH, FH	Fisher German
Ground	22-24, New Street, Worcester, WR1 2DP	719	67	11.13	119.78	8,000	LH	Halls Commercial and Fisher German
1st (part)	Marmion House, 3, Copenhagen Street, Worcester, WR1 2HB	538	50	7.50	80.74	4,035	LH	Fisher German
2nd (part)	Marmion House, 3, Copenhagen Street, Worcester, WR1 2HB	1,178	109	8.15	87.73	9,600	LH	GJS Dillon Limited

1st and 2nd	97a, High Street, 1 Fish Street, Worcester, WR1 2HW	1,220	113	9.84	105.89	12,000	LH	Andrew Grant Commercial
Block Q	The Waterside, Royal Worcester, Worcester, WR1 2NE	3,854	358	17	183.01	Not Available	LH, FH	Knight Frank
Warmstry House	The Waterside, Royal Worcester, Worcester, WR1 2NE	18,076	1,679	17.5	188.39	Not Available	LH	Knight Frank
Building 17	The Waterside, Royal Worcester, Worcester, WR1 2NE	3,584	333	17	183.01	Not Available	LH, FH	Knight Frank
Armstrong House	The Waterside, Royal Worcester, Worcester, WR1 2NE	4,604	428	17	183.01	Not Available	LH	Knight Frank
Slip House	The Waterside, Royal Worcester, Worcester, WR1 2NE	6,668	619	17	183.01	Not Available	LH	Knight Frank
Saggar House	The Waterside, Royal Worcester, Worcester, WR1 2NE	4,788	445	17	183.01	Not Available	LH	Knight Frank
Bone Mill	The Waterside, Royal Worcester, Worcester, WR1 2NE	6,321	587	17	183.01	Not Available	LH	Knight Frank
Throwing House	The Waterside, Royal Worcester, Worcester, WR1 2NE	5,568	517	17	183.01	Not Available	LH	Knight Frank
Entire Building	The Waterside, Throwing House, Severn Street, Worcester, WR1 2NE	5,208	484	17	183.01	Not Available	LH, FH	Knight Frank
Entire Building	The Waterside, Warmstry House, Severn Street, Worcester, WR1 2NE	18,271	1,697	17.5	188.39	Not Available	LH, FH	Knight Frank
Exhibition House	The Waterside, Royal Worcester, Worcester, WR1 2NE	6,398	594	17	183.01	Not Available	LH, FH	Knight Frank
2nd (part) and 3rd (part)	The Cross, 2, Trinity Passage, Worcester, WR1 2PQ	1,338	124	Not Available	Not Available	Not Available	LH	Harris Lamb
2nd	59-60, High Street, Worcester, WR1 2QA	1,259	117	7.15	76.95	9,000	LH	Fisher German
Unit 12	The Shambles, The Shambles, Worcester, WR1 2RF	325	30	36.92	397.48	12,000	LH	John Goodwin Limited
Suite 9	Canalside Office Complex, Canalside Office Complex, Lowesmoor, Worcester, WR1 2RS	355	33	Not Available	Not Available	Not Available	LH	GJS Dillon Limited and Fisher German
1st	1, Castle Street, Worcester, WR1 3AA	1,400	130	8.00	86.12	11,200	LH	Bruton Knowles
Ground Floor and 1st Floor	Independent House, Farrier Street, Worcester, WR1 3BH	1,200	111	Not Available	Not Available	Not Available	LH	Harris Lamb and Bruton knowles
1st (part)	Virginia House, The Butts, Worcester, WR1 3PL	2,081	193	11.17	120.27	23,250	LH	Fisher German
3rd	Virginia House, The Butts, Worcester, WR1 3PL	4,120	383	Not Available	Not Available	Not Available	LH	Bond Wolfe Plc
Entire Building	2, The Avenue, The Cross, Worcester, WR1 3QA	2,381	221	5.46	58.78	13,000	LH	Pennycuick Collins
2nd	6, Shaw Street, Worcester, WR1 3QQ	882	82	7.09	76.28	6,250	LH	Fisher German
1st	6, Shaw Street, Worcester, WR1 3QQ	415	39	8.43	90.79	3,500	LH	Fisher German
Suite 4	Malvern Gate, Bromwich Road, Worcester, WR2 4BN	2,583	240	7.05	75.85	18,200	LH	Harris Lamb
1st (part)	Everoak Industrial Estate, Oak House, Bromyard Road, Worcester, WR2 5HP	1,368	127	7.00	75.35	9,575	LH	Fisher German
Ground	Acton House, Perdiswell Park, Worcester, WR3 7GD	5,931	551	15	161.48	Not Available	LH	GVA
Ground	Perdiswell Park, Kirkham House, John Comyn Drive, Worcester, WR3 7NS	5,559	516	13.13	141.34	Not Available	LH	Andrew Grant Commercial and LSH
Entire Building	Perdiswell Park, Building C2, Droitwich Road, Worcester, WR3 7NW	1,200	111	Not Available	Not Available	Not Available	LH	Harris Lamb
Room 11B	BD Business Centre, Blackpole Road, Worcester, WR3 8SQ	365	34	Not Available	Not Available	Not Available	LH	Fisher German
Room 7b1	BD Business Centre, Blackpole Road, Worcester, WR3 8SQ	214	20	Not Available	Not Available	Not Available	LH	Fisher German
Room 9	BD Business Centre, Blackpole Road, Worcester, WR3 8SQ	86	8	Not Available	Not Available	Not Available	LH	Fisher German
Room 6	BD Business Centre, Blackpole Road, Worcester, WR3 8SQ	178	17	Not Available	Not Available	Not Available	LH	Fisher German
Phase 1A (part)	Worcester Six, Worcester Six, Junction 6 M5, Worcester, WR4 0AA	42,356	3,935	Not Available	Not Available	Not Available	LH, FH	Strutt & Parker and Harris Lamb
Phase 1B (part)	Citation House, Foregate Street, Worcester, WR1 1DB	79,999	7,432	Not Available	Not Available	Not Available	LH, FH	Strutt & Parker and Harris Lamb
Unit 3A/B	29, Foregate Street, Worcester, WR1 1DS	410	38	8.54	91.90	3,500	LH	Fisher German
Unit 11H/J	54-55, Foregate Street, Worcester, WR1 1DX	818	76	5.25	56.51	4,294	LH	Fisher German
Unit 11J	County House, St Marys Street, Worcester, WR1 1HB	239	22	6.28	67.56	1,500	LH	Fisher German
Unit 4A	1857, 23, The Tything, Worcester, WR1 1HD	1,749	162	5.57	60.01	9,750	LH	Fisher German
Unit 12D	1857, 23, The Tything, Worcester, WR1 1HD	145	13	31.24	336.31	4,530	LH	Fisher German
Unit 4	14, The Tything, Worcester, WR1 1HD	162	15	73.42	790.36	11,894	LH	Fisher German
Unit 17C	60, Barbourne Road, Worcester, WR1 1JA	905	84	5.97	64.23	5,400	LH	Fisher German
Unit 6	Arboretum Lodge, 24, Sansome Walk, Worcester, WR1 1LX	5,068	471	Not Available	Not Available	Not Available	LH	KWB and Fisher German
Entire Building	30, Sansome Walk, Worcester, WR1 1LX	16,803	1,561	13.15	141.59	221,000	LH	Cushman & Wakefield
Office suite	5, Pierpoint Street, Worcester, WR1 1TA	2,459	228	6.10	65.67	15,000	LH	GJS Dillon Limited
Rear, Ground and First	8, Sansome Place, Worcester, WR1 1UA	16,214	1,506	4.29	46.17	69,540	LH	GJS Dillon Limited
Office Suite	Haswell House, St Nicholas Street, Worcester, WR1 1UW	300	28	Not Available	Not Available	Not Available	LH	Not Available
Office Suite	Amber Gate, City Walls Road, Worcester, WR1 2AH	5,720	531	Not Available	Not Available	Not Available	POA	Fifield Glyn Limited
Entire Building	13-17, Carden Street, Worcester, WR1 2AX	2,381	221	5.46	58.78	13,000	LH	Pennycuick Collins
Ground Floor	22-24, New Street, Worcester, WR1 2DP	491	46	17.31	186.36	8,500	LH	GJS Dillon Limited
Entire Building	Marmion House, 3, Copenhagen Street, Worcester, WR1 2HB	7,569	703	5.95	64.00	45,000	LH, FH	Fisher German
Unit F7 and F8	Marmion House, 3, Copenhagen Street, Worcester, WR1 2HB	6,200	576	5.10	54.90	31,620	LH	Timothy Lea and Griffiths
First and Second	97a, High Street, 1 Fish Street, Worcester, WR1 2HW	682	63	7.33	78.92	5,000	LH	Fisher German
First Floor	The Waterside, Royal Worcester, Worcester, WR1 2NE	365	34	10.27	110.60	3,750	LH	Fisher German
Office Suite 7	The Waterside, Royal Worcester, Worcester, WR1 2NE	125	12	15.84	170.52	1,980	LH	Fisher German
Entire Building	The Waterside, Royal Worcester, Worcester, WR1 2NE	3,130	291	Not Available	Not Available	Not Available	POA	Bruton Knowles
Ground Floor	The Waterside, Royal Worcester, Worcester, WR1 2NE	197	18	253.81	2732.23	50,000	FH	Fisher German
4 Offices	The Waterside, Royal Worcester, Worcester, WR1 2NE	Not Available	Not Available	Not Available	Not Available	8,000	LH	Doorbars
Total		75	32,911					

Wychavon

Address		Size (sqft)	Size (sqm)	Rent (£/sqft)	Rent (£/sqm)	Rent (per annum)	Tenure	Agent
Industrial								
Unit 11	North Street Industrial Estate, North Street, Droitwich, WR9 8JB	2,066	192	6.05	65.13	12,500	LH	Harris Lamb and Andrew Grant
Unit 10	North Street Industrial Estate, North Street, Droitwich, WR9 8JB	4,015	373	3.11	33.51	12,500	LH	Andrew Grant Commercial
Offices A and Warehouse	Berry Hill Industrial Estate, The Big Berry, Berry Hill, Droitwich, WR9 9AB	185,248	17,210	Not Available	Not Available	Not Available	LH	CBRE
Unit 1	Berry Hill Industrial Estate, The Furlong, West Bank, Droitwich, WR9 9AH	58,784	5,461	Not Available	Not Available	Not Available	LH	Harris Lamb
Entire Building	Berry Hill Industrial Estate, Berry 185, West Bank, Droitwich, WR9 9AX	185,159	17,201	Not Available	Not Available	Not Available	LH, FH	Avison Young Commercial Real Estate and CBRE
Ground	8-10, Port Street, Evesham, WR11 1AN	841	78	9.53	102.59	Not Available	LH	Timothy Lea & Griffiths
Industrial Units	Land West Of Vale Business Park, Millennium Way, Evesham, WR11 1GL	50,000	4,645	Not Available	Not Available	Not Available	FH	Westbridge & Co
Unit 3	Vale Park South, Vale Park South, Enterprise Way, Evesham, WR11 1GT	18,000	1,672	Not Available	Not Available	Not Available	LH	Alder King Property Consultants and Timothy Lea & Griffiths and Savills
Unit 6	Vale Park South, Vale Park South, Enterprise Way, Evesham, WR11 1GT	86,999	8,082	Not Available	Not Available	Not Available	LH	Alder King Property Consultants and Timothy Lea & Griffiths and Savills
Unit 4	Vale Park South, Vale Park South, Enterprise Way, Evesham, WR11 1GT	27,000	2,508	Not Available	Not Available	Not Available	LH	Alder King Property Consultants and Timothy Lea & Griffiths and Savills
Unit 8	Vale Park South, Vale Park South, Enterprise Way, Evesham, WR11 1GT	34,000	3,159	Not Available	Not Available	Not Available	LH	Alder King Property Consultants and Timothy Lea & Griffiths and Savills
Unit 7	Vale Park South, Vale Park South, Enterprise Way, Evesham, WR11 1GT	145,999	13,563	Not Available	Not Available	Not Available	LH	Alder King Property Consultants and Timothy Lea & Griffiths and Savills
Unit 5	Vale Park South, Vale Park South, Enterprise Way, Evesham, WR11 1GT	27,000	2,508	Not Available	Not Available	Not Available	LH	Alder King Property Consultants and Timothy Lea & Griffiths and Savills
Unit 2	Vale Park South, Vale Park South, Enterprise Way, Evesham, WR11 1GT	18,000	1,672	Not Available	Not Available	Not Available	LH	Alder King Property Consultants and Timothy Lea & Griffiths and Savills
Unit 1	Vale Park South, Vale Park South, Enterprise Way, Evesham, WR11 1GT	38,000	3,530	Not Available	Not Available	Not Available	LH	Alder King Property Consultants and Timothy Lea & Griffiths and Savills
Unit 9	Vale Park South, Vale Park South, Enterprise Way, Evesham, WR11 1GT	33,000	3,066	Not Available	Not Available	Not Available	LH	Alder King Property Consultants and Timothy Lea & Griffiths and Savills
Unit 10	Briar Close Industrial Estate, Briar Close Business Park, Briar Close, Evesham, WR11 4JT	6,393	594	4.69	50.52	30,000	LH	Fisher German
Unit 2	Briar Close Industrial Estate, Briar Close Business Park, Briar Close, Evesham, WR11 4JT	5,602	520	4.91	52.84	27,500	LH	Timothy Lea & Griffiths
Unit 3	Briar Close Industrial Estate, Briar Close Business Park, Briar Close, Evesham, WR11 4JT	6,458	600	3.17	34.17	20,500	LH	Timothy Lea & Griffiths
Unit 2 and Unit 3	Briar Close Industrial Estate, Briar Close Business Park, Briar Close, Evesham, WR11 4JT	12,060	1,120	3.98	42.85	48,000	LH	Timothy Lea & Griffiths
Industrial Unit	Aldington Lodge, Offenham Road, Evesham, WR11 8DX	5884	547	1.70	18.30	10000	LH	Timothy Lea & Griffiths
Industrial Units	Abbey View Industrial Park, Abbey View Industrial Park, Abbey View Road, Pershore, WR10 2DS	33,000	3,066	Not Available	Not Available	Not Available	LH	Westbridge & Co-
Unit 1 and Unit 2	Industrial Units, Racecourse Road, Pershore, WR10 2EY	12,654	1,176	Not Available	Not Available	Not Available	FH	Noyes Lewis Commercial Property and Fisher German
Hanger 2	Throckmorton Airfield, Long Lane, Pershore, WR10 2JH	30,000	2,787	Not Available	Not Available	Not Available	LH	GJS Dillon Limited
Hanger 1	Throckmorton Airfield, Long Lane, Pershore, WR10 2JH	30,000	2,787	Not Available	Not Available	Not Available	LH	GJS Dillon Limited
Unit 19/20	Keytec 7 Business Park, Business Units, Goodwood Road, Pershore, WR10 2JL	5,350	497	5.50	59.21	29,425	LH	Timothy Lea & Griffiths
Unit 28 and Units 1-4	Woodcote House, Racecourse Road, Pershore, WR10	12,654	1,176	62.83	676.32	795,000	FH	Fisher German
Industrial Unit	Daniels Farm, Vicarage Lane, Claines, Worcester, WR3 7RP	5,457	507	2.75	29.59	15,000	LH	Fisher German
Total		28	100,297					

Address		Size (sqft)	Size (sqm)	Rent (£/sqft)	Rent (£/sqm)	Rent (per annum)	Tenure	Agent
Office								
1st	Orchard House, 2 Victoria Square, Droitwich, WR9 8DS	423	39	Not Available	Not Available	Not Available	LH	Harris Lamb
Ground	Four Pools Industrial Estate, Four Pools Industrial Estate, St. Richards Road, Evesham, WR11 1XJ	293	27	20.48	220.44	6,000	LH	Timothy Lea & Griffiths
Unit 10	Abbey Lane Court, Abbey Lane, Evesham, WR11 4BN	1,100	102	12.5	134.56	Not Available	LH, FH	KWB
Unit 8	Abbey Lane Court, Abbey Lane, Evesham, WR11 4BN	2,336	217	10	107.65	Not Available	LH, FH	KWB
1st	Clifton Chambers, 52, High Street, Evesham, WR11 4HG	2,123	197	6.83	73.52	14,500	LH	Timothy Lea & Griffiths
Ground	12, Vine Street, Evesham, WR11 4RE	1,350	125	9.63	103.66	13,000	LH	Timothy Lea & Griffiths
Office Unit	Davies Road, Evesham, WR11 1XN	672	62	11.61	124.95	7,800	LH	ROTEC Developments Limited
Suites 10 and 12	Clifton Chambers, 52, High Street, Evesham, WR11 4HG	1,571	146	11.14	119.92	17,500	LH	Timothy Lea & Griffiths
Office	23 Vine Street, Evesham, WR11 4RL	945	88	13.23	142.39	12,500	LH, FH	Timothy Lea & Griffiths
Ground	1 Vine Mews, Vine Street, Evesham, WR11 4RE	215	20	20.93	225.31	4,500	LH	Timothy Lea & Griffiths
First	2-4 Bridge Street, Evesham, WR11 4RS	Not Available	Not Available	Not Available	Not Available	7,000	LH	Timothy Lea & Griffiths
Ground	North Street Industrial Estate, Droitwich, WR9	2,066	192	6.05	65.13	12,500	LH	Andrew Grant
Ground	Nellies Yard, Droitwich, WR9	30	3	120.00	1291.80	3,600	LH	Tonks and Firkin
Entire Building	28 High Street, Droitwich, WR9	1,345	125	204.46	2201.02	275,000	FH	GJS Dillon Limited
Entire Building	19 Ombersley Street West, Droitwich, WR9 8HZ	933	87	Not Available	Not Available	POA	FH	Fisher German
Unit 1	YFC Centre, Shires Farm, Hawford, WR3 7SG	819	76	9.77	105.17	8,000	LH	Doorbars
Unit	Home Farm, Besford, WR8 9AP	Not Available	Not Available	Not Available	Not Available	7,000	LH	Doorbars
Total		17	1,507					

Appendix 5

Summary of Councils' Employment Areas Surveys

Existing Employment Areas - Malvern Hills

Location	Total Floorspace (sqm)	Total Area (ha)	No. of Vacant Units	% of Vacancies	Floorspace of Vacant Units (sqm)	Key Occupiers	Development Potential	BE Group Overall Commentary
Acorn Business Centre	284	0.49	1	8	23	~	0.75ha	Attractive small business centre in a rural location. Serves SME market and this function to continue in foreseeable future.
Backfields Upton	785	0.48	0	0	0	The Pudding Shop	None	Loose agglomeration of small units behind residential dwellings that line the street. Very narrow and poorly signed access point. For SMEs serving local function. Redevelopment opportunity in longer term
Ball Mill Top Business Park, Main Road	3,709	1.36	0	0	0	Aquabio Ltd, Sureweld	None	Mix of industrial and office units in a rural setting. On the A443 north of Worcester.Current function to continue, providing lower order units.
Blackmore Park	17,000	11.50	0	0	0	Essential Supply Products	6ha	Rural industrial estate with potential for expansion, both on the existing site and neighboring employment site allocation. Current function to continue and expand
Brookend Business Park	1,810	1.80	1	6	109	Hilton Removals	None	Single occupier across several buildings ina rural setting. Likely to remain as lower order storage and workshop uses.
Broomhall Business Centre	2,774	1.22	2	5	139	H&B Foods Ltd	0.25ha	Rural business park with a mix of light industrial units and office premises. Main occupier is a food manufacturer. Attractive buildings. Accessed via narrow laneway.
Bruff Business Centre	3,784	1.64	5	15	568	Suckley Engineering, TS Engineers, West Dubs	None	Mix of industrial and office units in a rural setting. Significant range of smaller occupiers
Buckman Works	6,540	1.64	0	0	0	Vowles	None	Small mix of industrial workshops in a rural setting. Fully occupied with localised industrial users. Current function to continue.
Cygnets Business Centre	528	1.10	1	6	32	~	0.5ha	Small workshops, studios and offices in a rural setting. Repurposed farm buildings.
Edgar Trading Estate	3,842	2.33	1	12	461	Estate Country Feeds, Ross Farm Machinery	0.5ha	Industrial units in a rural setting. Occupiers are agricultural suppliers and services
Elgar Business Centre, Moseley Road	2,106	0.85	0	0	0	Clearview Systems Ltd, Britannia Site Solutions Ltd	Consent for c. 350sqm office and workshop building	Office units in a rural setting. Fully occupied with SME businesses serving a local function.
Enigma Business Park	51,007	22.84	3	2.2	1,122	Metrosen, Malvern Analytica, The Malvern Spa, Automotive Packaging, Pendragon, Spellar Metcalfe, Westbridge, Malvern Instruments, Neoparl	3ha but reserved in the main for current business occupiers phased expansion	Key employment area in Malvern Hills, with a wide variety of B1/B2/B8 uses. Mix of quality office space, hybrid office/industrial space and standard inustrial units. Current functions to continue in foreseeable future.
Frobisher Business Park, Leigh Sinton Road	2,285	1.00	0	0	0	Element Materials Technology	None	Single occupier within two buildings. Site is within a residential area, including new build residetntial. Access is via residential streets. Likely to be pressure for redevelopment of the site once the current occupier has vacated.
Hallow Business Park	424	0.16	3	10	42	Bishops Accountancy, Eclipse Homecare	None	Office units in a repurposed heritage building. Rural setting althouh relatively close to Worcester urban area. High amenity area
Hanley Road Workshops	3,514	0.96	0	0	0	Cytoplant	2ha neighbouring farmland	Agglomeration of workshops in a rural setting. Small users and fully occupied. Likely to continue current function
Haysfield Industrial Estate	3,898	1.51	0	0	0	Pendragon, Foyer, Optimec	None	Part of broader employment and commercial corridor around Enigma Business Park. Mix of B-class uses. Current function to remain.
Hope House Farm Barns	462	0.15	0	0	0	Severn Rivers Trust	0.15ha	Repurposed farm building in a rural setting. Small offices and studios. Likely to retain its current function

Howsell Road Industrial Estate, Howsell Road	6,604	0.59	0	0	0	Bonomini Flooring, Churchfield Engineering	None	Narrow industrial estate alongside railline and Malvern Link IE. Narrow frontage does not immediately reveal the full extent of businesses in the estate, Continue its current function.
KDO Business Centre	2,160	0.48	0	0	0	Olpro Ltd	None	Storage and industrial units in a rural setting. Accessed via narrow laneway. Continue its current lower order function.
Malvern Hills Science Park, Geraldine Road	7,928	4.50	1	5	396	UTC Goodrich, 3SDL, Alere Forensics, Borwell	0.75ha	Dedicated science and research park over several buildings. Site can be awkward to access or first time visitors, although is well signed. Constrained by limited parking. Provides mix of laboratory and office units. Well occupied. Current function to continue.
Malvern Link Industrial Estate, Howsell Road	6,889	2.02	1	1	69	G Webb Automation, HD Connectivity	None	Industrial estate in Malvern providing local services for town. Ad hoc building layout but well occupied. Current function to continue
Malvern Technology Centre, St Andrews Road	78,000	26.00	1	5	3,900	QinetiQ	4.5ha	Large campus comprising research and office uses. Core occupier is QinetiQ, but also includes allied research and science businesses. Site has List X security. Some spare capacity on site (as well as employment allocation site), though QinetiQ will develop for their purposes or for similar, research subtenancies. Current function to continue
Martley Road Industrial Estate	12,213	4.70	0	0	0	Elisabeth the Chef, Senoble, Vandermoortele, Vamix	0.5ha	Food processing plant in a rural setting, although close to the edge of the Worcester urban area. Current function to continue.
Maylite Trading Estate	5,601	1.55	5	5	280	Baby Base Ltd	0.5ha	Trading estate immediately to the south of EdgarTrading Estate. In a rural setting. Units are a mix of workshops and offices, and are looking dated and in need of refurbishment. Current function to continue
Merebrook Industrial Estate	7,074	1.16	0	0	0	~	2ha on neighbouring farm land	Mix of B-class uses in a rural setting, reasonably close to the Three Counties Showground. Mix of offices, industrial units, open storage. Buildings are set back from the roadway and not visible to passing traffic.
Mill Pool Farm Industrial Estate, Main Road	1,702	0.75	0	0	0	Orchards Stone, JGM Carpets & Flooring	None	Mix of small workshops and local industrial uses, predominantly car servicing. Buildings are of a basic standard. Site is in need of refurbishment, although unlikely to be economic in the short term.
Mitre Farm Industrial Estate	3,139	1.93	2	3.4	107	P and L Manufacture	None	Mix of B-class units in repurposed farm buildings, including workshops, studios, offices and open storage. Quality built forms.
Morgan Motor Factory, Pickersleigh Avenue	11,889	1.62	0	0	0	Morgan Motor Co, Chance Glass	1ha	Morgan Motor Factory and Chance Glass are occupiers of this large site over several buildings. Buildings are low ceiling, brick factories. Any uses beyond the current uses are likely to require significant refurbishment or redevelopment of the site. Current functions would be expected to continue in the medium term, however, there may be pressures for non-employment uses in the longer term.
Newland Depot, Worcester Road	1,455	1.30	0	0	0	Ringway, Severn Waste	0.25ha	Council recycling centre and depot. Appropriate site for such uses. If Council leaves the site, an on-going B2/B8 use could be appropriate
Open Barn Business Centre	794	0.28	~	~	~	Parallel Lines (Marking), Mitre Oak Ltd	None	Small number of industrial units in a rural setting. Buildings are set back from the road and not immediately visible. Function is rural industry services.
Sixways Industrial Estate, Barnards Green	1,949	0.53	2	16	312	G and B Projects	None	Industrial units tucked in behind retail and residential units. Layout is poor and access is through narrow laneways. Potential for redevelopment.

Spring Lane Industrial Estate, Spring Lane North	49,957	16.49	5	2.8	1,399	Charlesworth, Fleet, Roundhouse, English Braids	None but one 550sqm derelict unit is ripe for redevelopment	Large industrial area, part of the broader Enigma Business Park area corridor. Mix of quality of building stock, from basic to good quality. However, overall there is a low vacancy level. Current function to continue, though periodic refurbishment of stock would be recommended.
Tenbury Wells Business Park, Bromyard Road	2,345	4.14	3	19	446	Roto-KP Ltd	0.5ha	Business park is a semi-rural position at the edge of Tenbury Wells. Some vacant land within business park. Units serve a local function. Continue with current function, including expanding on spare capacity.
Top Barn Business Centre, Worcester Road	7,559	6.53	5	3	227	Harper Farming, QM Systems	0.5ha	Large light industrial and office area at Holt Heath. Uses are mix of SMEs. Somewhat confusing layout of buildings. Some potential for expansion.
Upton Business Centre	5,988	1.09	1	9	539	BR Hodgson, RAW	None	Mix of industrial units in a rural setting.
Upton upon Severn Industrial Estate	8,004	2.06	1	5	400	Permadoor, Biodiagnostics	2ha, i.e. redevelopment of the whole site	Well occupied industrial estate in Upton upon Severn. Surrounded by residential and rural areas. Somewhat confusing access and layout, with rear and front access points
Willow End Park	4,654	1.66	3	1.5	70	CKS	2+ha on neighbouring farm land	Good quality business units, including offices and light industrial units in a rural setting. Units not readily visible from the roadway, which is a minor road.
Woodside Business Park	786	0.90	0	0	0	~	Yes	Small, dated units in a rural setting. Units and hardstand areas are in need of refurbishment.
Total	331,442	131.31	47	~	10,641			

3.21%

Existing Employment Areas - Worcester

Location	Total Floorspace (sqm)	Total Area (ha)	No. of Vacant Units	% of Vacancies	Floorspace of Vacant Units (sqm)	Key Occupiers	Development Potential (Scope for expansion or infilling)	BE Group Overall Commentary
Blackpole East Industrial Estate, Blackpole Road	77,062	16.95	11	5	3,853	Froude, British Polythene Industries, Aquila Truck Centre	None	Important industrial estate at capacity. Current function expected to continue for foreseeable future.
Blackpole West Industrial Estate, Hindlip Lane	38,640	10.28	4	7	2,705	Onsite, RG Luma Automation, Blackpole Recycling	None	Important industrial estate at capacity. Current function expected to continue for foreseeable future.
Bromyard Road	37,796	7.71	2	10.5	3,969	Joy Mining	No unless through redevelopment or by CoU of car showrooms	Some older industrial units and disjointed layout, including dead-ends and separation due to railline. Hardstand areas in need of repair. Some redevelopment potential through renewal of stock, but site remains appropriate for current types of employment.
Checketts Lane	21,076	5.07	0	0	0	VJM Precision Castings, Spectrum Environmental	Possible small infill opportunities	One large occupier to the north of the site (VJM) and a separate small industrial/workshop estate, which is older and surrounded by residential, though is fully occupied. May be pressure in the longer term to redevelop, but serving a useful local function at this stage.
Cosgrove Close, Blackpole Road	22,080	4.33	0	0	0	Aeromet & Superform Aluminium	No	Part of Blackpole employment and commercial area. Current function expected to continue for foreseeable future.
Cranham Industrial Estate, Shipston Close	7,507	1.39	3	7.3	548	Royal Mail, Therma Bead	No	Part of Blackpole employment and commercial area. Current function expected to continue for foreseeable future.
Derwent Close, Brickfields Road	3,546	0.89	2	11	390	Powell & Harber	No	Small industrial estate with Powell and Harbour as only significant occupier, with a small number of other small units. Surrounded by residential and community uses and distant from the key employent nodes in Worcester
Diglis Industrial Estate, Navigation Road	40,403	9.93	4	55	22,222	Industrial & Tractor, Global Tubes, Boston Matthews	Yes at least 2ha of vacant open storage land	Older industrial estate, relatively central within Worcester. Several buildings are unoccupied, with interest of landholders to redevelop for residential uses. Constrained by narrow access points. Some residential led regeneration has occurred in the locality.
Great Western Business Park, McKenzie Way	21,769	6.93	5	19	4,136	Materials Solutions LTD, Altaras International, Nemesis Ltd, Worcestershire Group Training Association	Possibly but this is a new estate so unlikely in the next ten years	Modern industrial estate with quality premises and good entry points . Current function expected to continue for foreseeable future
Gregory's Mill Industrial Estate, Gregory Mill Street	7,501	2.30	4	23	1,725	Inca Tooling, Malvern Medical Group	None	Small industrial estate surrounded by residential development. Access is through narrow, crowded residential streets. Units are small workshops and industrial premises. Potential for regeneration.
Kings Court, Charles Hastings Way	8,114	2.09	0	0	0	Fisher German, Atkins, Hereford & Worcester Fire & Rescue Service	None	Office buildings alongside Worcestershire Royal Hospital. Important office function complementing hospital, although potentially limits its market. Current function expected to continue for foreseeable future.
Malvern Gate Office Complex, Bromwich Road	4,069	1.29	6	16.9	688	NFU Mutual, Home Instead, Soma Health Ltd	Yes, 0.44ha site to the rear of the office complex	Office buildings in the sout of Worcester. Small individual units providing office premises out of town centre. Unitsare looking dated, but expect current function to continue.
Midland Road & Perrywood Estate, Midland Road	28,000	7.08	0	0	0	Fortis Living	Yes 1ha with planning permission and under construction	Industrial estate with a disjointed layout and poor access from the main arterials around Worcester. Fortis Living are investing in a new building for their own purposes, indicating confidence in the market. Some need for refurbishment and resurfacing
Orchard Street	8,582	1.16	0	0	0	~	None	Small industrial estate surrounded by residential development. Access is through narrow, crowded residential streets. Units are small workshops and industrial premises. Poorly signed. Potential for regeneration.
Perdiswell Office Park, John Comyn Drive, Droitwich Road	3,786	1.86	3	28	1,060	Parkwood Leisure, South Worcestershire Clinical Commissioning Group	None	High quality office park in the north of the Worcester urban area. Some public sector occupiers. High percentage of vacancies, but current function remains appropriate.
Pope Iron Road	3,650	0.72	3	4.5	164	~	None	Small number of industrial workshops in a residential neighbourhood. Dated looking units. Potential for redevelopment for residential uses
Three Springs Trading Estate, Vincent Road	5,720	0.93	7	18	1,030	Liaison UK Ltd, Advance Couriers, Dynamometer World Ltd	None	Cramped industrial estate surrounded by residential uses and accessed by narrow residential streets. Relatively high vacancies. Potential for redevelopment

Warndon Business Parks, Cotswold Way	247,041	69.85	1	0.7	1,729	Worcester Bosh, Mazak, N Power	Yes, history of applications to expand premises	Large agglomeration of business parks and industrial estates. Includes strategic occupiers for Worcestershire economy. Current function to continue
Weir Lane Industrial Estate, Weir Lane	22,489	5.88	9	3.3	742	Carmichael, NAL Ltd	Yes, 2.5ha of un-used Severn Trent land and extensive open storage areas	Industrial estate in south-west of Worcester. Mix of uses and quality of premises. Some trade counter uses. Current function to continue
Wildwood & County Hall, Wildwood Way	23,125	7.26	0	0	0	Worcestershire County Council	None	High quality office park. Includes public sector users. Proximate to A4440, linking to M5. Current function to continue
Worcester Trade Park, Sherriff Street	8,942	1.75	4	24	2,146	~	None	Centrally located industrial units in Worcester, predominantly for light industrial uses. Some significant vacancies. May be target for redevelopment although should look to retain at this stage.
Worcester Trading Estate, Blackpole Road	11,361	1.98	1	3.4	386	MR (Site Services) Ltd	None	Trading estate within the Blackpole commercial corridor. Small units with good occupancy levels. Current function to continue.
Total	652,259	167.63	69	~	47,493			

7.28%

Existing Employment Areas - Wychavon

Location	Total Floorspace (sqm)	Total Area (ha)	No. of Vacant Units	% of Vacancies	Floorspace of Vacant Units (sqm)	Key Occupiers	Development Potential	BE Group Overall Commentary
Abbey Lane, Abbey Lane	2,075	1.35	0	0	0	Parkinson Wright Solicitors, Buzz Electrical	Yes, unused car park of 0.16 ha	Predominantly an office park, with a mix of users. Range of quality of premises. Centrally located in Evesham and surrounded by civic and community uses.
Allen Gears, Atlas Works, Station Road	11,691	1.98	0	0	0	Allen Gears	No	Single occupier manufacturing premises over 3 buildings on site. Somewhat dated look of premises but part of broader Pershore industrial area.
Arc Tableware and White Logistics, Near Pinvin Crossroads	33,401	8.04	0	0	0	Arc Tableware, White Logistics	Yes, and permission has been granted for small units	Single occupier manufacturing premises. Large site, some intensification of site could be undertaken. Good quality buildings.
Beckford Silk	863	1.05	0	0	0	Beckford Silk	No	Small attractive units in a rural setting
Bennetts Hill Business Park, South Littleton	2,069	1	3	7.3	149	~	No	Collection of small workshops in a rural location near to Evesham. Suitable for secondary units or rural economy occupiers
Berry Hill Industrial Estate, Roman Way	132,007	48.6	0	0	0	~	Yes but very limited	Significant industrial estate in Droitwich, with good prominence in the town. Internal roads consistent of a one-way ring road, which limits perceptions of access and convenience. Buildings are of a range of qualities, but generally older than nearby Stonebridge Cross Business Park.
Blackminster Business Park	9,576	3.1	0	0	0	Spiers and Hartwell	No	Mix of a single large warehouse/factory as well as a collection of small craft workshops, though not too much interaction between two uses.
Blackminster Business Park West	1,162	1.3	0	0	0	~	No	Opposite side of B4085 to Blackminster Business Park. Not much prominence to the road, other than car parking. Uses include storage and workshops. A long site, though access is limited to a single point from the B4085 due to the rail track on the southern side of the site.
Bond Industrial Estate	2,273	0.5	2	10	227	~	No	Small collection of workshops in a rural location south-east of Evesham. Site does not have prominence on the road (A44) and is accessed via a very narrow laneway
Boughton Fuel Oils, Salwarpe Road	200	0.4	0	0	0	Boughtons	No	Single occupier site for fuel storage. Some potential sensitive uses nearby including Droitwich Canal and residential dwellings.
Briar Close Industrial Estate, Briar Close	10,534	2.3	5	16.2	1,706	~	Yes, some infill opportunities, 0.1 ha	Significant industrial estate in Evesham with small to mid sized units. Moderate standard of buildings. Occupiers are mainly local businesses serving a residential or trade market.
Chadwick Bank Industrial Estate	3,739	1.5	7	43	1,605	~	Only via redevelopment	Older, hangar style workshop spaces in rural location. Uses includes storage, depot, auto servicing and low order manufacturing. Provides basic, inexpensive workshop/storage space.
Craycombe Farm, Evesham Road	2,027	0.91	1	1	20	~	No	Mix of offices, workshops and secondary retailing in attractive units in a rural setting.
Crucible Business Park	100,000	12	0	0	0	Envirosort, part of Severn Waste/FCC, operation of the municipal recycling plant	No	though not far from the Worcester urban area. Mix of industrial, education, leisure uses on site, including some large footprint occupiers. Significant prominence between Worcester and Pershore.
Deer Park Business Centre, Woollas Hill	1,325	0.57	0	0	0	~	No	Reuse of country estate buildings for offices in an attractive rural setting.
Drakes Broughton Business Park, Worcester Road	4,125	1.36	0	0	0	Joerns Healthcare Ltd	No	small collection of industrial units on B4084 between worcester and Pershore. Recently developed units on the site.
Eddie's Auto's, Station Road	5,720	1.2	0	0	0	~	No	Long, narrow site containing small workshops in a rural location. Access is via a narrow laneway, with no prominence to the roadway.
Farncombe House, Farncombe Estate	752	0.5	0	0	0	Farncombe Estate itself	Yes	High quality offices in a rural setting on a country estate. Narrow and windy access road.

Field Barn Lane Industrial Estate, Field Barn Lane	1,389	0.31	0	0	0	~	No	Field Barn Lane is a very narrow thoroughfare, which restricts access to the industrial estate. Small number of occupiers in industrial units, serving a local function, including some rural economy occupiers.
Four Pools Industrial Estate, Orleans Close	6,037	1.6	0	0	0	Amcor Flexibles	No	Centrally located industrial estate in Evesham. Orleans CI provides access to a small number of older manufacturing units. Layout of this part of the estate is poor
Four Pools Industrial Estate & Evesham Trade Centre, St Richards Road	20,736	7.1	2	7	1,402	Sinclair Transport, Allen Fabrications	No	Centrally located industrial estate in Evesham. Mix of quality in buildings. Predominantly manufacturing and trade services. Busy estate, with car-parking problematic
George Baylis Road	27,739	6.43	2	3	832	Chess Plastics, Global, B&M	No	Prominent industrial estate in Droitwich, comprising buildings of a range of qualities. Good occupation levels. Some parking congestion.
Grantham Bridge Motors, Kidderminster Road	198	0.06	0	0	0	Grantham Bridge Motors	No	Single occupancy site next to railway overpass and residential dwellings. Currently a motor services, limited other employment opportunities and may be redeveloped in the longer term
Haddons Acre, Station Road	1,322	0.5	0	0	0	Satchell Ltd, G Bruce & Co	No	Good quality business park on the edge of Offenham. Access road is relatively narrow
Hampton Lovett Industrial Estate	76,785	21.81	4	3	2,303	~	No	Large, good quality industrial estate in Droitwich. Several larger, important occupiers.
Hartlebury Trading Estate	163,132	60.7	15	17	27,230	Weinerberger Ltd, Forest Garden, Envirocover	Yes	Large industrial node, key site for Wychavon. Several large occupiers in excess of 3,000 sqm. Vacant premises and land
Hawford Business Centre, Shires Farm	506	0.5	2	20	101	~	No	Small collection of office units in a rural location, though with good access to Worcester to the south via A449.
Highgrove Farm	2,439	0.85	0	0	0	~	No	Collection of workshops and industrial sheds in a rural location north of Pershore. Standard of premises is basic and the layout of buildings is poor.
Holden and Charlotte Works, New Road	6,813	1.5	0	0	0	Schloetters	No	Medium sized industrial units on narrow New Road, which also serves a residential function. Units are surrounded by residential uses. Potential for significant conflicts between industrial operations and surrounding uses.
Honeybourne Airfield Industrial Estate	22,788	20	3	20	4,558	IDS Transport	Yes	Sprawling industrial estate south of Honeybourne. Occupiers are lower order uses requiring cheaper, larger spaces. Opportunities for expansion through use of vacant land and intensification of existing uses.
Ikon Trading Estate, Droitwich Road	24,999	8.27	3	2	499	DRP UK Ltd	No	Rural location within a reasonable proximity to Kidderminster. Would provide a secondary location for the Kidderminster economy and serve part of its demand. Surrounded by agricultural fields
Kanes Foods, Cleeve Road	28,112	5.2	0	0	0	~	No	Large site with a single occupier, being a food manufacturer.
Longmarston, Longmarston Road	13,571	19.6	0	0	0	SIMS Group UK Ltd	7.5 ha	Processing facility at eastern edge of Wychavon District. Longmarston Rd is relatively narrow. Underutilised land to the rear of site.
Murcot Turn Business Park	500	0.5	0	0	0	~	No	Rural industrial estate, fully occupied at time of inspection with small industrial occupiers. Narrow access point past residential dwellings, although actual units are separated from residential uses. Serves a rural economy function.
North of Pershore Industrial Estates	63,313	22.64	1	0.4	249	Ferryfast, Red Deer Herbs, G&C	Yes at Keytech	Busy industrial estate with almost full occupancy. Important employment node in Pershore, with significant range of occupiers, including larger units.

North Street Industrial Estate	5,981	2.7	3	7.2	431	~	No	Southern part of the broad industrial corridor in Droitwich Spa. Mix of older units with limited off street car-parking. Opportunities for renewal of stock and refurbishment over time.
Norton Depot, Church Lane	41,933	30	0	0	0	SMH Fleet Hire	Yes, open storage areas could be developed	Car storage facility alongside M5. Potential for more intensive development.
Ryelands Business Centre and Oak Park Industrial Estate	10,554	10	0	0	0	Egbert H Taylor & Co Ltd	No	Two nodes on opposite side of Ryeland Ln. Oak Park Industrial Estate has a higher quality environment, with Ryelands Business Centre a more basic presentation. Surrounded by agricultural fields.
Site 7 Trading Estate	26,700	14	0	0	0	W H Bowker Ltd	Yes, 1.4 ha	Mix of industrial and office units surrounded by rural areas. Some potential for further expansion and intensification.
Stanway Screens, Oilcroft Orchard	1,996	0.37	0	0	0	Stanway Screens	No	Single use building for an industrial operator. Neighbouring uses include residential, rail corridor and open space. Building is set back from the road. Beyond its current occupation, it would be difficult to see its on-going use as an industrial operation.
Sterling Business Centre, Drury Lane	1,965	1.1	0	0	0	~	No	Small site with industrial units off narrow Drury Ln, though close to busy A38 south of Droitwich Spa. Neighbouring uses are residential which may represent conflicts.
Stockwood Business Park	3,599	1.76	3	14	503	~	No	Remotely located business centre serving a rural economy function. Reasonable quality buildings but narrow road access.
Stonebridge Cross Business Park	103,989	31.47	0	0	0	Vax Ltd, Muller Wiseman Diaries	Yes	Significant industrial estate in Droitwich Spa with capacity for further expansion. Houses larger occupiers in good quality premises.
Strensham Business Park, Twynning Road	1,965	0.65	0	0	0	~	No	Close to M5/M50 junction, although not visible from motorways and access to/from motorways includes a significant detour through Twynning. Reasonable quality buildings for small light industrial and office users. No vacancies at time of inspection. Serving a local function.
Summerfield, Worcester Road	58,774	31	0	0	0	Roxel Rocket Motors Ltd	No	Specialised single use research and manufacturing facility for rockets.
Travis Perkins, Kidderminster Road	823	0.3	0	0	0	Travis Perkins	No	Single use occupier on the site, bounded on two sides by railway tracks.
Union Lane, Union Lane	1,580	1	0	0	0	Comtherm	Yes, 1 ha	Small number of older industrial units and an area of cleared land with hardstand area, which could be redeveloped for further employment uses.
Vale Park, Millennium Way	101,295	40.1	15	2.8	2,836	Prima Fruit, Karndean, Foster & Freeman, Walsh Mushrooms	Yes, at least 37 ha	Large industrial node in the south of Evesham. Several significant occupiers taking large lots. Some infill and expansion plots available for further growth. Predominantly an industrial node, although there is some office stock as well.
Doncasters Vines Lane, Droitwich Spa	9,541	1.8	0	0	0	Doncasters	3 ha	Single occupier site in Droitwich Spa. Access is via narrow laneways. Potential development opportunity of eastern portion of the site, which has had a former use though is now cleared.
Whittington Hall, Whittington Road	6,848	2.7	2	6	410	Mainstay, Blakebrook Group	Yes, some limited potential	Collection of good quality office space in a mix of modern and refurbished stock. Parking is tight and traffic flow throughout the site is confusing. However site is well positioned on edge of Worcester and close to M5 junction.
Willmotts Business Park	3,386	0.75	1	5	169	Carlton Smith Joinery	No	Part of broader Pershore industrial corridor, this section has frontage to the A4104 and is at capacity.
Wood Norton/ BBC Training Centre, Wood Norton	4,000	4.95	0	0	0	BBC	No	Specific, single use of the site, which requires a large footprint. Re-use of the site for B-class uses may be difficult and likely to involve a broader mix of uses, however current use is appropriate.

Worcester Road Coal Yard	3,433	1.1	0	0	0	Reliance Water Controls	Yes, redevelopment site, 0.06 ha	Important site at a northern entry point to Evesham and alongside Tesco. Low intensity industrial uses on site. Potential for for intensive development of site and may be longer-term pressures to redevelop site for higher value uses.
Worcester Road Depot Industrial Estate, Worcester Road	9,841	2.4	1	3	295	Dawn Foods UK Ltd	No	Industrial estate at northern edge of Evesham. Mix of moderate quality, mid-sized industrial units. Neighbouring uses are residential, retail and agriculture.
Total	1,182,121	443.38	75	~	45,525			
					3.85%			

South Worcestershire Economic Development Needs Assessment
Malvern Hills District Council, Worcester City Council and Wychavon District Council

Location	Total Floorspace (sqm)	Total Area (ha)	No. of Vacant Units	Floorspace of Vacant Units (sqm)	% of Vacant Units
Worcester	652,259	167.63	69	47,493	7.28%
Malvern Hills	331,442	131.31	47	10,641	3.21%
Wychavon	1,182,121	443.38	75	45,525	3.85%
South Worcestershire	2,165,822	742.32	191	103,659	4.79%

Appendix 6

Property Agent Consultations

Appendix 6 – Property Agents Comments

A6.1 In order to protect confidentiality, names of the agents/agency have been separated from the information which they have provided. The opinions recorded in the table below are the opinions of the respondents.

Contact	Comment
Local Agent	Overall demand for offices is seen as weak due to limited available stock to attract them to South Worcestershire and the popularity of people now working remotely and from home. A general price for office space would be up to £108/sqm (£10/sqft). The opposite is seen for industrial properties with strong demand experienced throughout South Worcestershire, particularly Worcester. Their most recent unit let was located in Droitwich of a 192sqft unit which let for £56/sqm (£5.25/sqft).
Local Agent	Regarding offices in Worcester, previously seen was supply exceeding demand but now there is a healthy amount of take-up. The city centre sees limited demand due to lack of car-parking and the amount of congestion. Suggestion that for office development to be successful they would need to be in the periphery. Good demand is being received for industrial units in Worcester 6, but little elsewhere. The majority of these available options are leasehold opportunities. Malvern office market is weaker than Worcester, with low demand seen due to the accessibility difficulties. Belief that a Northern relief road would aid in congestion. The only positive aspect of the Malvern office market is the Malvern Hills Science Park, which receives strong demand. Occupiers of industrial units within Malvern tend to be longstanding tenants with demand to not only stay in Malvern, but also for room for expansion. Similar to Worcester, limited freehold options are available on the current market.
Local Agent	Manage industrial and office units across the Midlands, totalling c. 70,000 sqm (c. 750,000 sqft). Focus is on industrial units less than 4,600 sqm (<50,000sqft) and incubators around 30 sqm (c.330sqft). Belief that medium and large sized units are well catered for, with a strong amount of pre-sales occurring for these sized units and long leases being taken on them. Build costs for these large distribution centres is £650/sqm (£60/sqft) (including fees) which leads to land values of £500,000/acre max. Market is also strong for incubator centres. The real gap in the market is seen for small-medium industrial units as supply of decent quality is drying up. The latest residential developments (£1m to £1.5m/acre worth) play a huge role in the employment units as residential values are higher which leads to difficulty in developing employment sites. This leads to much less value being seen in light industrial units. Rents in West Midlands are existing at £65-75/sqm (£6-7/sqft) whereas higher rents are being seen as Worcester Trade Park of £91/sqm (£8.50/sqft) and £105/sqm (£9.75/sqft) in WCC.

Contact	Comment
Local Agent	Believes the whole of Worcestershire is seeing demand for units, particularly 230 sqm (2,500sqft) for industrial units and 140-280 sqm (1,500-3,000sqft) for office space. All stock currently is for larger units of 2,800-3,700 sqm (30,000-40,000sqft). Demand is being seen for freehold options predominantly. Rents being achieved of £55/sqm+ (£5/sqft+) for industrial and £85-170/sqm (£8-16/sqft) for offices. Malvern Business Centre is progressing well with a recent unit sold at the end of 2017, initial interest in letting but sold for £185,000 for 230 sqm. Suggestion for growth would be periphery of Worcester, near junction 6 and 7, would not suggest development in the city centre due to level of road congestion.
Local Agent	Currently only in operation within Wychavon. Regarding offices; Demand has reduced in recent years with the most recent scheme they were involved in changing to residential development. When demand is received it is for 100sqm units with average rents ranging from £107-129/sqm (£10-£12/sqft) for ground floor spaces, up to £54/sqm (£5/sqft) for the 2nd floor of units. Whilst demand is seen for freehold options, the market is mostly leasehold availability. Regarding industrial units; demand is definitely exceeding supply, particularly for under 200 sqm units which would have prices of around £65/sqm (£6/sqft). A property of 1000 sqm would be achieving rents of roughly £54/sqm (£5/sqft) and would on the market for around 6 months. There is not much 1000sqm+ stock being built., whilst more general industrial units are being developed in Vale Park, Evesham (roughly 40 acres of mixed uses). Similar to offices, demand is for freehold, yet options on current market are predominantly leasehold.
Local Agent	Offices are seeing rents of £140-170/sqm (£13-16/sqft), with Grade A space achieving at the higher end of £160-170/sqm. Majority of demand is for leasehold properties. The main issue in Worcester, especially town centre, is the lack of Grade A space and the problem of car-parking in the town centre. Whilst demand is increasing in places such as Malvern due to the Science Park, general view of developers is genuine interest is needed before building can commence. Regarding industrial units, a general lack of stock, regardless of quality, is seen. Rents being seen as low as £43/sqm (£4/sqft) and highs achieved at Worcester 6 of £65/sqm (£6.05/sqft). Demand all over South Worcestershire is for smaller units, c.200 sqm, with belief that if stock was available of this size then it would be filled very quickly. Biggest issue facing both markets is amount and quality of stock, with difficulty seen in gaining more employment land as price return is better for residential properties.

Appendix 7

Stakeholder Consultations

Appendix 7 – Stakeholder Consultations

Businesses		
Essential Supply Products Ltd	Manufacturer and supplier of disposable paper tissue products	ESP moved to Enigma Business Park in 2000 and eventually purchased 20 acres of land and installed electricity, gas, airband (WiFi) and ducting (BT Openreach high speed). Current facilities total over 10,000 sqm, split between a converting unit, offices and three warehouses. In 2007, the company started searching for suitable land/premises to consolidate all operations into one location and after struggling to find a suitable site considered moving to Wales (5 years rates break). Following a six years search, a 19 acre site at Blackmore Park was purchased, despite not being entirely suitable. After a lengthy planning process permission was granted for new HQ premises as well as a small anaerobic digestion plant. ESP have found the planning process frustrating and feel that business rates are very high (£200k). Congestion is worsening (M5, J7), and access also needs improving. The company trades nationally and uses an Evesham logistics company (Whites). In terms of workforce, half have been at ESP for more than ten years. The company has some concerns about the effects that Brexit might have, as it relies heavily on and Eastern European workers. It states there is not a rich labour pool as people are reluctant to commute from Worcester.
First Bus Group	Bus Operator	The Bus Depot has been on the Padmore Street since 1928, however the site is now earmarked by Worcester CC for future leisure/retail redevelopment. Require a site that will accommodate 80 vehicles as well as a maintenance /servicing area and office space for 25-30 maintenance and administrative employees. First Group is happy with the current city centre site and need an equally central and accessible site to relocate to – but nothing suitable has been found so far. The timescale for relocation is unknown – dependent on a suitable site being found. There are several routes with low bridges that are unsuitable for double decker buses, depending on where the new bus depot is located.
Fortis Living	Housing Association	Fortis Living own the Midland Road Employment Allocation and are developing it as 1,400 sqm offices for themselves and 1,400 sqm B1/B2/B8 space for another user. Although Fortis intended to lease the premises, an interested occupier (educational institute) have a preference to buy, and therefore negotiations are taking place. They are reluctantly building their own premises due to not being able to find anything 'ready built' suitable on the market. The new site will allow Fortis to consolidate their staff and relocate their existing Malvern staff (who currently operate from 1,900 sqm building at Festival House on Grovewood Road). This relocation is primarily for recruitment reasons (more difficult in Malvern), and because they view Worcester as a better location for the business. Once vacated, Fortis will sell their Malvern site. Fortis also previously owned/occupied a 460 sqm office in Droitwich, which they sold to a gym operator in 2017. They did not find there was much interest in this site.
HD Connectivity Ltd	Audio and visual technology company	The company occupies an office and warehouse unit and has 23 employees. It is moving to a new 930 sqm unit, one mile from current location. Company has a local workforce, hence the decision to relocate closely. Never had any issues with recruitment. Ideally the company wanted their own custom-built unit but there was no land availability. Feels Malvern is a good location – good road links that are constantly improving due to the growth of the University and Worcester, and links to Worcester are good. For the area to develop in terms of the economy the employment market, focus needs to be on providing jobs for the residents of the large numbers

		of houses being built in South Worcestershire. An enterprise zone between Malvern and Worcester would be a great idea to attract businesses to the area and to provide employment opportunities for the expected growth in population due to the housing expansion taking place.
Karndean Design Flooring	Flooring manufacturers	Karndean occupy three buildings totalling 10,000 sqm within 400 metres of each other on Crab Apple Way, Evesham. It employs 235 people in the UK, 160 of which are in Wychavon. Ideally the company would like all its operations at one site and is currently exploring options. It owns 5 acres next to its warehouse, and this could accommodate the 6,000 -7,000 sqm building that they require. However, there is no infrastructure at present, and Western Power would need to increase power capacity. A large proportion of workforce are local however recruitment is challenging particularly as specialist office staff are required. Evesham is seen as 'no man's land' – 30 minutes to Cheltenham and not on the motorway. Furthermore, there is a lack of local amenities - limited options for business meetings, and limited places for staff to get lunch. As housing development increases around A49, so does congestion. 70 percent of warehouse staff are Eastern European and as a result, Brexit is a concern.
Malvern Optical Limited	R&D provider (electro-optic and electromagnetic (radio-frequency) systems domains)	Malvern Optical was founded 2010 after it's the company's three directors were made redundant from QinetiQ. It has now expanded to 6-7 staff. In 2011 the company relocated as they required a larger site for trials. In 2014 it expanded and diversified, taking their current facility at Pershore Airfield. It is now looking to relocate again, but the property requirement is very specialist – it requires a large open space, limited neighbours, no Wi-Fi and no interference, as well as access for low loader platforms. There is no suitable land, and employment uses have to compete with housing development as the Council looks to increase housing supply. Recruitment is an ongoing concern for the company. It requires employees with very specialised skills, and this is an issue on a national level because the science and technology sector has a lack of skilled people and on a local level because Worcester University does not have big physics/engineering departments. Furthermore, despite trying to establish apprenticeship schemes, the closest college course is in Gloucester. Additionally, congestion is a big problem and commuting times have doubled in past few years – this definitely puts potential applicants off. This is a big worry for the business. The company collaborates with QinetiQ in some areas but is also a competitor. Suppliers come from all over the UK due to the specialist nature of the business, but where they can, they use local suppliers e.g. logistics.
One Creative Environments Ltd	Multi-disciplinary practice of architects, masterplanners and civil engineers	46 people based at headquarters at The Triangle, Worcester (one other, satellite office in London) – excellent quality building, great parking and brilliant access to motorways. Originally located in the city centre but outgrew this in 2007 and there was no suitable city centre property available. Therefore, relocated to out-of-town location. Looked to expand again last year due to growth in engineering side of businesses. Undertook property search but found no property of suitable size, quality or appropriate specification in a location close to current premises. Priorities have now changed due to Brexit – cautious about growth and therefore expansion is on hold. Nonetheless, it is anticipated that the business will grow, and when expansion is required the property options are limited. Ideally want to stay in Worcester – already have a good local reputation and a large proportion of staff are from the local area. Quality of their premises is the most important factor due to the nature of their work and the impression it gives to clients South Worcester is being dominated by housing, whilst the North is seen as a good commercial area (close to retail parks/ junction 6/good

		motorway access/ parking). Logically this would be the best place for the Council to develop office and industrial space. The technology belt is in the North but there is no Northern bypass to connect this Have had recruitment issues – had to increase their staff catchment areas due to the struggle to find skilled workers within Worcester – have staff members from Birmingham, Gloucestershire and as far as Surrey.
Payara	IT/Software Company	Payara are an IT company based at Malvern Hills Science Park. It is outgrowing its current premises and is looking to purchase a premises, however there are no options of the size that they need (there are lots of small units). Payara needs approximately 230 sqm (20 employees) and excellent internet. In terms of location the company is not tied to MHSP, although many staff live nearby, and recruitment has been an issue. Remote working is increasing, resulting in location being less important and the need for new premises is less urgent. Payara has looked at locating in Bristol and are considering as far as Portugal (incentives for IT companies). Malvern Hills is expensive compared to other areas. The company export approximately 90-95% of its products to US, Japan and Europe, and has very few customers in the UK.
QinetiQ	Defence Technology Company	QinetiQ has approx. 700-750 people employed at their Malvern site (this has reduced from approximately 2000 and therefore QinetiQ no longer need as much employment space). It owns a 4.5 ha site that is out of the List X high security boundary and is close to selling this land. The 28,000 sqm it is retaining will undergo significant investment (QinetiQ is significant anchor – but have spare capacity) and outline planning application is due to go in in May 2018. QinetiQ is currently emptying one building and modernising it. It will then lease it out for approximately 300 people (it has received 20 enquiries about this space, with rent similar to MHSP). QinetiQ are seeking a coherent approach with MHSP to market this area. QinetiQ also own 100 acre Pershore Airfield although they do not occupy any space here. Currently marketing the site for sale, as going concern with tenants (which include Malvern Optics and other high value businesses). However, Pershore Airfield could be developed as a mixed-use site (has good road and rail links), and QinetiQ are looking to get planning permission.
Roundhouse Kitchens	Luxury kitchen and furniture manufacturer	International company that has operated its factory in Malvern since 1998. Kitchen showrooms are predominantly in London and they also have European customers (mainly France, Spain, and Portugal) 52 employees at the current Malvern premises, 4,900 sqm which comprises two units 400m apart on Springhouse Lane in Malvern. Ideally wanted to consolidate into one 5,500 sqm unit for ease of production and searched for a unit/land for several years to no avail. Will revisit remises requirements in 2-3 years, and may consider Wyre Forest or Black Country, which has better priced commercial land. In terms of the local area – there is insufficient land and property to satisfy economic growth. Furthermore, the roads are awful – especially M5, M40 and A449. At times, commuting around Worcester is worse than commuting in London. Company has employees who work non-typical hours in order to avoid congestion, and deliveries set-off at 3:45am to congestion. Typically have difficulties recruiting because need specific skilled workers and it is hard to attract those types of people from Worcester due to bad roads and commuting problems. Recruiting can come from apprenticeships which they usually have 2/3 at a time but due to the specialist nature of the work, can be very difficult to recruit Not many skilled workers of around 30-40 years old.
Sanctuary Housing	Affordable and Social Housing Provider	Sanctuary Housing employs 1000 people in 4 buildings on Castle Street in Worcester city centre. This is HQ, and also houses their accounting department and a gym. The company also owns the adjacent site, which

		previously had planning permission for a 400 person office (now lapsed) This will eventually be developed for themselves, although they have no current plans. Very positive about their site: • Central – can walk to city centre and train station • Decent car parking • Good central location as a HQ (easy to get to for 13,000 UK staff) • Good train links to Birmingham. Furthermore, it feels Worcester as an attractive city with fair house prices. In terms of recruitment, Worcester has a good labour market and is also in close proximity to Birmingham/Cheltenham/Hereford. Recruiting nurses can be difficult, although this is a nation rather than local issue.
Walsh Mushrooms	Produce wholesaler of mushrooms	Walsh Mushrooms is a distributor, located in Evesham, of mushrooms within the UK (except Scotland) for produce from farms in Suffolk and Ireland. Around 70-80 employees within the business for roles including management, sales, admin and packaging. Walsh Mushrooms have been at Vale site since 1980's, however have been looking to relocate for 2 years due to the nature of the business and needing to be located on agricultural land. Cost is around £250-300,000/acre, which is too expensive for an agricultural enterprise. Have had a pre-lodgement meeting with Wychavon District Council, but lots of obstacles have occurred. Highly urgent in looking for 15 acres minimum (ideally 20-30 acre), with good road access for heavy goods, level land and proximity to 'affordable' town for employees. Agricultural sector has improved over the years, yet planning has not, and whilst planning is easier in Ireland, it has much poorer rural areas. The company would not want to go to Ireland.
Developers		
Canal and River Trust	Diglis, Navigation Way	The Canal and River Trust is the landholder of several parcels at Navigation Way, which have older industrial buildings on long leases. Some of the leases are expected to run until the 2040's, with Canal and River Trust having recently bought back one of the leases from a company that went into liquidation, and now have six acres (2.5 ha) to market. Development has been previously discussed with WCC and whilst it has been marketed for redevelopment under an employment use, and a number of enquiries have been there is limited interest and offers have been adventurous i.e. low price. A nearby brownfield residential development of 20 acres (8 ha) by Taylor Wimpy is taking place north of the Trust's land – Diglis Water Development. This is said to have changed the character of the surrounding land, particularly away from an employment use, and hence a reason why residential development may be more appropriate at Navigation Road. Altering the use of the site would fit in with WCC plans of opening up Diglis to the public. The Trust would hope to discuss these plans further with WCC and proceeding with this development would be on a 3-5 year timeframe, once a planning application has been submitted. Canal and River Trust are not geared for development, and whilst they do enter into joint ventures, the cost of redevelopment would be higher than the return – it is roughly £1,000-1,300/sqm (£100-120/ sqft) to build a basic unit, addition of land takes cost to £1,600-1,700/sqm (£150-160/ sqft) whereas freehold is £1,080/sqm, therefore costs are more than the value. Additionally, it is the opinion of valuers that the site is not suitable for modern premises, and hence why the Trust believes that the area is no longer suitable for employment use and so are considering residential development on the land.
Lansdowne Rodway Estates Ltd and Crown House Developments	Pershore, Venture and Blackpole	Lansdowne Rodway Estates and Crown House Developments are the current landholders and developers for three sites: • Venture, Worcester – units less than 1,000 sqm (250-600 sqm at £60-65/sqm), all fully let • Blackpole, Worcester – older, retrofitted units, only vacant space

		The site of Keytec 7, Pershore within Wychavon contains mid-sized units which are all currently let. Site at Keytec East contains land which has been sold to Red Deer Herbs. They build property and leased to Metal Mesh but Metal Mesh wished to original purchase. Work almost ready to start on 2,000 sqm. Companies are buying and renting land/ premises at Keytec because of a lack of space in Worcester. 3 plots have been opened up due to the latest construction, with speculative units of 2x10,000 sqm and demand for 30,000 sqm. The current enterprise centre was fully let within two months of opening and has 12 units which helps attract businesses to Pershore along with limited available property in Evesham, so Pershore receives the overspill. Start-up space of 50-130 sqm, all-inclusive rents of £100-110/sqm, is selling fast and lots of developers are forgetting about that end of the market It is their view that Worcester City is not catering for the mid-sized units market of c.1,000 sqm.
Maximus	Wildwood Triangle, Blackpole Road	Maximus is a commercial developer based in Worcester and are landlord and developer for several plots within Worcester. They developed a 3,900 sqm office park between junctions 6 and 7 of the M5 known as Wildwood Triangle, Worcester. 40 percent of the office development has been sold to Prime Plc with a further 2 units to Phipps (a pensions scheme). Maximus are selling units at £170/ sqm. The employment land in the east of Worcester City is popular, with St Modwen's industrial development at Nunnery Park all being let/sold even though the development is not yet complete. At Richardson's scheme, planning permission has been gained for B1 units but B2/B8 is what is wanted now, following on from demand. The employment land to the east of the M5 at Worcester 6 contains units c. 14,000 sqm of space which is being sold at £60/ sqm for spec-build units. Maximus believe that the large units at Worcester 6 are the wrong size for the market as local businesses require much smaller sized units. However, the unit of 15,000 sqm, they do expect it to be let/sold soon. The employment land to the west of the river contains employment units which are currently not working which is meaning Malvern is not as big of a market as is seen in Worcester. Ideally for employment, the best place to be is east of the river, around junction 6&7. Maximus also own a site of 34 acres (14 ha) which is not currently an employment allocation but would like to bring forward alongside the existing industrial land. The site would be highly deliverable as employment land with over 20,000 sqm of new floorspace potential. Located at Blackpole Road, the site is allocated as greenbelt but is separated from the actual greenbelt land by the A449. Due to the greenbelt nature, the committee has currently refused the application. In South Worcestershire, industrial units (B2) are in short supply, with the current market achieving rents of £46/ sqm for larger units, with smaller units approx. up to £60-65/ sqm. It is their view that there is a general shortage of stock, not just within South Worcestershire but the West Midlands overall. General demand is seen for B2/B8 units. Pershore/ Evesham are not seen as office locations due to appeal of Worcester, and so are rather seen as residential areas for commuters.
RPS Group on behalf of Gleeson Developments	NE Malvern Hills Employment Site	RPS Group are consultants representing Gleeson Developments on behalf of the NE Malvern Hills Employment Site. A planning application has been put forward which includes 10 ha of employment land and has been allocated in the Local plan, rather than based on any market evidence. In terms of the local area, the whole site is currently surrounded by residential or future residential developments. If permission is granted, then Gleeson will put in the infrastructure and then will take the site to the market. Current discussions with businesses in Malvern have revealed that whilst there is a lack of employment land, Malvern is home to significant

		businesses of which significant interest has been gained for the site in which Gleeson's is developing.
Spetchley Estates	Worcester Six and Warndon Woods	Spetchley Estate is a significant landholder in Wychavon, the land it controls includes the employment allocations of Worcester Six (previously known as Worcester Technology Park) and Worcester Woods Business Park. The Estate has significant landholdings to the east of the M5 and is aware of development pressures to accommodate an expanding Worcester that may impact on their landholdings. However, the Estate takes a long term approach when considering the development of its land and its focus, beyond the allocated sites, is to maintain and enhance the Estate's agricultural/rural operations on the substantial majority of their landholdings. The Worcester Six site was originally intended for Worcester Bosch, but the move fell through at the time of the global financial crisis and so Worcestershire County Council began a joint venture with Spetchley Estate on Worcester Six, with the County Council investing funding for essential infrastructure. Liberty have speculatively developed two units of c. 45,000 sqft (let to Siemens), and c. 165,000 sqft. Three further buildings of 140,000 sq ft (pre-let to Kimal), 70,000 sq ft (pre-let to Spire Healthcare) and 28,500 sq ft (pre-let to Cornelius Beverages) are all under construction. Another company was interested in the larger unit developed by Liberty but are in need of more space to allow for future growth, so are contracted to have a building of 159,000 sq ft developed for them within Phase 1B. The two speculatively built units were used to promote and stimulate interest in Worcester Six, which they have done. Only four plots remain available within Phase 1A and 1B with all other land committed. Enquiries are mainly for 30,000 sqft or 30-40,000 sqft. The final part of the development of the northern part of Worcester Six will require archaeological assessment and ecology and drainage work, which will put development on hiatus for 18 months. There will also be a need for a new outline permission to enable further reserved matters to be submitted. Highways England is currently undertaking work on junction 6 of the M5 which has factored in growth from Worcester Six and thus it is considered that this will be the main transport upgrade needs accounted for. It is forecast that 800,000 sqft will be developed at Phase 2 with work anticipated to begin at the end of 2019/start of 2020. Whilst no developer has been agreed, the estate is looking for planning consent 'sooner rather than later', with submission anticipated in Q4 2018/Q1 2019. Market evidence is suggesting there is hardly any demand for B1 and so intend for the site to be occupied by B2/ B8 uses. Worcester Woods (the Estate refer to it as the Newton Road site) was promoted by Pegasus in 2004 for B1 use, yet long debates over access to the site delayed securing the necessary consents and this led to market interest cooling as the global financial crisis took hold. Since then, a staff car park for the adjacent hospital has been developed and is held on a long lease (40 years) from the Spetchley Estate. Land was also sold for the development of an 82 bed care home on part of the site. Current interest for the remainder of the Worcester Woods site is for a bulky goods retail scheme with development estimated to be completed within three years, should appropriate planning permissions be granted. Enquiries are also taken for the Estate in general from small businesses looking for 2-8,000 sqft (B1), which some small conversions of agricultural complexes could provide.
Stoford Developments	Worcester 6 and Stonebridge Cross	Stoford Developments are currently developing at Worcester 6. The scheme is looking to contain businesses which contribute to 'Tech Park' uses and so demand is being required from certain sectors. If this was not the case, then take-up would be suspected to be much quicker. Buildings with a range of sizes and rents have already been agreed: • 4,200 sqm on a 10 year lease for £65/ sqm • 13,000 sqm to Kimmel on 10 year lease for £58/ sqm • 6,700 sqm to Spire Group for £65/ sqm • 2,600 sqm to Counselling Armiks on a 10 year lease • 15,000 sqm (with room for 10,000 sqm expansion) to Co Freehold for £92/ sqm In general, Worcester 6 is in a great location with 40,000 sqm already committed and 30,000 sqm already under offer.

		There is a limited supply of Grade A buildings of 2,500-10,000 sqm range. Demand for B1 units is currently very low due to negativities of being located within Worcester City centre where issues of congestion, average public transport and the street layouts means no large floorspaces are possible. Rents for non-city centre locations are static at £170-180/ sqm. At Stonebridge Cross, 4,600 sqm has now been allocated, with a planning application progressing with Aviva for B1/2/8 uses. In general, there is little to be excited about in regards to employment development in Malvern. Whilst the new bridge and Worcester 6 have helped to develop the area, the reputation of Malvern as a retirement location means it is a struggle to attract staff to the area. Low growth is also being affected by the shortage of supply, which is due to this lack of demand. Better sites are due to be coming forward in the future.
University of Worcester		The University of Worcester is in ownership of 47 acres (19 ha) of former campus land. With the rapid expansion of the university of 100,000-105,000 students, several sites have been bought to accommodate these students in terms of residential and learning facilities. Hylton Road is current under development for a sports and health facility, with a £15m building being developed over 5 acres (2 ha). Four plots have been amalgamated at the end of the road, 28 acres (11.5 ha), whilst the corner site of the land has planning permission in for 120 dwellings. Different forms of development are being decided for different parts of the site, and as with the vast amount available, the university has enough land for many years to come. Aspirations for a science park led to the purchase of the farm site in 2009 whilst opposite St Julian's Med now contains a science campus in the south (end of street). The Worcester Royal infirmary has recently been refurbished, with 2.5 acres (1 ha) of development potential still available., whilst the City campus has some incubator space.
Welbeck Land	Southern Urban Expansion Area	Welbeck Land are currently developing the Southern Urban Expansion Areas which contains 14 ha/ 50,000 sqm. The difficulty with the site is that it lies within a flood area and so for development to occur, a storm water sewer must be built. This therefore means development is 4-5 years away. The ownership of the land is flexible, with Welbeck willing to sell off as one piece or as individual parcels of land. Residential development will occur in the first phase with 240 units to be completed by Autumn 2018, then within the next 13 years a further 2,000+ dwellings will have been constructed. The residential development will then fund the employment development. Due to the distant future of this employment land development, employment markets have not been examined at this stage.

Appendix 8

List of Consultees

Appendix 8 – List of Consultees

Andrew Grant
Bruton Knowles
Canal and River Trust
Crown House Developments
Delta Planning
Essential Supply Products
Evesham Vale Growers
First Bus Group
Fisher German
Fortis Living
GJS Dillon
Goold Estates
Harris Lamb
HD Connectivity
Karndean Design Flooring
Lansdowne Rodway Estates
Malvern Optical
Maximus
One Creative
Payara
Qinetiq
Roundhouse Kitchens
RPS Group
Sanctuary Housing
Savills
Spetchley Estates
St Modwen
Stoford
Timothy, Lea and Griffiths
University of Worcester
Walsh Mushrooms
Welbeck Land

A business consultation event was also held in June 2018, in which the views and opinions of additional businesses within South Worcestershire were received in relation to the project.

Appendix 9

Site Scoring System

Appendix 9 – Site Scoring Systems

Employment Allocations		
Site Location and Access	Proximity to strategic highway network	• Site adjacent to motorway junction – score 10 • Site adjacent and with direct access to major A-road – score 8/9 • Site within 0.5km of A-roads – score 6/7 • Site on other key arterials within SW – score 4 • For each further half km distance from key arterials, reduce score by one point
	Prominence within South Worcestershire	• Site adjacent to, and visible from motorway – score 10/9 • Site adjacent to, and visible from other A-roads – score 8/7 • Site adjacent to, and visible from a major B road – score 6/5 • Site has local prominence, e.g. within its industrial location – score 4/3 • Site located in 'backlands' – score 2/1/0
	Public Transport	• Site close to bus route (within 0.5 km) and near to rail station (within 2 km) – score 10 • Site within 0.5 km of a bus route – score 5 • Limited public transport – score 0
	Sequential test	• Within urban area – score 10 • Urban fringe (close to settlement development boundary) – score 7 • Rural location (away from settlement development boundary) – score 3
Planning Status		• If site has detailed/full planning status – score 10 • If site has outline planning status – score 8 • If site allocated in the development plan – score 4 • If site is available, subject to planning – score 1
Site Conditions	Services Availability	• If all services are provided and in place – score 10 • If priority services are available with no abnormal costs – score 7 • If all priority services are available, but with abnormal costs – score 3 • Some services are unavailable – score 0
	Constraints	May be physical (including access), planning, or legal Reduce score by 2 for each constraint If there are none – score 10
	Environmental Setting	Subjective, score 0 to 10, examples: • Good quality business park/greenfield location – score 10 • Moderate quality industrial estate – score 5 • Poor quality industrial estate/in-fill location – score 2
	Flexibility	Subjective, score 0 to 10: Score site in terms of site shape and ability to sub-divide to suit smaller occupiers Consider the site within its context/category. Score 10 if it is flexible, 0 if it is inflexible.
Site Availability		• Site available to develop within 0-1 year – score 10 • Site available to develop within 1-3 years – score 6 • Site available to develop 3-5 years – score 3 • Site available to develop 5+ years – score 0

Existing Employment Areas		
Site Location and Access	Proximity to strategic highway network	• Site adjacent to motorway junction – score 10 • Site adjacent and with direct access to major A-road – score 8/9 • Site within 0.5km of A-roads – score 6/7 • Site on other key arterials within SW – score 4 • For each further half km distance from key arterials, reduce score by one point
	Prominence within South Worcestershire	• Site adjacent to, and visible from motorway – score 10/9 • Site adjacent to, and visible from other A-roads – score 8/7 • Site adjacent to, and visible from a major B road – score 6/5 • Site has local prominence, e.g. within its industrial location – score 4/3 • Site located in 'backlands' – score 2/1/0
	Public Transport	• Site close to bus route (within 0.5 km) and near to rail station (within 2 km) – score 10 • Site within 0.5 km of a bus route – score 5 • Limited public transport – score 0
	Sequential test	• Within urban area – score 10 • Urban fringe (close to settlement development boundary) – score 7 • Rural location (away from settlement development boundary) – score 3
Site Conditions	Ability to expand	• Large choice of several sites available for growth – score 10 • Some choice of sites available – score 7 • Limited choice of sites available – score 5 • Potential to expand to neighbouring sites, though no planning in place – score 3 • Estate is at capacity and no neighbouring options available – score 0
	Access and Congestion	Subjective, score 0 to 10, considering: • Sufficiency of car-parking • Congestion of internal roads • Entry to site • Appropriateness and capacity of roads leading to site • Turning capacity for heavy vehicles
	Interface with Neighbouring Sites	• No neighbouring uses that would limit activities on site – score 10 • Some potentially sensitive neighbouring uses but sufficient screening in place – score 7 • Neighbouring uses are moderately impacted by site uses, mitigated by basic screening – score 5 • Site is within a residential area and accessed through residential streets – score 0-2
	Building Quality and Condition	• High quality, modern premises in excellent state of repair – score 10 • Modern premises in good condition – score 8/9 • 1990's build in good or reasonable state of repair – score 6/7 • Older stock in moderate state, requiring some upkeep – score 4/5 • Dilapidated buildings, in need of refurbishment, not fit for

Existing Employment Areas		
		purpose – score 0-3
	Site Amenity	Subjective, score 0 to 10, considering: • Landscaping • Site layout • On-site services

Appendix 10

Site Scoring Results for Employment Allocations

Site Name	Size (ha)	Type	Site Location and Access				Planning Status	Site Conditions				Site availability	Total	Market - led Sub-total	Likely Use
			Strategic Road Proximity	Prominence	Public Transport	Sequential Test		Services Availability	Constraints	Environmental Setting	Flexibility				
Broomhall Community and Norton Barracks Community (Worcester South Urban Extension)	20	Greenfield	9	8	5	7	4	3	6	10	10	3	65	44	Office/Industrial
Temple Laugherne (Worcester West Urban Extension)	5	Greenfield	7	7	5	7	4	3	6	10	10	3	62	41	Office/Industrial
Malvern Technology Centre (QinetiQ), St Andrews Road, WR14 3PS	4.5	Brownfield	3	4	5	10	8	7	6	7	7	3	60	31	Office/Laboratory
Blackmore Park, WR13 6NN	5.1	Brownfield	1	2	0	3	4	7	8	6	6	6	43	18	Industrial
Development at North East Malvern	10	Greenfield	8	8	5	7	8	3	6	7	6	3	61	36	Office/Industrial
Worcester Woods Business Park, Newtown Road	11	Greenfield	9	9	5	7	4	7	8	10	10	6	75	45	Office
Land East of Nunnery Way North of the A44	4	Greenfield	9	9	5	7	10	10	10	10	8	10	88	43	Industrial
Land South of Warndon Wood	5	Greenfield	9	9	5	7	8	7	8	10	10	10	83	45	Industrial
Land to the North-East of Pershore	4	Greenfield	6	6	5	10	8	10	10	7	6	10	78	35	Industrial
Copcut Lane, WR9 0AH	3.5	Greenfield	8	8	5	10	8	7	8	10	6	3	73	42	Office
Stonebridge Cross Business Park, Pointon Way, WR9 0LW	10	Greenfield	4	3	5	10	4	7	6	7	10	3	59	34	Industrial
Vale Industrial Park, Evesham, WR11 1GT – allocations and developable in-fill sites	43.5	Greenfield	8	8	5	10	8	7	6	7	8	10	77	41	Industrial
Worcester Technology Park (South Phase)	16	Greenfield	9	9	5	10	4	7	6	10	10	3	73	48	Office/Laboratory/Industrial

Appendix 11

Site Scoring Results for Existing Employment Areas

Site Name	Type	Site Location and Access				Site Conditions					Total (Max 90)
		Strategic Road Proximity	Prominence	Public Transport	Sequential Test	Ability to Expand	Access and Congestion	Interface with Neighbouring Sites	Building Quality and Condition	Site Amenity	
Malvern Hills District											
Acorn Business Centre	B1	1	1	0	3	5	8	10	9	10	47
Backfields Upton	Mix of B-Class uses	0	1	0	10	0	2	2	6	5	26
Ball Mill Top Business Park, Main Road	mix of B-Class uses	6	3	0	3	3	6	10	7	7	45
Blackmore Park	B2, B8 uses	0	1	0	3	10	8	10	7	7	46
Brookend Business Park	B2, B8 uses	0	1	0	3	5	8	10	5	4	36
Broomhall Business Centre	Mix of B-Class uses	1	1	0	3	3	6	10	8	8	40
Bruff Business Centre	Mix of B-Class uses	0	1	0	3	3	6	8	6	5	32
Buckman Works	B2, B8 uses	0	3	0	3	3	7	8	6	5	35
Cygnat Business Centre	Mix of B-Class uses	0	2	0	3	3	7	8	8	8	39
Edgar Trading Estate	B2, B8 uses	0	3	0	3	3	8	10	7	7	41
Elgar Business Centre, Moseley Road	B1	0	3	0	3	3	8	10	8	8	43
Enigma Business Park	Mix of B-Class uses	7	6	5	10	3	7	10	7	7	62
Frobisher Business Park, Leigh Sinton Road	Mix of B-Class uses	3	2	5	10	5	5	4	6	6	46
Hallow Business Park	B1	6	3	0	3	3	9	10	9	10	53
Hanley Road Workshops	Mix of B-Class uses	1	3	0	3	3	8	10	7	7	42
Haysfield Industrial Estate	Mix of B-Class uses	6	4	5	10	0	6	10	7	7	55
Hope House Farm Barns	B1	0	2	0	3	0	7	8	8	8	36
Howsell Road Industrial Estate, Howsell Road	Mix of B-Class uses	5	4	5	10	0	5	8	6	6	49
KDO Business Centre	B2, B8 uses	0	1	0	3	0	5	8	5	4	26
Malvern Hills Science Park, Geraldine Road	B1	4	4	5	10	3	6	8	9	8	57
Malvern Link Industrial Estate, Howsell Road	Mix of B-Class uses	5	4	5	10	0	4	8	5	6	47
Malvern Technology Centre, St Andrews Road	B1	4	4	5	10	5	8	8	7	8	59
Martley Road Industrial Estate	B2	2	4	5	3	3	6	8	7	7	45
Maylite Trading Estate	Mix of B-Class uses	0	3	0	3	3	8	10	4	5	36
Merebrook Industrial Estate	Mix of B-Class uses	0	1	0	3	5	6	10	7	6	38
Mill Pool Farm Industrial Estate, Main Road	B2, B8 uses	6	3	0	3	3	6	10	2	2	35
Mitre Farm Industrial Estate	Mix of B-Class uses	0	1	0	3	3	8	10	8	8	41
Morgan Motor Factory, Pickersleigh Avenue	B2	6	5	5	10	3	7	7	5	6	54
Newland Depot, Worcester Road	B8, recycling centre	8	7	5	10	0	6	7	5	4	52
Open Barn Business Centre	B2, B8 uses	4	1	0	3	3	5	10	7	7	40
Sioways Industrial Estate, Barnards Green	Mix of B-Class uses	3	1	5	10	0	4	4	3	3	33
Spring Lane Industrial Estate, Spring Lane North	Mix of B-Class uses	6	5	5	10	0	6	10	7	7	56

		Strategic Road Proximity	Prominence	Public Transport	Sequential Test	Ability to Expand	Access and Congestion	Interface with Neighbouring Sites	Building Quality and Condition	Site Amenity	(Max 90)
Tenbury Wells Business Park, Bromyard Road	Mix of B-Class uses	0	4	0	7	5	8	7	6	5	42
Top Barn Business Centre, Worcester Road	Mix of B-Class uses	6	3	5	3	3	7	10	5	5	47
Upton Business Centre	B2, B8 uses	6	2	0	3	3	7	10	8	6	45
Upton upon Severn Industrial Estate	B2, B8 uses	4	2	0	7	0	5	5	6	5	34
Willow End Park	Mix of B-Class uses	0	0	0	3	3	7	10	8	8	39
Woodside Business Park	Mix of B-Class uses	0	1	0	3	3	6	10	4	3	30
Worcester City											0
Blackpole East Industrial Estate, Blackpole Road	Mix of B-Class uses	7	7	5	10	3	7	10	7	7	63
Blackpole West Industrial Estate, Hindlip Lane	Mix of B-Class uses	7	7	5	10	3	7	10	7	7	63
Bromyard Road	Mix of B-Class uses	8	8	5	10	0	6	8	4	4	53
Checketts Lane	Mix of B-Class uses	7	6	5	10	0	6	5	5	5	49
Cosgrove Close, Blackpole Road	Mix of B-Class uses	6	6	5	10	0	7	10	7	7	58
Cranham Industrial Estate, Shipston Close	B2, B8 uses	6	6	5	10	0	7	10	7	7	58
Derwent Close, Brickfields Road	B2, B8 uses	3	3	5	10	0	6	5	5	5	42
Diglis Industrial Estate, Navigation Road	B2, B8 uses	3	3	5	10	5	2	5	4	4	41
Great Western Business Park, McKenzie Way	mix of B-Class uses	5	6	5	10	7	8	10	9	8	68
Gregory's Mill Industrial Estate, Gregory Mill Street	B2, B8 uses	3	1	5	10	0	2	2	4	3	30
Kings Court, Charles Hastings Way	B1	7	7	5	10	0	7	7	9	9	61
Malvern Gate Office Complex, Bromwich Road	B1	4	5	5	10	0	8	8	6	7	53
Midland Road & Perrywood Estate, Midland Road	Mix of B-Class uses	3	4	5	10	3	3	6	5	5	44
Orchard Street	B2, B8 uses	3	1	5	10	0	2	2	4	2	29
Perdiswell Office Park, John Comyn Drive, Droitwich Road	B1	8	8	5	10	0	8	8	8	8	63
Pope Iron Road	B2	1	1	5	10	0	4	2	4	3	30
Three Springs Trading Estate, Vincent Road	B2, B8 uses	1	1	5	10	0	2	1	3	2	25
Warndon Business Parks, Cotswold Way	Mix of B-Class uses	9	8	5	10	5	7	10	8	7	69
Weir Lane Industrial Estate, Weir Lane	Mix of B-Class uses	8	7	5	10	0	7	6	6	6	55
Wildwood & County Hall, Wildwood Way	B1	7	8	5	10	3	7	10	8	9	67
Worcester Trade Park, Sherriff Street	Mix of B-Class uses	6	8	10	10	0	6	8	5	4	57
Worcester Trading Estate, Blackpole Road	Mix of B-Class uses	7	7	5	10	0	6	8	6	5	54
Wychavon District											0
Abbey Lane, Abbey Lane	Mix of B-Class uses	7	6	5	10	3	4	5	5	7	52
Allen Gears, Atlas Works, Station Road	Mix of B-Class uses	9	7	10	7	0	7	7	7	5	59
Arc Tableware and White Logistics, Near Pinvin Crossroads	B2, B8 uses	9	8	10	7	7	7	7	8	5	68

		Strategic Road Proximity	Prominence	Public Transport	Sequential Test	Ability to Expand	Access and Congestion	Interface with Neighbouring Sites	Building Quality and Condition	Site Amenity	(Max 90)
Beckford Silk	Mix of B-Class uses	6	2	0	3	0	7	10	10	6	44
Bennets Hill Business Park	B2, B8 uses	4	2	0	3	0	6	7	6	6	34
Berry Hill Industrial Estate, Roman Way	B2, B8 uses	9	8	5	7	3	7	7	8	7	61
Blackminster Business Park West	Mix of B-Class uses	5	6	5	3	0	7	7	5	4	42
Blackminster Business Park	Mix of B-Class uses	5	6	5	3	0	8	7	7	8	49
Bond Industrial Estate	B2, B8 uses	8	2	5	7	0	4	8	7	6	47
Boughton Fuel Oils, Salwarpe Road	B8 use	7	3	10	10	0	6	4	7	6	53
Briar Close Industrial Estate, Briar Close	Mix of B-Class uses	7	4	10	7	3	4	2	7	6	50
Chadwick Bank Industrial Estate	Mix of B-Class uses	9	8	0	3	3	6	10	3	3	45
Craycombe Farm, Evesham Road	Mix of B-Class uses	9	8	5	3	0	8	10	7	8	58
Crucible Business Park	Mix of B-Class uses	7	4	5	3	0	7	8	8	7	49
Deer Park Business Centre, Woolias Hill	Mix of B-Class uses	2	1	0	3	0	5	8	8	7	34
Drakes Broughton Business Park, Worcester Road	Mix of B-class uses	4	6	5	7	0	7	8	8	7	52
Eddie's Auto's, Station Road	Mix of B-Class uses	8	4	5	3	0	3	7	6	6	42
Farncombe House, Farncombe Estate	B1	1	0	0	3	5	5	5	9	6	34
Field Barn Lane Industrial Estate, Field Barn Lane	Mix of B-Class uses	3	4	5	7	0	7	4	4	4	38
Four Pools Industrial Estate, Orleans Close	B2, B8 uses	8	8	5	10	0	4	3	6	5	49
Four Pools Industrial Estate & Evesham Trade Centre, St Richards Road	Mix of B-Class uses	7	4	5	10	0	8	8	7	8	57
George Baylis Road	Mix of B-Class uses	7	7	10	7	0	6	8	7	6	58
Gantham Bridge Motors, Kidderminster Road	B2 Use	7	4	10	7	0	7	2	4	4	45
Haddons Acre, Station Road	B1 Use	3	3	0	0	0	8	10	10	8	42
Hampton Lovett Industrial Estate	Mix of B-Class uses	9	7	5	7	0	8	9	7	8	60
Hartlebury Trading Estate	Mix of B-Class uses	7	6	5	0	10	8	10	7	8	61
Hawford Business Centre, Shires Farm	Mix of B-Class uses	8	2	5	3	0	6	8	5	7	44
Highgrove Farm	Mix of B-Class uses	4	6	5	3	0	6	8	5	5	42
Holden and Charlotte Works, New Road	Mix of B-Class uses	7	4	5	10	0	3	0	4	3	36
Honeybourne Airfield Industrial Estate	B2, B8 uses	3	4	0	3	4	7	10	5	8	44
Ikon Trading Estate, Droitwich Road	B2, B8 uses	7	2	0	3	0	6	10	4	5	37
Kanes Foods, Cleeve Road	B8 Use	4	6	5	7	0	6	7	10	5	50
Longmarston, Longmarston Road	B2, B8 uses	3	1	0	3	7	7	10	8	3	42
Murcot Turn Business Park	B2, B8 uses	7	2	5	3	0	4	5	5	3	34
North Pershore Industrial Estate	Mix of B-Class uses	7	5	10	7	5	9	10	6	8	67
North Street Industrial Estate	B2, B8 uses	7	3	10	10	0	6	1	4	4	45

		Strategic Road Proximity	Prominence	Public Transport	Sequential Test	Ability to Expand	Access and Congestion	Interface with Neighbouring Sites	Building Quality and Condition	Site Amenity	(Max 90)
Norton Depot, Church Lane	B8 use	7	2	5	3	3	7	6	7	8	48
Ryelands Business Centre and Oak Park Industrial Estate	Mix of B-Class uses	9	2	0	3	0	4	9	8	7	42
Site 7 Trading Estate	B2, B8 uses	9	8	0	3	8	7	10	9	7	61
Stanway Screens, Oilcroft Orchard	B2 Use	4	5	5	7	0	3	2	6	2	34
Sterling Business Centre, Drury Lane	Mix of B-Class uses	8	3	5	3	0	6	2	9	7	43
Stockwood Business Park	Mix of B-Class uses	2	1	0	3	0	3	10	8	4	31
Stonebridge Cross Business Park	Mix of B-Class uses	8	4	5	7	3	7	10	10	8	62
Strensham Business Park, Twynning Road	Mix of B-Class uses	4	2	0	3	0	6	8	6	6	35
Summerfield, Worcester Road	Mix of B-Class uses	9	7	5	7	0	5	0	6	7	46
Travis Perkins, Kidderminster Road	B2, B8 uses	7	4	10	7	0	7	2	7	5	49
Union Lane, Union Lane	B2, B8 uses	6	4	10	7	6	7	5	5	5	55
Vale Park, Millennium Way	Mix of B-Class uses	9	8	10	7	10	9	10	9	8	80
Doncasters Vine Lane	B2, B8 uses	7	3	10	7	8	5	2	6	3	51
Whittington Hall, Whittington Road	B1 Use	9	7	5	7	5	7	10	10	8	68
Willmotts Business Park	Mix of B-Class uses	9	8	10	7	0	8	9	5	6	62
Wood Norton/ BBC Training Centre, Wood Norton	Mix of B-Class uses	9	2	0	3	0	6	3	8	7	38
Worcester Road Coal Yard	B2, B8 uses	7	6	10	7	5	7	9	7	5	63
Worcester Road Depot Industrial Estate, Worcester Road	B2, B8 uses	7	6	10	7	0	7	9	7	6	59

Appendix 12

Employment Land Past Take-Up

Appendix 12 – Employment Floorspace Past Take-up

Table A12.1 - Employment Floorspace Take-up by B-class Use, Malvern Hills

Time Period	Floorspace, sqm				
	B1	B2	B8	B1/B2/B8	Total
1996-1997	~	~	~	5,989	5,989
1997-1998	5,304	~	~	20,865	26,169
1998-1999	2,690	~	~	4,038	6,728
1999-2001	14,391	~	1,950	8,853	25,194
2001-2002	8,619	156	2,457	~	11,232
2002-2003	8,775	117	~	~	8,892
2003-2004	11,232	468	3,393	~	15,093
2004-2005	26,013	1,755	702	~	28,470
2005-2006	11,115	~	858	~	11,973
2006-2007	234	780	351	~	1,365
2007-2008	10,465	1,989	4,515	~	16,969
2008-2009	7,074	2,335	658	~	10,067
2009-2010	1,780	294	380	~	2,454
2010-2011	1,789	~	~	~	1,789
2011-2012	882	~	~	~	882
2012-2013	~	70	1,328	~	1,398
2013-2014	1,037	531	2,142	~	3,710
2014-2015	2,328	930	987	~	4,245
2016-2017	442	3,349	360	15,567	19,718
Total	114,170	12,774	20,081	55,312	202,337
Average (96/97-16/17)*	6,009	672	1,057	2,911	10,649
Average (06/07-16/17)*	2,603	1,028	1,072	1,557	6,260
Average Excluding Zero Take-up years (06/07-16/17)*	2,892	1,285	1,340	15,567	6,260

Source: Sustainable Economic Development Monitor, 2010, Malvern Hills Employment Land Availability, 2015, South Worcestershire Authorities' Monitoring Reports, 2016/17

* Average based on available years

Table A12.2 - Employment Floorspace Take-Up by B Class Use 1996-2017 (Worcester)

Time Period	Floorspace, sqm				
	B1	B2	B8	B1/B2/B8	Total
1996-1997	~	7,655	1,566	1,373	10,594
1997-1998	~	1,873	384	16,644	18,901
1998-1999	4,603	3,824	357	234	9,018
1999-2000	1,622	4,270	~	6,410	12,302
2000-2001	3,001	5,850	6,126	~	14,977
2001-2002	12,707	100	~	~	12,807
2002-2003	5,687	1,952	~	413	8,052
2003-2004	805	1,494	~	~	2,299
2004-2005	7,541	~	~	1,609	9,150
2005-2006	9,368	200	~	371	9,939
2006-2007	5,326	3,605	~	446	9,377
2007-2008	~	~	550	~	550
2008-2009	10,068	~	10,399	10,159	30,626
2009-2010	~	~	~	4,117	4,117
2010-2011	312	~	~	~	312
2011-2012	4,416	~	~	~	4,416
2012-2013	2,283	420	~	1,296	3,999
2013-2014	~	~	192	~	192
2014-2015	2,046	~	~	13,100	15,146
2015-2016	~	~	~	421	421
2016-2017	~	~	~	6,236	6,236
Total	69,785	31,243	19,574	62,829	183,431
Average (96/97-16/17)*	3,323	1,488	932	2,992	8,735
Average (06/07-16/17)*	2,223	366	1,013	3,252	6,854
Average Excluding Zero Take-up years (06/07-16/17)*	4,075	2,013	3,714	5,111	6,854

Source: Worcester City Council Employment Land Monitor, 2017

Table A12.3 – Employment Floorspace Take-up by B-class Use, Wychavon

Time Period	Floorspace, sqm				
	B1	B2	B8	B1/B2/B8	Total
2005-2006	6,375	25,248	9,164	1,278	42,065
2006-2007	6,652	7,282	13,806	22,237	49,977
2007-2008	5,371	4,085	13,465	588	23,509
2008-2009	2,540	965	210	5,108	8,823
2009-2010	7,734	7,953	12,713	1,759	30,159
2011-2012	1,755	1,329	4,503	0	7,587
2012-2013	576	5,051	2,275	0	7,902
2016-2017	1,809	890	18,846	0	21,545
Total	32,812	52,803	74,982	30,970	191,567
Average (06/07-16/17)*	3,777	3,936	9,403	4,242	21,357
Average Excluding Zero Take-up years (06/07-16/17)*	3,777	3,936	9,403	6,194	21,357

Source: Sustainable Economic Development Monitor, 2010, South Worcestershire Authorities' Monitoring Reports, 2011/12, 2012/13, 2016/17

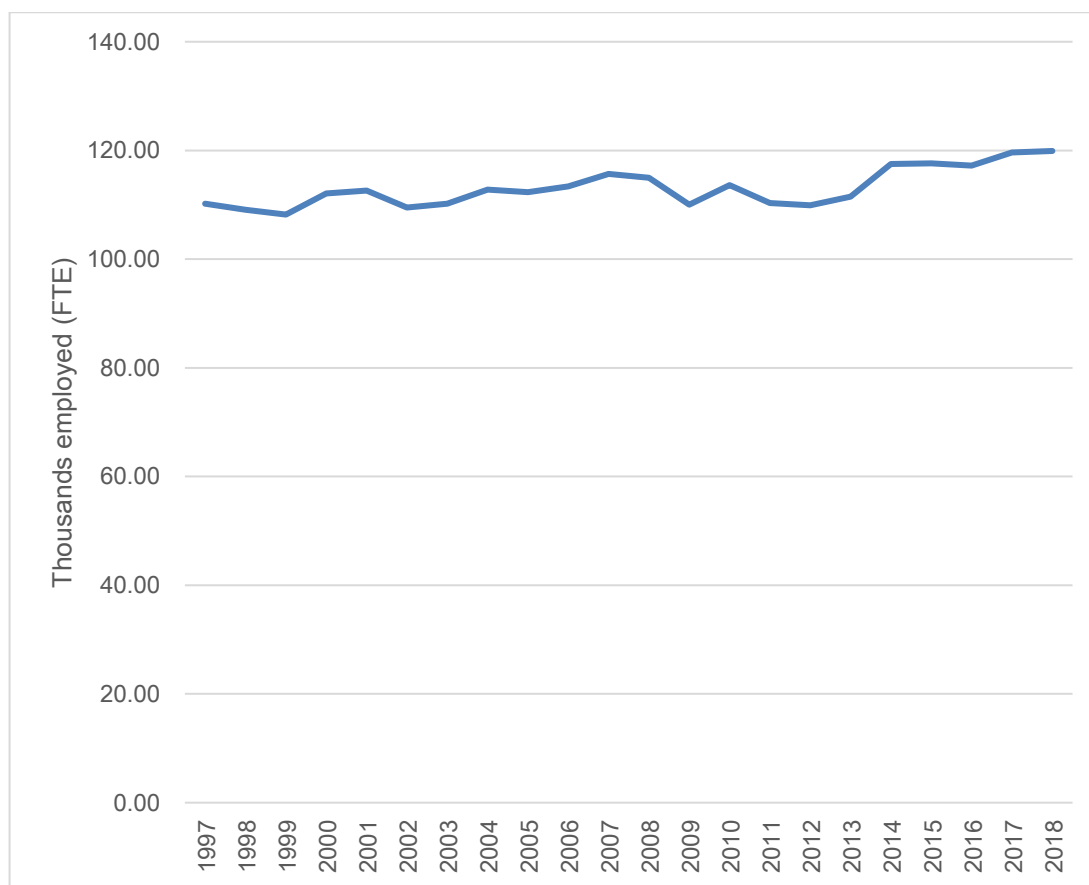
* Average based on available years

Appendix 13

Experian Model Analysis and Employment Land Forecasting

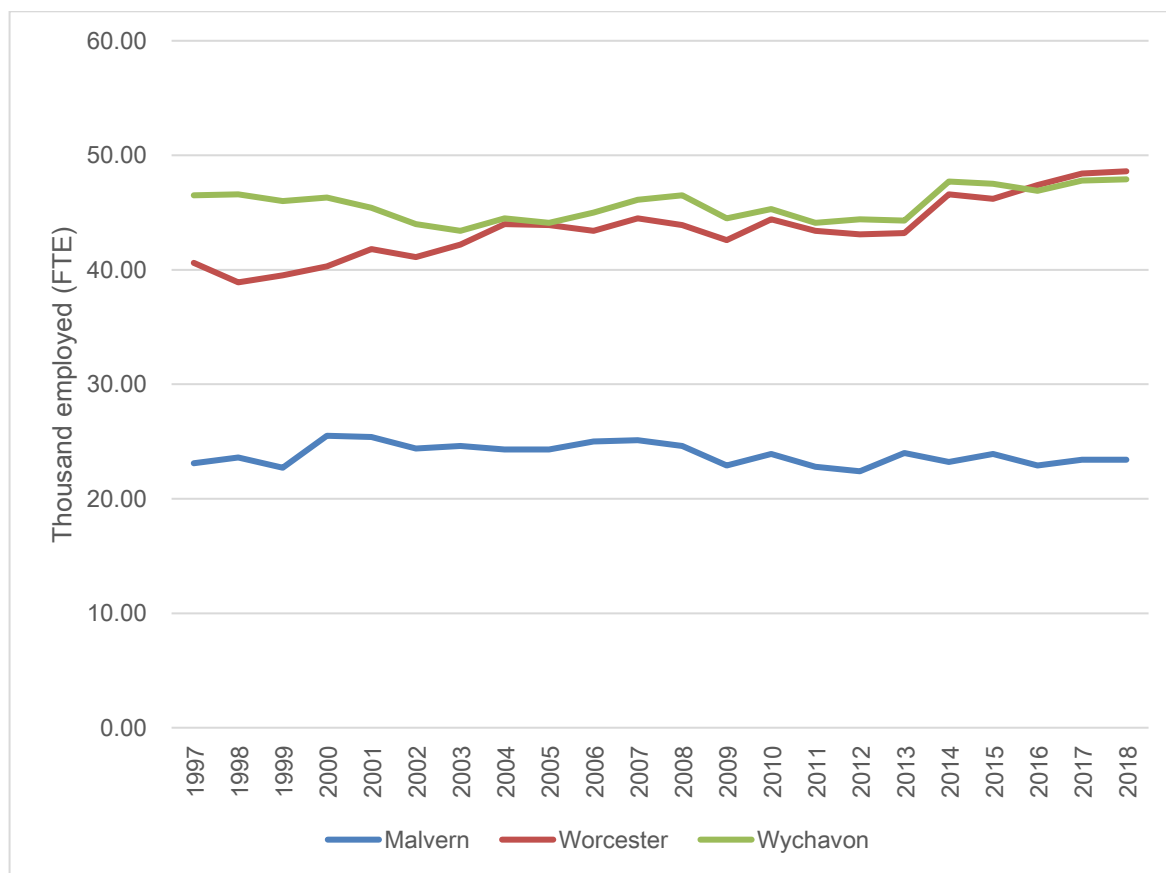
Appendix 13 – Experian Model Data for South Worcestershire & Land Forecasting Tables

Figure A13.1: Overall Employment (FTE) in 3 Authorities combined, 1997-2018



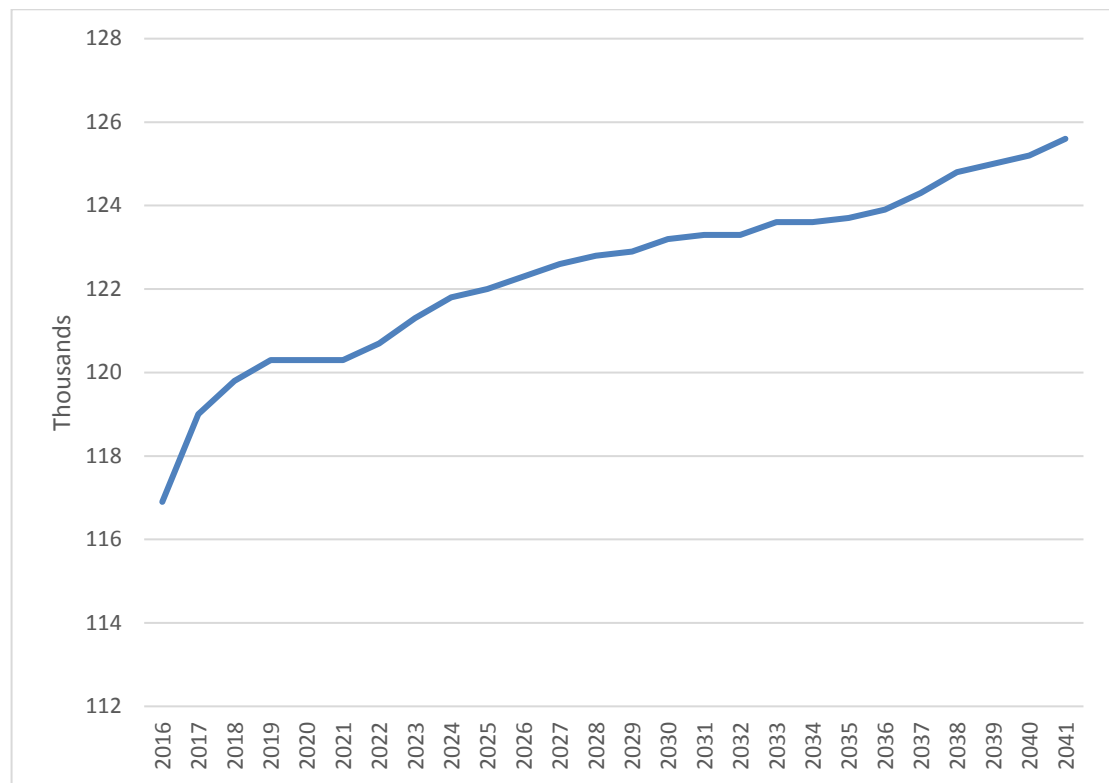
Source: Experian Econometric Forecast, 2018

Figure A13.2: Overall Employment (FTE) in three Authorities overlaid, 1997-2018



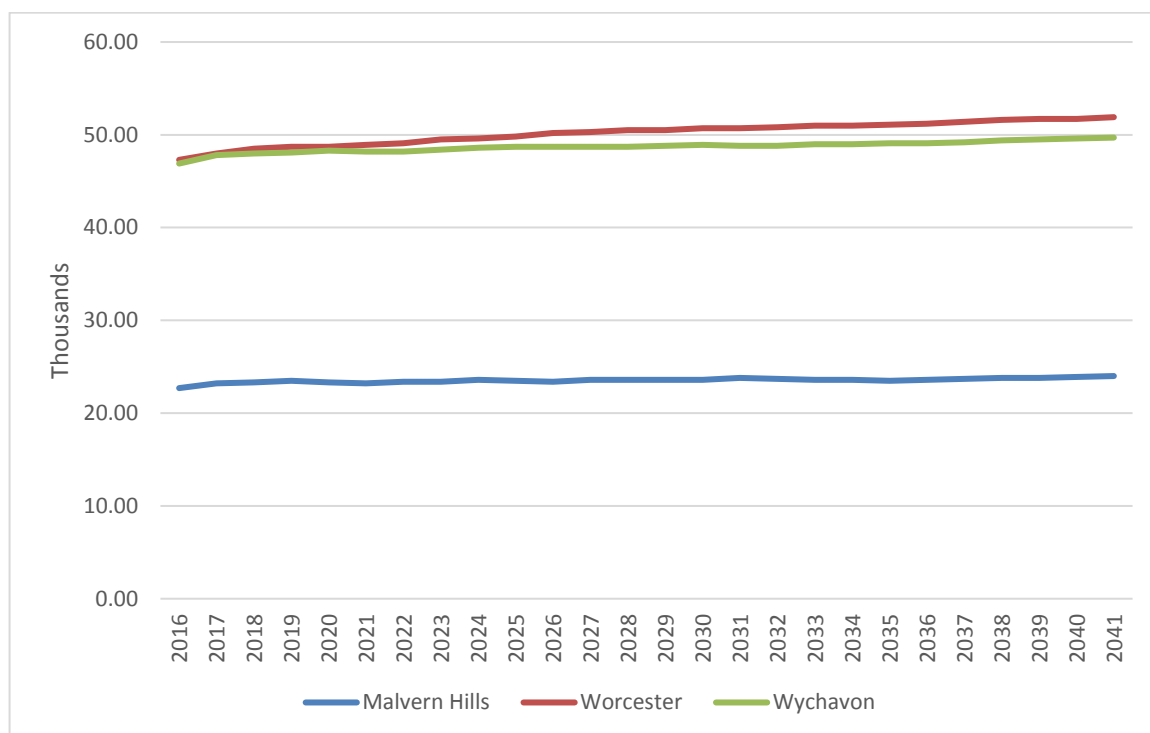
Source: Experian Econometric Forecast, 2018

Figure A13.3: Forecast Employment (FTE) in 3 Authorities Combined, 2016-2041



Source: Experian Econometric Forecast, 2018

Figure A13.4: Forecast Employment in (FTE) 3 Authorities Overlaid, 2016-2041



Source: Experian Econometric Forecast, 2018

- A13.1 The Experian data therefore suggests that overall employment in Malvern declined over the period 1997-2018 from a starting point of 23,600 people in 1997 to an end point in 2018 of 23,400. This was not a 'straight line' decline however, with employment hitting a high point of 25,500 in 2000 and a low point in 2012 at the end of the UK recessionary period of 22,400.
- A13.2 The same pattern was not recorded across the other 2 Local Authorities – both Worcester and Wychavon recorded higher levels of employment in 2018 compared to 1997. The result was that the combined total for the 3 Authorities was higher at the end of the period than the beginning.
- A13.3 The location recording reasonably sustained growth was Worcester. In 1997 the total employment recorded in Worcester was 40,600 and the lowest employment over the period was recorded at 38,900 in 1998. After this point employment was not recorded as having shown growth in every year but by 2018 employment was recorded as 48,600 and this did represent the highest total in the period.
- A13.4 Wychavon also recorded the highest total employment over the period in 2018 - when 47,900 jobs were recorded for the area. Employment at the start of the period was measured at 46,500. Over the period as a whole, employment declined to a low point of 43,400 in 2003.
- A13.5 The result of these changes was that the combined total for the 3 Local Authorities increased from 109,100 in 1997 to a total of 119,900 in 2018. The low point of the period was 1999 when employment reached the lowest point of 108,200.

A13.6 The overall data, whilst providing some context, is of limited use without considering the variations in the sectors providing the employment.

Sector Level Forecasts

A13.7 The Experian econometric forecast breaks down employment to 12 broad sectors of employment and also into 38 more detailed categories of employment. These provide employment change during the projected time periods, and also allow those jobs relevant to employment land to be identified. It should be noted that for this model the forecasts reflect a 'policy off' position. In other words, this is a non-intervention scenario in which none of the LEP or Local Authority specific initiatives are considered. Later we consider some reasonable sensitivity analysis to examine other potential scenarios.

A13.8 The table below shows the changes forecast in employment over the period 2016-2041 for the 12 broad sectors.

Table A13.1: Employment Forecast by Broad Sector (3 Authorities combined, thousands)

Category	2016	2041	Change 2016-41
Accommodation, Food Services & Recreation	9.50	11.3	1.80
Agriculture, Forestry & Fishing	2.30	2.5	0.20
Construction	5.10	4.9	-0.20
Extraction & Mining	0.00	0.0	0.00
Finance & Insurance	1.60	1.9	0.30
Information & communication	3.80	4.2	0.40
Manufacturing	19.10	23.0	3.90
Professional & Other Private Services	20.80	21.6	0.80
Public Services	28.50	30.1	1.60
Transport & storage	6.20	7.5	1.30
Utilities	1.60	1.4	-0.20
Wholesale & Retail	18.40	17.2	-1.20

Source: Experian Econometric Forecast, 2018

A13.9 The figures above do not always add up to the total workforce projections because of rounding errors.

A13.10 The figures show that despite the overall forecasted rise in employment in the period 2016-2041 there is some variation between the sectors.

A13.11 The largest sectors at the beginning of the planning period (2016) by employment are public services (28,500); professional & other private services (20,800) and

manufacturing (19,100). The forecast predicts that not only will these remain the largest sectors by employment but also to grow of the 2016-41 period. In the case of public services, employment is forecast to grow by 1,600 (6%), for manufacturing a rise of 3,900 employees is forecast (20%) and for professional & other private services a growth of 800 (4%).

A13.12 The other sectors forecast to grow strongly over the period are accommodation, food services & recreation (19%) and transport & storage (21%) but these rates of growth are from a smaller initial starting point.

A13.13 Declining sectors are anticipated to be wholesale & retail trade, construction and utilities.

A13.14 The table below sets out the forecast employment position for the 38 detailed categories of employment. Only those categories with any employment in any year have been included reducing the number of categories to 31.

Table A13.2: Employment Forecast by Category (3 Authorities combined)

Category	2016	2041	Change 2016-41
Accommodation & Food Services	6.60	8.2	1.60
Administrative & Supportive Services	7.60	7.0	-0.60
Agriculture, Forestry & Fishing	2.30	2.5	0.20
Civil Engineering	0.30	0.3	0.00
Computer & Electronic Products (manufacture of)	1.80	2.7	0.90
Computing & Information Services	2.60	3.0	0.40
Construction of Buildings	1.60	1.6	0.00
Education	8.60	7.9	-0.70
Finance	1.60	1.9	0.30
Food, Drink & Tobacco (manufacture of)	4.20	4.2	0.00
Health	7.60	8.7	1.10
Land Transport, Storage & Post	6.20	7.4	1.20
Machinery & Equipment (manufacture of)	2.10	3.9	1.80
Media Activities	0.20	0.2	0.00
Metal Products (manufacture of)	4.20	3.6	-0.60
Non-Metallic Products (manufacture of)	1.80	1.5	-0.30
Other Manufacturing	0.80	0.7	-0.10
Other Private Services	2.80	2.6	-0.20
Printing and Recorded Media (manufacture of)	0.10	0.1	0.00
Professional Services	7.30	8.2	0.90
Public Administration & Defence	4.90	4.0	-0.90
Real Estate	3.10	3.8	0.70
Recreation	2.90	3.0	0.10
Residential Care & Social Work	7.10	9.6	2.50
Retail	9.90	8.6	-1.30
Specialised Construction Activities	2.90	2.6	-0.30

Category	2016	2041	Change 2016-41
Telecoms	0.40	0.4	0.00
Transport Equipment (manufacture of)	1.70	4.5	2.80
Utilities	1.60	1.4	-0.20
Wholesale	8.50	8.5	0.00
Wood & Paper (manufacture of)	1.20	1.0	-0.20

Source: Experian Econometric Forecast, 2018

- A13.15 At the more detailed level of breakdown, the three largest sectors of employment in 2016 are retail (9,900), education (8,600) and wholesale (8,500). In addition, administrative & Supportive Services (7,600), health (7,600), professional services (7,300) and residential care & social work (7,100) all employ over 7,000 people.
- A13.16 In 2041 the largest sectors are forecast to be residential care & social work which is forecast to increase employment by 35% (to 9,600), health which is forecast to increase employment by 14% (to 8,700) and retail which despite a forecast decline of 13% is still expected to employ 8,600.
- A13.17 The fastest growth in employment over the period is forecast to be in the manufacture of transport equipment (265%), manufacture of machinery and equipment (86%), manufacture of computer and electronic products (50%).
- A13.18 The steepest declines in employment over the period are anticipated to be in public administration and defence (-18%), manufacture of wood and paper (-17%) and manufacture of non-metallic products (-17%).
- A13.19 There are three sectors which are each forecast to lose 700 or more jobs over the period (the largest absolute declines for any one sector). These are retail (-1,300 jobs), public administration and defence (-900) and education (-700).

Comparison to Recent Employment Trends

- A13.20 Before drawing the broad conclusions from the forecast data, it is useful to examine the trends which have been taking place over the last 21 years and these trends are set out for broad sectors in the table below.

Table A13.3: Recent Employment Changes by Broad Sector (3 Authorities combined)

Category	1997	2018	Change 1997-2018
Accommodation, Food Services & Recreation	6.7	10.3	3.6
Agriculture, Forestry & Fishing	3.0	3.2	0.2
Construction	5.6	5.1	-0.5
Extraction & Mining	0.0	0.0	0.0
Finance & Insurance	2.0	1.8	-0.2
Information & communication	2.5	3.9	1.4
Manufacturing	23.4	19.3	-4.1
Professional & Other Private Services	15.2	21.8	6.6
Public Services	22.8	28.6	5.8
Transport & storage	6.2	6.6	0.4
Utilities	1.9	1.7	-0.2
Wholesale & Retail	20.9	17.5	-3.4

Source: Experian Econometric Forecast, 2018

- A13.21 What is apparent is that the changes in the actual levels of employment by broad sector have, in general, been somewhat more variable than predicted in the forecast data for the 25 year planning period.
- A13.22 The trends which are predicted to continue are the growth in accommodation, food services & recreation (grew at 54% and now forecast to increase by a further 19%), information & communication (grew at 56% and now forecast to increase by a further 11%) and public services (grew at 25% and now forecast to grow by a further 6%).
- A13.23 As can be seen, employment in each of these sectors grew more rapidly in the last 20 years than is predicted in the forecast period.
- A13.24 The decline in manufacturing is a trend which is forecast to reverse in the period 2016-2041. In the period 1997-2018 manufacturing employment declined in the area by 4,100 (a decline of 17.5%). The sector is now forecast to grow by 20% to the period to 2041 and such growth would replace 3,900 of those jobs lost.
- A13.25 These patterns can be examined in greater detail by consideration of the 38 categories of employment and the recent changes in employment in these categories is shown in the table below (with those categories in which no employment is recorded in any year excluded).

Table A13.4: Recent Employment Changes by Category (3 Authorities combined)

Category	1997	2018	Change 1997- 2018
Accommodation & Food Services	4.9	7.3	2.4
Administrative & Supportive Services	7.2	7.9	0.7
Agriculture, Forestry & Fishing	3.0	3.2	0.2
Civil Engineering	0.5	0.3	-0.2
Computer & Electronic Products (manufacture of)	1.5	1.8	0.3
Computing & Information Services	1.3	2.7	1.4
Construction of Buildings	1.6	1.7	0.1
Education	6.9	8.6	1.7
Finance	1.7	1.8	0.1
Food, Drink & Tobacco (manufacture of)	2.4	4.1	1.7
Health	5.3	8.2	2.9
Land Transport, Storage & Post	6.2	6.5	0.3
Machinery & Equipment (manufacture of)	3.5	2.4	-1.1
Media Activities	0.4	0.2	-0.2
Metal Products (manufacture of)	5.9	4.2	-1.7
Non-Metallic Products (manufacture of)	4.6	1.8	-2.8
Other Manufacturing	1.5	0.7	-0.8
Other Private Services	2.1	2.7	0.6
Printing and Recorded Media (manufacture of)	1.0	0.1	-0.9
Professional Services	5.1	7.7	2.6
Public Administration & Defence	6.3	4.6	-1.7
Real Estate	1.0	3.5	2.5
Recreation	1.8	2.9	1.1
Residential Care & Social Work	4.1	7.4	3.3
Retail	12.0	9.3	-2.7
Specialised Construction Activities	3.1	2.8	-0.3
Telecoms	0.3	0.4	0.1
Transport Equipment (manufacture of)	0.7	1.9	1.2
Utilities	1.9	1.7	-0.2
Wholesale	8.8	8.2	-0.6
Wood & Paper (manufacture of)	0.9	1.3	0.4

Source: Experian Econometric Forecast, 2018

- A13.26 This table also highlights the dramatic variation in employment over the last twenty years in some categories of employment.
- A13.27 The table shows that the fastest growth recorded across three Authorities by category of employment was in real estate (250%), manufacture of transport equipment (171%); computing and information services (107%); and residential care and social work (80%) were the four fastest growing categories. In absolute terms, the largest growth in employment over the period was recorded in residential care and social work (with growth of 3,300 people employed).
- A13.28 All of these four sectors are expected to continue to increase levels of employment – in the case of the manufacture of transport equipment and residential care and social work the growth is forecast to remain strong – in the case of real estate and computing and information services the growth will slow.

Model Two Floorspace Forecasts for Three Local Authorities

Malvern Hills District

Assuming all single storey

Table A13.5 – Forecast Employment Land and Floorspace Demand based on Experian Forecasts 2016-2041 – Malvern Hills District

SIC Group	Workforce Growth 2016-41	Percentage Occupying B1/2/8 Space	Growth Number of Jobs on B1/2/8 Space	Floorspace Per Job, sqm	Floorspace Required, sqm
Agriculture, Forestry & Fishing	400	5	20	12	240
Accommodation, Food Services & Recreation	1100	0	0		0
Construction	400	26	104	12	1,248
Wholesale & Retail	-300	5	-15	70	-1,050
Extraction & Mining	0	5	0	12	0
Finance & Insurance	100	100	100	12	1,200
Information & Communication	-100	100	-100	12	-1,200
Manufacturing	-100	100	-100	36	-3,600
Professional & Other Private Services	900	100	900	12	10,800
Public Services	1300	22	286	12	3,432
Transport & storage	100	48	48	70	3,360
Utilities	0	26	0	12	0
Total	3,800		1,243		
Increase in Floorspace – Growth Sectors (sqm)					20,280
Decline in Floorspace – Declining Sectors (sqm)					- 5,850
Net Change in Floorspace Demand (sqm)					14,430
Assumed Developable Floorspace per Hectare (sqm/ha)					3,900
Equivalent Employment Land Needed – Growth Sectors (ha)					5.2
Equivalent Employment Land Needed – Declining Sectors (ha)					-1.5
Equivalent Employment Land Needed – Net (ha)					3.7

Source: BE Group and Mickledore, 2018 analysis of Experian forecasts

Land Requirements Assuming Two Storey Offices

Table A13.6 – Forecast Employment Land Assuming Two-Storey Offices, Malvern Hills District

Land Area Requirements to 2041 Assuming two-storey Office Buildings	Floorspace Required, sqm
Equivalent Employment Land Needed – Growth Sectors (ha)	3.0
Equivalent Employment Land Needed – Declining Sectors (ha)	-1.3
Equivalent Employment Land Needed – Net (ha)	1.7

Source: BE Group and Mickledore, 2018 analysis of Experian forecasts

Worcester City

Assuming all single storey

Table A13.7 – Forecast Employment Land and Floorspace Demand based on Experian Forecasts 2016-2041 – Worcester City

SIC Group	Workforce Growth 2018-41	Percentage Occupying B1/2/8 Space	Growth Number of Jobs on B1/2/8 Space	Floorspace Per Job, sqm	Floorspace Required, sqm
Agriculture, Forestry & Fishing	0	5	0	12	0
Accommodation, Food Services & Recreation	1000	0	0		0
Construction	-300	26	-78	12	-936
Wholesale & Retail	-1300	5	-65	70	-4,550
Extraction & Mining	0	5	0	12	0
Finance & Insurance	200	100	200	12	2,400
Information & Communication	400	100	400	12	4,800
Manufacturing	1700	100	1,700	36	61,200
Professional & Other Private Services	-100	100	-100	12	-1,200
Public Services	1000	22	220	12	2,640
Transport & storage	500	48	240	70	16,800
Utilities	-300	26	-78	12	-936
Total	2,800		2,439		
Increase in Floorspace – Growth Sectors (sqm)					87,840
Decline in Floorspace – Declining Sectors (sqm)					- 7,622
Net Change in Floorspace Demand (sqm)					80,218
Assumed Developable Floorspace per Hectare (sqm/ha)					3,900
Equivalent Employment Land Needed – Growth Sectors (ha)					22.5
Equivalent Employment Land Needed – Declining Sectors (ha)					-2.0
Equivalent Employment Land Needed – Net (ha)					20.6

Source: BE Group and Mickledore, 2018 analysis of Experian forecasts

Land Requirements Assuming Two Storey Offices

Table A13.8 – Forecast Employment Land Assuming Two-Storey Offices, Worcester City

Land Area Requirements to 2041 Assuming two-storey Office Buildings	Floorspace Required, sqm
Equivalent Employment Land Needed – Growth Sectors (ha)	21.3
Equivalent Employment Land Needed – Declining Sectors (ha)	-1.6
Equivalent Employment Land Needed – Net (ha)	19.7

Source: BE Group and Mickledore, 2018 analysis of Experian forecasts

Wychavon District

Assuming all single storey

Table A13.9 – Forecast Employment Land and Floorspace Demand based on Experian Forecasts 2016-2041 – Wychavon District

SIC Group	Workforce Growth 2016-41	Percentage Occupying B1/2/8 Space	Growth Number of Jobs on B1/2/8 Space	Floorspace Per Job, sqm	Floorspace Required, sqm
Agriculture, Forestry & Fishing	-700	5	-35	12	-420
Accommodation, Food Services & Recreation	900	0	0		0
Construction	-400	26	-104	12	-1,248
Wholesale & Retail	1200	5	60	70	4,200
Extraction & Mining	0	5	0	12	0
Finance & Insurance	100	100	100	12	1,200
Information & Communication	200	100	200	12	2,400
Manufacturing	3400	100	3,400	36	122,400
Professional & Other Private Services	1000	100	1,000	12	12,000
Public Services	500	22	110	12	1,320
Transport & storage	1000	48	480	70	33,600
Utilities	-100	26	-26	12	-312
Total	7,100		5,185		
Increase in Floorspace – Growth Sectors (sqm)					177,120
Decline in Floorspace – Declining Sectors (sqm)					- 1,980
Net Change in Floorspace Demand (sqm)					175,140
Assumed Developable Floorspace per Hectare (sqm/ha)					3,900
Equivalent Employment Land Needed – Growth Sectors (ha)					45.4
Equivalent Employment Land Needed – Declining Sectors (ha)					-0.5
Equivalent Employment Land Needed – Net (ha)					44.9

Source: BE Group and Mickledore, 2018 analysis of Experian forecasts

Land Requirements Assuming Two Storey Offices

Table A13.10 – Forecast Employment Land Assuming Two-Storey Offices, Wychavon District

Land Area Requirements to 2041 Assuming two-storey Office Buildings	Floorspace Required, sqm
Equivalent Employment Land Needed – Growth Sectors (ha)	43.2
Equivalent Employment Land Needed – Declining Sectors (ha)	-0.3
Equivalent Employment Land Needed – Net (ha)	43.0

Source: BE Group and Mickledore, 2018 analysis of Experian forecasts