

**Bromyard Employment Land Study
Herefordshire Council**

Draft Final Report

June 2019



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EXECUTIVE SUMMARY

- i. The Bromyard Employment Land Study is to guide Herefordshire Council's planning policy within future development plan documents with regard to employment land in and around Bromyard.
- ii. The report reviews and updates the findings of the Adopted Herefordshire Core Strategy (October 2015) which identifies a need for 5 ha of additional employment land to be provided in Bromyard. This study reviews the current employment market within Bromyard and comments on the on-going appropriateness of the 5 ha allocation. This report provides recommendations as to likely further demand for employment land in Bromyard and potential sites for that land.

Socio-Economic Profile

- iii. The characteristics suggest a stable population in and around Bromyard, with the Bromyard Study Area comprising 5.4 percent of the Herefordshire population. This includes the town and rural surrounding areas as encompasses areas of businesses which may be located in a rural area but have strong links to Bromyard, or picking up rural residents that would use Bromyard as their main centre. The Bromyard Study Area can be seen in Figure E1.

Figure E1 – Bromyard Study Area Context Map



Source: Nomis, 2019

- iv. Unemployment in the area is low. The Bromyard workforce is very localised with almost 70 percent of the residential working population employed in Bromyard or elsewhere in Herefordshire.
- v. The largest industry sector by employment in the Bromyard Study Area is manufacturing, comprising 27.5 percent of the workforce. This proportion is over twice that of Herefordshire as a whole. In particular, the largest manufacturing subsectors by employment include **manufacture of motor vehicles, trailers and semi-trailers** (600 workers) and **manufacture of beverages** (150 workers).
- vi. The forecasts for employment estimate modest growth. Positive growth is predicted to be in the shorter term, with employment peaking in 2024 at 4,250 jobs, before slowly but steadily declining to 4,180 jobs by 2031.

Property Market Assessment

- vii. The Bromyard commercial property market is a very small, localised market. Limited turnover of premises is evident with the town averaging only about one recorded property transaction per year. Current occupiers in the town are long-term businesses indicating strong links and loyalty to the town; however, a limited choice of commercial premises available means limited opportunities for local operators to expand or change premises and limited in-migration of new businesses.
- viii. Locally active agents suggest that there is demand for good quality industrial units and potentially small-scale office start-up units.

Company Survey and Business Engagement

- ix. The business survey shows a snapshot of the current market within Bromyard, with an overall response that local businesses are satisfied with their current premises. Respondents showed a strong sense of loyalty to Bromyard with several companies having been at their current premises for a significant time. No respondent expressed a desire to relocate premises or in need of alternative sites.
- x. More detailed consultations were carried out with a sample of businesses within Bromyard, which also showed loyalty to the area over the long term. However, it also provided anecdotal evidence of how key businesses have dealt with limited property options in the past. Expansion of Polytec for additional manufacturing premises has occurred in Telford. They are retaining their Bromyard site, yet had to seek alternative arrangements for expansion as could not find suitable premises/ land in Bromyard.

Additionally, Marches Bottling and Packaging are currently looking for space to expand. Ideally they wish to expand on their existing rural site, but have also been looking at alternative solutions, currently without success.

Employment Land Supply

- xi. The existing employment areas have been reviewed and scored (out of 100) according to their current functionality, potential expansion and on-going appropriateness for employment uses. The potential employment sites have been reviewed and scored (out of 110) by a set of different measures to assess their ability and availability to become employment sites.

Table E1 – Existing Employment Areas

Employment Site	Total Size (ha)	Site Score (max 100)	Suitability for Employment
Linton Trading Estate	2.90	56	Small plot at front of site, approx. 0.23 ha
Porthouse	8.76	62	0.8 ha in two separate plots
Station Trading Estate	2.78	47	No Capacity

Source: Herefordshire Council, Call for Sites 2017, BE Group Reviews

* For a map of sites, refer to Figure 13 in Section 6.0

Table E2 – Potential Employment Areas

Employment Site	Total Size (ha)	Site Score (max 110)	Suitability for Employment
Oliver Land south of Linton Industrial Estate	5.60	35	Not suitable for employment due to constraints impacting on viability
Land to the west of Panniers Lane	10.30	~	Not available for employment uses
The Depot	~	~	Not available for employment uses
Land to the west of Tenbury Road (north of Rugby Club)	9.40	48	Marginal Site
Submitted Sites			
Land adjacent to Linton Court	0.15	55	Suitable for small-scale office or light industrial units
Field adjacent to B4214, Little Froome Farm	5.0	61	Suitable for small to mid-sized industrial and warehousing uses

Source: Herefordshire Council, Call for Sites 2017, BE Group reviews

* For a map of sites, refer to Figure 13 in Section 6.0

- xii. The three existing employment areas are all capable of providing an on-going employment function for Bromyard. There is approximately some 0.93 ha of

employment land within these three existing employment areas that could be developed for further employment uses.

- xiii. In assessing other potential sites, it is considered that the two sites emerging from the Call for Sites process both represent reasonable opportunities for Bromyard. The **Land adjacent to Linton Court** (0.15 ha) could service the very small enterprise market, including sole operators, and providing a mix of office (B1a) and light industrial (B1c) premises would be appropriate. Further clarifications would need to be secured regarding the access and traffic movements for the site and whether a shared access point with Linton Court would be appropriate and workable.
- xiv. The **Field adjacent to B4214, Little Froome Farm** (5 ha) would be appropriate for small to mid-sized industrial and warehousing premises. While not forming a contiguous expansion of the Bromyard urban footprint, it is recognised that the site to the north, between this site and Bromyard, has more significant sloping and is likely to be costlier to develop. The site has direct frontage to the A465 and straightforward connectivity to the A44. The site could be subdivided into serviced, development plots and would provide an option for the existing manufacturing businesses to acquire and develop purpose-built premises.

Employment Land and Floorspace Demand

- xv. The demand for employment floorspace to 2031 is dependent on the current market conditions and direction, as well as potential future growth (or declines) in the economy. This contains a level of uncertainty; however, reviewing the demand profile from multiple perspectives helps to gain a rounded view of the potential demand for employment land.
- xvi. The Oxford Economics forecasts for Bromyard employment suggest a modest growth between 2018 and 2031 in Professional Services employment and Other employment. The forecasts project modest declines in Production and Public Services, as seen in the table below. The demand for employment floorspace can be inferred from these forecasts through assuming an average floorspace per worker, with analysis showing growth peaks in 2024 for the total employment, with a gradual decline thereafter.

Table E3 – Projected Employment by Broad Group

Sector Group	2011	2016	2018	2021	2024	2026	2031	Change 2018-31
Production	1,090	1,280	1,440	1,460	1,450	1,430	1,380	-60
Professional Serv.	560	580	610	650	670	670	680	+70
Public Serv.	940	940	980	970	970	970	960	-20
Other	840	900	1,110	1,140	1,160	1,160	1,160	+50
Total	3,430	3,700	4,140	4,210	4,250	4,230	4,180	+40

Source: Oxford Economics, 2018

- xvii. The table below provides estimates of the change in floorspace and resulting employment land requirements emerging from the forecast changes in employment groups.

Table E4 – Forecast Employment Land and Floorspace Demand based on Employment Forecasts, 2018-31

Increase in Floorspace – Growth Sectors (sqm)	1,400
Decline in Floorspace – Declining Sectors (sqm)	-1,817
Net Change in Floorspace Demand (sqm)	-417
Assumed Developable Floorspace per Hectare (sqm/ha)	3,900
Equivalent Employment Land Needed – Growth Sectors (ha)	0.36
Equivalent Employment Land Needed – Declining Sectors (ha)	-0.47
Equivalent Employment Land Needed – Net (ha)	-0.11

Source: BE Group, 2019 analysis of OE forecasts

- xviii. For employment land planning, it is more appropriate to consider just the growth sectors, which are projected to have a growth in floorspace of 1,400 sqm, which equates to a demand for 0.36 ha of employment land.
- xix. However, as mentioned above, the employment numbers are projected to decline from a peak in 2024. Therefore, it is instructive to look at the demand for employment floorspace resulting from the growth period 2018-2024. This is calculated in the table below.

Table E5 – Forecast Employment Land and Floorspace Demand based on Employment Forecasts, 2018-24

Increase in Floorspace – Growth Sectors (sqm)	1,574
Decline in Floorspace – Declining Sectors (sqm)	-26
Net Change in Floorspace Demand (sqm)	1,548
Assumed Developable Floorspace per Hectare (sqm/ha)	3,900
Equivalent Employment Land Needed – Growth Sectors (ha)	0.40
Equivalent Employment Land Needed – Declining Sectors (ha)	-0.01
Equivalent Employment Land Needed – Net (ha)	0.40

Source: BE Group, 2019 analysis of OE forecasts

- xx. Reviewing this growth period 2018-24 means that the net floorspace demand over this period is 1,548 sqm or 0.40 ha of employment land. Just looking at the growth sectors results in a demand from those sectors of 1,574 sqm or 0.40 ha of land.
- xxi. As a corroboration, the demand for B-class employment was also reviewed from the perspective of population growth. As the population of the Bromyard Study Areas, this additional population would have a need for a variety of services and facilities, including employment opportunities, some of which would be on B-class employment land. The table below provides the calculations of floorspace and land demand for B-class employment.

Table E6 – Forecast Employment Land and Floorspace Demand based on Additional Population in New Dwellings, 2018-31

Additional Dwellings 2018-31	300
Estimated Population in New Dwellings	690
Employed and Working in Bromyard	100
Increase in Floorspace (sqm)	1,537
Assumed Developable Floorspace per Hectare (sqm/ha)	3,900
Equivalent Employment Land Needed (ha)	0.39

Source: BE Group, 2019 analysis of OE forecasts

- xxii. **Based on this methodology looking at dwelling growth, the forecast demand for B-class floorspace is approximately 1,540 sqm, which is equivalent to 0.39 ha.**
- xxiii. It is recommended that a significant degree of flexibility is incorporated into the forecasts to enable businesses to grow within the town. While for a larger area a percentage increase (e.g. +20 percent) might be considered appropriate, given the small numbers in the forecasts, compared to actual business unit sizes, BE Group recommends adopting a level five times that of the forecast level.
- xxiv. **Therefore, the recommended employment forecast demand is 7,900 sqm and the forecast employment land demand is 2.0 ha.**

Recommendations

- xxv. **Recommendation One: Employment Floorspace and Land Need**
It is recommended that the employment floorspace need for Bromyard to 2031 is 7,900 sqm of B-class employment floorspace. Employment land of 2.0 ha is required to meet that need. This is a total requirement that may be met across Bromyard in several sites or as a single site.
- xxvi. **Recommendation Two: Consideration of 5 ha Provision in the Core Strategy**
The Core Strategy designates a provision for 5 ha of employment land in Bromyard. While the above recommendation is for 2 ha, Council may wish to retain the 5 ha level as an aspirational or stretch target for Bromyard. As seen in the forecasting evidence, the demand is likely to be in the first half of the forecast period. Therefore, employment provision should be flexible enough to incorporate growth in the earlier years of the forecast period.

xxvii. **Recommendation Three: Provision of Employment Land**

The Call for Sites process revealed two potential locations for further employment uses. While not ideal sites, they represent reasonable solutions for the provision of employment land for Bromyard. These sites are:

- Land adjacent to Linton Court: 0.15 ha
- Field adjacent to B4214, Little Froome Farm: 5 ha

xxviii. **Recommendation Four: Delivery of the Sites**

The land adjacent to Linton Court should be deliverable within a short timeframe. It is recommended that Council engage with the landholder in order to encourage the appropriate development of this site. For the Little Froome Farm site it is likely that the landholder will look to gain planning approval for the site and perhaps develop serviced plots, and then take to the market as development land. Many businesses will be looking at the built premises market, rather than looking to acquire a site and develop themselves, therefore there is a need for an entity to develop some of these parcels speculatively in order to then lease the premises to occupiers. Council may choose to have a role in this, although may also look to encourage the landholder to develop units speculatively.

1.0 INTRODUCTION

- 1.1 The Bromyard Employment Land Study is to guide Council's planning policy within future development plan documents with regard to employment land in and around Bromyard. Bromyard had a population of approximately 4,100 persons at the time of the 2011 Census and supports a rural population of a further 5,900 persons. It has an established manufacturing base due to long-term businesses in the town, which provides a consistent stock of employment opportunities. It is important to continue to support the economic base of Bromyard by providing employment land that is deliverable and appropriate for local businesses' needs.
- 1.2 The Adopted Herefordshire Core Strategy (October 2015), identifies a need for 5 ha of additional employment land to be provided in Bromyard. This has yet to be allocated or developed. This study is to review the current employment situation within Bromyard and ascertain whether the 5 ha allocation is still appropriate, and if so, what type of employment land would be required within the town and possible options for future sites.
- 1.3 The study is to provide robust evidence to support policy formulation and future examination of a development plan document.
- 1.4 The Bromyard Employment Land Study has been prepared by BE Group to advise Herefordshire Council on Bromyard's employment land and demand.

Methodology

- 1.5 To examine the employment land supply and demand issues in Bromyard, the Employment Land Study has incorporated various primary and secondary research techniques:
- A review has been undertaken of the overarching existing policies and planning that will influence employment land in Bromyard
 - The existing socio-economic and demographic characteristics of the residential and working populations have been analysed, using Office of National Statistics (ONS) data
 - Site visits, face-to-face and telephone interviews with property market representatives and key local businesses
 - A wider telephone-based business survey was undertaken of businesses of the types that typically locate on employment land (office users, industrial users,

warehousing).

- The property market was also reviewed by critiquing current vacancies in the town and past transactions of premises and land over the last decade.
- Potential employment land options were assessed and graded as to their potential to accommodate employment growth at Bromyard.
- The demand for employment land to 2031 was assessed using employment number forecasts prepared by Oxford Economics. This was corroborated by the evidence gathered through the review of the property market and the consultations with local business and property representatives.
- The evidence was brought together in a series of recommendations for the employment provision in Bromyard to 2031.

2.0 POLICY CONTEXT

National

National Planning Policy Framework (NPPF) (July 2018)

- 2.1 The framework sets out planning policies for England, as made by the Government, and the ways in which they can be applied. The introduction states that it “*provides a framework within which locally-prepared plans for housing and other development can be produced.*” The NPPF must be taken into account when developing local authority development plans and is a material consideration in planning decisions.
- 2.2 Key for employment will be Chapter 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 updating 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.”*

Herefordshire Council

Herefordshire’s Economic Vision 2016

- 2.3 This overall aim of the Economic Vision is to create a strategy to capitalise on Herefordshire’s full economic potential through four ambitious, yet sustainable and achievable objectives.
- *‘To support the growth of the Herefordshire economy by identifying priority projects*
 - *To attract investment to Herefordshire and guide it within the county*
 - *To raise the profile of Herefordshire and the investment opportunities*
 - *To provide Herefordshire with clear priorities for negotiations’.*
- 2.4 For the business sector of Herefordshire, 10,000 new jobs and 1,000 new businesses are to be created by 2031.

- 2.5 A series of projects are highlighted across the County including the potential creation of business incubator centres in market towns. Any market town '*where there is a shortage of business accommodation or where known demand exists*' will be a priority. Delivery of these centres will be through new build premises, refurbishment/conversion of existing buildings or a development agreement with a third party provider.

Herefordshire Local Plan Core Strategy 2011-2031 (Adopted October 2015)

- 2.6 The Core Strategy has been created as the first key document in the production of the Local Plan. The Core Strategy's vision seeks new employment land to complement new houses and support higher income jobs and '*a genuine commitment by all businesses to sustainable development will underpin a unique quality of life*'.
- 2.7 Policy BY1 of the Core Strategy states that "*Bromyard will accommodate a minimum of 500 new homes together with around 5 hectares of new employment land during the plan period.*" Policy BY1 states that this employment land addition will come forward through the Bromyard Development Plan. Sites will be encouraged where they can '*accommodate small scale employment sites including live/ work units within and around the town*'. This Bromyard Employment Land Study forms part of the assessment of Bromyard to inform the Bromyard Development Plan.
- 2.8 For Herefordshire as a whole, Policy E1 – Employment provision aims to '*provide a range of locations, types and sizes of employment buildings, land and offices to meet the needs of the local economy*'. The explanation supporting Policy E1 states that Hereford will continue to provide a large proportion of the employment supply in the County and that '*the market towns of Leominster, Bromyard, Kington, Ross-on-Wye and Ledbury will also continue to support employment development through the rest of the county at existing and/or new strategic employment sites.*' The main strategic employment location in the market towns are listed and does not include any locations in Bromyard.
- 2.9 Policy E5 regarding Town Centres applies for Bromyard with development being favourable within the town centre, then edge of centre sites, followed by out of centre locations. This latter location for development would need to have good transport links and be well connected to the centre.
- 2.10 The Core Strategy sets out an overall employment land target of 148 ha over the plan period. This includes a continuous supply of employment land of 37 ha of readily

available employment land to be made available over a five-year period. Policy SS5 – Employment Provision of the Core Strategy states that “*new strategic employment land locations are identified at Hereford (15ha); Leominster (up to 10ha); Ledbury (15ha), and Ross-on-Wye (10ha).*” The policy states further that employment land provision in Bromyard will be brought forward through the Bromyard Development Plan Document. This Bromyard Employment Land Study will inform the Bromyard Development Plan.

Herefordshire Core Strategy – Sustainability Appraisal including Strategic Environmental Assessment (March 2013)

- 2.11 This Sustainability Appraisal report was created in association with the draft Herefordshire Core Strategy in order to assess any social, environmental or economic effects of any of the strategies. The objectives assessed of relevance to the economy included:
- *‘Support, maintain or enhance the provision of high quality, local or easily accessible opportunities, sited to the changing needs of the local workforce*
 - *Secure a more adaptable and higher skilled workforce*
 - *Maintain or enhance conditions that enable a sustainable economy and continued investment’.*
- 2.12 The two policies specifically for Bromyard comprise of Policy BY1: ‘Development in Bromyard’ which provides the overall strategy for development within all sectors from employment to the environment. Policy BY2: ‘Land at Hardwick Bank and South of the A44 Leominster Road’ details the proposed urban extension. Both policies aim to guide overall growth in Bromyard, specifically in the employment sector through the development of 5 ha of employment land.
- 2.13 Whilst measures have been included in both policies for sustainable transport provision, development is proposed near current residential provision and so allowing easy access to employment opportunities for residents. Policy BY2 in particular will look to provide highway links between the urban extension and the town centre, including provision for public transport, walking and cycling routes.
- 2.14 The overall employment land target of 148 ha over the plan period and the continuous supply of employment land of 37 ha of readily available employment land is to be made available over a five-year period. It is stated that that “*new strategic employment sites are identified at Hereford (15ha); Leominster (up to 10ha); Ledbury (12ha) and*

Bromyard (5ha).” This is slightly different to the more recent Core Strategy (Adopted October 2015) reviewed above as it includes Bromyard as one of the listed areas to make up the 37 ha of readily available employment land. This was removed for the more recent Core Strategy, which stated that employment land provision in Bromyard would be brought forward in a Neighbourhood Development Plan.

Herefordshire Core Strategy – Sustainability Appraisal/ Strategic Environmental Assessment – Adoption Statement 2015

- 2.15 This report sits alongside the Herefordshire Local Plan – Core Strategy and is an update from the 2013 report reviewed above. It acts as a summary of all the supporting documents which have come together to identify the environmental and sustainability issues that may arise from the Local Plan.
- 2.16 Specific policies in relation to Bromyard were discussed in the Full SA report of 2013, which included strategic allocation sites for housing and employment. From this document being produced, the policies for Bromyard were strengthened *‘in order to help mitigate potentially negative sustainability effects identified at that stage’*. Additionally the employment site (south of the A44 Leominster Road) has been removed as a strategic site.

Herefordshire Local Plan – Rural Areas Site Allocations (RASA) Development Plan Document – Issues and Options Paper (June 2017)

- 2.17 This Development Plan Document (DPD) will form a number of documents containing detailed planning policies for specific locations or issues. The RASA DPD contained *‘more detailed proposals to ensure the full delivery of the rural growth targets within the Core Strategy’* and to *‘support the delivery of Policies RA1 and RA2 in those areas that are not producing a Neighbourhood Development Plan’*.
- 2.18 It is noted within the RASA DPD Scoping Report 2016 that there is the *‘opportunity to allocate employment land within the rural area if appropriate’*, therefore allowing for potential workspaces and employment opportunities within rural areas included in the RASA DPD. Any additional rural areas may discuss rural employment opportunities in their individual Neighbourhood Development Plans.

Economic Development Strategy for Herefordshire 2011-2016

- 2.19 This document focuses upon the current and future vision for Herefordshire’s economy and the strategy to increase the wealth of the County through four main aims reflected in an action plan of:

- *‘Sustaining business survival and growth*
- *Increasing wage levels, range and quality of jobs*
- *Having a skilled population to meet future work needs*
- *Developing the county’s built infrastructure so enterprises can flourish’*

2.20 Key priorities for the business profile of the County have been discussed with the manufacturing sector of Herefordshire employing a high proportion of the population, higher than seen in England and the West Midlands. 40 percent of this sector is based outside of Hereford within the small market towns (e.g. Bromyard). Whilst overall the public sector seems to be shrinking, it still remains a significant local employer for the region in the health services, education, emergency services and local government.

2.21 Herefordshire is part of the Marches Local Enterprise Partnership (LEP) with neighbouring counties of Shropshire and Telford because of *‘the synergies between the economies and common issues.’* The LEP will use shared resources to benefit local businesses across the areas, through improving and utilising local supply and exporting links.

Herefordshire County Employment Land Study 2012

2.22 Whilst a quantitative assessment of the different employment allocations was undertaken, two sites in Bromyard, Linton Trading Estate and land at Bromyard Trading Estate, were determined as adopted UDP employment allocations without current planning permission. However, no current employment land commitments are found within Bromyard.

2.23 The qualitative review of sites was also undertaken for land allocations and commitments in each of the individual towns of Herefordshire, with the four sites in Bromyard described in detail below:

Table 1 – Employment Site Allocations and Commitments for Bromyard, 2012

Location	Size (ha)	Comments
Linton Trading Estate	2.90	<p>This is a protected employment site (Policy E5) in a rural location. Currently contains a modern two-storey office building, an older single-storey brick building and an area of undeveloped land. Rear of estate contains a number of moderate quality single-storey employment buildings and a storage area. A small area of land is recorded as available (without planning permission).</p> <p><i>Commercial (Market Attractiveness)</i> Site has high visibility to the A44 and a reasonable level of car parking provision. Overall market attractiveness is negative due to the adjacent waste recycling centre which requires access through the estate. This adjacent site is also allocated for employment therefore any redevelopment could contribute positively to the market attractiveness of this site.</p> <p><i>Environmental Sustainability and Strategic Planning</i> Site location is outside of the urban area with limited access to services and travel.</p> <p><i>Role within Employment Hierarchy</i> The site is classified as 'Moderate'.</p>
South of Linton Trading Estate	5.60	<p>Site is allocated in the UDP for employment uses (Policy E3), however currently remains uncommitted. Access to the site is gained through the existing industrial estate or via a rural road to the south. Part of the site is used as a waste recycling centre and also contains a large pool identified as a Local Geological Site. Additional land is used as a gypsy traveller site with current discussions of relocation vs upgrading the existing site.</p> <p><i>Commercial (Market Attractiveness)</i> With no main road frontage and significant ground condition and remediation issues, the site is deemed to have poor market attractiveness. Developing the site would be problematic, expensive and require substantial amounts of time, therefore meaning the site is not considered to be developable.</p> <p><i>Environmental Sustainability and Strategic Planning</i> There is significant contamination across the site due to the site formerly being used for clay extraction associated brick and tile manufacturing. The site location is 1km away from the urban area of Bromyard with limited access to services and travel. Sustainability on the site could be increased with a Green Travel Plan.</p> <p><i>Role within Employment Hierarchy</i> Constraints of the land mean that the entirety of the site is effectively undevelopable, therefore the site is classified as 'Poor'.</p>

Land West of Panniers Lane	10.30	<p>Site is split into two agricultural fields with the northern part adjacent to Worcester Road and contained. The southern part is adjacent to Panniers Lane and open in nature.</p> <p><i>Commercial (Market Attractiveness)</i> The site is deemed to be attractive to the market due to the quality and appropriateness of the surrounding environment, road frontage and accessibility. However, ownership details and aspirations are currently unknown.</p> <p><i>Environmental Sustainability and Strategic Planning</i> Currently it is a greenfield site in agricultural operation meaning any development would detract from the current environmental quality. Provision of travel to the site is adequate via bus services and cycling routes yet infrequent.</p> <p><i>Role within Employment Hierarchy</i> The site is classified as 'Moderate'.</p>
Porthouse	8.76	<p>This is a protected employment site in the UDP under Policy E5 with access into the site from the east and west. A range of quality buildings exists on site including Three Mills Trading Estate, Porthouse Business Centre and the newly built large Royal Mail complex.</p> <p><i>Commercial (Market Attractiveness)</i> The general image of the site is attractive to the market as a high quality site. Overall visibility to local roads and less than 1km from major road.</p> <p><i>Environmental Sustainability and Strategic Planning</i> The north eastern part of the site is at risk (category 1 or 2) of flooding. Whilst located outside of the centre, the site is within an urban area and offers good travel provision with footpaths throughout the site.</p> <p><i>Role within Employment Hierarchy</i> The site is classified as 'Good'.</p>

Source: Herefordshire County Employment Land Study, 2012

- 2.24 The Employment Land Study reported that total amount of commercial floorspace for Herefordshire (Valuation Office Agency, 2008 data) was 134,000 sqm of office floorspace and 1,360,000 sqm of manufacturing, warehouse and distribution floorspace spread throughout the County. Since the previous study, the amount of vacant floorspace has decreased for offices yet increased for industrial premises. Forecasted figures for the County to 2031 predict agriculture and manufacturing will remain as significant sources of employment.

Herefordshire Authority Monitoring Report 2018

- 2.25 The most recent annual monitoring report was released in November 2018.
- 2.26 The monitoring reports provide information on housing and employment land and completions. Housing growth in the town is likely to be a product of people moving from hotter areas such as Worcester and Kidderminster and while this Bromyard Employment Land Study is focussed on the employment land provision, it is informative to also look at the town's housing completions data as an indicator of residential growth and another measure of the performance of the town.
- 2.27 The housing completions over recent years for the Bromyard housing market area and for Herefordshire as a whole are provided in Table 2 below.

Table 2 – Housing Completions

	Bromyard			Herefordshire		
	Completions (gross)	Losses	Completions (net)	Completions (gross)	Losses	Completions (net)
2011/12	6	0	6	365	24	341
2012/13	1	1	0	222	21	201
2013/14	7	1	6	354	23	331
2014/15	41	3	38	858	84	774
2015/16	14	3	11	369	42	327
2016/17	81	3	78	469	64	405
2017/18	58	5	53	818	39	779
Total	208	16	192	3,455	297	3,158

Source: Herefordshire Authority Monitoring Report, 2018

- 2.28 As can be seen from the above completions data, housing activity has increased in recent years in the County, including within Bromyard. Furthermore, Bromyard has taken a higher percentage of the overall completions in recent years, peaking at 19 percent of the County's total in 2016/17, which was substantially above the earlier

years in the table.

- 2.29 The monitoring report also states that the Bromyard housing market area has net commitments of 271 dwellings as of April 2018, which is 5 percent of total County commitments.
- 2.30 Regarding the provision of employment land, Section 2 of the Authority Monitoring Report states that “*new employment land delivered in the plan period so far 2011-2015 covers 21.35ha. Planning permissions between 2015 and 2017 added a further 8.2ha*”. The only reference to Bromyard’s provision of 5 ha of employment land in the Core Strategy was “*consideration of employment land provision to be undertaken through preparation of a Bromyard Development Plan*”. This Bromyard Employment Land Study forms part of the assessment of Bromyard to inform the Bromyard Development Plan.

Call for Sites October and November 2017

- 2.31 The call for sites ran from October – November 2017 and invited land owners/ agents with clients that own land in the Bromyard area of the adjacent parishes of Avenbury, Bredenbury and District Group, Brockhampton Group, Bromyard and Winslow, Hatfield and District Group, Stoke Lacy or Thornbury Group to come forward if available for consideration.
- 2.32 Two employment sites came forward within Bromyard, with no sites coming forward within a wider land search, and are listed below:

Table 3 – Site Submissions, Bromyard

Site	Area (ha)	Owner	Current Use	Comments
Land adjacent to Linton Court, HR7 4QJ	0.15	Draycott Developments	Storage building, hardstand, grass	Submitted for a proposed B1 use. Some access to infrastructure (water, sewage, electricity) but not gas. Access would be through Linton Court.
Little Froome Farm, HR7 4RX	5	David Watts	Agricultural field	

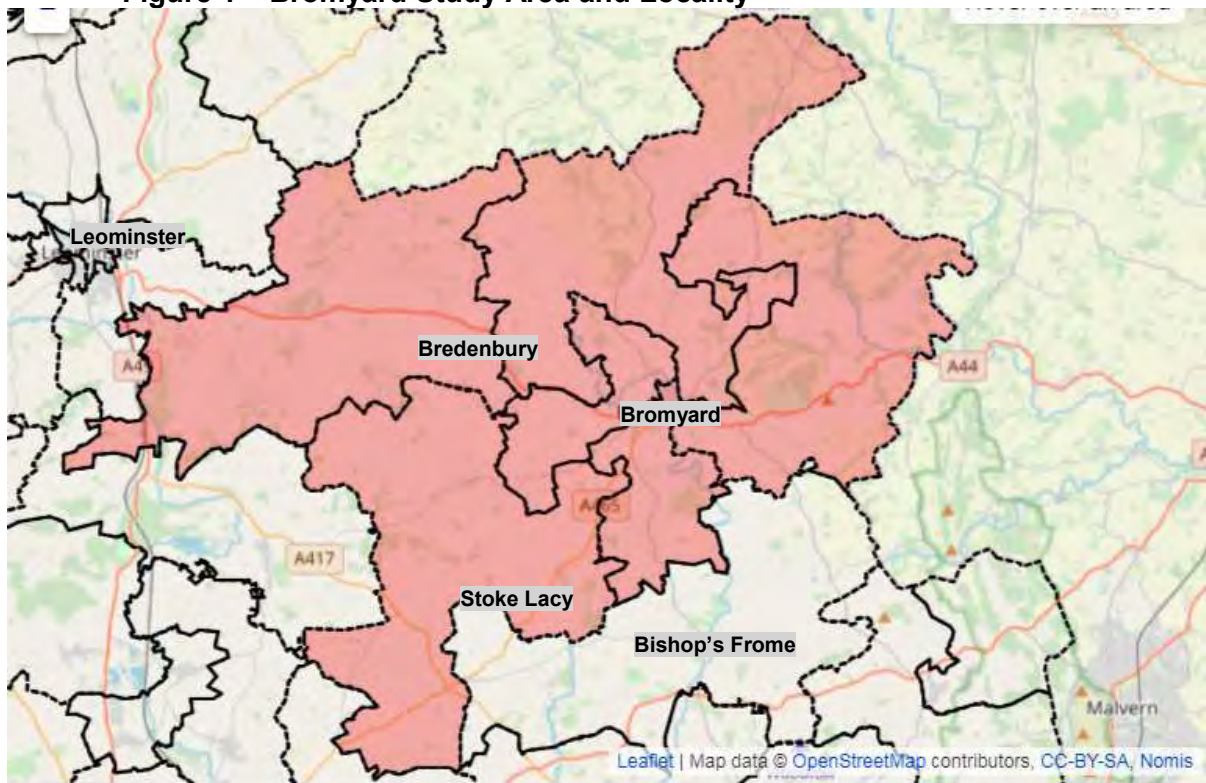
Source: Herefordshire Council, 2017

3.0 SOCIO-ECONOMIC PROFILE

Introduction

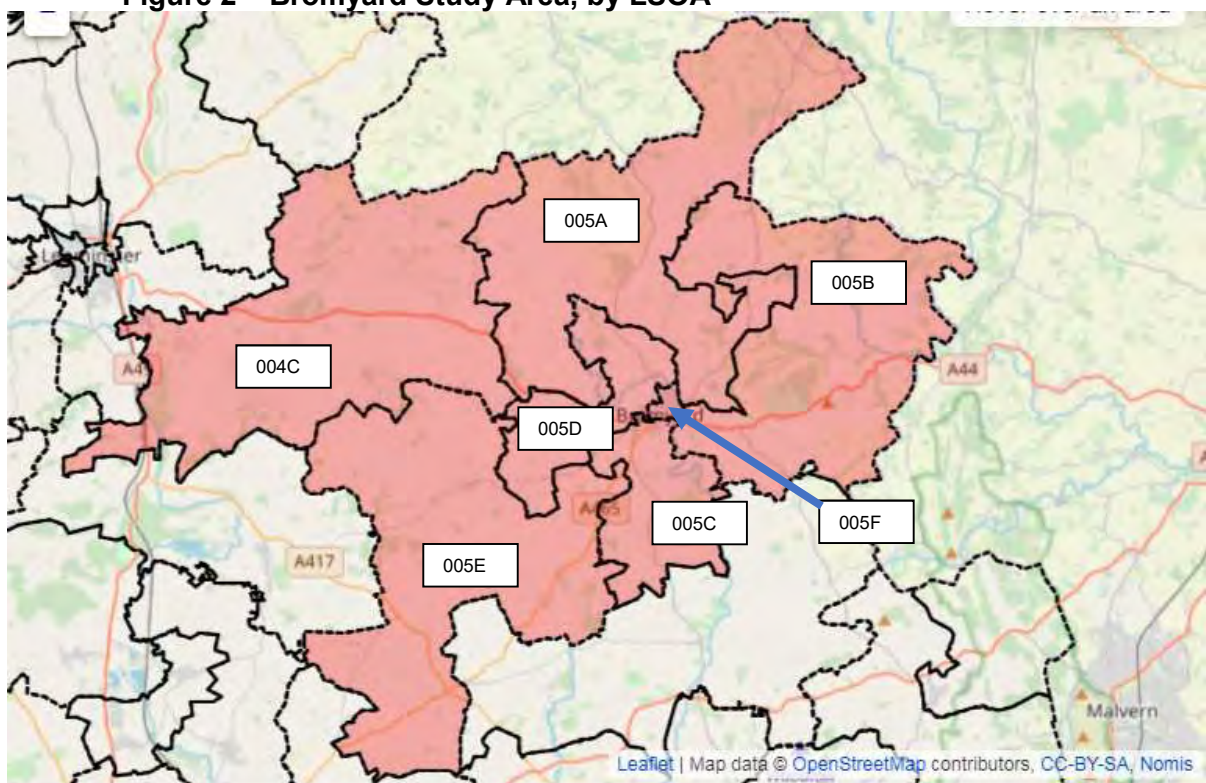
- 3.1 The characteristics of Bromyard are compared to Herefordshire and national averages. Reviewing the socio-economic characteristics provides insights into the types of employment in the area and the local workforce.
- 3.2 Characteristics have been compiled from Office of National Statistics (ONS) data, most of which is derived from the most recent Census, which was 2011. Therefore, there is some uncertainty regarding this data, which is of particular note for smaller areas, such as individual towns, rather than local authority areas or regions.
- 3.3 The socio-economic characteristics have been compiled based on Lower Super Output Areas (LSOAs), which are the smallest areas for which ONS and Census data is available. The following map illustrates the LSOAs that have been used for this analysis. It includes Bromyard itself, as well as the surrounding rural catchment, which is of relevance for this assessment as the rural economy forms an important component of the potential demand for employment floorspace in this area. The definition of this Bromyard Study Area is subjective and not absolute; rather it is an estimation of the areas of population most likely to be affected by (positively and negatively) and have regular interactions with Bromyard.
- 3.4 The Bromyard Study Area has been used to review the characteristics of both the residential population and the worker population and is the basis of the employment forecasts to 2031. It is based on LSOA boundaries, with the inclusion or exclusion of LSOAs in the Bromyard Study Area considering proximity to Bromyard, proximity to other centres, key travel corridors and population distribution within the LSOAs. In particular the A44 and A465 are key corridors connecting Bromyard with surrounding areas and thus have influenced the definition of the Bromyard Study Area.

Figure 1 – Bromyard Study Area and Locality



Source: Nomis, 2019

Figure 2 – Bromyard Study Area, by LSOA



Source: Nomis, 2019

- 3.5 The labels on the map are the identifier codes for the LSOAs. The town footprint of Bromyard is within the LSOA of 005F and parts of 005D and 005C. The broader area picks up rural areas including Stoke Lacy, Hatfield and Upper Sapey.

Population

- 3.5 The estimated population of the Bromyard Study Area as at the time of the 2011 Census was 9,996 persons. The breakdown of the populations for each of the LSOAs is provided in the following table. This population represented some 5.4 percent of the total Herefordshire population (183,477 persons) at that time.
- 3.6 The ONS reported that the Bromyard Built-up area (the immediate township of Bromyard) had a population of 4,117 persons at the time of the 2011 Census.

Table 4 – Population of Bromyard Study Area by LSOA

	2001		2011		Percentage Change 2001-2011	
	Total	Working Age (15-64)	Total	Working Age (15-64)	Total	Working Age (15-64)
Bromyard Study Area	9,978	6,279	9,996	6,188	0.2%	-1.4%
LSOA 004C	1,291	847	1,286	814	-0.4%	-3.9%
LSOA 005A	1,395	906	1,396	856	0.1%	-5.5%
LSOA 005B	1,504	1,001	1,434	933	-4.7%	-6.8%
LSOA 005C	1,413	776	1,397	725	-1.1%	-6.6%
LSOA 005D	1,474	949	1,512	996	2.6%	5.0%
LSOA 005E	1,395	880	1,419	868	1.7%	-1.4%
LSOA 005F	1,506	920	1,552	996	3.1%	8.3%
Herefordshire	174,871	109,461	183,477	115,207	4.9%	5.2%
Eng & Wales	52,041,916	33,902,124	56,075,912	36,961,701	7.8%	9.0%

Source: ONS, 2019

- 3.7 The Bromyard Study Area had a stable population between 2001 and 2011, growing only 0.2 percent (18 residents) over the decade. By comparison, Herefordshire as a whole grew by 4.9 percent over the same period.

- 3.8 Within the Bromyard Study Area, LSOA 005F, which is fully within the Bromyard town footprint (i.e. does not include any surrounding rural areas) exhibited the strongest population growth of the LSOAs at 3.1 percent.
- 3.9 The working age population in the Bromyard Study Area declined over the period 2001 to 2011 by 1.4 percent (91 residents). By comparison, both Herefordshire (5.2 percent) and England and Wales (9.0 percent) saw positive growth in this age group that was at a higher rate than the overall population growth.
- 3.10 The median age of the Bromyard Study Area was 48 years, compared to 44 years for Herefordshire and 39 years for England and Wales.

Deprivation

- 3.11 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) 2015. Most of the data underpinning the IMD 2015 relates to 2012/13.
- 3.12 The IMD is a measure of an area's deprivation across a number of different factors, broadly grouped into seven domains of deprivation (income, employment, education skills and training, health deprivation and disability, crime, barriers to housing and services, and living environment) which are weighted and combined to calculate the IMD. Data is provided to the LSOA level, with the index providing a rank for all 32,844 LSOAs in England. A rank of 1 is the most deprived LSOA in England.
- 3.13 Individual rankings are also provided for each of the seven domains, which provides insights on the particular areas of deprivation that an area may be experiencing. Table 5 below provides the deprivation rankings for the seven domains as well as the overall IMD for each LSOA in the Bromyard Study Area. The decile of each ranking (1=most deprived 10% of LSOAs) is provided in brackets.

Table 5 – Indices of Deprivation Ranking of Bromyard Study Area (inc. decile)

LSOA	IMD	Income	Employment	Education, Skills and Training	Health deprivation and disability	Crime	Barriers to housing and services	Living Environment
LSOA 004C	12,196 (4)	21,665 (7)	21,563 (7)	20,034 (7)	27,505 (9)	30,160 (10)	14 (1)	788 (1)
LSOA 005A	13,614 (5)	24,527 (8)	22,329 (7)	21,779 (7)	23,541 (8)	32,402 (10)	33 (1)	1,670 (1)
LSOA 005B	13,399 (5)	22,053 (7)	26,258 (8)	23,597 (8)	27,710 (9)	32,194 (10)	29 (1)	739 (1)
LSOA 005C	21,392 (7)	23,352 (8)	23,573 (8)	21,409 (7)	22,025 (7)	21,842 (7)	4,918 (2)	15,138 (5)
LSOA 005D	12,934 (4)	12,503 (4)	10,642 (4)	9,173 (3)	14,048 (5)	24,713 (8)	10,413 (4)	14,738 (5)
LSOA 005E	13,630 (5)	22,470 (8)	28,240 (9)	19,966 (7)	26,331 (9)	29,377 (9)	296 (1)	584 (1)
LSOA 005F	7,947 (3)	7,005 (3)	7,203 (3)	7,002 (3)	8,168 (3)	16,205 (5)	13,682 (5)	7,548 (3)
Herefordshire	126	179	187	162	193	251	19	50

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

NB: Rank of 1=most deprived LSOA in England, 32,844=least deprived in England

Decile of 1=in 10% of most deprived LSOAs

- 3.14 Overall the LSOAs comprising the Bromyard Study Area generally rank in the middle of the IMD 2015. However, when assessing the individual components that make up the IMD there are significant differences in the performances according to the different indices. The LSOAs scored low ranks (i.e. low levels of deprivation) in areas of crime, health, education and skills, employment and income. However, the area scored high ranking (i.e. high levels of deprivation) on the indices of barriers to housing and services and living environment. The barriers to housing and services includes indicators such as housing affordability, homelessness and distances to essential services (post office, school, retail, GP). The rural nature of most of the LSOAs means that they are distant from most services and have housing supply constraints. The living environment index includes factors on the indoor environment (houses without central heating, poor quality housing) and the outdoor environment (air quality, road accidents).
- 3.15 Herefordshire's rank (based on the average of all LSOA scores) is the 126th most deprived local authority in England (where 1 is the worst deprived local authority and 326 is the least deprived). Individual domains showed a similar profile to the Bromyard

Study Area, with Herefordshire performing well in crime, health, employment and income and poorly in barriers to housing and services and the living environment.

- 3.16 Additionally, looking particularly at LSOA 005F or 'Bromyard Central', it is one of the 12 LSOA's in the County that are amongst the 25 percent most deprived in England. In particular, 'Bromyard Central' is one of the 25 percent most deprived in England for employment deprivation, equating to 17 percent of people within the LSOA.

Economic Activity

- 3.17 The Bromyard Study Area had approximately 5,090 economically active residents at the time of the Census, which represented 69.2 percent of the 16-74 year old population at that time. This was similar to the England and Wales average, though two percentage points lower than the Herefordshire average.
- 3.18 The Bromyard Study Area had a higher percentage of self-employment (18.9 percent) than the Herefordshire and national averages, which reflects the rural nature of much of the Study Area, with farmers described as self-employed.

Table 6 – Economic Activity, 2011

	Bromyard Study Area		Herefordshire %	Eng & Wales %
	No.	%		
Economically active	5,093	69.2	71.3	69.7
Employment	4,719	64.1	65.6	61.9
Self-employment	1,392	18.9	14.4	9.7
Unemployment	227	4.4	4.6	6.3
Inactive	2,265	30.8	28.7	30.3

Source: ONS, 2019

* Percentage is of population aged 16-74, except for unemployment, which is a percentage of economically active

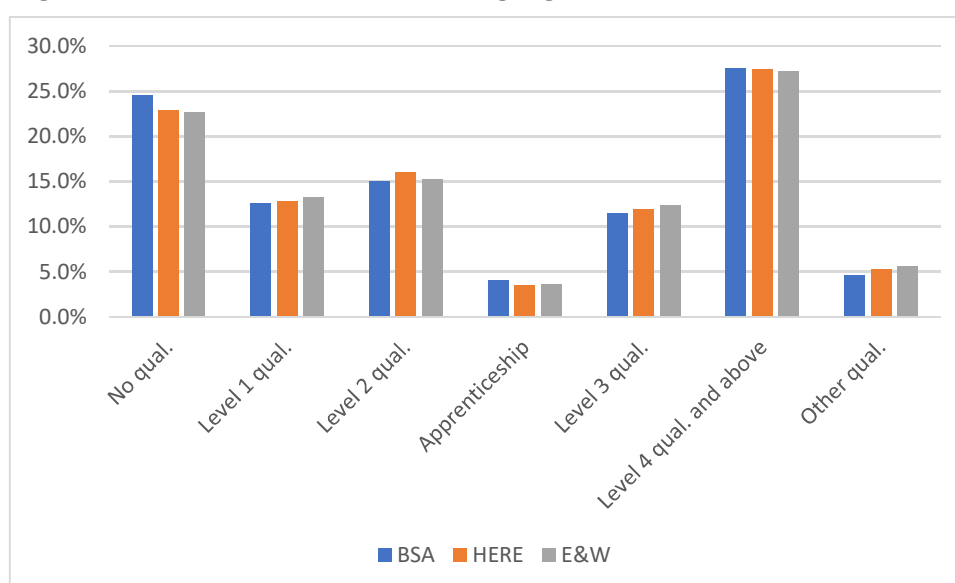
- 3.19 Unemployment in the Study Area was 4.4 percent, similar to the Herefordshire average (4.6 percent) and lower than the England and Wales average (6.3 percent).

- 3.20 Since the 2011 Census, Herefordshire's economic activity levels have increased significantly to 82.3 percent (2017/18) and unemployment has decreased to 2.7 percent. This trend is also evident at the national scale. Therefore, it is considered that unemployment levels in the Bromyard Study Area are likely to be lower than the data at 2011, and economic activity levels are likely to have increased.

Skills and Qualifications

- 3.21 At the time of the 2011 Census, the Bromyard Study Area had a similar profile of qualification levels to Herefordshire as a whole and to the England and Wales average. This is illustrated in Figure 3 below. The percentages are for those aged 16 to 74 years and not current students. There was a slightly higher proportion of the Bromyard Study Area population that had no formal qualifications (24.6 percent, cf. Herefordshire 22.7 percent), though the percentage that had full degree level qualifications or above was the same for the Bromyard Study Area as Herefordshire (27.5 percent).

Figure 3 – Qualifications of Working Age Population



Source: Census 2011

Current Sectoral Composition

- 3.22 The ONS's Business Register and Employment Survey (BRES) is a regular survey of businesses throughout the UK and provide details of an area's employment numbers by sector. Data is available for small areas, although as it is based on a survey, the level of uncertainty in the data becomes more significant.

3.23 Overall, the BRES data estimates that there was about 3,650 jobs (employees and self-employed) within the Bromyard Study Area in 2017, which equates to about 4 percent of total jobs in Herefordshire at that time (90,000).

3.24 The table below outlines the jobs estimates by sector for the Bromyard Study Area, with comparisons to the County and national averages. Note that BRES data excludes farm agriculture.

Table 7 – Employment by Industry Sector, 2017

Industry Sector	Bromyard Study Area		Herefordshire		England & Wales	
	Number	%	Number	%	Number	%
Agriculture, forestry & fishing	0*	0.0	11,000	12.2	405,000	1.4
Mining, quarrying & utilities	10	0.3	1,000	1.1	323,000	1.2
Manufacturing	1,005	27.5	12,000	13.3	2,248,000	8.0
Construction	235	6.4	4,500	5.0	1,358,000	4.8
Motor trades	85	2.3	2,250	2.5	498,000	1.8
Wholesale	165	4.5	3,000	3.3	1,085,000	3.9
Retail	245	6.7	9,000	10.0	2,656,000	9.5
Transport & storage (inc postal)	40	1.1	1,750	1.9	1,317,000	4.7
Accommodation & food services	330	9.0	7,000	7.8	2,071,000	7.4
Information & communication	70	1.9	1,250	1.4	1,227,000	4.4
Financial & insurance	10	0.3	900	1.0	957,000	3.4
Property	20	0.5	1,750	1.9	510,000	1.8
Professional, scientific & technical	215	5.9	4,500	5.0	2,426,000	8.7
Business administration & support services	190	5.2	5,000	5.6	2,526,000	9.0
Public administration & defence	10	0.3	1,250	1.4	1,101,000	3.9
Education	175	4.8	6,000	6.7	2,444,000	8.7
Health	655	17.9	13,000	14.4	3,572,000	12.8
Arts, entertainment, recreation & other services	190	5.2	4,500	5.0	1,283,000	4.6
Total	3,650	100.0	90,000	100.0	28,004,000	100.0

Source: ONS 2017 BRES data

*These figures exclude farm agriculture

3.25 As can be seen from the above table, the largest industry sector by employment in the Bromyard Study Area was manufacturing, comprising 27.5 percent of the workforce. This proportion is over twice that of Herefordshire as a whole and over three-times the England and Wales average. The second highest industry sector was health, with 17.9 percent of the employment, which would be primarily driven by the Bromyard Community Hospital and residential care facilities as key employment assets in the area.

- 3.26 The annual BRES survey information shows that manufacturing employment has increased in the Bromyard Study Area by about 100 workers since 2015 (the BRES surveys before that year had different inclusions and thus direct comparison of the year-on-year growth is not possible). Overall employment increased between 2015 and 2017 by about 350 jobs.
- 3.27 Importantly, in looking at the sectors that would be located in B-class employment units, manufacturing (taking B2 space) is above the County proportion and has seen recent increases. Sectors that would typically be located within B1 office units are similar to or slightly below the County averages though generally below the England and Wales average. Transport and storage, which would locate to B8 space, is below the regional and national averages, although wholesale is above the comparator averages.
- 3.28 Further analysis of the subsectors within the manufacturing sector (i.e. 2-digit SIC codes), shows that as at 2017, the largest manufacturing subsectors by employment in the Bromyard Study Area were:
- **Manufacture of motor vehicles, trailers and semi-trailers:** 600 workers, which would primarily be driven by Polytec and Holden
 - **Manufacture of beverages:** 150 workers.
- 3.29 Location Quotients (LQs) are used to consider how sectoral employment in an area 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.
- 3.30 The table below highlights the industry sectors (at 2-digit SIC code) in the Bromyard Study Area where the proportion is at least 1 and a half times the national average. When comparing small areas such as Bromyard to the national average, there will be clear substantial differences in the economic profile, which are borne out in the LQ numbers. The table clearly shows the importance of particular manufacturing sectors due to the location of one, large and significant employer in the area.

Table 8 – Major Industry Sectors (as measured by LQ of 1.5+) in Bromyard Study Area (2017)

Industry Sector	LQ
Manufacture of beverages <i>including non-alcoholic beverages and mineral water, manufacture of alcoholic beverages mainly through fermentation, beer and wine, and manufacture of distilled alcoholic beverages</i>	37.90
Manufacture of motor vehicles, trailers and semi-trailers <i>including parts, accessories and finished products</i>	31.33
Remediation activities and other waste management services <i>including the provision of remediation services, i.e. the clean-up of contaminated buildings and sites, soil, surface or ground water.</i>	7.83
Residential care activities <i>residential nursing care activities, residential care activities for learning disabilities, mental health, substance abuse, for elderly and disabled, other residential care activities</i>	4.89
Manufacture of machinery and equipment not elsewhere classified <i>including the manufacture of machinery and equipment that acts independently on materials either mechanically or thermally or performs operations on materials (such as handling, spraying, weighing or packing). It includes their mechanical components which produce and apply force, and any specially manufactured primary parts. This includes the manufacture of fixed and mobile or hand-held devices, regardless of whether they are designed for industrial, building and civil engineering, agricultural or home use. The manufacture of special equipment for passenger or freight transport within demarcated premises also belongs within this division.</i>	3.50
Other manufacturing <i>the manufacture of a variety of goods not covered in other parts of the classification</i>	3.36
Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials <i>including manufacture of timber, plywood, veneers, wooden containers, wooden flooring, wooden trusses, and prefabricated wooden buildings. The production processes include sawing, planning, shaping, laminating, and assembling of wood products</i>	3.06
Manufacture of textiles <i>preparation and spinning of textile fibres, weaving, finishing, manufacture of other textiles, canvas, textiles for soft furnishings, carpets and rugs, cordage, rope, twine or netting, made-up textile articles (does not include apparel)</i>	2.96
Civil engineering <i>general construction for civil engineering work, including new work, repair, additions and alterations, the erection of pre-fabricated structures on the site and also construction of temporary nature</i>	2.78
Veterinary activities <i>including provision of animal health care and control activities for farm animals or pet animals</i>	2.66
Manufacture of fabricated metal products, except machinery and equipment <i>including the manufacture of "pure" metal products (such as parts, containers and structures), usually with a static, immovable function, as opposed to the manufacture of combinations or assemblies of such metal products</i>	1.89
Services to buildings and landscape activities <i>including cleaning of exteriors and interiors, the interior and exterior cleaning of buildings of all types, cleaning of industrial machinery and vehicles, bottle cleaning, street sweeping, snow and ice removal, provision of landscape care and maintenance services and provision of these services along with the design of landscape plans and/or the construction (i.e. installation) of walkways, retaining walls, decks, fences, ponds, and similar structures.</i>	1.76
Creative, arts and entertainment activities <i>including production and promotion of, and participation in, live performances, events or exhibits intended for public viewing; the provision of artistic, creative or technical skills for the production of artistic products and live performances.</i>	1.70
Sports activities and amusement and recreation activities <i>including the provision of recreational, amusement and sports activities (except museum activities, preservation of historical sites, botanical and zoological gardens and nature reserve activities; and gambling and betting activities)</i>	1.50

Source: BRES 2017, SIC 2007

- 3.31 This table shows a variety of specialisations within the Bromyard Study Area economy, reflecting the key employers in the area.

Travel to Work Patterns

- 3.32 The Census data includes information on the origins and destinations of workers on the day of the Census. At that time, 74.5 percent of workers working in the Bromyard Study Area resided somewhere within Herefordshire. This was a relatively even split between those that resided within the Bromyard Study Area (37.1 percent) and those that resided elsewhere in Herefordshire.
- 3.33 Other local authorities from which Bromyard workers were commuting from include Malvern Hills (6.5 percent of the Bromyard Study Area workforce), Worcester (5.2 percent) and Shropshire (2.3 percent). As can be seen from these figures, the percentages quickly fall away for individual local authorities, with Bromyard's workforce dominated by local residents.
- 3.34 The Census data also provides insights into where the working residents of Bromyard are working. Of the working residents of the Study Area, 69.2 percent worked in Herefordshire. This included 35.8 percent within the Bromyard Study Area and 33.4 percent elsewhere in Herefordshire. Other important locations of employment for the Study Area residents include Malvern Hills (8.5 percent), Worcester (7.7 percent) and Wychavon (2.3 percent).
- 3.35 This demonstrates a very localised nature of employment for Bromyard, with workers living close to their location of work. Bromyard employers looking for further labour are also likely to recruit locally, with Bromyard having only limited pull for workers outside of Herefordshire.

Economic Forecasts

- 3.36 Oxford Economics (OE) was commissioned to provide employment forecasts for the Bromyard Study Area to cover the forecast period. The forecasts use OE's modelling which incorporates assumptions on employment characteristics, economic changes, workforce participation as well as looking at data on previous growth characteristics in the area. Such forecasting models generally provide a reasonable indicator of growth, but are more reliable for larger areas (where localised volatility would be averaged out) than smaller areas.
- 3.37 Therefore, a degree of caution should be applied to the interpretation of these forecasts. However, they are informative of the potential direction and scale of change envisaged for the area.

- 3.38 Due to the uncertainty of forecasting for a small area, OE has grouped together the industry sectors into four broad headings, with the forecast provided on this basis. The industry sectors within each heading are listed below.

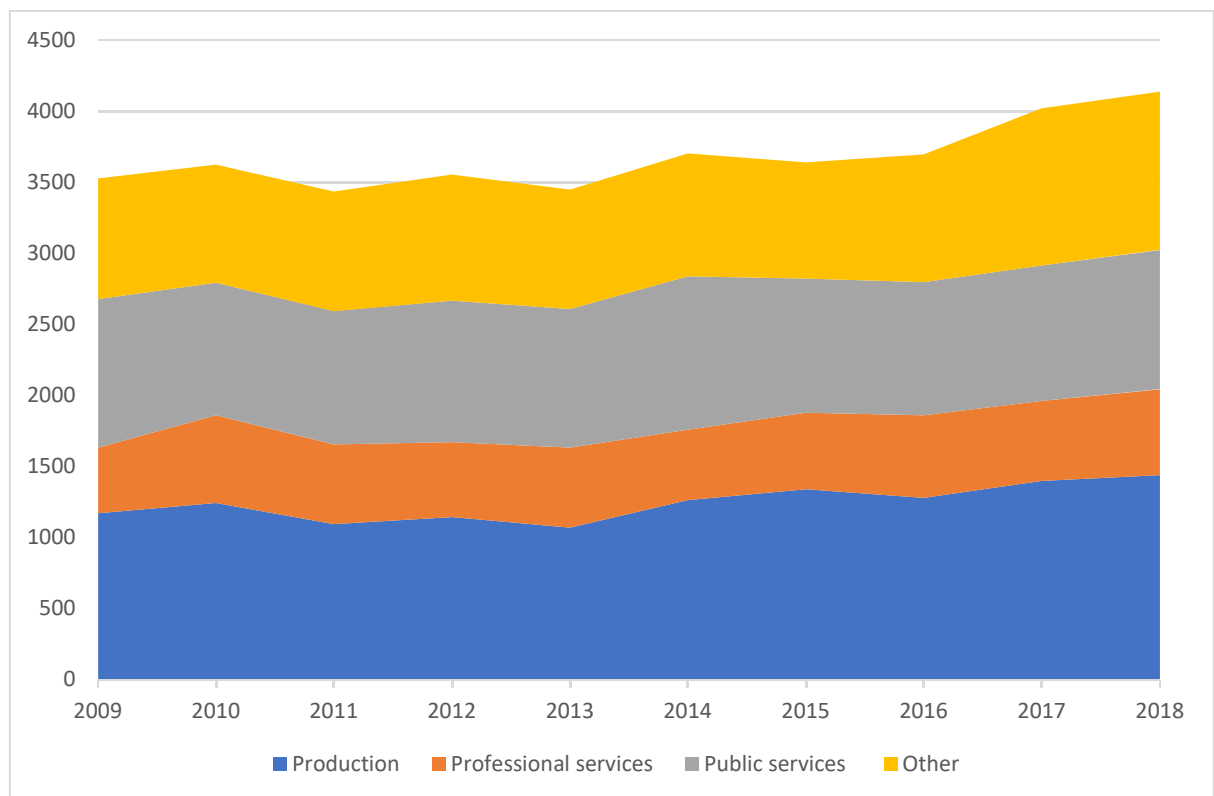
Table 9 – Employment Forecast Groupings

Heading	Sector Inclusions
Production	Agriculture, forestry and fishing Mining and quarrying Manufacturing Electricity, gas, steam and air conditioning supply Water supply, sewerage, waste management and remediation activities Construction
Professional Services	Information and communication Financial and insurance activities Real estate activities Professional, scientific and technical activities Administrative and support services activities
Public Services	Public administration and defence; compulsory social security Education Human health and social work activities
Other	Wholesale and retail trade; repair of motor vehicles and motorcycles Transportation and storage Accommodation and food service activities Arts, entertainment and recreation Other service activities

Source: Oxford Economics, 2018

- 3.39 OE also provided data on the employment for the four broad groups by year back to 2009, which is illustrated in Figure 4.

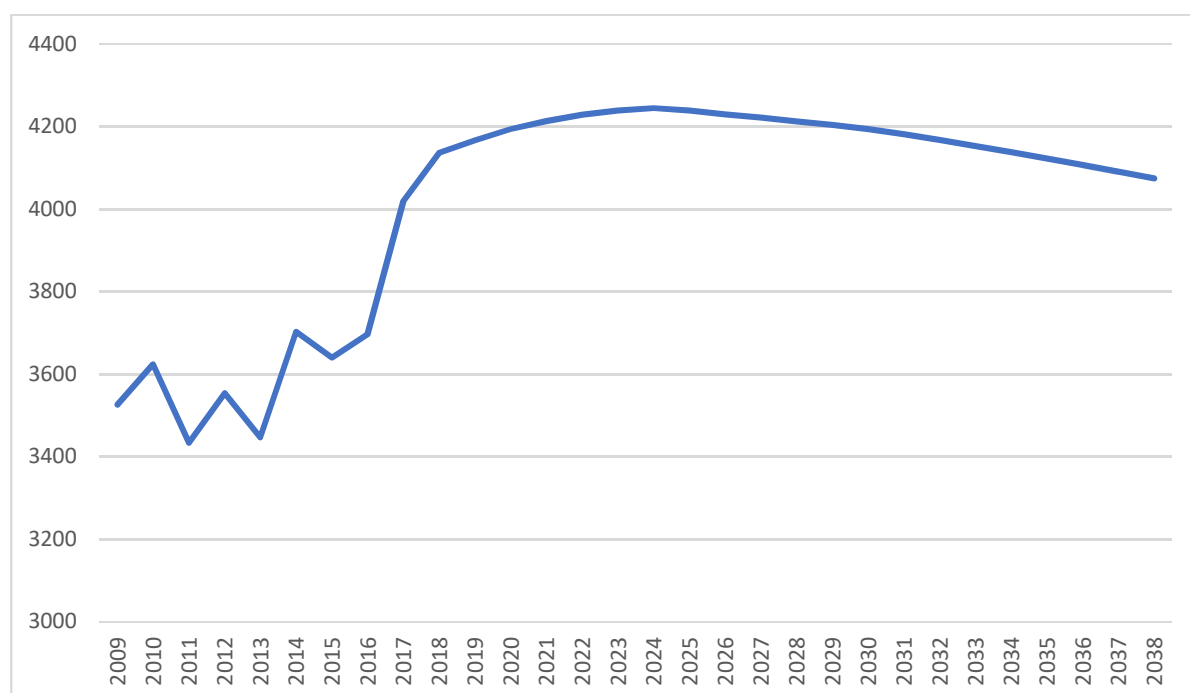
Figure 4 – Historic Growth of Employment in Bromyard Study Area



Source: Oxford Economics, 2018

- 3.40 This model provides slightly different numbers to the BRES data, although it is similar. OE has estimated that total employment in the area has increased from 3,530 jobs in 2009 to 4,140 jobs in 2018. Employment has increased in production (+270), other (+270) and professional services (+140) but decreased in public services (-70). Employment was at its lowest point in 2011, with approximately 3,430 jobs.
- 3.41 As at 2018, production was estimated to comprise some 35 percent of jobs in the Bromyard Study Area, or 1,440 jobs. Other sectors comprised 27 percent (1,110 jobs), public services 24 percent (980 jobs) and professional services 15 percent (610 jobs).
- 3.42 OE has provided forecasts that include annual figures to 2038. The forecast period for this study is to 2031; however looking at the growth beyond that will be informative for the overall understanding of demand. The following figure shows the overall growth projection of employment for the Bromyard Study Area from the OE forecasts.

Figure 5 – Projected Growth of Employment in Bromyard Study Area 2009-38



Source: Oxford Economics, 2018

3.43 As can be seen in the graph, employment is projected to peak in 2024 in the Bromyard Study Area at about 4,250 jobs, before seeing a gradual but steady decline. By 2031, it is projected that total employment will be 4,180 jobs, which is a net growth of +40 jobs over 2018. By 2038, it is projected that there will be about 60 fewer jobs than in 2018.

3.44 The table below summarises the projected growth by broad sector group. Production and public services are projected to see declines between 2018 and 2031, although production is projected to see positive growth in the short term.

Table 10 – Projected Employment by Broad Group

Sector Group	2011	2016	2018	2021	2026	2031	Change 2018-31
Production	1,090	1,280	1,440	1,460	1,430	1,380	-60
Professional Serv.	560	580	610	650	670	680	+70
Public Serv.	940	940	980	970	970	960	-20
Other	840	900	1,110	1,140	1,160	1,160	+50
Total	3,430	3,700	4,140	4,210	4,230	4,180	+40

Source: Oxford Economics, 2018

Summary

3.45 The Bromyard Study Area comprises some 5.4 percent of the Herefordshire population. Recent years have seen virtually no population growth. The population has an older median age than comparator areas.

- 3.46 The deprivation indices revealed that the Bromyard Study Area is overall in the middle of the ranking for deprivation and is not an urgent area of concern. However, the individual scores for barriers to housing and services and the living environment highlight particular areas of concern, which are typical in rural areas.
- 3.47 The residential population has a moderate skill level. Unemployment in the area is low.
- 3.48 Manufacturing is the key employment sector within the Bromyard Study Area. In particular, manufacturing of motor vehicles, trailers and semi-trailers (including parts and accessories) and manufacture of beverages are important employment subsectors. The health sector is the second largest employment sector in the area after manufacturing.
- 3.49 The travel to work data reveals that the Bromyard workforce is very localised. The residential working population is predominantly working in Herefordshire, including in the Study Area itself. Conversely, the working population of Bromyard largely resides in the Study Area or the remainder of the County.
- 3.50 These characteristics suggest a stable population in Bromyard. The dominance of manufacturing in the economy highlights the need to ensure that there is sufficient on-going employment land to support growth and flexibility within this sector. That is, to ensure that there is sufficient land that are appropriate for B2 units.
- 3.51 Further population growth, which is anticipated through the housing completions and commitments data (see review of Herefordshire Authority Monitoring Report), may lead to further demand for employment opportunities. If the characteristics of this future population are comparable to the current population, then there would be an expectation for employment opportunities in close proximity to Bromyard.
- 3.52 The forecasts of employment in the Bromyard Study Area show an overall increase in employment, although a decrease in the largest broad sector, production. The overall growth is modest, although the positive growth is projected to be in the shorter term, with employment peaking in 2024, before slowly but steadily declining. Therefore, employment land and floorspace projections that consider employment growth would need to consider this peaking and gradual decline.

4.0 PROPERTY MARKET ASSESSMENT

Introduction

- 4.1 The current property market in Bromyard has been reviewed in this chapter based on recorded information on commercial deals conducted within Bromyard over the last 10 years, currently available commercial property and discussions with locally active property agents.

Transactions

- 4.2 A list of recorded deals between 2008 and 2018 has been compiled using data from the EGi database of industrial and office transactions within Bromyard, with the data displayed below. While such data sources may not include every single deal in an area, they do provide a guide to the level and nature of activity within Bromyard.

Industrial

- 4.3 Between 2008 and 2018, eight transactions were recorded on industrial units within Bromyard. These totalled 9,332 sqm of floorspace, with a breakdown by year seen in Table 11.

Table 11 – Industrial Deals within Bromyard, 2008-2018 (sqm)

		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001-10,000	10,001+	Total
2018	Total Floorspace	~	159	~	~	~	~	~	159
	No. of units	~	1	~	~	~	~	~	1
2017	Total Floorspace	~	~	~	586	~	5,103	~	5,689
	No. of units	~	~	~	1	~	1	~	2
2016	Total Floorspace	~	~	~	~	~	~	~	0
	No. of units	~	~	~	~	~	~	~	0
2015	Total Floorspace	~	~	330	635	~	~	~	965
	No. of units	~	~	1	1	~	~	~	2
2014	Total Floorspace	~	~	~	~	~	~	~	0
	No. of units	~	~	~	~	~	~	~	0
2013	Total Floorspace	~	140	~	651	~	~	~	791
	No. of units	~	1	~	1	~	~	~	2
2012	Total Floorspace	~	~	~	~	~	~	~	0
	No. of units	~	~	~	~	~	~	~	0
2011	Total Floorspace	~	~	~	~	1,728	~	~	1,728
	No. of units	~	~	~	~	1	~	~	1
2010	Total Floorspace	~	~	~	~	~	~	~	0
	No. of units	~	~	~	~	~	~	~	0
2009	Total Floorspace	~	~	~	~	~	~	~	0
	No. of units	~	~	~	~	~	~	~	0
2008	Total Floorspace	~	~	~	~	~	~	~	0
	No. of units	~	~	~	~	~	~	~	0
Total	Total Floorspace	0	299	330	1,872	1,728	5,103	0	9,332
	No. of units	0	2	1	3	1	1	0	8

Source: EGi, 2018

- 4.4 The spread of industrial floorspace can be seen across all size ranges, with units of 501-1,000 sqm seeing the highest number of deals completed, although this was only three. From the data above, it can be seen that there is a reasonable spread of unit sizes transacted, but critically, the overall volume is very small, averaging less than one unit transacted per year.
- 4.5 2017 saw the largest amount of floorspace taken up during a single year of 5,689 sqm across two deals. This was due to the largest transaction of the decade occurring during this year of a 5,103 sqm industrial unit sold as part of an investment sale (within the Station Road Industrial Estate). Therefore, in terms of occupation transactions (either leasing or purchasing to occupy) six of the seven industrial transactions were under 1,000 sqm, with the largest being 1,728 sqm in 2011.
- 4.6 For the eight deals completed during the decade, 25 percent (two) were completed as leasehold, 62 percent (five) as freehold and 13 percent (one) as an investment sale.

- 4.7 However, it is recognised that not all transactions in an area may be recorded in the property transaction databases, particularly if they are private transactions between landlord and occupier, without an agent involved. Additional data has been discovered through consultation with a current business who occupy a unit on Linton Industrial Estate and also own five other units on site. Four units have recently been let, with a fifth unit of 930 sqm expected to be completed shortly. The deals completed at this industrial estate were handled by the owner of the site.

Office

- 4.8 According to the EGi database, no office transactions were recorded as occurring during 2008-2018 in Bromyard. Whilst this data source usually provides an accurate description of transactions for an area, this has evidently not been the case for Bromyard. Data gained of any past office transactions has been collected through consultations with the property agents.
- 4.9 As stated above, some transactions have found to not have been recorded by the EGi database. With such a small market occurring within Bromyard, some property deals are seemingly taking place without being recorded in the same manner as others. However, the data does highlight the overall low volume of transactions in the town,

Rents

- 4.10 Rental figures have been obtained and displayed for each of the individual years between 2008-2018, and an average price recorded. Of the eight industrial deals recorded within Bromyard, six displayed rental figures from EGi. Obviously with the very low transaction volumes, no real trends can be established in the rent data, although it is indicative of the overall market position in Bromyard.

Table 12 – Average Rents by Year, Industrial 2008-2018

Year	No. of Deals	Average Deals, £/sqm	Average Deals, £/sqft
2018	0(1)	~	~
2017	1(2)	102.27	9.5
2016	0	~	~
2015	2(2)	37.03	3.44
2014	0	~	~
2013	2(2)	35.31	3.28
2012	0	~	~
2011	1(1)	48.44	4.5
2010	0	~	~
2009	0	~	~
2008	0	~	~
Total	6(8)		

Source: EGJ, 2018

- 4.11 With limited information available of past office transactions and therefore rental figures, data has been gathered from Hereford and other nearby towns to gain an estimate of where market figures lie. The past 10 years have seen figures in Hereford lie between £28.50/sqm and £172/sqm, with an average rent for an office of the last 10 years lying at £92.25/sqm.
- 4.12 Similar sized neighbouring towns to Bromyard, unsurprisingly, have not been achieving the same high values as have been produced within Hereford. From a selection of towns, past office rents can be seen ranging from £67/sqm to £100/sqm, with an average of £83.60/sqm, almost £10/sqm below figures seen in Hereford. This gives an indication of where figures are likely to lie for Bromyard.

Property Supply

- 4.13 Vacant floorspace being marketed within Bromyard (as of December 2018/January 2019) has been compiled in the table below. This data has been collected from physical survey of employment nodes, a review of commercial property agent's websites and consultations with agents. This data is taken as a reasonable approximation of current vacancies, though there may be occupiers waiting for interest in their property before moving and empty units which may be available, but not currently being marketed.

Table 13 – Marketed Premises in Bromyard

Address	Size		Price	Tenure	Agent
	Sqft	Sqm			
Industrial					
Unit A, Linton Trading Estate	10,500	975	£36/sqm	Leasehold	John Goodwin
Unit C, Linton Trading Estate	3,371	313	£45/sqm	Leasehold	WJ Holden and Assoc.
Offices					
9 Cruxwell Street, HR7 4EB	664	62	£99,950	Freehold	Sunderlands
Office Building, Church Street	5,000	464	£43/sqm	Leasehold	Arkwright Owens
Unit E, Linton Trading Estate	1,122	104	£82/sqm	Leasehold	WJ Holden and Assoc.

Source: EGi, Commercial Property Agent's Websites, 2018/19

- 4.14 Two available industrial units can be found at Linton Trading Estate, a 313 sqm and 975 sqm unit. Given the importance of industrial employment in Bromyard, as reviewed in the previous socio-economic chapter, having only two units available for such businesses within this sector provides very little capacity for expansions of indigenous businesses or new manufacturing businesses coming to Bromyard.
- 4.15 Three office units are currently being marketed. Two units are available within the centre of Bromyard. With a 62 sqm office being sold for £99,950 as part of a building which also includes therapy rooms, reception rooms and three flats. A 464 sqm office building is available to lease for £43/sqm, however a planning application has been submitted for change of use to housing. The remaining marketed office unit is an older, brick building within the Linton Trading Estate, available for lease.
- 4.16 The functionality of this small office market is different from that seen in the large nearby towns of Hereford and Worcester. Current office availability is being found in atypical forms such as converted schools and as part of a residential investment offering.

Years of Existence in Bromyard

- 4.17 Identifying the number of years businesses have been in Bromyard is an informative way to understand the longevity of company life within the town. This can provide an indication to how committed businesses are to the area of Bromyard, and perhaps therefore a signal of good market performance.
- 4.18 Years of occupation per business have been gained from the online source of the EGi property database. The figures have been collected for businesses within Bromyard

who are located within a use class of B1/B2/B8 properties.

- 4.19 The question of occupation within Bromyard was also asked during the business survey, analysed in Chapter 5.0, although the larger sample size of the EGi property database provides a more complete indication of business stability. A total of 243 businesses have been identified within Bromyard, with an average number of years in residence of 10 years and one month. This high average year of residence within Bromyard indicates a town with good access to employees and markets/ supplies for their business to function.

Commercial Property Agents

- 4.20 Along with the property data analysis above pertaining to Bromyard, consultations with active commercial property agents have been undertaken. Agents were asked about activity levels in Bromyard for industrial and office units in regard to spatial and size differences, levels of supply and demand and weaknesses of the market. Feedback gained is summarised in the tables below.
- 4.21 In order to protect confidentiality, names of the agents/ agency have been separated from the information that they provided. A list of the agents spoken to during the consultations can be found in Appendix 1.

Table 14 – Property Agents Comments, Industrial

Contact	Comments
Regional Agent	The only good units available are in Porthouse Estate. The agent believes that constant demand is being received for units on the site.
Regional Agent	<p>The agent is currently marketing:</p> <ul style="list-style-type: none"> • Unit A, Linton Trading Estate • 975 sqm • £35,000 per annum (£35.90/ sqm) • Property has been on the market for a while <p>When units are a reasonable price, there is some interest seen but overall there is no demand being received in the area for industrial units.</p> <p>The location of Bromyard and the limited access to the town has meant that the area is not seen as a popular employment town, Hereford/ Worcester are more popular locations for businesses to reside in.</p> <p>If more units were to be built, then the demand would come, however buildings would have to be good quality to bring in the occupiers.</p>

Regional Agent	<p>Demand is present for industrial units at Porthouse. The agent potentially has a building that they are about to start marketing at Porthouse, but not instructed yet.</p> <p>Bromyard is a 'one horse town'. Its location is hindering businesses coming to the area because it does not have the communications to entice businesses. Also limited facilities for the business community means occupiers are not attracted to the area.</p> <p>Anyone of working age residing in the town is more likely to be commuting to Hereford/ Worcester for work. Bromyard should be looking to be more like the similar small town within Herefordshire of Kington.</p> <p>The agency covers a regional market and have noted that overall more demand is present for Hereford than the small market towns.</p>
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Source: BE Group's interviews with Commercial Property Agents, 2018

Table 15 – Property Agents Comments, Office

Contact	Comments
Local Agent	<p>A local agent to Hereford, they are not marketing any property in Bromyard and has been roughly 5 years since marketed any units in that area.</p> <p>There is the belief that there is not really any property to market in Bromyard, yet if opportunity arose, the agent would be reluctant to do any further work in the area as prefer Hereford as an area to market as there is more demand and interest. Furthermore, the agent's office is based in Hereford so distance to Bromyard is too far to market.</p> <p>Not receiving any demand for businesses wishing to be located in Bromyard, for office or industrial units. Businesses wish to be in bigger towns such as Hereford. However, unsure as to why there is no demand in Bromyard.</p>
Regional Agent	<p>The agent is marketing one building within Bromyard –</p> <ul style="list-style-type: none"> • A school which has been converted to offices since 1992 • Located on Church Street • 465 sqm which has been let to a single occupier for £20,000 per annum (£43/ sqm) • Company now moving out to Worcester • This building is subject to a planning application for housing. <p>The agent is currently receiving no significant demand for occupation within Bromyard from businesses.</p> <p>A software engineering company had to take space in an industrial unit one year ago due to limited availability of</p>

	<p>offices in Bromyard. They came to view the converted school recently, wishing it had been available when they were looking for premises.</p> <p>Overall Bromyard is considered a weak office market due to limited communications, transport links and a high number of people choosing to work from home.</p> <p>Workers would prefer to be closer to the M5 and Bromyard would need better public transport to entice occupiers to the area. Currently there is poor/ limited public transport.</p> <p>The whole country seems to want to increase the number of cars on the road rather than reducing the number i.e. the building of new bridges across Herefordshire.</p>
Regional Agent	<p>The agent is currently marketing:</p> <ul style="list-style-type: none"> • 62 sqm office within a building with accompanying rooms of therapy rooms, reception rooms and 3 upstairs flats. Located on Cruxwell Street • Not a straightforward office instruction as desire to sell as one package with ground rent income of the 3 flats included. This would also incorporate maintenance of the exterior and common areas. This is a problem as not many people looking for an office would also want this residential managerial responsibility • Little demand seen. <p>Freehold is always easier to market than lettings, a trend seen in Bromyard and most small towns.</p> <p>The agent would be very cautious of a future office development as it would be difficult to make viable. If anything was to be developed, it should be smaller units for starter businesses of 50-100 sqm. This is where the market is currently seeing demand, however this may change after Brexit.</p> <p>In general, no set locations in mind for new development but for access reasons, close to the A44 would be ideal.</p>
Local Agent	<p>There is a high number of self-employed people in the area. Therefore business spaces should serve this market, providing smaller units – both offices and small workshops.</p>

Source: BE Group's interviews with Commercial Property Agents, 2018/19

Summary

- 4.22 The Bromyard commercial property market is a very small market, with limited turnover of premises over the last decade. Consultations with agents confirm that there is very limited activity in this market. However, occupying businesses of commercial premises in the town are long-term businesses, with strong links and loyalty to the town.

- 4.23 There is very limited choice of commercial premises currently on the market in Bromyard, which limits opportunities for businesses to enter the market in Bromyard or for local businesses to expand or find alternative premises. For Bromyard, with long-term businesses and limited in-migration of businesses, the limited availability of premises will affect local operators more particularly.
- 4.24 While overall transaction volumes are low, demand has been exhibited for quality premises (e.g. new units in Porthouse), which have been taken up by the market. Some agents have also suggested that small starter units, both offices and workshops, would be appropriate for this area.

5.0 COMPANY SURVEY AND BUSINESS ENGAGEMENT

Introduction

5.1 The consultations and primary research with the business community of Bromyard and relevant organisations comprised a dual approach of:

- Telephone survey with a randomised selection of existing Bromyard businesses that typically locate in B-Class premises;
- Targeted one-on-one consultations with key businesses in Bromyard.

5.2 This chapter provides a summary of the findings of that research.

Business Survey

5.3 A business survey has been carried out as part of this study to provide further evidence to the analysis of the local commercial property market, as discussed in the previous chapter. It is another strand of information that has been used to inform the conclusions and recommendations of this study.

5.4 The views discussed below are those of the individual organisations surveyed at the time of consultation. They are not the views of the consultants or local authority.

Methodology

5.5 67 businesses within Bromyard were surveyed in December 2018, which is representative of about 20 percent of the current business stock within Bromyard, which could have been surveyed. The businesses' information was gained from a business database; Market Locations, and once received, businesses were filtered out to those business types that typically use B1, B2 and B8 premises. These were the target groups required for the business survey to align with the focus of this employment study. The survey was undertaken over the telephone, with the questionnaire being completed by the surveyor at the time of correspondence. The survey included basic information regarding the respondent's current location, as well as confidence in the local market and future needs whilst residing in Bromyard. The business survey can be found in Appendix 2.

Survey Responses

5.6 The responses to each of the survey questions have been consolidated and displayed in tables/graphs and analysed individually below.

Current Accommodation

Business Sector

- 5.7 Companies were asked to state the main activity of their business. These results were then classified into the SIC classification groups. Within Bromyard these fit into 12 different groups.

Table 16 – SIC Classification Groups

SIC Classification Group	Responses	
	Number	Percent
Agriculture, forestry, fishing	4	6.0
Manufacturing	12	17.9
Construction	13	19.4
Wholesale and Retail Trade	6	9.0
Transport & Storage	8	11.9
Accommodation & Food Services	4	6.0
Information & Communication	2	3.0
Property	1	1.4
Professional, Scientific & Technical	9	13.4
Business Administration	1	1.4
Health	3	4.4
Other Service Activities	4	6.0
Total	67	100.0

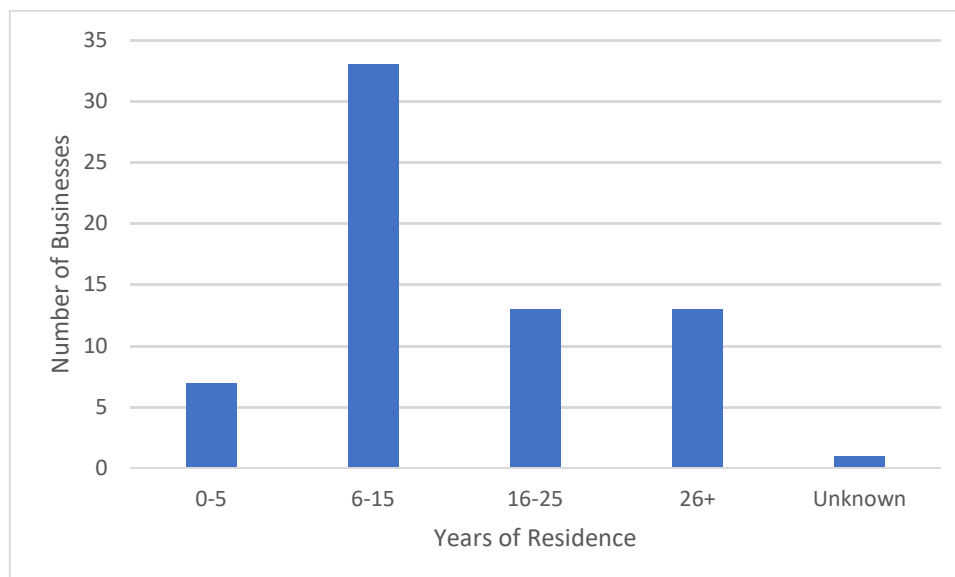
Source: BE Group, 2018

- 5.8 *Construction* can be seen as the classification with the greatest number of respondent businesses within Bromyard, with almost a fifth of the businesses surveyed belonging to this classification group. The *Manufacturing* sector was the second most represented industry, with 12 respondents. This full breakdown indicates that a significant variety of business types locate in employment spaces throughout the town, which would need to be recognised in planning for more business space. It is important to note that this is a breakdown of the number of businesses in each category, rather than overall employment. The construction firms would be smaller contractor firms. As seen in Chapter 3.0, the largest employment sector is the manufacturing sector.
- 5.9 It is noted that a small number of respondents were identified as agriculture, forestry or fishing businesses. This is different to Table 7 from Chapter 3.0 which summarises the ONS's BRES data for the Study Area, because this BRES data does not include farm based businesses.

Years within Bromyard

- 5.10 Companies were questioned on the number of years they had been active and operational within Bromyard. A median operation lifetime within Bromyard from the respondents was 17 years. Figure 6 shows a breakdown of the years of occupation.

Figure 6 – Years of Residence



Source: BE Group, 2018

- 5.11 49 percent of businesses stated having been located within Bromyard for between six and 15 years. This indicates longevity of business life, and a stable and viable business environment for operators in Bromyard.

Employee Numbers

- 5.12 Companies stated the number of employees currently within their business in the Bromyard premises, with an average number per company of six employees. A breakdown of the respondents' employee size bands is seen in Table 17 below showing a local economy made up of micro and small businesses.

Table 17 – Respondent Employee Number by Size Band

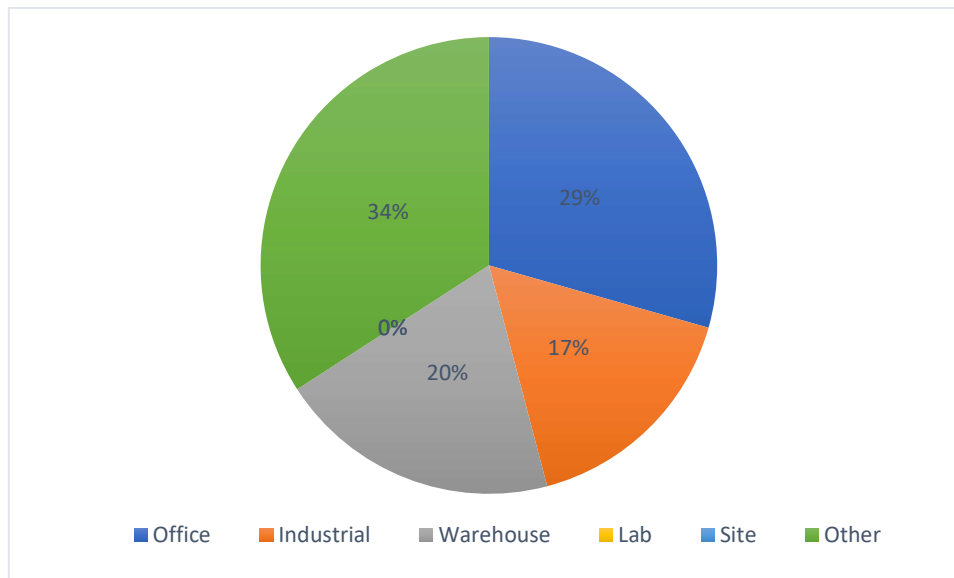
	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	Unknown
Number	56	11	0	0	0
Percent	83.6	16.4	0	0	0

Source: BE Group, 2018

Type of Premises

- 5.13 Businesses were asked to state the type of current premises they reside in, with options given which suit the typical premises of B1, B2, B8 class businesses. These results have been amalgamated in Figure 7.

Figure 7 – Type of Business Premises, Percent



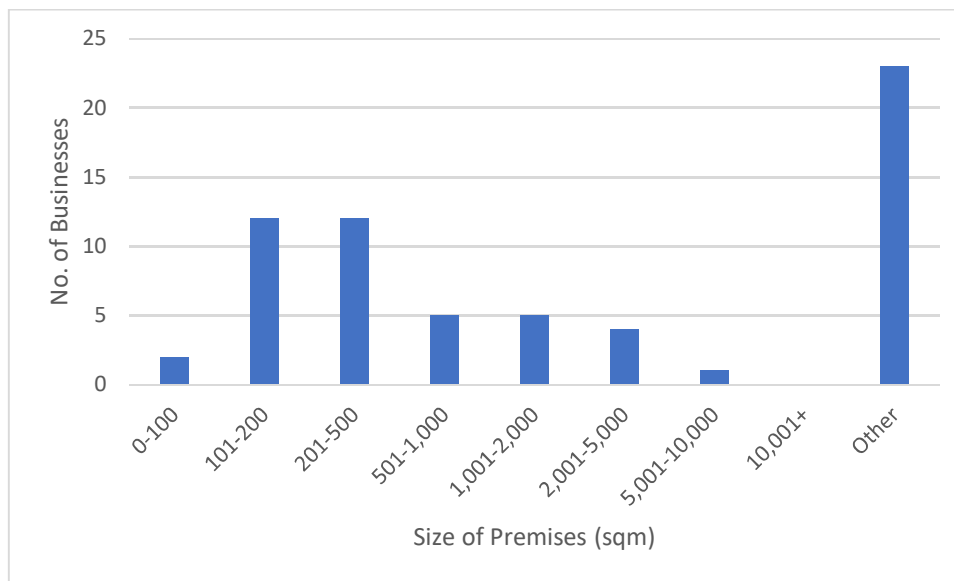
Source: BE Group, 2018

- 5.14 The responses received for this question varied, with businesses allowed to choose more than one answer due to some companies potentially operating from more than one location within Bromyard, or occupying a hybrid unit i.e. office/ warehouse. The most popular premise type was the category of 'other' with 34 percent. This was mostly made up of businesses located in the employee's homes. Offices were the second highest response, with 29 percent, and a combined total of 37 percent of businesses listed their business as including a warehouse/ industrial unit.
- 5.15 This highlights the importance of home-based businesses, including those with a home office, self-employed contractors/tradespeople or those just establishing their businesses. While not currently within premises for B-class employment uses, potentially they would be looking for such uses as their businesses grow as an alternative or an additional unit to their current home-base (e.g. storage of equipment, more formal office space, etc).

Size of Premises

- 5.16 Businesses were asked to state the size of the premises they are currently residing in within Bromyard. This can help to identify the popular sizes of premises that existing companies are residing in, and be useful for identifying what is needed in future supply.

Figure 8 – Size of Premises, sqm



Source: BE Group, 2018

5.17 Figure 8 above shows a range in the sizes of premises that businesses surveyed are currently occupying. With businesses working from home, 34 percent of companies stated the size of their business as 'other', making this the most popular category. 38 percent of companies stated small sized units of below 500 sqm as their current premises, which is unsurprising as 83.6 percent of the businesses contained a micro sized number of employees.

5.18 The larger sized properties are typically warehouse/ industrial units, with only one business stating a size of above 5,000 sqm. Overall, the unit sizes stated are commensurate with the small number of employees working within the respondent businesses.

Ownership and Lease Length

5.19 Businesses were asked about the ownership of their premises; if the company owned the building or were in occupation through a lease, and if so, how long was left on the current lease. The split in Bromyard saw 53.7 percent of properties owned, 32.8 percent have a leasehold tenure on the property, and 13.4 percent are unsure of the tenure status.

5.20 The length left on these leases ranges from two – five years, with an average time remaining of 2.9 years for the 19 companies who knew the length of time remaining on their lease.

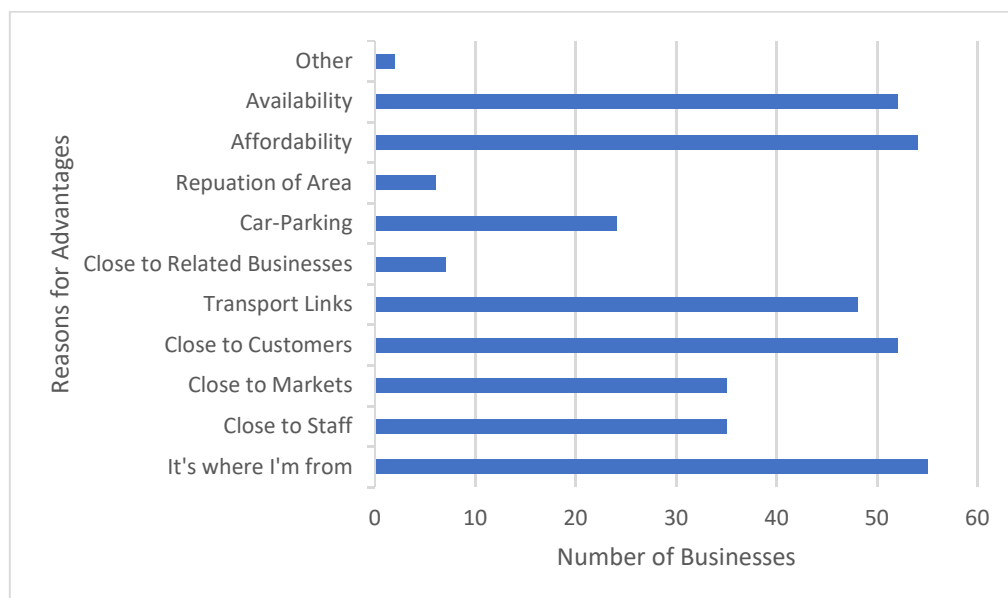
Previous Location of Business

- 5.21 Companies were asked if there had been any previous location for their business, either within Bromyard or elsewhere. Almost all of the businesses surveyed (98.5 percent) had had no previous location for their business. Just one company had been located elsewhere and moved to Bromyard when combining with another company in 2004.
- 5.22 This is an important finding of the study and highlights the indigenous nature of businesses in Bromyard. Therefore, if they are looking for alternative or additional premises, their primary location of search is likely to be Bromyard or nearby. Therefore, adequate provision and flexibility should be provided in the market to accommodate growth of the indigenous businesses.

Advantages of Current Location

- 5.23 Respondents were given 11 different options as to the advantages of having their business located in Bromyard, with the ability to pick as many options as necessary. The results are displayed in Figure 9 below.

Figure 9 – Advantages of Current Location



Source: BE Group, 2018

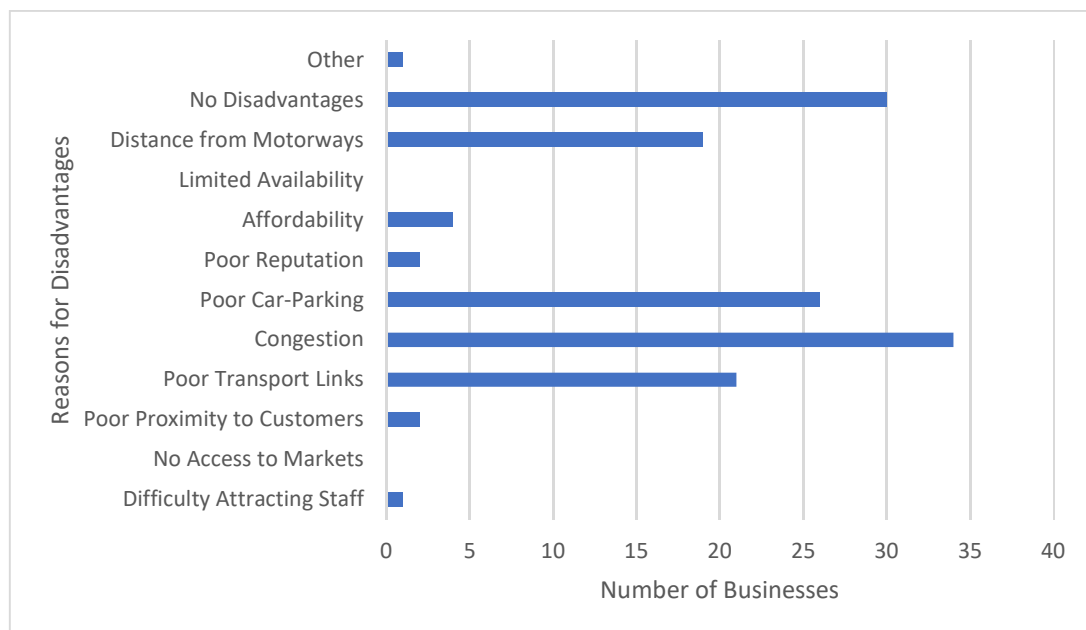
- 5.24 For 82.1 percent of the respondents, the main advantage of being in Bromyard for business is because it is where they are from, indicating that proximity of their home life and work life suits many of the employees/ businesses within Bromyard. Popular answers were also given for proximity to customers (77.6 percent), affordability (80.6

percent) and availability of the premises (77.6 percent). Positively, a broad mix of responses were provided.

Disadvantages of Current Location

- 5.25 Respondents were given 12 different options for stating reasons as to why there are disadvantages for operating their business within Bromyard. Similarly as to advantages, multiple responses were allowed to be given.

Figure 10 – Disadvantages of Current Location



Source: BE Group, 2018

- 5.26 Noticeably, the four major disadvantages companies had been experiencing all concerned transport issues; Congestion (50.7 percent of respondents), poor car-parking provision (38.8 percent), poor transport links (31.3 percent) and distance to motorways (28.4 percent).
- 5.27 Positively, 44.8 percent of companies did not state any disadvantages to being located in Bromyard. Additionally, with only a small number, if any, finding disadvantages in options relating to the market, this would indicate an employment market with good access to staff and customers alike.
- 5.28 The list of disadvantages that did not receive many (or any) responses is also instructive and includes:
- Limited availability of premises (0 responses)

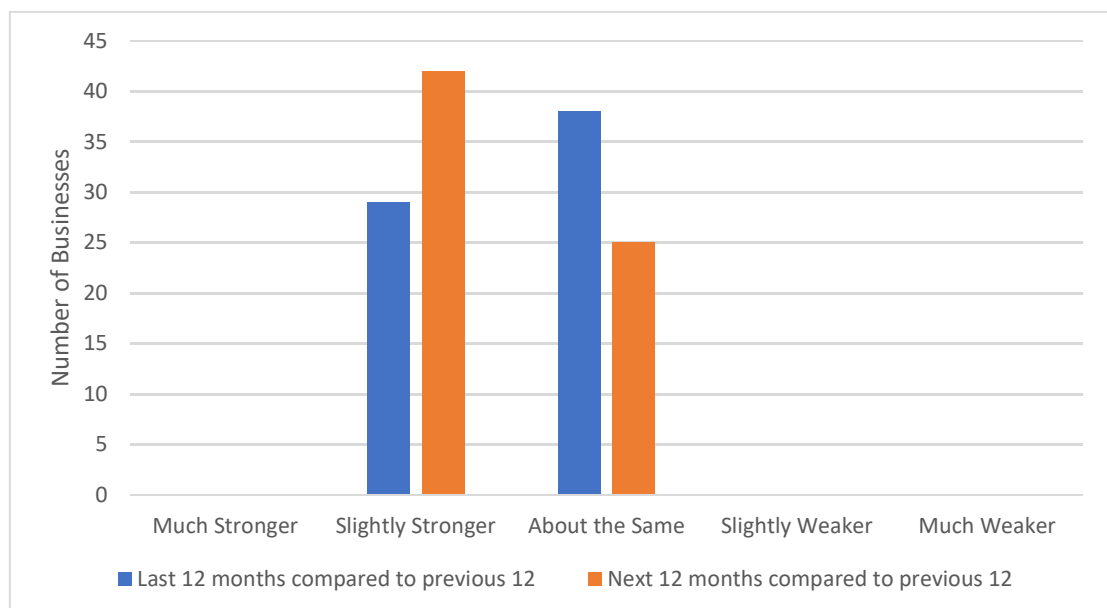
- No access to markets (0 responses)
- Difficulty attracting staff (1 response)
- Not close enough to customers (2 responses)
- Poor image of town (2 responses)
- Affordability (4 responses)

5.29 This suggests satisfaction with the business conditions in the town (other than the transport issues highlighted above).

Business Confidence

5.30 Businesses were asked about their performance levels to analyse recent growth and business confidence for future growth. Figure 11 below shows questions asked in relation to how their business had changed from the previous year to the current, and comparing the current year to the expected performance for the upcoming year. The performance levels were rated on a scale from 'much stronger' to 'much weaker'.

Figure 11 – Business Performance



Source: BE Group, 2018

5.31 Looking to how the business has performed within the last 12 months compared to the previous 12, 56.7 percent of businesses had seen no change. Positively, 43.3 percent of businesses believe their company has performed slightly stronger within the last 12 months. Additionally, none of the companies surveyed have experienced a weaker performance.

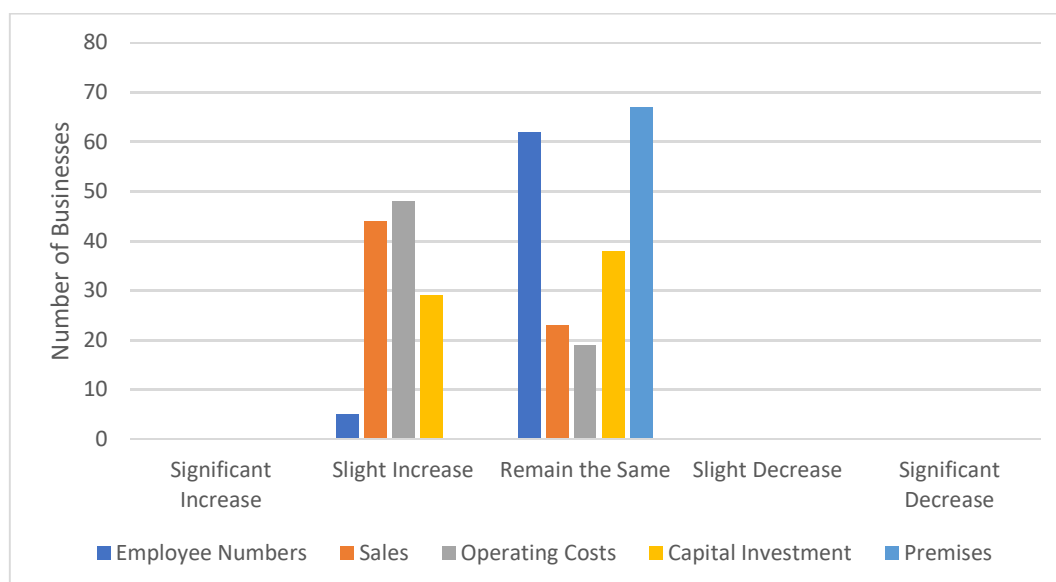
5.32 Regarding the prediction of the future performance of their businesses, the majority surveyed (62.7 percent) have stated an expected slightly stronger business performance than that of the previous 12 months. The remaining 37.3 percent of companies believe their business will perform the same in the next 12 months when compared to the previous 12 months.

5.33 The fact that all 67 respondents answered these business performance questions with 'about the same' or 'slightly stronger' is another indicator of the stability of the local economy. Businesses are continuing on as they have been for several years, being long term, stable enterprises, satisfied with their current operations.

Changing Business Factors

5.34 To identify the level of growth businesses are expecting to experience over the upcoming 12 months, they were given five factors (employee numbers, sales, operating costs, capital investment and premises) to rate on a scale from significant increase to significant decrease. These results are summarised in Figure 12 below. Overall the only expectations that the businesses surveyed had were for business factors to remain the same or a slight increase to be experienced, once again highlighting the stable, satisfied nature of businesses in the area.

Figure 12 – Expected Changes in Business Factors



Source: BE Group, 2018

5.35 Companies responded with predictions of a slight increase in sales and operating costs, and with operating costs, capital investment and premises to remain the same.

This is not particularly surprising as the last three factors are generally more stable within a business than sales and operating costs, which tend to fluctuate more often.

- 5.36 A slight increase expected for the sales of a company is positive, with 65.7 percent of businesses predicting future growth for this factor. Alongside this, 71.6 percent of respondents are also predicting a slight increase in operating costs.
- 5.37 Employee numbers and capital investment are predicted to remain the same by 92.5 percent and 56.7 percent of businesses respectively. The high number of businesses predicting no change in employee numbers, whilst being an indication of consistent business performance, also suggests that there would be limited need for alternative premises due to outgrowing current units.
- 5.38 100 percent of businesses surveyed predict there to be no expected change in the premises of their business. This is reflected in the answers received for questions regarding 'future requirements', discussed below.

Future Requirements

- 5.39 Businesses were asked to state 'yes' or 'no' whether they were considering relocating their business premises. 100 percent of businesses surveyed stated no desire for a relocation or expansion. It is positive for Bromyard that there is no desire from these companies for relocation, however, no plans for expansion perhaps suggest a static business market with limited growth potential.
- 5.40 The remaining seven questions in the survey were rendered void as were only to be answered by companies who wished to relocate or expand.

Additional Comments

- 5.41 With companies encouraged to bring forward any additional issues that they may have, certain comments arose which were not able to be brought up through a question in the survey, but deemed appropriate by the respective businesses to mention.
- 5.42 Positively, many of the companies wished to emphasise how the current premises which they occupy are ideal for their business. With 98.5 percent of businesses stating that there has been no previous location for the business, and an average time within Bromyard of 17 years, this suggest that the majority of companies surveyed have had one set place of business and never moved. This pattern shows Bromyard as having

a loyal employment base, with businesses able to sustain a long existence in the area due to property and business needs being met.

- 5.43 With the location of Bromyard in a rural setting, some of the businesses surveyed stated premises of not only office/ industrial units, but some additional farming facilities for use in sectors such as machinery, agricultural services and manufacturing of alcohol. This is showing some companies operating from different locations within Bromyard, alongside the B1, B2, B8 use premises.
- 5.44 Unsurprisingly given the current economic climate, three businesses stated no set long term plans for the business, along with four stating Brexit as the reason for uncertainty over their company's future. It is not unreasonable to hear of doubt in future business growth during these times and this has been consistent with other surveys that BE Group has undertaken in recent times.

Targeted Business Consultations

- 5.45 To complement the business survey, a series of one-on-one business consultations with key businesses in Bromyard was undertaken to provide a deeper level of understanding of issues for businesses in the town. Businesses were specifically targeted, either because they are a large business within Bromyard, in terms of employee numbers or unit size, or because it was known that they had a particular requirement or concern.
- 5.46 The consultations were undertaken as telephone conversations. They did not follow a strict list of questions or were fully scripted; rather they were discussions covering a range of topics – historic reasons for establishing a business within Bromyard, requirements for premises, key concerns, staff requirement, future business plans etc.
- 5.47 The summaries of the consultations with the business representatives are provided below

Table 18 – Summary of One-on-One Business Consultations

Business Type	Commentary
Polytec Group (Car component manufacturer)	The company has been located in Bromyard since 1971 and manufactures different parts for the car industry – to be exported all over the country, but mainly Europe. Their current facility in Bromyard is a 100,000 sqft (9,290 sqm) factory, located at Porthouse Industrial Estate, which they own. The site is home to 450 employees. 2018 saw a new unit of 75,000 sqm (6,970 sqm) open in Telford as part of a £25 million investment. The company would have

	<p>preferred to carry out the expansion within Bromyard, yet land wasn't available at the time to expand the business on their current site, or on one larger piece of land in Bromyard. Additionally, the area seems too hilly to locate the large factory which they require and the poor location, in respect to motorway access, was a commanding factor in choosing Telford. Telford is just five minutes to the M54.</p> <p>Positively however, the company has no desire to move from Bromyard and consolidate in one place.</p> <p>60 percent of the factory workers are eastern European, which means there is an uncertainty of how staffing will be affected after Brexit. Further problems with staffing are due to the general low educational level of the Bromyard residents meaning it is difficult to obtain skilled workers for skilled roles such as team leaders/supervisors. It is difficult to attract the employees with these skill sets to such a small town like Bromyard, they would rather be working for bigger companies i.e. Jaguar, who are located in better places, such as big cities like Birmingham, and can pay more.</p>
<p>Holden Vintage and Classic</p> <p>(Car component manufacturer)</p>	<p>The company manufactures classic car components from mostly mail orders. Situated on Linton Industrial Estate in a 560 sqm factory with a retail unit situated at the front. Employs 12-15 employees, all from within five miles of the business. Haven't experienced difficulties attracting labourers for the technical manufacturing work – can generally attract a good labour generally.</p> <p>Company relocated to Bromyard from Kidderminster in 1994 because it was the preferred location and whilst initially operated over two sites (Station Industrial Estate), now is consolidated onto one site. Did once control other companies such as Holden Aluminium Technologies, but sold that part off three-four years ago. Whilst that company was sold off, Holden retained ownership of their building and several others on the site, which they now lease off.</p> <p>Demand is received for these units, however Holden only wishes to lease and most of the demand is looking for freehold opportunities of small units around 90-185 sqm. They own five units, with four of them currently let. The last unit of 930 sqm is about to be let – but for a much cheaper rent than he would have liked. Overall belief that industrial units are needed in Bromyard as demand is being received, although currently there is a lull.</p> <p>No current expansion of the business into further premises is needed, however if required, they own buildings on their current industrial estate which they can expand into. Current location is fine with being in the centre of the country and just 20 minutes from the motorway, no problem is found in transporting their products to customers.</p>
<p>Marches Bottling and Packaging</p> <p>(Packaging Company)</p>	<p>As a sister company to a beverage manufacturer located on a farm just south of Bromyard, the company handles the bottling and packaging of different alcoholic beverages into various containers. The operations are mainly for companies within Herefordshire, thereby providing employment to local people and business for local companies.</p> <p>The company is located in an industrial unit at Porthouse Business Centre of roughly 350-400 sqm, as were looking to purchase a property and so did so with an old factory for £285,000. Major issues have been experienced on site with regard to drainage issues which the environmental agency has had to become involved with. The result of this is the company spending a huge amount of money and time to tanker their own waste.</p> <p>Desperately seeking space due to the fast growing nature of the business, and have been looking to expand for the last year.</p>

	<p>However, the owner of the land surrounding their current unit is unwilling to sell them land, and so expansion is being rendered extremely difficult. Owner is suggesting housing on the rest of the development land which would significantly impact the operating hours of their business. They do not want to leave Bromyard, but if no space is available, then they may end up being pushed out. Desperately seeking support from the Council over this issue. Ideal situation would be to remain in current location due to costs which would be associated with having to move machinery and equipment to a new location.</p> <p>Recruitment of staff is good, with the majority of their employees being local residents.</p>
Legge of Bromyard (Food Retail Store)	<p>Business was established within Bromyard and has remained there ever since, with a total of 28 employees all from the local area.</p> <p>Operate out of a retail shop, with industrial units to the rear being leased to T&S Autoservices. Lease been held for a long period of time.</p> <p>All produce used is locally sourced and serves local residents, workers from nearby factories i.e. lunch time population, and customers who have specifically travelled to Bromyard to visit the shop. They also supply to 15-20 wholesalers within the local area. No desire to expand business into more space or to move out of Bromyard.</p> <p>Traffic and transport around the town is not seen as an issue. Vans are used to transport produce around the county to the customers/ wholesalers, and no problem is found for accessing motorways/ roads.</p>

Source: BE Group interviews, 2018

Summary

- 5.48 The business survey is a snapshot of the current market within Bromyard, taken from a random sample of businesses that typically reside in B-Class premises.
- 5.49 Overall the respondents showed confidence in their business prospects for the future whilst being located within Bromyard. The resounding message received is a strong sense of loyalty to the area of Bromyard for business, with several companies in long-term occupation within the town, and 100 percent not looking to relocate. Whilst this figure is not reflective of the entire business community's future plans, it is a strong indication as to the plans of a significant sample.
- 5.50 The biggest disadvantages of the area were deemed as traffic related issues (i.e. congestion, car-parking), yet confidently, 44.8 percent of respondents stated no disadvantages to having their business located in Bromyard. Along this, the majority of businesses are in long-term existence in the area, due to it being where the respondent is from, again showing loyalty to the area.
- 5.51 The targeted consultations also showed loyalty to the area over the long term. It also showed how businesses have responded in the past to needing to acquire further

employment space. Expansion of Polytec has occurred outside of Bromyard, and while they have retained their Bromyard presence, a different firm may take a different approach to needing to expand and relocate their entire operations due to a lack of space. Furthermore, Marches Bottling and Packaging are currently looking for space, without success.

6.0 EMPLOYMENT LAND SUPPLY

6.1 The existing employment areas have been visited and assessed according to their current functionality as an employment site, potential for expansion and on-going appropriateness for employment uses. As well as a qualitative review of the sites, each employment area has 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 roads i.e. motorways, A-roads
- prominence within Bromyard – visibility from roads
- access to public transport
- sequential testing/ location from the town centre
- ability to expand
- access and congestion
- interface with neighbouring sites
- building quality and condition
- flood risk
- site amenities i.e. services, site layout.

6.2 The scoring system is provided in Appendix 3. The total score is provided in Table 19 overleaf, which also includes descriptions of the existing employment areas. The breakdown of the scores for each site is provided in the following Table 20.

6.3 Site proformas, including site maps, for the employment allocations and other sites under consideration are provided in Appendix 4. An overall context map is provided overleaf.

Figure 13 – Bromyard Study Area Context Map



Source: Google Maps, 2019

Table 19 – Existing Employment Areas

Employment Site	Total Size (ha)	Uses	Comments	Site Score (max 100)	Spare Land Capacity
Linton Trading Estate, HR7 4NS	2.90	Mix of B-class uses, mainly B2/B8	<p>Currently is the site of a trading estate, commercial buildings and storage. Mix of standards of buildings, from older, tired looking premises to reasonable quality units. Main occupier of the units is WJ Holden, which also owns the majority of the units. WJ Holden leases units to other occupiers.</p> <p>Linton Trading Estate has good prominence, being located on the A44, east of Bromyard. Entrance is off A44.</p> <p>Internal movement within the Trading Estate is disjointed.</p> <p>A hardstand area to the west of the entrance point of approximately 0.23 ha. This hardstand area ("Site F") gained permission for caravan and motorhomes sales use in 2017, although in early 2019 this was not occurring on the site.</p> <p>Rear of the estate contains moderate quality single storey employment buildings and storage areas. The site is moderately sloped towards the rear of the site, with cut-and-fill used to develop sites.</p> <p>Small designated travellers' site to the south (though access is not through the trading estate)</p> <p><i>Attractiveness</i> Linton Trading Estate is a key employment location in Bromyard with local prominence and high visibility on the A44. Sufficient car parking for existing uses. Uses towards the rear (south) of the site are lower order uses, which would impact on attractiveness, with these uses accessed via A44 entry-point.</p> <p><i>Suitability</i></p>	56	Small plot at front of site, approx. 0.23 ha.

Employment Site	Total Size (ha)	Uses	Comments	Site Score (max 100)	Spare Land Capacity
			The area is suitable for an on-going employment use. Site location is separated from the main urban area of Bromyard, although is an established employment location and is on the A44 connecting with Bromyard. Linton Trading Estate has environmental constraints limiting its potential to expand, including its high visibility in a rural location (thereby having a visual impact).		
Porthouse, HR7 4NS	8.76	Mix of B-class uses, mainly B2/B8	<p>Site contains Three Mills Trading Estate and the modern Porthouse Business Centre with overall building qualities variable with some new high-quality units and some areas of poor quality. This area includes key employers such as Polytec, Kristal D&D, Micron. Several businesses are connected to the local rural economy, including farming equipment, food tech, wool storage.</p> <p>There is some spare land capacity within the location, including a small site (0.1 ha) on Station Rd, currently grassed frontage for warehousing. A larger site, with hardstand and grassed areas, is located between Tenbury Rd and Porthouse Business Centre (0.7 ha), which would be appropriate for further employment. Access would be through the internal roads at Porthouse, rather than Tenbury Rd.</p> <p><i>Attractiveness</i> This location is a key employment site in Bromyard, closely positioned near the town centre and accessible for the resident workforce. This area includes the most modern units within Bromyard. The general image of the site is attractive to the market as a high-quality site. It is a primary location for B2 and B8 businesses in Bromyard.</p> <p><i>Suitability</i> The area is suitable for an on-going employment use, predominantly B2 and B8 uses, but also appropriate for office units. Location is appropriate for a range of sizes, from small starter units to mid-size factory premises.</p>	62	0.8 ha in two separate plots

Employment Site	Total Size (ha)	Uses	Comments	Site Score (max 100)	Spare Land Capacity
Station Trading Estate, HR7 4NT	2.78	Mix of B-class uses, mainly B2/B8	<p>Site located on the edge of Bromyard with varying sizes, types and quality units. Some larger industrial and storage units. Key occupiers include Holden Aluminium Technologies, Travis Perkins, bus depot. Estate has a building supplies focus, including timber yard and building supplier, although also has important factory uses.</p> <p>River Frome forms the eastern edge of this estate, which presents a flood risk and potential environmental constraints.</p> <p>Estate is close to the town centre and the resident workforce of Bromyard. It is also close to the Porthouse area.</p> <p>The estate does not have spare land capacity and renewal would require redevelopment of existing areas.</p> <p><i>Attractiveness</i> Building standard is moderate, although the streetscaping and physical attractiveness of the estate is limited. Premises are generally adequate but also has areas which require maintenance. Part of the site slopes and is a risk of flooding. The estate has only local prominence.</p> <p><i>Suitability</i> The area is suitable for an on-going employment use. Renewal of parts of the site should be encouraged, though to retain employment uses.</p>	47	No capacity

Sources: Employment Land Study 2012, Hereford Council, Call for Sites 2017, BE Group reviews

6.4 These three employment areas are all capable of providing an on-going employment function for Bromyard. They will retain a mixed B-class employment function with strong connectivity to the surrounding rural economy. All three sites score reasonably well on the multi-criteria assessment, with Porthouse scoring the highest, due to its central location and quality of premises. There is approximately some 0.93 ha of

employment land within these existing employment areas that could be developed for further employment uses within the footprint. These are across three separate plots.

- 6.5 This table provides the breakdown of the scores for the existing employment areas. The criteria that the areas were scored against is located in Appendix 3.

Table 20 – Breakdown of Scores for Existing Employment Areas (Max. 100)

	Linton Trading Estate	Porthouse	Station Trading Estate
Proximity	6	5	5
Prominence	10	5	6
Public Transport	0	10	10
Sequential	3	10	7
Expanding Ability	5	5	0
Access/ Congestion	5	6	4
Interface with neighbouring sites	7	7	5
Building Quality	6	6	6
Flood Risk	10	3	0
Site Amenity	4	5	4
Total	56	62	47

Source: BE Group, 2019

- 6.6 Table 21 below reviews other sites that have previously been identified as potential further employment areas for Bromyard. These sites have been scored against a similar but slightly different scoring matrix, reflecting that they are not existing employment sites, but rather vacant sites with potential for employment uses to be developed on them. This scoring is comprised of 11 individual measures, each scored out of ten, equating to a maximum score of 110. Differences occur in these totals due to more factors being identified to measure site conditions for the potential employment areas (e.g. planning status, constraints to development) than for the existing employment areas.

6.7 These scores provide guidance as to the overall potential suitability of the sites for employment uses in the future, with the 11 different measures listed as:

- proximity to the strategic roads i.e. motorways, A-roads
- prominence within Bromyard – visibility from roads
- access to public transport
- sequential testing/ location from the town centre
- planning status
- availability of services
- constraints (physical, planning or legal)
- environmental setting
- flexibility (site shape, ability to sub-divide)
- flood risk
- site availability

Table 21 – Other Identified Potential Employment Areas

Employment Site	Total Size (ha)	Comments	Site Score (max 110)	Suitability for Employment
Oliver Land south of Linton Industrial Estate	5.60	<p>Rural location with access to the site through the existing estate or from a narrow rural lane to the south.</p> <p>Part of site was formerly used for clay extraction and thus it is expected that there is significant contamination across the site and need of further remediation.</p> <p>The site connects with the Linton Trading Estate to the north, including access to part of the site through the existing trading estate. This access point includes a roadway with a significant slope. Part of site used as a recycling centre/ for the storage of scrap. There is a travellers' site designation on part of the site.</p> <p><i>Attractiveness</i> Being adjacent to an existing employment area, this site has some level of attractiveness for future employment, integrated with the Linton Trading Estate. However, the site has no main road frontage and would require substantial access and highways upgrades to deliver the site. Furthermore, there are significant ground condition and remediation issues. Developing this site for employment would be very expensive and unlikely to be viable in the foreseeable future. The only potential to bring to the market would be to link it with Linton Trading Estate, though this is considered very unlikely.</p> <p><i>Suitability</i> Site is not considered suitable for employment uses due to substantial constraints in bringing forward.</p>	35	Not suitable for employment due to constraints impacting on viability
Land to the west of Panniers Lane	10.30	<p>Site comprises two agricultural fields, one contained and the other open in nature. Some existing business premises opposite the southern quarter of the site.</p> <p>Northern part of the site (north of Pencombe Ln) is subject to a current development application for residential dwellings by Gladman Developments. This application does not include B-class employment and the developer does not intend to pursue an employment option.</p>	~	Not available for employment uses.

Employment Site	Total Size (ha)	Comments	Site Score (max 110)	Suitability for Employment
		The southern part of the site has formally been withdrawn by the owner from consideration for employment uses.		
The Depot	~	Council approved this site for redevelopment for a 45-dwelling housing scheme and thus should not be considered as an on-going employment site.	~	Not available for employment uses.
Land to the west of Tenbury Rd (north of Rugby Club)	9.40	<p>Put forward for consideration as part of the 5 ha required for employment allocation in July 2017, although not in the formal Call for Sites process.</p> <p>Site is used for agricultural purposes and is moderately sloped in parts. A small watercourse runs through part of the site.</p> <p>Site is in ownership of WJ Holden, which has considerable landholdings throughout Bromyard, including employment sites.</p> <p>There are some significant issues associated with the site, notably potential access and transport to and from the site. It is on a relatively narrow B-road, which is likely to require upgrades to support HGV and vehicle movements. Furthermore, it is on rising land and thus has previously been assessed to have a significant visual impact. The site is also physically detached from the built form of Bromyard.</p> <p>Additionally, the proposal of 40 static caravans at Rock Farm Caravan Park on the opposite side of the road (eastern side) was denied, with an appeal dismissed in 2015. The impact on the character and appearance of the landscape was a reason behind the dismissal and it was decided the environmental harm would not be outweighed by potential social/ economic benefits.</p> <p><i>Attractiveness</i> The site itself should be developable for small to mid-sized employment units. However, from a market attractiveness viewpoint, the site would be perceived as being on the 'wrong' side of Bromyard to appeal to potential occupiers, being poorly connected to the A44 or A465, which are important connections to Worcester/motorways and Hereford. Furthermore, connecting roads and</p>	48	Marginal site

Employment Site	Total Size (ha)	Comments	Site Score (max 110)	Suitability for Employment
		<p>distance from the urban footprint of Bromyard would limit the market for employment units on the site.</p> <p><i>Suitability</i> The site is likely to be a marginal prospect for employment uses. While the site itself should be developable and in the ownership of someone that could bring the site forward, the market perception, access and connectivity to the site have considerable limitations.</p>		
Submitted Sites				
Land adjacent to Linton Court, HR7 4QJ	0.15	<p>Site put forward by Draycott Developments in Call for Sites in 2017 and submitter has confirmed that they are still interested in promoting the site.</p> <p>Site currently used as a storage area with hardstanding and grass, with a proposed use of B1. There are rights granted for existing access through Linton Court Estate (same land owner), and currently no other restrictions.</p> <p>Site does have water supply, sewage infrastructure and electricity supply, however, does not presently have gas supply.</p> <p>Historically, the site had an application for residential in 2013 (P132643/F) which was refused due to adjacent industrial noise.</p> <p>Site is partially treed and alongside a treed corridor, that separates the site from Linton Trading Estate. Site is relatively flat (particularly compared to other potential Bromyard sites).</p> <p><i>Attractiveness</i> Site has frontage to A44 and is near to Linton Trading Estate. However, access is likely to be indirect, through neighbouring Linton Court (a residential scheme) and while near to Linton Trading Estate, there will be no direct links due to a separating corridor.</p> <p>Site has some potential for very small-scale office/light industrial workshop units, e.g. for start-up units.</p>	55	Suitable for small-scale office or light industrial units.

Employment Site	Total Size (ha)	Comments	Site Score (max 110)	Suitability for Employment
		<p><i>Suitability</i> Access conflicts between the site and neighbouring Linton Court would need to be resolved, though it is recognised that there is a common landholder. Residents of Linton Court may be impacted.</p> <p>Suitable for small scale units if access conflicts can be overcome.</p>		
Field adjacent to B4214, Little Froome Farm	5.0	<p>Site put forward in Call for Sites in 2017 and submitter has confirmed that they are still interested in promoting the site.</p> <p>Large, gently sloping site, near the intersection of the A465 and B4214. Separated from the urban footprint of Bromyard by other agricultural fields. Sites closer to Bromyard on the A465 (i.e. that would provide a contiguous expansion of Bromyard) are more sloped than this site.</p> <p>Site is currently used for agricultural purposes but submitted in Call for Sites process as a potential employment site.</p> <p>Site appears to have limited obvious constraints. The moderate sloping on the site is likely to increase costs for development, though should be deliverable. Infrastructure would need to be connected.</p> <p>Likely to be brought to the market as serviced development plots.</p> <p>Could accommodate all of 5ha requirement that is in current planning documents (though this may not be preferred outcome, as it puts all employment land in control of one landholder)</p> <p><i>Attractiveness</i> Site has relatively long frontage to A465, which connects to Hereford. Relatively straightforward to develop, though would require infrastructure connections. The site is appropriate to cater for mid-sized industrial (B2) or warehousing (B8) uses, thereby providing alternative locations to the key employment sectors in Bromyard.</p>	61	Suitable for small to mid-sized industrial and warehousing uses.

Employment Site	Total Size (ha)	Comments	Site Score (max 110)	Suitability for Employment
		<i>Suitability</i> The site is separated from the existing Bromyard footprint, which is not a preferred outcome. Although it is recognised that sloping constraints increase for sites further north. Otherwise suitable for B2 and B8 uses.		

Sources: Hereford Council, Call for Sites 2017, BE Group reviews

6.8 The breakdown of the scoring of these potential sites is provided in the table below.

Table 22 – Breakdown of Scores for Potential Employment Areas (Max. 110)

	Oliver Land South of Linton TE	North of Rugby Club	Adjacent to Linton Court	Field adjacent to B4214 (Little Froome Farm)
Proximity	5	1	6	5
Prominence	2	6	10	8
Public Transport	0	0	0	0
Sequential	3	3	3	3
Planning Status	1	1	1	1
Services	0	0	0	0
Constraints	2	4	6	8
Environment	2	7	7	10
Flexibility	2	10	2	10
Flood Risk	10	10	10	10
Availability	6	6	10	6
Total	33	48	55	61

Source: BE Group, 2019

- 6.9 The review of the existing employment spaces revealed a small quantity of developable land across three plots, providing some 0.93 ha of land in total, comprising:
- Linton Trading Estate, 'Site F': 0.23 ha
 - Land at Station Road: 0.1 ha
 - Land alongside Porthouse Business Centre: 0.7 ha
- 6.10 This provides for some, limited short-term flexibility in the market, although it is dependent on the willingness of the landholders to bring the sites forward. For a substantial proportion of the market, most notably smaller enterprises, the preference would be for built premises, rather than development plots. The higher up-front capital costs for construction projects, longer-term commitment of purchasing and building and the more immediate needs of smaller enterprises means that small businesses are more likely to prefer to look for built premises, either on a leasehold or freehold basis.
- 6.11 In assessing other potential sites, it is considered that the two sites emerging from the Call for Sites process both represent reasonable opportunities for Bromyard. The **Land adjacent to Linton Court** (0.15 ha) could service the very small enterprise market, including sole operators, and providing a mix of office (B1a) and light industrial (B1c) premises would be appropriate. Further clarifications would need to be secured regarding the access and traffic movements for the site and whether a shared access point with Linton Court would be appropriate and workable.
- 6.12 The **Field adjacent to B4214, Little Froome Farm** (5 ha) would be appropriate for small to mid-sized industrial and warehousing premises. While not forming a contiguous expansion of the Bromyard urban footprint, it is recognised that the site to the north, between this site and Bromyard, has more significant sloping and is likely to be costlier to develop. The site has direct frontage to the A465 and straightforward connectivity to the A44. The site could be subdivided into serviced, development plots and would provide an option for the existing manufacturing businesses to acquire and develop purpose-built premises.
- 6.13 The **Land to the west of the Tenbury Road** (approx. 9.40 ha) is a marginal site. While the site appears to be developable for small to mid-sized industrial and commercial units, the access and connectivity to the site is limited. Again this site does not form a

contiguous expansion of Bromyard. Being to the north of Bromyard, it would be perceived by the market as not as prominent or accessible than sites with better connectivity to the A44 and A465. The visual prominence of the site is also an issue with the potential landscape impacts from public vantage points on Bromyard Downs if development was to occur. Additionally, the refusal of 40 static caravan parks at Rock Farm Caravan Park was denied due to the potential impact it would cause to the character and appearance of the landscape.

7.0 EMPLOYMENT LAND AND FLOORSPACE DEMAND

Introduction

- 7.1 There is no clear or exact methodology for forecasting employment land demand for an area. Employment land demand forecasts as inputs into Local Plans are generally for a forecast period of about 20 years, which has a significant degree of uncertainty inherent in it. National and local changes to the economy can occur within that timeframe, which may not be adequately accounted for in the forecasts. Examples of national or international changes that can affect the actual employment land demand profile include recessions, economic boom times, structural changes in the economy (e.g. movement towards a services economy), policy interventions, conflicts, etc. Local changes that can affect employment land demand include individual business decisions, policy changes, infrastructure delivery, performance of key sectors, competition from neighbouring areas, etc. An assessment of a localised market, such as this Bromyard assessment, is more susceptible to such localised uncertainties, where a location decision of a single, significant employer can have substantial implications for overall demand (e.g. movement in or out of Bromyard).
- 7.2 Therefore, it is important to understand the potential uncertainties of employment land forecasts when planning for employment land. Furthermore, it is important to gather information from several sources that may guide the employment land forecasts. The previous chapters have highlighted several individual points of intelligence that could inform the employment land forecasts including:
- **Policy support:** There is policy support for employment and housing growth in Bromyard. The Core Strategy 2011-2031 anticipates a minimum of 500 new homes and around five hectares of new employment land. While this level of employment land is being reassessed as part of this study, the policy support for further employment land in Bromyard is established. Furthermore, the Core Strategy supports the strengthening and diversification of the economies of Herefordshire's five market towns, which includes Bromyard.
 - **Housing completions:** The Herefordshire Authority Monitoring Report shows that recent years have seen Bromyard with an increased number of housing completions and an increased proportion within Herefordshire. A proportion of this increased population would have a demand for employment opportunities within the local area. 180 net housing completions have been recorded since 2014/15.

- **Socio-economic profile:** The profile showed that manufacturing is an important component of the local economy, being the highest employment sector in the Bromyard Study Area, with some 27.5 percent of the workforce working in the Bromyard Study Area in the manufacturing sector. Therefore, the provision of land and floorspace that is appropriate for B2 uses is important to ensure flexibility and growth in this sector. Manufacturing employment had increased by about 100 workers between 2015 and 2017.
- **Employment forecasts:** The OE projects that employment in the Bromyard Study Area will increase by 40 jobs between 2018 and 2031, led by growth in professional services (+70 jobs) and other services (+50 jobs), somewhat offset by declines in production (-60 jobs) and public services (-20 jobs). However, job numbers are anticipated to peak in 2024, being 110 jobs above 2018 levels. Therefore, planning for employment land and floorspace should be cognisant of the overall changes through the planning period, but also should be flexible to accommodate the peak and subsequent tapering off of the employment numbers.
- **Property market:** The Bromyard property market is a very small, localised market averaging only about one recorded transaction per year. This is a function of the limited demand, but also a function of the limited availability of space in the market.
- **Demand for industrial units:** Transactions that have occurred over the last decade have been for industrial units, with a range of sizes. However, the overall volume of transactions that have occurred has been low. The office market is negligible.
- **Demand for starter units:** Local commercial agents consider that there is demand for small start units, recognising that there is a high proportion of small enterprises and self-employed people in the area. This demand is likely to be for small office space and small workshops.
- **Reasonable interest in Countrywide unit:** discussions with the agent disposing of the vacant Countrywide alongside the Co-op has suggested that there has been a reasonable level on interest in the unit, including as storage, industrial or retail uses. Interest has been from local businesses.
- **Business survey:** It is noted from the business survey that local businesses are satisfied with their current premises. Furthermore, it is noted that businesses have been at their current premises for a significant time. Generally, businesses are satisfied with their current operations and are not in the market for further premises.
- **Marches Bottling and Packaging are actively looking for premises:** This firm has reported difficulties in finding premises for expansion plans. They have a desire to stay

in Bromyard and a preference to expand on their existing rural site, but have been looking at alternative solutions.

- **Polytec opened new additional manufacturing premises in Telford:** While they are retaining their Bromyard site and are happy to remain in the town, this is an example of a key business that could not find suitable premises/land in Bromyard and thus sought alternative arrangements.

7.3 This demand picture at present is characterised by low overall turnover of units, though the tightly held market is limiting options for businesses that have requirements for alternative or additional premises (even though this is a small number). The interest is in two areas – very small units for micro businesses or self-employed operators and a small number of expansion opportunities for the local manufacturing businesses, as required. Expansions of local manufacturing is an irregular demand profile and thus hard to cater for, though is important in order to maintain their presence in the town and the overall health of the economy.

Demand Forecasts

7.4 The demand for employment floorspace to 2031 is dependent on the current market conditions and direction, as well as potential future growth (or declines) in the economy. Obviously, this contains a level of uncertainty; however, reviewing the demand profile from multiple perspectives helps to gain a rounded view of the potential demand for employment land.

7.5 The Oxford Economics forecasts for Bromyard employment suggest a modest growth between 2018 and 2031 in Professional Services employment and Other employment (see Table 9 in Chapter 3.0 for the list of sectors in each broad group). The forecasts project modest declines in Production and Public Services. The demand for employment floorspace can be inferred from these forecasts through assuming an average floorspace per worker. Further analysis of the projections shows that the growth peaks in 2024 for the total employment, with a gradual decline thereafter.

7.6 Therefore, in terms of overall employment floorspace demand, the projected demand would depend on the timeframe that is chosen. Only reviewing the 2018 to 2031 change would reveal a modest growth in floorspace demand. However, the period to 2024 would result in a higher floorspace demand.

Table 23 – Projected Employment by Broad Group

Sector Group	2011	2016	2018	2021	2024	2026	2031	Change 2018-31
Production	1,090	1,280	1,440	1,460	1,450	1,430	1,380	-60
Professional Serv.	560	580	610	650	670	670	680	+70
Public Serv.	940	940	980	970	970	970	960	-20
Other	840	900	1,110	1,140	1,160	1,160	1,160	+50
Total	3,430	3,700	4,140	4,210	4,250	4,230	4,180	+40

Source: Oxford Economics, 2018

- 7.7 The conversion of employment changes to floorspace demand uses the jobs density averages compiled by the Home and Communities Agency's (HCA) Employment Density Guide 3rd Edition (2015). However, not all of the employment within each sector group will be located on B-class land (offices, factories, warehousing), with other floorspace types (e.g. retail, restaurants, sui generis, etc.) also taking a component of the employment. Given that the sector groups include multiple industry sectors, BE Group has estimated the percentage of the employment within each group that would be located on B-class employment land. This estimate has been based on the BRES data on the relevant sizes of each industry sector as at 2017 (see Table 7 in Chapter 3.0) and the typical employment types in offices, factories and warehousing.

Table 24 – Model Assumptions

Industry Sector	Employees		
	Percentage of staff occupying B1, B2, B8 Floorspace (percent)	Floorspace occupied per person (sqm)	Other Comments
Production	B2 80% B1 5%	36 12	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 Bromyard, the general industrial density has been adopted (36 sqm/job). B1 is office component
Professional Serv.	B1 100%	12	Office based employment
Public Serv.	B1 22%	12	Office based employment
Other	B8 16%		HCA provides a range of 70-95 sqm/job. Range reflects final mile distribution centres (70 sqm/job), regional distribution centres (77 sqm/job) and national distribution centres (95 sqm/job). Assume 70 sqm/job for Bromyard to account for local warehousing, storage, transportation.

Source: HCA, 2015, BE Group 2019

7.8 From these assumptions, the estimated change in floorspace for Bromyard can be estimated. The table below provides estimates of the change in floorspace and resulting employment land requirements emerging from the forecast changes in employment sector groups.

Table 25 – Forecast Employment Land and Floorspace Demand based on Employment Forecasts, 2018-31

Sector Group	Workforce Growth 2018-31	Percentage Occupying B1/2/8 Space	Growth Number of Jobs on B1/2/8 Space	Floorspace Per Job, sqm	Floorspace Required, sqm
Production	-60	85	51	36/12	-1,764
Professional Services	70	100	70	12	840
Public Services	-20	22	-4	12	-53
Other	50	16	8	70	560
Total	40		23		
Increase in Floorspace – Growth Sectors (sqm)					1,400
Decline in Floorspace – Declining Sectors (sqm)					-1,817
Net Change in Floorspace Demand (sqm)					-417
Assumed Developable Floorspace per Hectare (sqm/ha)					3,900
Equivalent Employment Land Needed – Growth Sectors (ha)					0.36
Equivalent Employment Land Needed – Declining Sectors (ha)					-0.47
Equivalent Employment Land Needed – Net (ha)					-0.11

Source: BE Group, 2019 analysis of OE forecasts

7.9 Using this method, it is projected that the change in employment numbers in Bromyard of 40 workers between 2018 and 2031 would result in a net change in employment numbers on B-class land of some 23 workers. This net change includes positive growth in the Professional Services sector (all assumed to be on B1 land) and Other sectors (assumed to occupy B8 land), offset by declines in Production (B2 and B1) and Public Services (B1). Given the larger workspace requirements per worker for Production, compared to office workers, while there is a small net positive growth in employment numbers, the resulting net demand in employment floorspace is negative over the forecast period (-417 sqm). Therefore, the net employment land demand is also negative (-0.11 ha).

7.10 However, it should be noted that with some sectors projected to have growing employment land demands and some with declining employment land demands, just looking at a net employment land implies a smooth transition from one employment use to another. This may be appropriate and relatively straightforward in some instances (e.g. from manufacturing to warehousing) but not appropriate in others (e.g. manufacturing to office).

7.11 Therefore, it is more appropriate to consider just the growth sectors, which are projected to have a growth in floorspace of 1,400 sqm, which equates to a demand for 0.36 ha of employment land.

7.12 However, as mentioned above, the employment numbers are projected to decline from a peak in 2024. Therefore, it is instructive to look at the demand for employment floorspace resulting from the growth period 2018-2024. This is calculated in the table below.

Table 26 – Forecast Employment Land and Floorspace Demand based on Employment Forecasts, 2018-24

Sector Group	Workforce Growth 2018-24	Percentage Occupying B1/2/8 Space	Growth Number of Jobs on B1/2/8 Space	Floorspace Per Job, sqm	Floorspace Required, sqm
Production	10	85	8	36/12	294
Professional Services	60	100	60	12	720
Public Services	-10	22	-2	12	-26
Other	50	16	8	70	560
Total	110		74		
Increase in Floorspace – Growth Sectors (sqm)					1,574
Decline in Floorspace – Declining Sectors (sqm)					-26
Net Change in Floorspace Demand (sqm)					1,548
Assumed Developable Floorspace per Hectare (sqm/ha)					3,900
Equivalent Employment Land Needed – Growth Sectors (ha)					0.40
Equivalent Employment Land Needed – Declining Sectors (ha)					-0.01
Equivalent Employment Land Needed – Net (ha)					0.40

Source: BE Group, 2019 analysis of OE forecasts

7.13 Just looking at this growth period 2018-24 means that the net floorspace demand increases to 1,548 sqm or 0.40 ha of employment land. Just looking at the growth sectors results in a demand from those sectors of 1,574 sqm or 0.40 ha of land.

- 7.14 It would be too simplistic to assume that if employment floorspace was developed to accommodate this 2024 peak that after this point there would be derelict premises/underused land as employment numbers decline to 2031. In reality, employment numbers will go up or down within a business without an immediate change of their floorspace occupation. Furthermore, employment changes may be due to regular turnover of staff, changes in capacity or automation. Considering automation, a business may use automated processes to reduce staff numbers, but maintain or indeed increase output, thus still require the same or more floorspace. That is, one of the limitations of this forecast method is that it relies on a constant floorspace per job ratio, which may not be the case over the forecast period.
- 7.15 Despite these limitations, the forecasts are instructive of the direction and scale of change. It is recommended just to adopt the growth sector demand levels, rather than the net change as it may be difficult to convert one employment floorspace type to another. Furthermore, it is recommended that the 2018-24 forecast period be adopted for the employment floorspace forecast changes, as this accounts for the peak employment expected in the middle of the forecast period. **Therefore, using the employment forecasts, it is projected that there is a demand for about 1,570 sqm of employment floorspace, equivalent to 0.40 ha of land.**
- 7.16 Another means of looking at potential employment land demand would be to look at the demand for employment resulting from the growing local residential population. The Core Strategy includes a policy for a minimum of 500 new homes to be built in Bromyard between 2011 and 2031. Allowing for housing completions to 2018, this equates to a minimum of some 300 additional dwellings from 2018 to 2031. This new population would have a demand for employment opportunities, a significant proportion of which would be provided within Bromyard.
- 7.17 The characteristics of the existing resident population can be instructive as to the new population's demand for employment in Bromyard. Chapter 3.0 profiled the socio-economic characteristics of the existing residential and workforce populations of Bromyard, including details of travel to work patterns and economic activity levels. The following table provides calculations of how many of the additional residents within the new dwellings in Bromyard may be also employed in the town.

Table 27 – Additional Labour Supply from Population Growth 2018-3031

Metric	Level
Additional Dwellings 2018-31 (500 less completions)	300
Estimated population in new dwellings	690
Additional 15-64 year old cohort	430
Percentage of working age population in employment (assumed to have increase since 2011 at 64.1%)	68%
Persons employed	290 workers
Percentage of employed residents working in Bromyard (from commuting data)	35.8%
Employed and working in Bromyard	100 workers

Sources: ONS, Nomis, Census – BE Group Analysis

7.18 Therefore, of the population in the new dwellings in Bromyard, some 100 people are estimated to be working in Bromyard. These could be working across the gamut of industries, including, but not limited to businesses on B-class land.

7.19 Using the analogous method as above to estimate the floorspace demand, the table below provides the calculations of floorspace and land demand for B-class employment.

Table 28 – Forecast Employment Land and Floorspace Demand based on Additional Population in New Dwellings, 2018-31

Sector Group	Workforce Growth 2018-24	Percentage Occupying B1/2/8 Space	Growth Number of Jobs on B1/2/8 Space	Floorspace Per Job, sqm	Floorspace Required, sqm
Production	33	5	2	12	20
Professional Services	16	100	16	12	192
Public Services	23	22	5	12	61
Other	28	16	4	70	314
Total	100		54		
Increase in Floorspace (sqm)					1,537
Assumed Developable Floorspace per Hectare (sqm/ha)					3,900
Equivalent Employment Land Needed (ha)					0.39

Source: BE Group, 2019 analysis of OE forecasts

7.20 **Based on this methodology looking at dwelling growth, the forecast demand for B-class floorspace is approximately 1,540 sqm, which is equivalent to 0.39 ha.**

Critique of Demand Forecasts

- 7.21 The forecasts above are summarised in the table below. There is a reasonably strong level of consistency between the forecasts.

Table 29 – Summary of Forecasts

Forecast	Floorspace (sqm)	Land (ha)
Growth Sector Employment Forecast – 2018-31	1,400	0.36
Growth Sector Employment Forecast – 2018-24	1,570	0.40
Population Growth 2018-31	1,540	0.39

Source: BE Group, 2019

- 7.22 Therefore, on the basis of the employment forecasts and the anticipated new dwelling growth, Bromyard would have a demand for about 0.4 ha of additional employment land, providing about 1,570 sqm of floorspace (adopting largest forecast). This would be a mix of B1, B2 and B8 floorspace.
- 7.23 However, such forecasts do not easily account for individual business decisions and changes. Rather, they are based on averages and trends. For a small area, such as Bromyard, the business decision of a single, significant business can substantially impact (positively or negatively) on the employment growth profile and thus floorspace demand over the forecast period. As seen from the property transactions over the last decade, a single transaction could be for a +1,000 sqm unit. Therefore, such a new unit taken by a single enterprise in Bromyard over the forecast period, would take a disproportionately large part of the forecast demand.
- 7.24 Therefore, it is recommended that a significant degree of flexibility is incorporated into the forecasts to enable businesses to grow within the town. While for a larger area a percentage increase (e.g. +20 percent) might be considered appropriate, given the small numbers in the forecasts, compared to actual business unit sizes, BE Group recommends adopting a level five times that of the forecast level.
- 7.25 **Therefore, the recommended employment forecast demand is 7,900 sqm and the forecast employment land demand is 2.0 ha.**

Comparison to Core Strategy Allocation

- 7.26 The Core Strategy has an allocation of 5.0 ha of employment land for Bromyard over the forecast period to 2031. This may be retained as a 'stretch' target for Bromyard, with the 2.0 ha level being seen as a more moderate level. The 2.0 ha level should be

delivered to the market in the first half of the forecast period (i.e. by 2024) in line with the anticipated strongest employment growth. If the actual take up of land in coming years is such that further employment land appears to be warranted, then the remaining 3.0 ha of employment land could be provided as a second phase.

8.0 RECOMMENDATIONS

- 8.1 The following provides a series of recommendations for the provision of employment land to 2031 in Bromyard. This is based on the evidence gathered in this study.

Recommendation One: Employment Floorspace and Land Need

- 8.2 The demand profile has shown a mixed position within Bromyard. While a small market, there are low vacancy levels in commercial property and some indicators of demand in certain sectors, such as industrial and small scale, starter units. The employment floorspace and land need has been estimated based on a review of past market performance, current activity and interest and projected growth.
- 8.3 **It is recommended that the employment floorspace need for Bromyard to 2031 is 7,900 sqm of B-class employment floorspace. Employment land of 2.0 ha is required to meet that need.**
- 8.4 The following table provides an estimate of the mix of employment use types by floorspace for Bromyard to 2031. This should be read as an indicative mix, and the planning and provision of employment land should be sufficiently flexible to allow for variations in this mix, as the market changes.

Table 30 – Indicative Mix of Employment Floorspace Demand

Floorspace Type	Floorspace (sqm)	Land (ha)
B1a Offices	1,000	0.3
B1c Light Industry	700	0.2
B2 Industry	5,200	1.3
B2 Warehouses	1,000	0.3
Total	7,900	2.0

Source: BE Group, 2019
Figures rounded

- 8.5 As can be seen from this breakdown, the largest component of floorspace is anticipated to be for industry uses. This floorspace type is considered to be ‘under-forecast’ using the employment projections, with businesses likely to still be in the market for industrial floorspace, even if not expanding (or indeed shrinking) their industrial workforce.

- 8.6 As discussed in the demand chapter, the demand for employment floorspace is most likely to be apparent in the first half of the forecast period. Therefore, planning for employment land and floorspace should accommodate this.

Recommendation Two: Consideration of 5 ha Provision in the Core Strategy

- 8.7 The Core Strategy designates a provision for 5 ha of employment land in Bromyard. While the above recommendation is for 2 ha, Council may wish to retain the 5 ha level as an aspirational or stretch target for Bromyard. As seen in the forecasting evidence, the demand is likely to be in the first half of the forecast period. Therefore, employment provision should be flexible enough to incorporate growth in the earlier years. The planning approach could therefore be that the 2 ha is provided in the short term. As the actual take-up of this land is understood, consideration could be given to whether a further 3 ha would be appropriate for Bromyard.

- 8.8 Therefore, sites that could accommodate a second phase if required would be advantageous.

Recommendation Three: Provision of Employment Land

- 8.9 The review of sites has revealed small parcels of undeveloped land within the three key existing employment areas, being:

- Linton Trading Estate, 'Site F': 0.23 ha
- Land at Station Road: 0.1 ha
- Land alongside Porthouse Business Centre: 0.7 ha.

- 8.10 These would provide potential short-term solutions for new build options, though as in-fill pockets, some businesses would not find these ideal. It is recommended that further land parcels are provided to meet the forecast demand and to provide sufficient choice in the market.

- 8.11 The Call for Sites process revealed two potential locations for further employment uses. While not ideal sites, they represent reasonable solutions for the provision of employment land for Bromyard. These sites are:

- Land adjacent to Linton Court: 0.15 ha
- Field adjacent to B4214, Little Froome Farm: 5 ha

- 8.12 The land adjacent to Linton Court would be appropriate for small-scale, starter units. Likely to be predominantly office space, there may also be a small amount of light industry workshops. Access concerns with sharing an entry point with the neighbouring Linton Court would need to be resolved.
- 8.13 The Little Froome Farm site would be suitable to meet the industrial demand for Bromyard. While not representing a contiguous expansion of the Bromyard footprint, areas to the north are more sloped and are unlikely to provide an economic solution. This site could be brought to the market two phases, in-line with the recommended approach in Recommendation Three above.

Recommendation Four: Delivery of the Sites

- 8.14 Ensuring that these sites come to the market within an appropriate timeframe will be important for Bromyard.
- 8.15 The land adjacent to Linton Court should be deliverable within a short timeframe. It is recommended that Council begins discussions with the landholder to gain a further understanding of their plans, in particular resolving access. Council should encourage the landholder to progress their planning for the site for small scale units.
- 8.16 For the Little Froome Farm site it is likely that the landholder will look to gain planning approval for the site and perhaps develop serviced plots, and then take to the market as development land. Therefore, it would be important for Council to ensure that this development land is built upon, rather than sitting unoccupied for several years. Many businesses will be looking at the built premises market, rather than looking to acquire a site and develop themselves, particularly for small and medium enterprises. Therefore, it is likely that there would be a need for an entity to develop some of these parcels speculatively, in order to then lease the premises to occupiers.
- 8.17 Council could have a role, through its Economic Development team, to encourage bringing in a third party that could build speculative smaller industrial units (around 200-500 sqm units) that would be appropriate for the leasehold market. Alternatively, Council could have an active role in the development, either acquiring a development plot and building units itself, or underwriting the development of such units, where Council would guarantee taking the head-lease on such units and then sublease to the market.

- 8.18 A portion of the market would have a preference for development plots for their own design and build projects and thus the provision of a mix of plots would be appropriate.

Appendix 1

List of Consultees

Appendix 1 – List of Consultees

Arkwright Owens

Cross & James Commercial

Draycott Developments

Holden Vintage and Classic

John Goodwin

Legge's of Bromyard

Linton Design

Marches Bottling & Packaging LTD

Polytec

Sunderlands

67 local businesses were also surveyed

Appendix 2

Business Survey

**Herefordshire County Council
Bromyard Business Survey 2018**

Company Details

1. Company Name

2. Respondent Name

3. Position within Company

4. Telephone Number

5. Email Address

Current Accommodation

6. Activity of Company

7. Number of years active

8. Number of employees

9. Type of accommodation:

Office ☐

Warehouse ☐

Industrial/Factory ☐

Lab ☐

Site (undeveloped land) ☐

Other

10. What is the size(sqm) of your current premises?

0-100 (0-1,076sqft)	<input type="checkbox"/>	101-200 (1,077-2,152sqft)	<input type="checkbox"/>	201-500 (2,153-5,382sqft)	<input type="checkbox"/>
					<input type="checkbox"/>
501-1,000 (5,383-10,764sqft)	<input type="checkbox"/>	1,001-2,000 (10,765-21,529sqft)	<input type="checkbox"/>	2,001-5,000 (21,530-53,820sqft)	
					<input type="checkbox"/>
5,001-10,000 (53,821-107,639sqft)	<input type="checkbox"/>	10,001+ (107,640sqft+)	<input type="checkbox"/>	Other (i.e. hectares/acres)	

11. Is the property rented or owned?

Rented ☐ Owned ☐

12. If rented, how long is the current lease?

.....

13. Has there been any previous location for the business?

No previous site	<input type="checkbox"/>
In the same industrial estate/ Business park	<input type="checkbox"/>
In Bromyard	<input type="checkbox"/>
Elsewhere (<i>please state</i>)	<input type="checkbox"/>

.....

14. What are the advantages of having your business in its current area? (Please tick as many that apply)

Its where I'm from	<input type="checkbox"/>	Car-parking	<input type="checkbox"/>
Close to staff	<input type="checkbox"/>	Reputation of area	<input type="checkbox"/>
Close to market	<input type="checkbox"/>	Affordability	<input type="checkbox"/>
Close to customers	<input type="checkbox"/>	Availability	<input type="checkbox"/>
Transport links	<input type="checkbox"/>	Other (<i>please state</i>)	<input type="checkbox"/>
Close to related businesses	<input type="checkbox"/>		

.....
15. What are the main disadvantages of having your business located in its current area? (Please tick as many that apply)

Difficulty attracting staff	<input type="checkbox"/>	Poor reputation/image	<input type="checkbox"/>
No access to markets	<input type="checkbox"/>	Affordability	<input type="checkbox"/>
Not close enough to customers	<input type="checkbox"/>	Limited availability	<input type="checkbox"/>
Poor transport links	<input type="checkbox"/>	Distance from motorways	<input type="checkbox"/>
Poor congestion	<input type="checkbox"/>	No disadvantages	<input type="checkbox"/>
Poor car-parking	<input type="checkbox"/>	Other (<i>please state</i>)	<input type="checkbox"/>

.....

Business Confidence

16. How would you rate the strength of your business on the following performance issues?

	Much Stronger	Slightly Stronger	About the same	Slightly Weaker	Much Weaker
How has your business performed in the last 12 months compared to the previous 12?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How do you expect your business to perform in the next 12 months compared to the previous 12?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. How do you expect the following factors of your business to change over the next 12 months?

	Significant increase	Slight increase	Remain the same	Slight decrease	Significant decrease
Employee Numbers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Operating Costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Capital Investment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Premises	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Future Requirements

18. Looking to relocate or expand?

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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If answered 'No' to question 18, please proceed to question 24.

19. Will this be **additional** ☐ or **alternative** ☐ to existing property?

20. What is the main reason for your business choosing to relocate/expand?

Current site too small	<input type="checkbox"/>	Need to be closer to market	<input type="checkbox"/>
Current site too large	<input type="checkbox"/>	Need to be closer to customers	<input type="checkbox"/>
Current site too old	<input type="checkbox"/>	Upgrading	<input type="checkbox"/>
Cost	<input type="checkbox"/>	Lease running out	<input type="checkbox"/>
Location	<input type="checkbox"/>	Other (<i>please state</i>)	<input type="checkbox"/>
Need to be closer to staff	<input type="checkbox"/>		

21. What is your time frame for relocating/expanding your business?

12 months	<input type="checkbox"/>
2 – 5 years	<input type="checkbox"/>
5+ years	<input type="checkbox"/>
Unknown	<input type="checkbox"/>

22. What type of property will you be looking for?

Office	<input type="checkbox"/>	Lab	<input type="checkbox"/>
Warehouse	<input type="checkbox"/>	Land	<input type="checkbox"/>
Industrial/Factory	<input type="checkbox"/>	Other (<i>Please state</i>)	<input type="checkbox"/>

23. What size site(sqm) are you looking for?

0-100 (0-1,076sqft)	<input type="checkbox"/>	101-200 (1,077-2,152sqft)	<input type="checkbox"/>	201-500 (2,153-5,382sqft)	<input type="checkbox"/>
501-1,000 (5,383-10,764sqft)	<input type="checkbox"/>	1,001-2,000 (10,765-21,529sqft)	<input type="checkbox"/>	2,001-5,000 (21,530-53,820sqft)	<input type="checkbox"/>
5,001-10,000 (53,821-107,639sqft)	<input type="checkbox"/>	10,001+ (107,640sqft+)	<input type="checkbox"/>	Other (i.e. hectares/acres) <input type="checkbox"/>	

24. Is there a location you have in mind for relocation/expansion?

No location in mind	<input type="checkbox"/>
In the same industrial estate/ Business park	<input type="checkbox"/>
In Bromyard	<input type="checkbox"/>
Elsewhere, please state	<input type="checkbox"/>

.....

25. Have you had any difficulties finding new premises?

No difficulty	<input type="checkbox"/>	Significant difficulty	<input type="checkbox"/>
Some difficulty	<input type="checkbox"/>	Great difficulty	<input type="checkbox"/>

Additional Comments

26. Please let us know if you have any additional comments to make regarding your business or commercial properties in Bromyard in general:

.....

.....

.....

27. Please let us know if you would be happy to be contacted again for further research:

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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Appendix 3

Site Scoring System

Appendix 3

Site Scoring System for Employment Allocations

Site Location and Access	Proximity to strategic highway network	<ul style="list-style-type: none"> • Site adjacent to motorway junction – score 10 • Site adjacent and with direct access to A44 – score 6 • Site within 0.5km of A44 – score 5 • Site on other key arterials within Bromyard – score 4 • For each further half km distance from key arterials, reduce score by one point
	Prominence within Bromyard	<ul style="list-style-type: none"> • Site adjacent to, and visible from A44 – score 10/9 • Site adjacent to, and visible from other A road – 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	<ul style="list-style-type: none"> • Site close to bus route (less than 0.5 km) – score 10 • Site within 0.5 km – 1km of a bus route – score 5 • Limited public transport – score 0
	Sequential test	<ul style="list-style-type: none"> • 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		<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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.
	Flood Risk	<ul style="list-style-type: none"> • No risk of flooding - 10 • Low risk of flooding - 7 • Medium risk of flooding - 3 • High risk of flooding - 0
Site Availability		<ul style="list-style-type: none"> • 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

Site Scoring System for Existing Employment Areas

Site Location and Access	Proximity to strategic highway network	<ul style="list-style-type: none"> • Site adjacent to motorway junction – score 10 • Site adjacent and with direct access to A44 – score 6 • Site within 0.5km of A44 – score 5 • Site on other key arterials within Bromyard – score 4 • For each further half km distance from key arterials, reduce score by one point
	Prominence within Bromyard	<ul style="list-style-type: none"> • Site adjacent to, and visible from A44 – score 10/9 • Site adjacent to, and visible from other A road – 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	<ul style="list-style-type: none"> • Site close to bus route (less than 0.5 km) – score 10 • Site within 0.5 km – 1km of a bus route – score 5 • Limited public transport – score 0
	Sequential test	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<p>Subjective, score 0 to 10, considering:</p> <ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 purpose – score 0-3

	Flood Risk	<ul style="list-style-type: none"> • No risk of flooding - 10 • Low risk of flooding - 7 • Medium risk of flooding - 3 High risk of flooding - 0
	Site Amenity	Subjective, score 0 to 10, considering: <ul style="list-style-type: none"> • Landscaping • Site layout • On-site services

Appendix 4

Site Proformas

Site Proformas

Existing Employment Areas



Name	Linton Trading Estate
Description	Trading estate including office and industrial buildings, coach storage area and an area of undeveloped land at the roadside. Existing occupiers appear geared towards the car industry
Key Occupier(s)	Holden Vintage & Classic Holden Technologies
Prominence	Located outside of the main town centre Strong visibility off A44 leading into the town centre
Current Use (Use Classes)	B1, B2, B8
Size, ha	2.90
Building Age Range	1960's to 1990's
Average Building Quality	Majority of buildings in good/ reasonable state of repair
Constraints	Sloped estate with single access into the site Adjacent waste recycling requires access through the estate
Critical Mass	Site sits in isolation from other employment areas
Opportunities for redevelopment/ expansion	Small parcel of land (0.42 ha) for potential development lies in the North West of the site, with frontage onto the A44
Other Information	Whilst good car-parking provision is provided, there is limited access to services/ public transport
Site Score (Max 100)	56



Name	Station Trading Estate
Description	Small employment estate located on the edge of the town Range in quality of industrial units occupy majority of the site, with a timber yard located on the other side of the B4203
Key Occupier(s)	Travis Perkins Trading Co. DRM Bus Securidor
Prominence	Good visibility from local road into town, B4203, yet poor prominence to any major road/ A road
Current Use (Use Classes)	B1, B2, B8
Size, ha	2.78
Building Age Range	1960's to 1990's
Average Building Quality	Relatively modern units, but some areas of the site are poorly maintained Some vacancies on site, with units available to let/ buy
Constraints	3 ha of the site is sloping – adding an extra level of difficulty to development North Eastern/ Southern edge of the site is subject to high risk of flooding
Critical Mass	Established employment area in the East of the town with some sensitive uses nearby including residential properties and a cemetery
Opportunities for redevelopment/ expansion	Front of site needs maintenance/ development
Other Information	~
Site Score (Max 100)	47



Name	Porthouse
Description	Hardstanding land Largest industrial estate/ office location within the town comprising Three Mills Trading Estate and Porthouse Business Centre. Quality of units ranges from high to poor quality. An area of hardstanding lies at the front of the site adjacent to Tenbury Road/ B4214
Key Occupier(s)	Micron Sprayers Polytec Car Styling Phoenix Organics LTD Canova
Prominence	Situated within an urban area, in North East of the town Site sits adjacent to B4214, however mainly set back behind area of hardstanding
Current Use (Use Classes)	B1, B2, B8
Size, ha	8.76
Building Age Range	1960's to modern
Average Building Quality	Some high quality two-storey units at the rear of the site, with some lower quality units near to the front. Strong level of occupancy with some level of vacancy
Constraints	North Eastern part of site is a medium flood risk Potential problems with road width and access issues from HGV Access out of estate via one road, causing congestion at peak times
Critical Mass	Established employment area within the town with some sensitive uses nearby of residential properties and future residential development taking place to the North of the estate
Opportunities for redevelopment/ expansion	Current planning application approved (June 2018) for single storey building in front of business centre Hardstanding grass area at front of site of 0.6 ha

Other Information	Town Council believe that the UDP allocated housing site at Porthouse farm should instead be brought forward for employment land
Site Score (Max 100)	62

Potential Employment Sites



Name	Oliver land adjacent/ South of Linton Trading Estate
Description	Located behind Linton Trading Estate, mixture of uses on site including scrap yard and household recycling centre. A geological site of a large pool sits along the Western side, with a traveller site occupying the Eastern side.
Key Occupier(s)	N/A
Prominence	Weak prominence due to access to the A44 gained through Linton Industrial Estate, or a rural road at the rear of the site
Current Use (Use Classes)	B8
Size, ha	5.60
Building Age Range	
Average Building Quality	One existing building on site of reasonably good external quality
Constraints	Former use of site for clay extraction which has left significant contamination across the site The large pool on site is identified as a Large Geographical Site Access gained through existing industrial estate
Critical Mass	Whilst site is behind existing industrial estate, surrounding area is isolated from other employment uses
Opportunities for redevelopment/ expansion	With the contamination and Large Geographical pool, this leaves the site practically undevelopable
Other Information	Original plans for travellers site of relocation (discussed in the UDP), however plans are now discussing upgrading the current site
Site Score (Max 110)	35



Name	Land to the West of Panniers Lane
Description	Two agricultural fields located on periphery of town with one field contained and the other open in nature. No units on site
Key Occupier(s)	N/A
Prominence	Good prominence from A44 into the town, yet current access points are only via Panniers Lane/ B4214 or Pencombe Lane.
Current Use (Use Classes)	Agricultural Land
Size, ha	10.30
Building Age Range	N/A
Average Building Quality	N/A
Constraints	Public transport to the site is limited and access needs to be improved Site is greenfield land
Critical Mass	Sits on the periphery of the town and residential areas with a couple of residential properties and a school adjacent to the site
Opportunities for redevelopment/ expansion	Northern portion of the site has plans for residential development and southern portion withdrawn from consideration by owner.
Other Information	
Site Score (Max 110)	



Name	The Depot
Description	Former Council depot site including vacant buildings and an area of hardstanding. Site has roadside frontage on to A465
Key Occupier(s)	Existing buildings appear vacant
Prominence	Strong prominence and roadside frontage off major A road leading into town.
Current Use (Use Classes)	~
Size, ha	1.42
Building Age Range	
Average Building Quality	Existing buildings in moderate external condition
Constraints	No visible constraints
Critical Mass	Not situated in an established employment area Surroundings comprise of open space and residential properties, with Western side of site bordered by a high school
Opportunities for redevelopment/ expansion	December 2018 saw councillors approve Keepmoat Homes' plans for housing scheme on site. Development would demolish existing buildings and remove area of hardstanding to make way for 45 homes Planning Application P182239/CD4 Not available for employment.
Other Information	
Site Score (Max 110)	



Name	Land to North of Rugby club
Description	Situated in the rural area North of the town, two parcels of land adjacent to B4214. No existing buildings on site
Key Occupier(s)	N/A
Prominence	Off B4214 and adjacent to the road. Poor local prominence, with strategic routes into the town lacking
Current Use (Use Classes)	N/A
Size, ha	10.7 (estimate)
Building Age Range	N/A
Average Building Quality	N/A
Constraints	Land slopes upwards from the town centre Site is separated from the town centre with only one strategic route of B4214 Narrow roads would cause problems for HGV
Critical Mass	Not an established employment area Surrounding areas of site are predominantly open space, with a caravan park on the opposite side of B4214. Some residential properties lie sporadically in the neighbouring area
Opportunities for redevelopment/expansion	Land deemed not feasible for development upon assessment from Council officer, mainly due to access, distance from town and landscape concerns. Difficult to market employment sites on this side of town, away from A-roads.
Other Information	Site was formally brought forward as employment land in July 2017
Site Score (Max 110)	48

Site Submissions



Name	Land adjacent to Linton Court
Description	Triangular grassed area with hardstanding and a storage building (previously used engine room) in the North East of the site.
Key Occupier(s)	Adjacent to Linton Court to the East and Linton Industrial Estate is situated to the West of the site
Prominence	Situated outside of the main town Strong visibility from A44
Current Use (Use Classes)	Majority grassland with B8
Size, ha	0.15
Building Age Range	N/A
Average Building Quality	N/A
Constraints	No gas supply to the site Access to the site is gained through Linton Court Estate
Critical Mass	Mixed uses surrounding the site of employment area in the West and residential in the East
Opportunities for redevelopment/ expansion	Whole of site Proposed use of B1 (a, b or c)
Other Information	Previous planning application for residential use denied in 2015 on grounds of adjacent industrial noise. Marginal increase in traffic is expected, with no highways issues being found from previous planning application
Site Score (Max 110)	55



Name	Field adjacent to B4214
Description	Land is located south of the main town, to the east of the B4214. Neighbouring uses of fields, with nearest properties 100m to the north of a car showroom and a school.
Key Occupier(s)	N/A
Prominence	Situated outside of the main town Strong visibility with fronting on to B4214/ A465
Current Use (Use Classes)	Agricultural Purposes
Size, ha	5
Building Age Range	N/A
Average Building Quality	N/A
Constraints	Some moderate sloping.
Critical Mass	Not an established employment area Predominantly open space in surroundings, with buildings scattered intermittently in the South and closest buildings in the North being 100m away
Opportunities for redevelopment/ expansion	Owner of the site wishes to change the site to employment use (B1, B2, B8).
Other Information	Not contiguous with Bromyard footprint
Site Score (Max 110)	61