

WEST MIDLANDS REGIONAL ASSEMBLY- REGIONAL PLANNING BODY

This report has been prepared on behalf of the West Midlands Regional Assembly, the Regional Planning Body, as technical advice to inform the Regional Spatial Strategy Revision process. It is one of a suite of technical reports commissioned to inform the development of spatial policy as part of Phase Two Revision on West Midlands Regional Spatial Strategy.

West Midlands Regional Spatial Strategy - Regional Centres Study OFFICE FORECASTS



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CONTENTS

1	INTRODUCTION, SUMMARY OF METHODOLOGY AND DATA SOURCES.....	1
	Introduction.....	1
	Summary of Methodology.....	1
	Data Sources.....	1
2	CURRENT OFFICE HIERARCHY	3
	Introduction.....	3
	Hierarchy of Strategic Centres.....	3
3	OFFICE SUPPLY	5
	Introduction.....	5
	Office Supply at District Level.....	5
	Office Supply in Districts which Contain a Strategic Centre.....	7
4	BASELINE OFFICE FORECASTS	9
	Forecast Model.....	9
	Employment Forecasts.....	9
5	CONVERSION OF BASELINE EMPLOYMENT FORECASTS TO FLOORSPACE REQUIREMENTS	19
6	SCENARIOS FOR DISTRIBUTING IDENTIFIED OFFICE NEEDS.....	23
	Introduction.....	23
	Evaluation of the Office Scenarios.....	29

APPENDICES

Appendix 1	ODPM Office Employment Sectors
Appendix 2	Derivation of the Current Office Hierarchy
Appendix 3	Cambridge Econometrics Employment Forecasts by District

1 INTRODUCTION, SUMMARY OF METHODOLOGY AND DATA SOURCES

Introduction

- 1.1 Technical Paper 6 provides details of the methodology used for quantifying office needs in the West Midlands Region from 2001 to 2021. The Paper then identifies and evaluates five 'scenarios' which illustrate how the distribution of projected net gains in occupied office floorspace could change as a result of policy intervention.
- 1.2 We should emphasise, at the outset, that the background data contained in this technical paper (for instance in relation to office supply) were collected in the early stages of the study in 2005. We recognise that some changes may have taken place since the data were collected.

Summary of Methodology

- 1.3 The assessment of need in the office sector is based on a simple conceptual approach, with three steps as follows:
- i) use Cambridge Econometrics' Multi-Sectoral Dynamic Model (MDM) to produce a forecast gain in office jobs across the West Midlands Region, of 207,900 from 2001 to 2021;
 - ii) convert the office employment forecast to office space requirements (the net gain in occupied office stock), through the application of an average floorspace density for office employment of 18 sq.m per worker, so as to provide a fixed control total for the uplift in occupied office stock in the Region, of 3.74 million sq.m in the period from 2001 up to 2021; and
 - iii) distribute the total net gain in occupied office stock to different parts of the Region, taking into account past trends, physical constraints, market demand and, most importantly, policy goals.

Data Sources

- 1.4 Three data sources have been tested at district level for current office employment:
- ABI data for the financial & business services sector, as a proxy for office employment;
 - ODPM data for its definition of office employment, based on ABI data, but using a precise set of five digit SICs, as set out in Appendix 1; and
 - Census data for financial & business services.
- 1.5 We tested for two spatial definitions for the strategic centres, as follows:
- ward definitions that best fit the strategic town centres, as agreed with the local authorities; and
 - the ODPM's definition¹ of the strategic centres.

¹ In a news release of 28 January 2005, the ODPM stated: *"The Office of the Deputy Prime Minister's Town Centres Statistics project aims to produce consistent boundaries for town centres across England and Wales, together with statistics covering employment and floorspace. These statistical boundaries are generated from data on economic activity, in order to take a consistent approach to defining town centres"*. (http://www.odpm.gov.uk/pns/displaypn.cgi?pn_id=2005_0011)

- 1.6 After much discussion with the Steering Group, it was decided that we would favour the ODPM's definition of office employment (using ABI data at five digit level) - since the data include both private sector and public administration office employment - and that we would favour the ODPM's spatial definition of the strategic centres, which is tighter than ward boundaries, but more refined

2 CURRENT OFFICE HIERARCHY

Introduction

- 2.1 At the outset, we should emphasise that the hierarchy of town centres in the Region accounts for only a minority of recent office investment; indeed, only 31 per cent of the office floorspace completed in the last three years has been in town centre locations and only 28 per cent of the stock of office commitments - under construction, or with planning permission - is in town centre locations². Thus, apart from Birmingham city centre and to a lesser extent Coventry city centre and Solihull town centre, most new office development in the Region has been concentrated in out-of-centre locations, such as the Waterfront, and along key trunk road corridors such as the M42, M54, M6, M45/M1 and M40 corridors; and there are new office markets emerging in the M5 and M6 toll-road corridors.

Hierarchy of Strategic Centres

- 2.2 In defining the hierarchy within the network of strategic centres, in terms of their importance as office locations, we have used two indicators - total office employment and total office floorspace in each of these centres.
- 2.3 We first ranked each centre in terms of total employment in the Financial & Business Services (F&BS) and public service sectors, using ABI data at ward level; and the total built office stock using ODPM floorspace statistics at ward level. We then took an average of the two ward-based measures and expressed the findings in index format (Tables 1 to 3 of Appendix 2).
- 2.4 However, given the difficulties of defining town centres on a ward basis and because of the uncertainties involved in using ABI data at ward level, we also assessed total office employment in the 'commercial' and 'public' sectors, as well as the stock of office floorspace in each of the centres, using data from the ODPM.
- 2.5 Having agreed to favour the ODPM's definition of office employment (using ABI data at five digit level) and the ODPM's spatial definition of the strategic centres, we took the average of the two ODPM-based measures (Tables 4 and 5 of Appendix 2) and expressed the resultant hierarchy in index format, as set out in Table 6 of Appendix 2 and in Table 2.1 of the main body of this Paper.
- 2.6 Table 2.1 reveals that there are five clear levels in the office hierarchy. At the top of the hierarchy, Birmingham city centre's office presence is more than five times that of Coventry city centre, which is the second-ranking centre in the hierarchy, and more than seven times that of Wolverhampton city centre, which is the third-ranking centre.
- 2.7 The third level in the office hierarchy - with index scores in relation to Birmingham city centre which are in the range 5.6 to 7.3 - comprises the centres of Leamington Spa, Walsall, Solihull, Telford, Worcester and Dudley. All of these third tier centres, except Leamington Spa, are either located within the MUAs, or are sub-regional foci centres.
- 2.8 The fourth level comprises seven centres within a narrow range of index scores from 3.0 for Redditch to 5.0 for Stafford. However, this fourth level includes Hanley for which there are significant aspirations for office investment. Hanley is located within the North Staffordshire Regeneration Zone, for which there is a planned £70 million regeneration programme over the next few years that is expected to have a significant influence on the local economy. Indeed, the Housing Market Pathfinder RENEW Programme has an ambitious strategy to transform the urban form and the local housing market, and it projects a leverage of £2.3 billion in private sector investment

² West Midlands Regional Spatial Strategy: Annual Monitoring Report, February 2005, Tables APP.PA14 and APP.PA15

over a 15-year period. As a consequence, studies undertaken for the City of Stoke-on-Trent Council forecast a need for 50,000 sq.m of additional office space in Hanley's Business District by 2011; this would be an extremely significant step change vis-à-vis past trends, but the ambition indicates a likelihood that Hanley will rise in the office hierarchy as part of a future review/partial review of the RSS.

- 2.9 The fifth level in the office hierarchy, which accounts for the remaining ten centres, is also confined to a narrow range in index scores, from 1.2 for Cannock to 2.6 for Stratford-upon-Avon. This fifth level includes Merry Hill, but the ODPM's spatial definition of Merry Hill is over-tight and appears to exclude the Waterfront office location. In our assessment, the Waterfront already functions as an office location in the fourth tier of the Region's network of strategic office centres.

Table 2.1 Overall Hierarchy of Centres Based on ODPM Employment and Floorspace Data

Centre	Average of the ODPM Employment and Floorspace Indexes
Birmingham	100.0
Coventry	19.0
Wolverhampton	13.3
Leamington Spa	7.3
Walsall	6.8
Solihull	6.6
Telford	6.4
Worcester	5.9
Dudley	5.6
Stafford	5.0
Hanley	4.9
West Bromwich	4.8
Shrewsbury	4.2
Newcastle-under-Lyme	3.8
Hereford	3.6
Redditch	3.0
Stratford-upon-Avon	2.6
Nuneaton	2.5
Sutton Coldfield	2.4
Burton-upon-Trent	2.4
Kidderminster	2.3
Lichfield	2.3
Merry Hill ³	2.0
Rugby	1.9
Tamworth	1.9
Cannock	1.2

³ Merry Hill's position in the ODPM-based office hierarchy is significantly lower than its position using ward-based data (see tables in Appendix 2). This is because the ODPM's definition of 'Merry Hill' is tightly defined and excludes a substantial proportion of the offices at the Waterfront office location.

3 OFFICE SUPPLY

Introduction

- 3.1 In Sections 4 and 5, we set out a range of office employment forecasts and floorspace requirements. This section examines the supply-side information at district and centre level for the West Midlands Region. The supply-side information is collected from the Regional Employment Land Supply (RELS) Office Development Database, provided by Mott MacDonald Limited.

Table 3.1 Office Supply Pipeline in the West Midlands - Completed Developments, Development Under Construction and with Planning Permission (sq.m)

	Completed	Under Construction	With Planning Permission
2000	234,700	220,800	871,500
2001	140,600	266,500	961,300
2002	270,700	137,600	951,100
2003	159,700	199,300	987,400
<i>2004 (qtr)</i>	<i>41,600</i>	<i>217,100</i>	<i>1,012,200</i>

Source: RELS Database, provided by Mott MacDonald Limited

- 3.2 The office supply data contained in Table 3.1 shows that:
- completed office developments across the Region as a whole varied between a low of 140,000 sq.m and a high of 270,000 sq.m, per annum, in the first four years of this decade;
 - there was a significant amount of office development under construction in the first quarter of 2004; and that
 - an increase in the supply of office space can be expected in the short-term given the rise in the stock of extant consents.

Office Supply at District Level

- 3.3 Table 3.2 provides the stock of extant planning permissions for office development at district level and it shows that:
- the majority of the supply of the Region's new office space is expected to be located in the Major Urban Areas (MUAs);
 - the administrative areas of Birmingham and Solihull were dominant, accounting for 28 per cent and 16 per cent, respectively, of the Region's stock of extant permissions for office development;
 - Rugby and North Warwickshire districts are each expected to capture approximately 10 per cent of the Region's office development pipeline; and that
 - eight districts had no extant permissions for office development, as at 2004, these being Cannock Chase, East Staffordshire, Lichfield, Malvern Hills, Newcastle-under-Lyme, South Staffordshire, Staffordshire Moorlands and Tamworth.

Table 3.2 District-level Office Supply Based on Extant Planning Permissions at 2004

District	Sq.m	Share of Region Total	As % of 2003 Stock
Birmingham	279,100	27.6%	13%
Solihull	166,000	16.4%	30%
Rugby	100,000	9.9%	92%
North Warwickshire	98,100	9.7%	158%
Warwick	57,200	5.7%	16%
Nuneaton & Bedworth	49,000	4.8%	61%
Wolverhampton	43,900	4.3%	14%
Stafford	32,900	3.3%	19%
Shrewsbury & Atcham	31,900	3.2%	22%
Dudley	30,300	3.0%	9%
The Wrekin	27,800	2.7%	12%
Sandwell	20,600	2.0%	7%
Coventry	11,900	1.2%	2%
Stoke-on-Trent	10,600	1.0%	4%
Stratford-on-Avon	10,600	1.0%	6%
Worcester	8,100	0.8%	4%
Wychavon	7,400	0.7%	7%
Hereford	6,000	0.6%	4%
Wyre Forest	5,400	0.5%	6%
Bromsgrove	3,400	0.3%	3%
Bridgnorth	3,300	0.3%	15%
Redditch	2,700	0.3%	3%
South Shropshire	2,500	0.2%	12%
Oswestry	2,300	0.2%	7%
Walsall	700	0.1%	0%
North Shropshire	600	0.1%	2%
Cannock Chase	0	0.0%	0%
East Staffordshire	0	0.0%	0%
Lichfield	0	0.0%	0%
Malvern Hills	0	0.0%	0%
Newcastle-under-Lyme	0	0.0%	0%
South Staffordshire	0	0.0%	0%
Staffordshire Moorlands	0	0.0%	0%
Tamworth	0	0.0%	0%
West Midlands Region	1,012,200	100%	13%

Source: RELS, provided by Mott MacDonald Limited

- 3.4 Table 3.2 also reveals that outstanding planning permissions for office development in 2004 equated to 13 per cent of the Region's year 2003 stock. For two-thirds of the authorities, however, permissions equated to less than 10 per cent of the stock.
- 3.5 Rugby, North Warwickshire and Nuneaton & Bedworth districts, on the eastern edge of the Region, all had a large supply of outstanding permissions in 2004, in relation to the size of their stocks of existing office floorspace. However, of the MUA districts, only Solihull had the scale of outstanding permissions that would signify substantial growth in relation to the size of the existing stock in the short term.
- 3.6 As we make clear in subsequent sections of this technical paper, we expect to see a significant increase in the scale of office requirements for the West Midlands over the forecast period.

Office Supply in Districts which Contain a Strategic Centre

- 3.7 The office development database categorises planning permissions for office development as being *'in centre'* or *'outside-centre'*. The *'in-centre'* and *'outside-centre'* categories were developed because participants in the Office Developments monitoring survey are asked to fix each development to a *'centre'*, *'business park'*, or *'other'* location category.
- 3.8 Details of the absolute amount of office developments with planning permission in the local authority districts which contain the Region's 25 strategic centres are provided in Table 3.3, which shows, as at 2004, that:
- the supply of office development in the short-term future is expected to be located predominantly outside of the strategic centres; only 29 per cent of the supply of office commitments in those districts which contain a strategic centre, was accounted for by *'in-centre'* locations (256,000 sq.m);
 - Birmingham is the only authority where the proportion of planning permissions for office development in *'in-centre'* locations is greater than the corresponding proportion accounted for by *'outside-centre'* locations (78 per cent versus 22 per cent); and that
 - Birmingham city centre accounted for some 84 per cent of total permitted office development in the Region's *'in-centre'* locations.
- 3.9 Birmingham is the only centre in the Region where the majority of office development with planning permission at 2004 was for *'in-centre'* locations. In all other authorities that contain a strategic centre, the majority of approved floorspace is in *'outside-centre'* locations. Delivery of a large volume of office development in Birmingham city centre is vital if regional objectives are to be met. However, there is also a need for substantial new office employment in the other MUA centres; it is disappointing, therefore, that Table 3.3 shows, as at 2004, that there were no extant permissions for office development in the MUA centres of Wolverhampton, West Bromwich (Sandwell), Hanley (Stoke-on-Trent), Walsall, Sutton Coldfield and Newcastle-under-Lyme.
- 3.10 In summary, the data in Table 3.3 indicate that there is potentially a large under-supply of offices in town centre locations, with the majority of extant planning permissions (at 2004) relating to sites outside of the town centres. This finding is in direct contrast to current policy objectives (as set out in Technical Paper 1) and it will need to be addressed by proactive policies which create sites and remove supply-side constraints in seeking to steer more office development to town centre locations. Nevertheless, it must be recognised that whilst policy can steer a greater proportion of offices to town centres, there will still be substantial pressure for office development in out-of-centre locations. We discuss this further in the main report.

Table 3.3 Office Developments with Planning Permission 'In Centre' and 'Out-of-Centre' at 2004

	In Centre (sq.m)	Outside Centre (sq.m)	Total	In Centre as % Total
Birmingham	216,400	62,700	279,100	78%
Solihull	4,200	161,900	166,100	3%
Rugby	0	100,000	100,000	0%
Warwick	3,000	54,200	57,200	5%
Nuneaton & Bedworth	2,900	46,200	49,100	6%
Wolverhampton	0	43,900	43,900	0%
Stafford	0	32,900	32,900	0%
Shrewsbury & Atcham	9,500	22,500	32,000	30%
Dudley	6,400	24,000	30,400	21%
Merry Hill	n/a	n/a	30,400	n/a
Telford & Wrekin	10,000	17,800	27,800	36%
Sandwell	0	20,600	20,600	0%
Coventry	1,200	10,700	11,900	10%
Stratford	2,500	8,100	10,600	24%
Stoke-on-Trent	0	10,600	10,600	0%
Worcester	0	8,100	8,100	0%
Herefordshire	0	6,000	6,000	0%
Wyre Forest	0	5,400	5,400	0%
Redditch	0	2,700	2,700	0%
Walsall	0	700	700	0%
Tamworth	0	0	0	/
Cannock	0	0	0	/
Burton-upon-Trent	0	0	0	/
Sutton Coldfield	0	0	0	/
Lichfield	0	0	0	/
Newcastle-under-Lyme	0	0	0	/
Total	256,100	639,000	895,100	29%

Source: Office Development Database, provided by Mott MacDonald Limited

4 BASELINE OFFICE FORECASTS

Forecast Model

- 4.1 Forecasts of office employment in the West Midlands Region were produced utilising Cambridge Econometrics' Multisectoral Dynamic Model (MDM) and the intelligence gathered from its network of regional experts. The MDM extrapolates past trends in employment change in order to produce employment forecasts, by sector, for the Region and its constituent districts in the period 2001 to 2021. There is an underlying assumption in the MDM that past trends will, to a great extent, continue into the future.
- 4.2 The advantages of the econometric forecast model are that it is:
- relatively objective;
 - mathematically sophisticated; and
 - a well-tested method that is used for producing economic forecasts in the UK, both in the public and private domains.
- 4.3 The disadvantages of the MDM method are that it:
- cannot take into account future policy initiatives, which might cause a break from past trends; and
 - does not take into account qualitative factors that it may influence office take-up - for instance, the physical capacity of centres, or the quality of the portfolio of office sites and redevelopment opportunities likely to be available.
- 4.4 We seek to overcome the implicit disadvantages of the MDM method by modelling the effects of positive policy intervention, and by taking into account physical capacity constraints and market opinion; as a result, we consider our method to be robust⁴.

Employment Forecasts

- 4.5 Our baseline forecast of additional office employment in each of the strategic centres and for the rest of the Region was produced by averaging four runs, as follows, but with each run having a fixed regional gain of 207,900 office jobs from 2001 up to 2021:
- i) application of Cambridge Econometrics' growth rates in the financial and business services (F&BS) sector for each of the districts (as set out in Table 4.1) to the ODPM's estimates of office employment in each district and in each centre in the 2001 base year, with the growth rate of each strategic centre tied to the district in which it is located - which we term *'the historic trend'*;
 - ii) application of Cambridge Econometrics' regional growth rate in the F&BS sector - of 2.1 per cent per annum - to the ODPM's estimates of office employment in each district and in each centre in the 2001 base year - which we term *'the regional trend'*;
 - iii) a variation of the historic trend, taking into account our threefold (red, amber, green) assessment of each centre's physical capacity; and
 - iv) a further variation of the historic trend, but this time based on our threefold classification of market opinion for each centre.

⁴ Indeed our method is consistent with the approach set out in the ODPM's Employment Land Reviews: Guidance Note of December 2004.

Table 4.1 F&BS Employment Growth at District Level: Projected Change Per Annum in the Period 2001 to 2021

Lichfield	4.5%	Oswestry	2.5%
South Staffordshire	4.1%	Stratford-on-Avon	2.5%
Solihull	3.6%	Stafford	2.2%
Wyre Forest	3.6%	Warwick	2.1%
Dudley	3.5%	Worcester	2.1%
Wychavon	3.4%	Bridgnorth	2.0%
Newcastle-under-Lyme	3.4%	Nuneaton & Bedworth	1.9%
North Warwickshire	3.2%	Coventry	1.9%
The Wrekin	3.2%	Sandwell	1.4%
Cannock Chase	3.1%	South Shropshire	1.3%
Tamworth	3.1%	Shrewsbury & Atcham	1.2%
Hereford	3.0%	Birmingham	1.2%
Redditch	2.9%	Stoke-on-Trent	0.9%
East Staffordshire	2.8%	Staffordshire Moorlands	0.9%
Rugby	2.6%	Wolverhampton	0.9%
Malvern Hills	2.6%	Bromsgrove	-1.3%
Walsall	2.5%		

Source: Cambridge Econometrics

- 4.6 The method described above was applied to all centres, with the exception of Dudley and Merry Hill/Waterfront. The baseline forecasts for these two centres were produced jointly, and then split between the two centres using a 40 per cent to 60 per cent ratio, in favour of Merry Hill/Waterfront.

The 'Historic' and 'Regional' Trend Forecasts

- 4.7 The Steering Group expressed concerns about the robustness of forecasts at sub-regional level (that is, the *'historic trend'*), and requested that we also model the effect of applying the regional growth rate equally to all districts. Accordingly, in addition to the *'historic trend'* employment forecasts produced using Cambridge Econometrics' district-level growth rates, we also applied the *'regional trend'* growth rate, of 2.1 per cent, per annum, to the ODPM's estimate of office employment in each of the districts and in each of the strategic centres in the 2001 base year.
- 4.8 Table 4.4 shows that there are significant differences in the two forecasts, primarily in the districts where the regional trend growth rate is significantly higher, or significantly lower, than the districts' own trend-based (*'historic'*) growth rate.

Physical Capacity Adjustment

- 4.9 The *'historic trends'* and *'regional trend'* growth rates are derived by extrapolating past change in office employment in order to predict future growth and as such neither take into account current physical capacity constraints. We therefore produced a variation of the *'historic trend'* forecast, based on our assessment of each centre's physical capacity to accommodate office development. Each centre was classified into one of the following three categories (and the modelling assumption for each is set out in square brackets):

- **'Optimistic'** (Green) - where physical capacity exists for future in-centre office development, so that office employment can expand over and above the trend forecasts, particularly where policies encourage an increase in the centre's share of the district-wide office stock.

[Modelling assumption: office employment in these 'optimistic' centres grows by one additional percentage point, per annum, above the 'historic trend' forecast]

- **'Achievable'** (Amber) - centres where there are some physical capacity constraints, but where an active policy approach could have a positive impact on office development. Assuming such an active policy stance is adopted, then office employment in the *'achievable'* centres could grow at, and possibly even exceed, past trends, but not to the same extent as the centres we are *'optimistic'* about.

[Modelling assumption: office employment in these 'achievable' centres grows at the same rate as the 'historic trend' forecast]

- **'Difficult'** (Red) - centres in this category face substantial physical capacity constraints, making it difficult to achieve the trend forecasts.

[Modelling assumption: office employment in these 'difficult' centres grows by one percentage point below the 'historic trend' forecast]

4.10 In undertaking our assessment of physical capacity in the office sector, we have taken account of the definition of *'edge-of-centre'* set out in Table 2 of Annex A of PPS6, which is more generous for offices than for retail⁵. We have also taken account of local authorities' assessments of the potential for significant office development in their respective town centres, as provided in a series of meetings with local authority officers at the start of the study.

4.11 The left side of Table 4.3 summarises our assessment of the physical capacity for office development in the 25 strategic centres, and at Merry Hill/the Waterfront; it shows that seven centres - Walsall, Telford, Hanley, Merry Hill/Waterfront, Worcester, Redditch and Kidderminster - contain substantial physical opportunities to accommodate office development. Conversely, the centres of Leamington Spa, Dudley, Stratford-upon-Avon and Shrewsbury are all heavily constrained, which means that office development of any material scale in these centres will be harder to achieve. Each of the remaining 15 centres has some degree of physical constraints, but not to the same extent as in the four *'difficult'* centres.

Market Opinion Adjustment

4.12 According to the market representatives consulted during the course of the study, the attractiveness of centres as locations for office development depends on a number of factors including:

- **Accessibility of the centre** - office developments need to be accessible for the office tenants' labour force. The developers we consulted considered that in some cases the availability of parking space will influence the location of office tenants more so than rental levels; in part this explains the popularity, to date, of out-of-centre office locations.
- **The availability of labour** - office sectors require a skilled labour pool and the ability of a centre to attract/retain skilled labour will influence office investment decisions. Small differences in labour costs can have a considerable bearing on the location of offices.

⁵ For offices, the term *'edge-of-centre'* covers the locations within 300 metres of the town centre boundary, whereas for retail purposes the term *'edge-of-centre'* extends only to locations of up to 300 metres from the defined Primary Shopping Area.

- **The quality of life** - nice places to live will attract labour and hence also offices. There is some evidence that skilled labour is attracted to towns and cities of cultural and recreational diversity, and places with high-quality amenities.
- **The economic structure of the local economy** - developers are more optimistic about the future of office developments in centres undergoing a structural shift from manufacturing to service sectors. Image is also an important consideration, since towns and cities that are seen to be service-focused are expected to attract more office investment.

4.13 Table 4.2 illustrates the relative performance of the 25 policy PA11 centres in relation to some of the factors that influence the investment decisions of office developers.

Table 4.2 Factors that Influence Perceptions of Office Developers

Strategic Centre	Prime Office Rents, £ft ²	Distance Travelled to Work: 0km to less than 5km	Economically Active	Student (economically inactive)
Birmingham	28	22%	69%	8%
Burton-upon-Trent	12	55%	78%	5%
Cannock	14	52%	76%	4%
Coventry	15	63%	74%	8%
Dudley	14	47%	74%	5%
Hanley	12	50%	73%	6%
Hereford	10	56%	80%	3%
Kidderminster	11	60%	80%	3%
Leamington Spa	18	50%	78%	9%
Lichfield	14	33%	79%	3%
Newcastle-under-Lyme	12	52%	74%	6%
Nuneaton	14	62%	76%	5%
Redditch	14	61%	79%	4%
Rugby	12	61%	80%	4%
Shrewsbury	15	60%	80%	4%
Solihull	20	44%	76%	5%
Stafford	13	52%	78%	4%
Stratford-upon-Avon	17	34%	81%	5%
Tamworth	15	63%	80%	3%
Telford	14	49%	78%	4%
Walsall	10	50%	72%	6%
West Bromwich	10	45%	71%	7%
Wolverhampton	10	50%	75%	5%
Worcester	15	60%	81%	4%
Sutton Coldfield	12	40%	76%	5%

Source: Census 2001 and King Sturge for rents

4.14 The overall investor perspective on the prospects for office development in the 25 Policy PA11 centres and at Merry Hill/the Waterfront, is summarised on the right-hand side of Table 4.3.

Table 4.3 Summary of Physical Capacity and Market Outlook (Offices)

Centre	PHYSICAL CAPACITY		MARKET OUTLOOK	
	Classification ⁺	Summary of Physical Capacity Issues	Classification ⁺⁺	Summary of the Market's Outlook
Birmingham		Some supply side constraints due to multiple ownership and current planning constraints. However development sites do exist within/adjacent to the centre, which could be expanded beyond the Queensway ring road.		The market view is that high quality space needs to be focused in Birmingham, to make it more competitive. However, the market representatives acknowledge the multiple ownership constraints on office development.
Wolverhampton		The centre is constrained by conservation areas to the north and east, and by infrastructure constraints. However there is potential to expand the centre to the south and west.		Whilst the centre has accessibility constraints, the market view is that there is sufficient capacity to meet the trend forecasts.
Coventry		A number of potential office sites exist within/adjacent to the centre.		The market view is that Coventry needs to become more car-friendly if significant office development is to be attracted to the centre.
Walsall		Scope for significant office development in the town centre, particularly in the south east. Walsall town centre also has considerable capacity for office development around its northern side, along the route of the ring road, which is to be improved.		The market view for Walsall centre's office market is not optimistic - representatives do not feel that the centre can meet the trend-based forecast, because there has been no rental increase in the centre for several years.
Telford		Plenty of development opportunities exist within the centre, which would allow intensification (supported by the Council).		According to market representatives, there is a skills shortage in the area, which means that the trend-based forecasts may be high.
Hanley		Development sites exist within/adjacent to the centre, particularly to the south of the core.		Market representatives did not feel that the trend-based forecasts are implausible.
Leamington Spa		Most of the town centre lies within a conservation area and many of the buildings are listed, which severely restricts intensification, expansion and redevelopment opportunities.		Market representatives suggest that the centre is an attractive place to locate so that the market would deliver more office development if the physical capacity constraints can be overcome.
Dudley		Accessibility to the town centre is a problem, which the Council aims to address with proposed improvements to the road network. There is little capacity for new office developments in the town centre.		The market view is that the trend-based targets are realistic and are likely to be achieved.
Solihull		A conservation area runs east-west through the centre, and there is also a shortage of readily developable sites. However there may be some long-term expansion potential to the north of the centre, where office development has already breached the ring road.		The market would deliver more office development in the centre if more land was available.

Centre	PHYSICAL CAPACITY		MARKET OUTLOOK	
	Classification [±]	Summary of Physical Capacity Issues	Classification ^{±±}	Summary of the Market's Outlook
Merry Hill/ Waterfront		Scope for significant office development adjacent to Merry Hill/Waterfront, particularly to the north.		The current planning climate surrounding Waterfront/Merry Hill mean that the market outlook is less optimistic than it would be in a positive planning climate.
West Bromwich		The centre is currently constrained by the Ringway. However its realignment - which will permit development of the large physical opportunities that exist - will be provided as part of the approved Ringway/Expressway (Tesco) development which is due to commence in spring 2007.		The centre is a good office location with good accessibility, and the market is optimistic that development above the trend forecasts can be achieved, particularly in the latter period of the study's timeframe.
Burton-upon-Trent		Some opportunity sites exist within the centre.		Market representatives did not feel that the trend-based forecasts are implausible.
Worcester		Whilst large areas of the centre are protected by conservation designations, and the centre is also constrained by the River Severn and the dual carriageway, significant opportunities exist in edge-of-centre locations.		The market view is that due to land supply constraints, there is a need to expand the city centre.
Sutton Coldfield		The centre is constrained by the ring road, rail embankment and steeply sloping land.		Market representatives did not feel that the trend-based forecasts are implausible.
Stafford		Main constraints are the ring road, the River Sow, and conservation areas. However the Council has identified a number of sites with redevelopment potential.		Because of the growing service sector, market representatives believe that the trend forecasts are achievable.
Hereford		The ring road provides the main constraint to town centre expansion, although the Council is looking to address this through accessibility improvements.		Road accessibility to the centre is a key problem that reduces the attractiveness of the centre to the market.
Stratford-upon-Avon		Tight restrictions to maintain the existing townscape character mean that significant levels of office development in the centre will be difficult to achieve.		The centre is an attractive place to locate and more offices would locate there if space was available.
Rugby		Expansion of the centre is restricted by Corporation Street in the west and by strict controls due to the centre's conservation area status.		Market representatives did not feel that the trend-based forecasts are implausible.
Lichfield		Constraints exist including the green belt to the west, the railway line to the south east and the cathedral to the north. However, these constraints are not so tight that they would prevent significant expansion in some directions.		Due to the physical capacity constraints, the market is not optimistic about the centre's ability to accommodate substantial office development.

Centre	PHYSICAL CAPACITY		MARKET OUTLOOK	
	Classification [±]	Summary of Physical Capacity Issues	Classification ^{±±}	Summary of the Market's Outlook
Redditch	Green	There are potential development opportunities between the ring road and the existing town centre core.	Yellow	Market representatives did not feel that the trend-based forecasts are implausible.
Kidderminster	Green	Capacity for significant office development within the current boundary (large scale car parks and some vacant large buildings).	Yellow	Market representatives did not feel that the trend-based forecasts are implausible.
Newcastle-under-Lyme	Yellow	The dual carriageway ring road forms a barrier to office development.	Red	Market representatives consider that the trend-based forecasts are too optimistic, and also noted that there is a lack of a skills base for offices in the area.
Shrewsbury	Red	The entire centre lies within a conservation area and its character is a key constraint to intensification. Physical expansion is also difficult due to the presence of the River Loop and its flood plain.	Yellow	The market view is that despite the tight land supply, the trend-based forecasts are realistic.
Cannock	Yellow	Opportunities for development in the short-term exist, but longer-term office expansion is restricted by the dual carriageway and the presence of residential areas adjacent to the centre.	Yellow	The market representatives are optimistic about the future of office development in Cannock town centre and suggest that the trend is achievable.
Tamworth	Yellow	The centre is constrained by the River Anker, its flood plain, the ring road, residential areas and conservation areas.	Yellow	Tamworth is seen as a commuter town and the majority of office development is expected to be located outside of the centre.
Nuneaton	Yellow	The conservation area and stringent policies on design present the main constraint to development.	Yellow	Market representatives did not feel that the trend-based forecasts are implausible.

***Key to Physical Capacity Classification**

Green	'Optimistic' - physical capacity exists for material levels of office development. Office employment in these centres could expand over and above trend forecasts.
Yellow	'Achievable' - some or significant physical capacity constraints. With a proactive policy approach, office employment could grow at or above past trends, although not at the same pace as the 'optimistic' centres.
Red	'Difficult' - substantial physical capacity constraints

****Key to Market Outlook Classification**

Green	Positive market outlook - greater office development than in the past is expected in these centres.
Yellow	Office development is expected to grow at the same pace as in the past.
Red	The market outlook for these centres is ominous.

- 4.15 We use the same green-amber-red methodology as for the analysis of physical capacity and classify each centre as follows⁶:
- **Green** indicates a positive market outlook; the market representatives expect office growth in these centres to be higher than in the past.
[Modelling assumption: office employment in these centres grows by one additional percentage point, per annum, above the 'historic trend' forecast]
 - **Amber** indicates that office employment is expected to grow at around the same pace as historic trends in these centres.
[Modelling assumption: office employment in these centres grows by the same rate as the 'historic trend']
 - **Red** indicates that the market outlook for these centres is ominous.
[Modelling assumption: office employment in these centres grows by one percentage below the 'historic trend' forecast]
- 4.16 Table 4.3 shows that the market representatives identified just four of the 26 centres as having good prospects for achieving office growth above past trends. It is perhaps not surprising that three of these centres - Leamington Spa, Solihull and Stratford-upon-Avon - are amongst the most physically attractive in the Region and are the type of location that people generally enjoy living and working in. West Bromwich is also viewed optimistically by the market because of its strategic location five miles from Birmingham city centre and because of improved accessibility by road and Metro.
- 4.17 The potential for office growth at three of the Region's strategic centres - Walsall, Hereford and Newcastle-under-Lyme - was viewed pessimistically by the market representatives. In each of these centres the market view is that the trend-based forecasts will be difficult to achieve.
- 4.18 The remaining 19 centres each achieved an 'amber' rating from the market representatives, who felt that constraints to growth were not so great as to mean that trend forecasts for office development could not be achieved.
- 4.19 It is noteworthy that no single centre was classified as 'green' in terms of both physical capacity and market outlook. This finding suggests that proactive planning strategies will need to be pursued and realised if in-centre office development at, or in excess of, past trends is to be achieved.

The 'Baseline' Employment Forecast

- 4.20 The employment forecasts generated under each of the four runs are shown in Table 4.4. The resultant baseline forecast for change in office employment in the period 2001 to 2021 - which is the average of these four runs - is set out in the final column of Table 4.4. Under the baseline forecast, the 25 strategic centres, plus the Waterfront at Merry Hill, are projected to absorb 36 per cent of the Region's gain in office jobs in the period up to 2021 (74,500 jobs out of 207,900), with the remainder absorbed by smaller centres outside of the Policy PA11 network and in out-of-centre locations. The share of the gain in office jobs accounted for by the 25 strategic centres, plus Merry Hill/the Waterfront, of 36 per cent, represents an improvement on past performance, even under our baseline forecast which, to a significant extent, remains trend-based. Indeed, all town centres in the West Midlands Region, including smaller centres outside the PA11 network, accounted for only 31 per cent of office floorspace completed in the last three years, and only 28 per cent of office floorspace

⁶ It is worth emphasising that these are the current market perceptions. Various regeneration initiatives are aimed at improving the image and market attractiveness of particular centres (the £600m regeneration programme that was recently announced by the Walsall Regeneration Company being one pertinent example).

which is currently under construction, or with planning permission, is located in the Region's town centres⁷.

Table 4.4 Forecast Gains in Office Employment (ODPM based) from 2001 to 2021 in the Strategic Centres and Elsewhere in the Region

Strategic Centre	Historic Trend	Regional Trend	Physical Capacity Adjustment	Market Opinion Adjustment	Baseline Forecast
Birmingham	18,253	34,590	18,253	18,253	22,337
Burton-upon-Trent	986	684	986	986	911
Cannock	915	571	915	915	829
Coventry	6,591	7,598	6,591	6,591	6,843
Dudley	2,468	1,291	2,354	2,882	2,249
Hanley	479	1,250	1,106	479	828
Hereford	1,910	1,229	1,910	1,154	1,551
Kidderminster	1,689	853	2,393	1,689	1,656
Leamington Spa	2,391	2,460	1,121	3,920	2,473
Lichfield	2,199	809	2,199	2,199	1,851
Newcastle-under-Lyme	2,548	1,401	2,548	1,624	2,030
Nuneaton	894	1,041	894	894	930
Redditch	1,761	1,192	2,624	1,761	1,834
Rugby	890	676	890	890	836
Shrewsbury	881	1,675	144	881	895
Solihull	4,927	2,458	4,927	6,968	4,820
Stafford	1,889	1,834	1,889	1,889	1,876
Stratford-upon-Avon	1,202	978	655	1,862	1,174
Tamworth	1,026	650	1,026	1,026	932
Telford	4,031	2,445	5,886	4,031	4,098
Walsall	2,994	2,434	4,635	1,630	2,923
West Bromwich	1,211	1,915	1,211	2,269	1,651
Wolverhampton	1,915	4,827	1,915	1,915	2,643
Worcester	1,987	1,967	3,225	1,987	2,291
Sutton Coldfield	538	1,020	538	538	659
Merry Hill/Waterfront	3,702	1,936	3,532	4,323	3,373
Sub-Total for Strategic Centres	70,277	79,785	74,367	73,556	74,496
Remainder of Region (smaller town centres & out-of-centre locations)	137,647	128,139	133,557	134,368	133,428
Total for the Region	207,924	207,924	207,924	207,924	207,924

Note: The above ODPM-based office employment forecasts are converted into office floorspace requirements based on a ratio of 18 sq.m per employee.

⁷ West Midlands Regional Spatial Strategy: Annual Monitoring Report, February 2005, Tables APP.PA14 and APP.PA15

5 CONVERSION OF BASELINE EMPLOYMENT FORECASTS TO FLOORSPACE REQUIREMENTS

Density Ratios

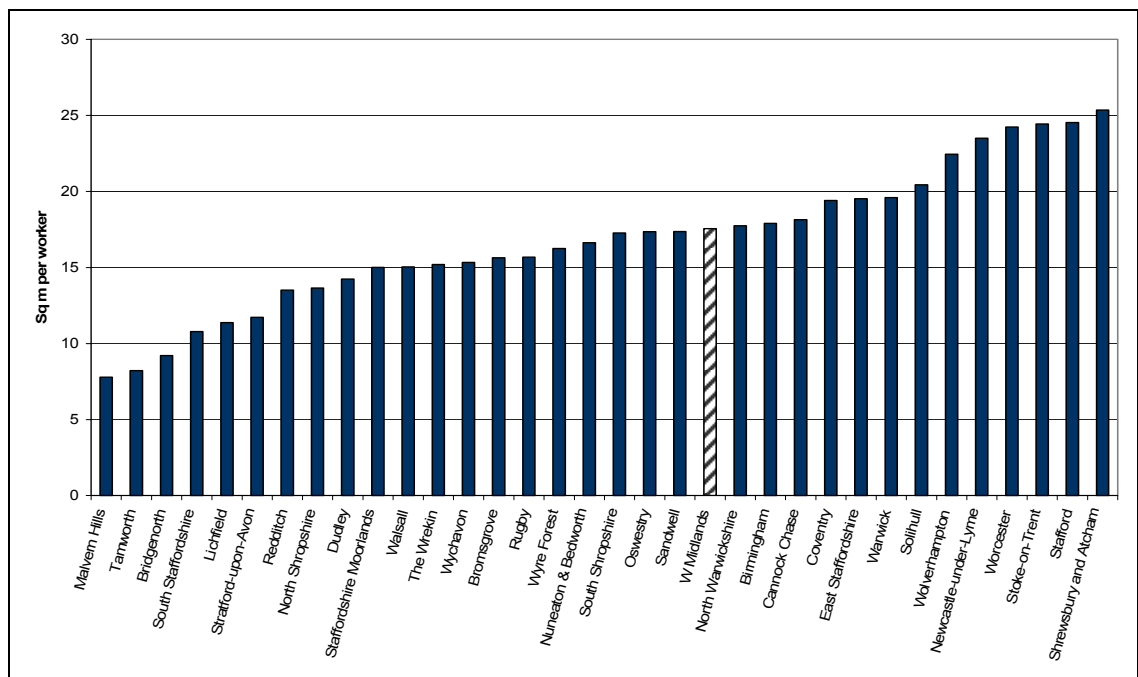
- 5.1 Surveys and studies of office employment space have found the average floorspace per worker ratio to be around 18 sq.m per employee, as summarised in Table 5.1:

Table 5.1 Floorspace Per Worker Ratios for Office Employment

Survey	Date	Source	Floorspace (sq.m) per Worker
Use of Business Space and Changing Working Practices in the South East	2004	DTZ Piedad	18.3
Employment Densities for RDAs	2001	Arup	19.0
Overcrowded, Under-utilised or Just Right	2001	Gerald Eve	16.3
Use of Business Space: Employment Densities and Working Practices in the South East	1997	RTP	17.9

- 5.2 Figure 5.1 shows the implied floorspace per worker ratio derived by dividing the office floorspace stock (ODPM data) by employment in the F&BS sector. As can be seen for the West Midlands Region as a whole and for the largest local authority, Birmingham, 18 sq.m is a very good fit. Most districts fall within the range of 15 to 20 sq.m per worker.

Figure 5.1 Calculated Floorspace per Worker Estimates



- 5.3 For some time, various commentators have assumed that employment density ratios are likely to rise as a result of increased use of new working practices. However, survey evidence shows that despite cases of this occurring, average density ratios have remained fairly constant over recent years⁸. Furthermore, in its 2004 report for SEERA, DTZ stated

⁸ Survey evidence from LAURA (1984), RTP (1997) and DTZ Piedad (2004) have all found similar average employment density ratios for offices.

that it had found: *'Limited changes in overall employment density since the 1997 RTP survey'*. As a consequence, we convert the projected change in office jobs to office floorspace requirements, by using an average density of 18 sq.m per job

Floorspace Requirements

5.4 Thus, the total gain in occupied office floorspace associated with the 207,900 additional office jobs across the Region, in the 20 year period 2001 to 2021, amounts to 3.74 million sq.m (207,900 jobs x 18 sq.m per job), as set out in Table 5.2. In comparison, the total amount of office floorspace developed in the Region over the 20 year period 1984 to 2004 amounted to 2.2 million sq.m.

Table 5.2 Forecast Gains in Occupied Office Floorspace from 2001 to 2021 in the Strategic Centres (ODPM based) and Elsewhere in the Region ('000s sq.m)

Strategic Centre	Historic Trend	Regional Trend	Physical Capacity Adjustment	Market Opinion Adjustment	Baseline Forecast
Birmingham	330	620	330	330	400
Burton-upon-Trent	20	10	20	20	20
Cannock	20	10	20	20	10
Coventry	120	140	120	120	120
Dudley	40	20	40	50	40
Hanley	10	20	20	10	10
Hereford	30	20	30	20	30
Kidderminster	30	20	40	30	30
Leamington Spa	40	40	20	70	40
Lichfield	40	10	40	40	30
Newcastle-under-Lyme	50	30	50	30	40
Nuneaton	20	20	20	20	20
Redditch	30	20	50	30	30
Rugby	20	10	20	20	20
Shrewsbury	20	30	0	20	20
Solihull	90	40	90	130	90
Stafford	30	30	30	30	30
Stratford-upon-Avon	20	20	10	30	20
Tamworth	20	10	20	20	20
Telford	70	40	110	70	70
Walsall	50	40	80	30	50
West Bromwich	20	30	20	40	30
Wolverhampton	30	90	30	30	50
Worcester	40	40	60	40	40
Sutton Coldfield	10	20	10	10	10
Merry Hill/Waterfront	70	30	60	80	60
Sub-Total for Strategic Centres	1,260	1,440	1,340	1,320	1,340
Remainder of Region (smaller town centres and out-of-centre locations)	2,480	2,310	2,400	2,420	2,400
Total for Region	3,740	3,740	3,740	3,740	3,740

5.5 The higher volume of office development predicted for the 20 year period 2001 to 2021, compared to that which occurred in the 20 year period 1984 to 2004, is to be expected, for three reasons, as follows:

- i) the higher base starting figure for 2001 (compared to 1984) will generate greater absolute growth for the same rate of percentage change;

- ii) the West Midlands is expected to undergo a further structural shift away from manufacturing towards service sector employment; and because
 - iii) a higher proportion of the jobs provided by manufacturing businesses is expected to be office based (as a result of a national trend which is called *'tertiarisation'*).
- 5.6 Thus, on the basis of past trends and likely future changes to the economy, the figure of 3.74 million sq.m for the Region as a whole does not appear to be unreasonable.
- 5.7 Under the baseline assessment, the 25 strategic centres (plus the Waterfront at Merry Hill) are projected to absorb 1.34 million sq.m of the identified need for office floorspace of 3.74 million sq.m, thus equating to 36 per cent of the Regional total. In contrast, the current supply of office consents in these strategic centres amounts to only 0.26 million sq.m. Thus, it is clear that the local authorities will need to encourage further office development, within and on the edge of these strategic centres, in a highly proactive manner, if the baseline assessment of need is to be met.
- 5.8 We must stress, however, that the baseline need assessment set out in the final column of Table 6.10 should be regarded as being *'fixed'* only in respect of the regional control total of 3.74 million sq.m. The quanta of office floorspace indicated for each of the 25 centres plus Merry Hill/Waterfront should not be regarded as being prescriptive limits. Some centres such as Hanley (Stoke-on-Trent) are set to benefit from huge levels of regeneration investment associated with the North Staffordshire Regeneration Zone and the Housing Market Renewal Pathfinder. Indeed, we understand that the Integrated Economic Strategy for North Staffordshire envisages the need for 50,000 sq.m of office space in Hanley's business quarter in the period up to 2021. Thus, Hanley is an example of where trend-based forecasting does not fit comfortably with a policy-led approach. Another example is Telford, where the local authority envisages 115,000 sq.m of employment development in the town centre by 2021.
- 5.9 Thus, given that the largely trend-based baseline forecast is associated with 2.40 million sq.m of office development being located outside the strategic centres - in smaller towns and in out-of-centre locations - there is ample scope for the local authorities who manage the strategic centres to improve on their baseline performance. In Section 6 we therefore assess the effects, on the distribution of office need, of five alternative policy approaches, four of which use the same regional control total for the gain in occupied office floorspace of 3.74 million sq.m, but with variations in the proportion of this regional pot which is absorbed, in aggregate, by the 25 strategic centres, plus the Waterfront at Merry Hill.

6 SCENARIOS FOR DISTRIBUTING IDENTIFIED OFFICE NEEDS

Introduction

- 6.1 In the final column of Table 5.2 we set out our baseline forecasts of floorspace need in the office sector and our baseline distribution across the network of strategic centres and for the remainder of the Region. Under this baseline distribution, the strategic centres are projected to absorb 36 per cent of the office floorspace need, with the remainder being absorbed in smaller town centres and in out-of-centre locations. However, as in the retail sector, we have developed alternative distributions of the fixed regional need control total, so as to reflect different policy approaches. In the office sector there are five alternative scenarios.

Scenario 1: More Office Development in all Strategic Centres

- 6.2 This scenario models the effects of seeking to direct a greater proportion of office floorspace requirements from each of the Region's districts to the strategic centres. The implication of such a policy is that the strategic centres will grow faster than if a continuation of historic trends was left to prevail. Thus, the Scenario 1 model assumes that office employment in each of the 25 PA11 centres plus the Waterfront/Merry Hill will grow faster than the historic trend prevailing in their respective districts by one additional percentage point, per annum.

Scenario 2: More Office Development in the MUAs

- 6.3 Scenario 2 seeks to channel a greater share of office employment to the strategic centres located within the Region's MUAs, that is, to ten of the PA11 centres, plus the Waterfront/Merry Hill. This scenario is achieved by allowing office employment in these eleven centres to grow faster than the historic trend prevailing in their respective districts by one additional percentage point, per annum. Office employment in the remaining 15 strategic centres outside the MUAs is assumed to grow in line with the historic trend.

Scenario 3: More Office Development in all Strategic Centres, but with a Further Emphasis on those Strategic Centres Located within the MUAs

- 6.4 Scenario 3 looks at the effects of pursuing a simultaneous policy of promoting greater quanta of office development in all of the strategic centres (i.e. Scenario 1), and particularly in the MUA centres (i.e. Scenario 2). Our model achieves this through an assumption that office employment will grow faster than the trend by one additional percentage point, per annum in those strategic centres located outside the MUAs, but with office employment in the MUA strategic centres growing faster than the trend by 1.5 additional percentage points. As a consequence, office employment forecasts for the MUA centres will be higher than in both Scenario 1 and Scenario 2.

Scenario 4: More Office Development in all Strategic Centres, with an Emphasis on MUA and Sub-Regional Foci Centres

- 6.5 Scenario 4 builds on the policy objectives of Scenario 3 by encouraging more office employment in all strategic centres, but with special emphasis on the MUA and sub-regional foci centres. For this scenario, our model builds in an assumption that office employment in each of the MUA centres and sub-regional foci centres will grow faster than the trend by 1.5 additional percentage points, per annum, and with all remaining strategic centres growing faster than the trend by one additional percentage point, per annum. As a consequence, office employment forecasts for the MUA centres and sub-regional foci centres will be higher than in both Scenario 1 and Scenario 2.

Scenario 5: Black Country

- 6.6 In the Black Country Scenario we examine the effects of seeking to direct more office employment into the Black Country districts of Dudley, Sandwell, Walsall and Wolverhampton. For this scenario, we examined the results of the Black Country Study⁹, which projects a gain of 57,000 F&BS jobs and a gain of 6,000 Public Administration jobs in the Black Country districts between 2003 and 2023. We note that the time horizon of the Black Country Study differs slightly to that examined in this Regional Centres Study, but both studies cover a 20-year period. Therefore, in Scenario 5, we use the 63,000 office jobs as a proxy of the projected gain in office employment in the Black Country districts for the period 2001 to 2021.
- 6.7 The trend-based forecast produced by Cambridge Econometrics suggests a total gain in office employment in the Black Country districts of 37,200. This implies that there is a difference of 25,800 office jobs between the trend-based forecast and the Black Country Study ambition. In Scenario 5, we therefore add a further 25,800 office jobs distributed across the Black Country districts of Dudley (including the Waterfront at Merry Hill), Wolverhampton, Walsall and Sandwell¹⁰. These jobs are assumed to be additional to the Region, so that the regional job gain in office jobs in the period up to 2021 increases to 233,700.

Distribution of the Gains in Office Jobs and Office Floorspace under the Various Scenarios

- 6.8 Table 6.1a presents the implications for the distribution of gains in office employment for each of the five scenarios, together with the baseline forecast, and Table 7.8b translates these office employment changes to floorspace through the application of an employment density of 18 sq.m per worker. Under all five scenarios there is a greater proportion of office jobs located in the strategic centres compared to the baseline. Under Scenario 4, the proportion of the Region's additional office jobs which are located in the strategic centres rises to 44.4 per cent (92,300 from the regional total of 207,900), compared to 35.8 per cent under the baseline. In terms of floorspace (Table 6.1b), Scenario 4 yields an aggregate quantitative need in the strategic centres, plus the Waterfront at Merry Hill, of 1.66m sq.m; this is an ambitious target in relation to the current supply of extant consents for office developments in these centres of just 0.26m sq.m. Thus, it is clear that all LPAs will need to encourage further office development in their respective strategic centres in a highly proactive manner, if the needs set out in Tables 6.1a and 6.1b are to materialise.
- 6.9 Tables 6.2a and 6.2b present the '*Rest of District*' office employment and floorspace distributions - that is, the residual requirements for locations outside the network of strategic centres. Thus, the '*Rest of District*' office employment and floorspace requirements relate to smaller town centres not classified as '*strategic*'¹¹ and to out-of-centre locations. The proportion of the Region's gain in office jobs which is projected to occur outside the network of strategic centres reduces to 56 per cent under Scenario 4, whereas such locations account for 64 per cent under the baseline forecast set out in Tables 6.1a and 6.1b.

⁹ GHK, February 2005, *Long Term Economic and Employment Strategy for the Black Country - Final Report*.

¹⁰ This scenario represents a vision-led approach for the Black Country which is assumed not to be replicable for the rest of the Region.

¹¹ Office employment/floorspace in the 25 Policy PA11 centres plus the Waterfront at Merry Hill is allocated from the district total and the residual is '*rest-of-district*' office employment. Thus in districts with no strategic centre the district total is equal to the rest-of-district total.

Table 6.1a Office Employment Gains from 2001 to 2021 in the Strategic Centres, under Baseline and Alternative Policy Scenarios

Strategic Centre	Baseline Forecast	Scenario 1	Scenario 2	Scenario 3	Scenario 4	Scenario 5
Birmingham	22,300	26,900	26,900	29,600	29,600	29,600
Burton-upon-Trent	900	1,000	900	1,000	1,000	1,000
Cannock	800	900	800	900	900	900
Coventry	6,800	8,000	8,000	8,600	8,600	8,600
Dudley	2,200	2,500	2,500	2,700	2,700	3,600
Hanley	800	1,000	1,000	1,100	1,100	1,100
Hereford	1,600	1,800	1,600	1,800	1,900	1,800
Kidderminster	1,700	1,800	1,700	1,800	1,800	1,800
Leamington Spa	2,500	2,900	2,500	2,900	2,900	2,900
Lichfield	1,900	2,000	1,900	2,000	2,000	2,000
Newcastle-under-Lyme	2,000	2,300	2,300	2,500	2,500	2,500
Nuneaton	900	1,100	900	1,100	1,100	1,100
Redditch	1,800	2,100	1,800	2,100	2,100	2,100
Rugby	800	1,000	800	1,000	1,000	1,000
Shrewsbury	900	1,100	900	1,100	1,200	1,100
Solihull	4,800	5,300	5,300	5,600	5,600	5,600
Stafford	1,900	2,200	1,900	2,200	2,200	2,200
Stratford-upon-Avon	1,200	1,300	1,200	1,300	1,300	1,300
Tamworth	900	1,100	900	1,100	1,100	1,100
Telford	4,100	4,600	4,100	4,600	4,800	4,600
Walsall	2,900	3,300	3,300	3,600	3,600	5,300
West Bromwich	1,700	1,900	1,900	2,100	2,100	3,500
Wolverhampton	2,600	3,300	3,300	3,600	3,600	7,100
Worcester	2,300	2,600	2,300	2,600	2,800	2,600
Sutton Coldfield	700	800	800	900	900	900
Merry Hill/Waterfront	3,400	3,800	3,800	4,000	4,000	5,300
Sub-Total for Strategic Centres (& Proportion of Regional Total)	74,500 (36%)	86,500 (42%)	83,200 (40%)	91,500 (44%)	92,300 (44%)	100,500 (43%)
Remainder of Region (smaller town centres & out-of-centre locations)	133,400	121,400	124,700	116,400	115,600	133,200
Regional Total	207,900	207,900	207,900	207,900	207,900	233,700

Note: All of the figures in the table are rounded; hence there may be some slight discrepancies with totals.

Table 6.1b Gains in Occupied Office Floorspace from 2001 to 2021 in the Strategic Centres, under Baseline and Alternative Policy Scenarios ('000 sq.m)

Strategic Centre	Baseline	Scenario 1	Scenario 2	Scenario 3	Scenario 4	Scenario 5
Birmingham	400	480	480	530	530	530
Burton-upon-Trent	20	20	20	20	20	20
Cannock	10	20	10	20	20	20
Coventry	120	140	140	160	160	160
Dudley	40	50	50	50	50	60
Hanley	10	20	20	20	20	20
Hereford	30	30	30	30	30	30
Kidderminster	30	30	30	30	30	30
Leamington Spa	40	50	40	50	50	50
Lichfield	30	40	30	40	40	40
Newcastle-under-Lyme	40	40	40	40	40	40
Nuneaton	20	20	20	20	20	20
Redditch	30	40	30	40	40	40
Rugby	20	20	20	20	20	20
Shrewsbury	20	20	20	20	20	20
Solihull	90	100	100	100	100	100
Stafford	30	40	30	40	40	40
Stratford-upon-Avon	20	20	20	20	20	20
Tamworth	20	20	20	20	20	20
Telford	70	80	70	80	90	80
Walsall	50	60	60	60	60	100
West Bromwich	30	30	30	40	40	60
Wolverhampton	50	60	60	60	60	130
Worcester	40	50	40	50	50	50
Sutton Coldfield	10	10	10	20	20	20
Merry Hill/Waterfront	60	70	70	70	70	100
Sub-Total for Strategic Centres (& Proportion of Regional Total)	1,340 (36%)	1,560 (42%)	1,500 (40%)	1,650 (44%)	1,660 (44%)	1,810 (43%)
Remainder of Region (smaller town centres & out-of-centre locations)	2,400	2,190	2,240	2,090	2,080	2,400
Regional Total	3,740	3,740	3,740	3,740	3,740	4,210

Note: All of the figures in the table are rounded, hence there may be some slight discrepancies with totals.

Table 6.2a Office Employment Gains from 2001 to 2021 for the Rest of each District, under Baseline and Alternative Policy Scenarios

Remainder of District	Scenario 1	Scenario 2	Scenario 3	Scenario 4	Scenario 5
Birmingham	17,400	17,400	16,300	16,100	16,300
Burton-upon-Trent	3,400	3,500	3,300	3,300	3,300
Cannock	2,000	2,100	1,900	1,900	1,900
Coventry	7,000	7,000	6,700	6,600	6,700
Dudley	9,100	9,100	8,700	8,700	14,200
Hanley	3,700	3,700	3,600	3,600	3,600
Hereford	2,900	3,100	2,800	2,800	2,800
Kidderminster	1,500	1,600	1,400	1,400	1,400
Leamington Spa	5,800	6,200	5,600	5,600	5,600
Lichfield	3,200	3,400	3,000	3,000	3,000
Newcastle-under-Lyme	1,500	1,500	1,400	1,400	1,400
Nuneaton	1,200	1,300	1,100	1,100	1,100
Redditch	1,100	1,300	1,000	1,000	1,000
Rugby	1,900	2,000	1,800	1,800	1,800
Shrewsbury	2,300	2,500	2,200	2,200	2,200
Solihull	8,700	8,700	8,400	8,400	8,400
Stafford	3,700	4,000	3,500	3,500	3,500
Stratford-upon-Avon	5,400	5,600	5,200	5,200	5,200
Tamworth	1,200	1,300	1,200	1,200	1,200
Telford	5,000	5,500	4,800	4,800	4,800
Walsall	3,900	3,900	3,700	3,700	6,700
West Bromwich	4,500	4,500	4,300	4,300	8,600
Wolverhampton	4,000	4,000	3,800	3,800	7,900
Worcester	1,400	1,700	1,300	1,200	1,300
South Shropshire	700	700	700	700	700
Bromsgrove	700	700	700	700	700
Oswestry	900	900	900	900	900
Bridgnorth	1,200	1,200	1,200	1,200	1,200
North Shropshire	1,400	1,400	1,400	1,400	1,400
Staffordshire Moorlands	1,800	1,800	1,700	1,700	1,700
North Warwickshire	2,000	2,000	2,000	1,900	2,000
Malvern Hills	2,800	2,800	2,700	2,700	2,700
South Staffordshire	2,900	2,900	2,800	2,800	2,800
Wychavon	5,300	5,300	5,100	5,100	5,100
Remainder of Region (smaller town centres & out-of-centre locations)	121,400 (58%)	124,700 (60%)	116,400 (56%)	115,600 (56%)	133,200 (57%)
Regional Total	207,900	207,900	207,900	207,900	233,700

Note: All of the figures in the table are rounded, hence there may be some slight discrepancies with totals,

Table 6.2b Gains in Occupied Office Floorspace from 2001 to 2021 in the Rest of Each District, under Baseline and Alternative Policy Scenarios ('000 sq.m)

Remainder of District	Scenario 1	Scenario 2	Scenario 3	Scenario 4	Scenario 5
Birmingham	310	310	290	290	290
Burton-upon-Trent	60	60	60	60	60
Cannock	40	40	30	30	30
Coventry	130	130	120	120	120
Dudley	160	160	160	160	260
Hanley	70	70	60	60	60
Hereford	50	60	50	50	50
Kidderminster	30	30	30	20	30
Leamington Spa	100	110	100	100	100
Lichfield	60	60	50	50	50
Newcastle-under-Lyme	30	30	20	20	20
Nuneaton	20	20	20	20	20
Redditch	20	20	20	20	20
Rugby	30	40	30	30	30
Shrewsbury	40	40	40	40	40
Solihull	160	160	150	150	150
Stafford	70	70	60	60	60
Stratford-upon-Avon	100	100	90	90	90
Tamworth	20	20	20	20	20
Telford	90	100	90	90	90
Walsall	70	70	70	70	120
West Bromwich	80	80	80	80	160
Wolverhampton	70	70	70	70	140
Worcester	20	30	20	20	20
South Shropshire	10	10	10	10	10
Bromsgrove	10	10	10	10	10
Oswestry	20	20	20	20	20
Bridgnorth	20	20	20	20	20
North Shropshire	30	30	20	20	20
Staffordshire Moorlands	30	30	30	30	30
North Warwickshire	40	40	40	40	40
Malvern Hills	50	50	50	50	50
South Staffordshire	50	50	50	50	50
Wychavon	90	90	90	90	90
Remainder of Region (smaller town centres & out-of-centre Locations)	2,190 (58%)	2,240 (60%)	2,090 (56%)	2,080 (56%)	2,400 (57%)
Regional Total	3,740	3,740	3,740	3,740	4,210

Note: All of the figures in the table are rounded, hence there may be some slight discrepancies with totals

Evaluation of the Office Scenarios

Policy Objectives and Policy Aims

- 6.10 As in the retail sector, we have evaluated each of the five policy-based office scenarios, using the agreed evaluation matrix. Thus, we have employed the same seven policy objectives and the same 16 policy aims as in the retail evaluation and again we score performance against each policy aim using the same three-point scoring system (1 'poor'; 2 'moderate'; and 3 'good').

Evaluation Findings

- 6.11 As in the retail evaluation, each policy-based office scenario could achieve a maximum possible score of 48 in the matrix. The full evaluation of the office scenarios is set out as Appendix 4 of the main report. Below, in Table 6.3, we summarise the findings from the evaluation, showing the overall score achieved by each scenario, as well as a summary of each scenario's performance in relation to each policy objective in terms of good ('G'), moderate ('M') or poor ('P').

Table 6.3 Evaluation of Policy-based Office Scenarios Against National/Regional Policy Objectives

<i>Objectives</i>									
	Urban Renaissance	Rural Renaissance	Economic Competitiveness	Optimising the Balance of the Network	Contribution to Sustainability Objectives	Social Progress for All (Social Inclusion)	Deliverability	TOTAL SCORE (OUT OF 48)	
<i>Scenarios</i>									
Baseline Forecast	M	M	M	M	M	M	M	31	
Scenario 1 - All Strategic Centres	G	M	M	M	M	P	M	36	
Scenario 2 - MUA Focus	G	P	G	G	G	M	G	38	
Scenario 3 - All Strategic Centres, but with even more focus in the MUAs	G	M	G	G	G	M	G	40	
Scenario 4 - All Strategic Centres, but with even more focus in the MUAs & in the Sub-Regional Foci Centres	G	M	G	G	G	G	G	42	
Scenario 5 - Black Country Focus	G	P	M	M	M	G	M	35	

- 6.12 The baseline forecast principally reflects a continuation of existing trends, albeit adjusted to reflect physical constraints and market opinion. As such it scores least well in relation to agreed policy objectives, attaining an overall matrix score of just 31.
- 6.13 All policy-based scenarios score better in the matrix vis-à-vis a continuation of historic trends. However, Scenario 1 does not necessarily target the areas of greatest need, and Scenario 5 fails to achieve an optimum balance in the network of centres. Hence, these two scenarios achieve overall matrix scores of 36 and 35, respectively.
- 6.14 Scenarios 2, 3 and 4 achieve the highest evaluation ratings in the range 38 to 42 points. Scenario 2 scores well in relation to five of the seven policy objectives, but it scores badly in relation to the objectives for rural renaissance and only moderately in relation to objectives for social progress. Scenario 3 scores well against five of the seven policy objectives, but only moderately in relation to rural renaissance and social progress. Scenario 4 achieves the highest overall ranking in the evaluation matrix and would assist most in seeking to improve the balance of the network of strategic

centres. Moreover, Scenario 4 closely reflects the desire of the existing RSS to promote growth in the MUAs and in the Sub-Regional Foci Centres.

APPENDIX 1

ODPM OFFICE EMPLOYMENT SECTORS

Offices

22110 Publishing of books
22120 Publishing of newspapers
22120 Publishing of journals and periodicals
22140 Publishing of sound recordings
22150 Other publishing
65110 Central banking
65121 Banks
65122 Building societies
65210 Financial leasing
65221 Credit granting by non-deposit taking finance houses and other specialist consumer credit grantors
65222 Factoring
65222 Activities of mortgage finance companies
65229 Other credit granting not elsewhere classified
65221 Activities of investment trusts
65222 Activities of unit trusts and property unit trusts
65222 Security dealing on own account
65224 Activities of bank holding companies
65225 Activities of venture and development capital companies
65229 Financial intermediation not elsewhere classified
66010 Life insurance
66020 Pension funding
66020 Non-life insurance
67110 Administration of financial markets
67121 Fund management activities
67122 Security broking and related activities
67120 Activities auxiliary to financial intermediation not elsewhere classified
67200 Activities auxiliary to insurance and pension funding
70110 Development and selling of real estate
70120 Buying and selling of real estate
70201 Letting of conference and exhibition centres
70202 Other letting of own property other than conference and exhibition centres
70209 Other letting of own property
70210 Real estate agencies
70220 Management of real estate on a fee or contract basis
72100 Hardware consultancy
72200 Software consultancy and supply
72200 Data processing
72400 Data base activities
72500 Maintenance and repair of office, accounting and computing machinery
72600 Other computer related activities
72100 Research and development on natural sciences and engineering
72200 Research and development on social sciences and humanities
74110 Legal activities
74111 Activities of Patent and Copyright Agents
74119 Other legal services
74121 Accounting and auditing services
74122 Book-keeping activities
74122 Tax consultancy activities
74120 Market research and public opinion polling
74141 Public relations activities
74142 Financial management
74142 General management consultancy activities
74149 Miscellaneous business and management consultancy activities
74150 Management activities of holding companies
74151 Management activities of wholesale holding companies
74152 Management activities of transport holding companies

74152 Management activities of construction holding companies
74154 Management activities of catering holding companies
74155 Management activities of motor trades holding companies
74156 Management activities of service trades holding companies
74157 Management activities of retail holding companies
74158 Management activities of production holding companies
74159 Management activities of non-financial holding companies
74201 Architectural activities
74202 Urban planning and landscape architectural activities
74202 Quantity surveying activities
74204 Engineering consultative and design activities
74205 Engineering design activities for industrial process and production
74206 Engineering related scientific and technical consulting activities
74209 Miscellaneous engineering activities
74200 Technical testing and analysis
74401 Sale or leasing activities of advertising space or time
74402 Planning, creating and placement of advertising activities
74409 Miscellaneous advertising activities
74601 Investigation activities
74811 Operation of photo coin-operated machines
74820 Secretarial and translation activities
74841 Credit reporting and collection agency activities
74842 Speciality design activities
74842 Activities of exhibition and fair organisers
74844 Activities of conference organisers
74849 Miscellaneous business activities
91110 Activities of business and employers' organisations
91120 Activities of professional organisations
91200 Activities of trade unions
91220 Activities of political organisations
91220 Activities of other membership organisations not elsewhere classified
92111 Motion picture production in film or video tape
92119 Other motion picture and video production activities
92120 Motion picture distribution
92201 Radio activities
92202 Television activities
92219 Other artistic and literary creation and interpretation
92400 News agency activities

This definition excludes:

74500 Labour recruitment and provision of personnel
74602 Security and related activities
74709 Specialised cleaning activities
74701 Interior cleaning of buildings; window cleaning activities

Most of the people employed according to this classification do not necessarily work at the office where they are registered. For example, it is not uncommon for hundreds of people to be registered as working at an employment agency office on the high street when in reality only four or five people may actually work there. This can clearly skew the statistics and so these categories are not included.

APPENDIX 2

Derivation of the Current Office Hierarchy

Tables 1 and 2 Ward-based Total Office and Total Employment

TABLE 1 OFFICE EMPLOYMENT		
Centre	Total Office Employment (F&BS + Public Sector)	INDEX OF TOTAL EMPLOYMENT
Birmingham	76,597	100.0
Wolverhampton	18,841	24.6
Coventry	14,625	19.1
Walsall	10,997	14.4
Telford	9,032	11.8
Hanley	7,768	10.1
Dudley	7,456	9.7
West Bromwich	7,381	9.6
Solihull	7,368	9.6
Leamington Spa	6,723	8.8
Sutton Coldfield	6,596	8.6
Merry Hill (Waterfront)	5,933	7.7
Worcester	5,925	7.7
Burton-upon-Trent	5,066	6.6
Stafford	4,901	6.4
Hereford	4,540	5.9
Stratford-upon-Avon	4,387	5.7
Cannock	3,912	5.1
Redditch	3,566	4.7
Rugby	3,550	4.6
Lichfield	3,318	4.3
Tamworth	3,052	4.0
Shrewsbury	2,850	3.7
Kidderminster	2,712	3.5
Newcastle-under-Lyme	2,584	3.4
Nuneaton	2,292	3.0

TABLE 2 OFFICE FLOORSPACE		
Centre	Total Built Office Stock, 000m ²	INDEX OF TOTAL BUILT OFFICE STOCK
Birmingham	1,328	100.0
Wolverhampton	230	17.3
Coventry	169	12.7
Walsall	133	10.0
Hanley	125	9.4
Telford	109	8.2
Merry Hill (Waterfront)	107	8.1
Leamington Spa	106	8.0
Dudley	92	6.9
Solihull	86	6.5
Burton-upon-Trent	82	6.2
Worcester	80	6.0
Stafford	78	5.9
West Bromwich	74	5.6
Hereford	74	5.6
Stratford-upon-Avon	73	5.5
Rugby	70	5.3
Sutton Coldfield	60	4.5
Lichfield	56	4.2
Redditch	51	3.8
Newcastle-under-Lyme	51	3.8
Kidderminster	50	3.8
Shrewsbury	45	3.4
Nuneaton	41	3.1
Tamworth	30	2.3
Cannock	22	1.7

Sources:

No. employed in F&BS & public admin: ABI 2003 - ward level

Total built office stock: ODPM floorspace stats - ward level

Table 3 Overall Ward-based Employment & Floorspace Index

Centre	AVERAGE OF THE WARD-BASED EMPLOYMENT AND FLOORSPACE INDEXES
Birmingham	100.0
Wolverhampton	21.0
Coventry	15.9
Walsall	12.2
Telford	10.0
Hanley	9.8
Leamington Spa	8.4
Dudley	8.3
Solihull	8.0
Merry Hill (Waterfront)	7.9
West Bromwich	7.6
Burton-upon-Trent	7.4
Worcester	6.9
Sutton Coldfield	6.6
Stafford	6.1
Hereford	5.7
Stratford-upon-Avon	5.6
Rugby	5.0
Lichfield	4.3
Redditch	4.2
Kidderminster	3.7
Newcastle-under-Lyme	3.6
Shrewsbury	3.6
Cannock	3.4
Tamworth	3.1
Nuneaton	3.0

Tables 4 and 5 ODPM-based Total Office and Total Employment

TABLE 4 OFFICE EMPLOYMENT		
Centre	Total Office Empl. 2001 (Commercial + Public Sector)	INDEX OF TOTAL EMPLOYMENT
Birmingham	66,285	100.0
Coventry	14,560	22.0
Wolverhampton	9,250	14.0
Leamington Spa	4,715	7.1
Solihull	4,710	7.1
Telford	4,685	7.1
Walsall	4,665	7.0
Worcester	3,770	5.7
Dudley	3,740	5.6
West Bromwich	3,670	5.5
Stafford	3,515	5.3
Shrewsbury	3,210	4.8
Newcastle-u-Lyme	2,685	4.1
Merry Hill	2,443	3.7
Hanley	2,395	3.6
Hereford	2,355	3.6
Redditch	2,285	3.4
Nuneaton	1,995	3.0
Sutton Coldfield	1,955	2.9
Stratford-u-Avon	1,875	2.8
Kidderminster	1,635	2.5
Lichfield	1,550	2.3
Burton-upon-Trent	1,310	2.0
Rugby	1,295	2.0
Tamworth	1,245	1.9
Cannock	1,095	1.7

TABLE 5 OFFICE FLOORSPACE		
Centre	Total Built Office Stock, 000m ²	INDEX OF TOTAL BUILT OFFICE STOCK
Birmingham	1,280,290	100.0
Coventry	204,145	15.9
Wolverhampton	162,140	12.7
Leamington Spa	95,140	7.4
Walsall	84,525	6.6
Hanley	80,470	6.3
Worcester	77,810	6.1
Solihull	76,860	6.0
Telford	73,930	5.8
Dudley	71,825	5.6
Stafford	61,350	4.8
West Bromwich	52,505	4.1
Hereford	46,430	3.6
Shrewsbury	45,985	3.6
Newcastle-u-Lyme	45,105	3.5
Burton-upon-Trent	36,185	2.8
Redditch	32,280	2.5
Stratford-u-Avon	29,915	2.3
Lichfield	28,425	2.2
Kidderminster	28,250	2.2
Nuneaton	26,690	2.1
Sutton Coldfield	24,925	1.9
Rugby	24,315	1.9
Tamworth	23,620	1.8
Cannock	9,005	0.7
Merry Hill	2,910	0.2

NB: ODPM Town Centres data is sourced from different datasets - ABI (employment) & Valuation Office (floorspace). The ODPM warns against comparing the two datasets as different methodologies have been applied

VOA

Data is held for individual units of occupation, or 'hereditaments', which include groups of buildings, individual buildings, and parts of buildings (for instance, an office building let in floors). Most of these hereditaments are classified as one of four bulk classes (retail, offices, factories, and warehouses), with the remainder (including hotels, public houses, libraries and leisure premises) classified to a non-bulk class. Crown properties, including central government offices, were added to the VOA's databases in April 2000 and are included in the floorspace data set. Hence, while it would be desirable to include floorspace for leisure activities, this information is currently not available.

ABI

The ABI is an annual survey of businesses, collecting information about jobs and other economic data including turnover. It draws its sample from the Inter-Departmental Business Register (IDBR), which is a register of businesses based on the Value Added Tax and Pay As You Earn (PAYE) administrative registers. The data on 'employee jobs' is the variable that has been used in both the model and the output tables of descriptive statistics. This simply counts all employees, whether part-time or full-time, registered at a business. This is not the same as 'full-time equivalents' (FTE), which estimates the number of full-time employees equivalent to the number of hours worked (by all employees).

Table 6 Overall ODPM-based Employment & Floorspace Index

Centre	AVERAGE OF THE ODPM EMPLOYMENT AND FLOORSPACE INDEXES
Birmingham	100.0
Coventry	19.0
Wolverhampton	13.3
Leamington Spa	7.3
Walsall	6.8
Solihull	6.6
Telford	6.4
Worcester	5.9
Dudley	5.6
Stafford	5.0
Hanley	4.9
West Bromwich	4.8
Shrewsbury	4.2
Newcastle-under-Lyme	3.8
Hereford	3.6
Redditch	3.0
Stratford-upon-Avon	2.6
Nuneaton	2.5
Sutton Coldfield	2.4
Burton-upon-Trent	2.4
Kidderminster	2.3
Lichfield	2.3
Merry Hill	2.0
Rugby	1.9
Tamworth	1.9
Cannock	1.2

APPENDIX 3

Cambridge Econometrics Employment Forecasts by District

District Employment in F&BS, Cambridge Econometrics

	1981	1986	1991	1996	2001	2006	2011	2016	2021
Bromsgrove	2,700	5,100	6,600	11,500	11,100	6,800	7,300	7,900	8,500
Hereford	3,600	4,300	4,700	6,000	5,600	7,600	8,300	9,200	10,100
Malvern Hills	2,800	2,600	3,900	3,400	5,300	7,100	7,600	8,200	8,900
Redditch	4,100	3,100	5,700	5,100	7,200	8,900	10,100	11,300	12,700
Worcester	4,600	4,400	6,600	6,700	6,900	8,800	9,300	9,900	10,500
Wychavon	2,800	5,500	4,000	7,800	5,000	7,300	8,100	8,900	9,800
Wyre Forest	1,900	2,300	2,300	4,500	3,900	5,800	6,400	7,200	8,000
Bridgnorth	1,100	1,200	2,000	2,100	2,700	2,600	3,000	3,500	4,100
North Shropshire	1,200	1,100	2,000	2,000	2,100	2,400	2,600	3,000	3,400
Oswestry	700	700	1,100	1,300	1,800	1,900	2,200	2,500	2,900
Shrewsbury and Atcham	4,900	4,900	5,700	5,300	6,100	6,000	6,500	7,100	7,800
South Shropshire	1,300	1,200	800	1,000	1,500	1,300	1,500	1,700	1,900
The Wrekin	3,500	4,300	5,600	9,500	15,000	15,800	18,700	22,700	27,900
Cannock Chase	1,600	2,700	3,300	3,000	4,300	4,900	5,700	6,700	7,900
East Staffordshire	3,200	5,200	6,600	5,400	7,600	8,900	10,100	11,600	13,300
Lichfield	3,300	5,200	4,300	6,200	5,600	8,000	9,500	11,300	13,600
Newcastle-under-Lyme	3,300	5,300	6,400	4,600	4,500	5,600	6,500	7,600	8,800
South Staffordshire	1,500	1,600	2,500	2,600	2,700	4,700	5,000	5,500	6,100
Stafford	9,100	8,900	6,300	10,000	7,100	7,400	8,300	9,500	10,900
Staffordshire Moorlands	2,900	2,900	2,700	3,500	4,000	4,500	4,400	4,600	4,800
Stoke-on-Trent	10,700	11,900	14,700	12,600	12,200	12,700	13,300	14,000	14,600
Tamworth	2,000	1,600	2,800	3,000	6,700	8,500	9,500	10,700	12,100
North Warwickshire	1,300	2,800	2,500	3,400	3,100	3,800	4,400	5,000	5,800
Nuneaton & Bedworth	2,200	2,800	4,400	4,400	4,800	5,300	5,800	6,400	7,000
Rugby	3,500	4,100	4,800	9,800	6,200	7,600	8,500	9,400	10,400
Stratford-upon-Avon	5,700	6,200	7,500	14,400	12,400	15,400	16,900	18,500	20,300
Warwick	8,000	10,400	13,000	15,800	17,100	19,600	21,500	23,500	25,700
Birmingham	81,500	85,100	98,300	114,000	115,700	127,400	134,000	140,700	147,500
Coventry	16,700	16,200	22,500	23,800	26,800	30,800	33,100	35,900	39,000
Dudley	11,000	13,800	14,900	16,800	19,300	27,700	31,200	34,700	38,500
Sandwell	15,600	18,800	16,100	15,100	14,500	16,800	17,700	18,500	19,300
Solihull	7,500	10,400	16,100	31,900	21,700	29,800	33,800	38,800	44,400
Walsall	7,600	8,400	9,600	12,500	15,200	19,000	21,000	22,900	25,000
Wolverhampton	14,900	14,900	18,400	12,000	15,100	15,300	16,200	17,200	18,200
West Midlands	248,200	279,600	328,600	391,000	400,500	465,800	508,000	555,900	609,500

