Nathaniel Lichfield & Partners
Planning. Design. Economics.

Swindon Employment Land Review

Final Report

Swindon Borough Council

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Executive Summary

Swindon Borough Council commissioned Nathaniel Lichfield & Partners ('NLP') to undertake an Employment Land Review (ELR) for Swindon Borough. The objective of the study is to provide a long term assessment of the need for business space and employment land within the Borough over the period to 2036.

The study provides the Council with an assessment of the current economic situation in Swindon and the future requirements of the local business economy. This is focused on 'B-class' employment uses only i.e. offices, industry and warehousing. The study objectively assesses the Borough's future need for these uses in line with the National Planning Policy Framework (NPPF) and Planning Practice Guidance (PPG).

Local Economy

Swindon is located at the heart of the M4 corridor, which provides the Borough with excellent access to much of the UK. The strategic transport connections that characterise Swindon represent a key strength for the Borough as a business location, particularly for the distribution sector that values strong access to the national motorway network. Historically, the Borough has been perceived as a lower cost business location, which coupled with the good connectivity and availability of land, has attracted high levels of commercial development. However, much of this take-up of employment land in Swindon has been for large distribution and manufacturing uses that have generally not supported growth in higher value employment opportunities in the Borough.

In this context, the Borough supports a relatively productive economy with high levels of GVA per job, although productivity gains in the economy has slowed during recent periods. The diverse business base and strong representation of sectors in Swindon provides a diversity of employment opportunities for local workers, with a number of large international companies and headquarters across a number of sectors. The presence of a small number of large employers is part of the explanation why there has been volatility in the historic employment trends within Swindon.

The local labour force in Swindon is characterised as being less skilled compared with regional and national averages, which aligns with a lower share of the labour force being employed in higher skilled occupations. However, the Borough does support relatively high levels of earnings, which is likely due to the local economy supporting some high value sub-sectors, such as vehicle manufacturing. This sector in particular supports specialist manufacturing and assembly roles that are likely to require advanced vocational qualifications rather than normal NVQ4 and above qualifications. In this context, the Borough has also seen a growing outflow of local workers to other areas in the wider sub-region for their employment (e.g. Wiltshire and Vale of White Horse) which could reflect a lack of appropriate employment growth in Swindon when compared to recent housing growth.

Overview of Employment Space

Long-term trends since 2000 indicate a gradual reduction in the stock of employment space in Swindon particularly industrial uses, whilst office space has been broadly static in overall terms. However, the Council's monitoring data indicates that have been net gains in industrial space since 2008 reflecting completion of a number of large scale distribution developments.

Warehouses now dominate the stock of industrial space in Swindon, reflecting the strategic nature of Swindon as a business location for various distribution and logistics activities and which have driven recent completions of space.

Office space in the Borough is largely focused in and around Swindon town centre, although some larger office premises are also situated in the urban fringe of Swindon town in business park settings. Industrial space is also clustered in numerous employment areas in the Borough including older industrial estates in inner urban areas and newer industrial sites on the edge of Swindon town that benefit from better strategic road access.

The introduction of Permitted Development Rights (PDR) for change of use from office to residential has impacted Swindon, with monitoring data indicating that 38 prior approval applications have been granted in the Borough. If all these were implemented, the local market would lose 46,600sq.m of office space which is equivalent to 9% of the total office stock in Swindon in 2012. This trend has mainly been concentrated in the town centre.

Commercial Market

Swindon operates within the M4 western market corridor in commercial property terms and the town is considered to constitute the key node at the western end of the M4 corridor. It shares strong economic linkages with the south west region and key centres such as Bristol, with more limited overlap in commercial property market terms with more eastern centres in Berkshire, such as Newbury and Reading.

As noted above, historic perception of the town as a relatively low cost business location has attracted significant levels of new development in the past. Its locational advantages mean that Swindon tends to be located on the fringes of the typical occupier 'area of search' for London relocations. These occupier flows tend to operate in an East-West direction along the M4 with North-South links comparatively weaker.

The office market in Swindon is currently reported to be performing well with demand having improved considerably with take-up keeping pace and the outlook remaining positive. The majority of recent office take-up has occurred within the out of town business parks which tend to command a premium in terms of rents.

Limited levels of new office development have occurred within Swindon over the last few years, and as a result much of the existing office stock is dated and in need of modernising, particularly within the town centre. This issue is considered by local property agents to represent a key risk to Swindon's ability to effectively compete for higher value office occupiers in future and to retain the town's existing occupiers.

Swindon's industrial market is characterised by a high level of demand from a mix of industrial sectors, but with a particular focus on warehousing and logistics space and increasingly from higher tech engineering/manufacturing sectors. The town is recognised as a strategic industrial location, benefiting from strategic road access via the M4.

Whilst development of large-scale logistics space has been relatively high in Swindon over recent periods, development of other types of industrial space has been more limited. When coupled with strong demand, this has resulted in a shortage of certain types of industrial space and meant that some existing businesses in the Borough struggle to accommodate their expansion and relocation plans. In this context, there is considered to be scope for a pro-active and holistic strategy to bring forward new sites for multi-use industrial, as well as distribution development over the plan period. This would help to enable 'churn' in the existing market by freeing up existing sites for redevelopment as well as providing the opportunity to accommodate new demand and occupiers whose requirements are currently unable to be satisfied within the town.

Review of Employment Sites

A review of 36 existing employment sites in Swindon has been undertaken as part of this review. All the assessed employment sites within Swindon have planning policy status, with all the sites currently safeguarded for employment purposes except for North Star and Hawksworth Industrial Estate.

The range of employment sites in Swindon generally comprise good quality, well-maintained stock with relatively low vacancy, demonstrating that much of the existing employment space in the Borough is meeting a need in the local market. Many sites also accommodate some non-employment uses, such as car showrooms and leisure uses.

Higher performing employment sites in the Borough tend to be focused in the north-eastern and south-western parts of Swindon town, which have excellent strategic and local access and generally better quality buildings. Although there are some lower performing employment sites and premises, often characterised by poorer access and proximity to local services, these sites are still largely occupied and appear to be servicing a local need for more affordable space from low value activities.

Future Requirements for Employment Space

Modelling future scenarios of growth in Swindon will inevitably have uncertainties and limitations. For example, there are some inherent limitations to the use of local level economic forecasts, particularly in the context of significant recent changes in the economy and the outcome of the UK referendum on membership of the European Union. Such forecasts are regularly updated and the resulting outputs will change over the course of the period to 2036.

Following guidance in the PPG, various scenarios of future employment space requirements in Swindon during the period 2016 to 2036 have been considered based upon a number of approaches that reflect economic growth, completion rates and labour supply factors. The labour demand forecasts indicate a potential change in total B class jobs between 2016 and 2036 of a loss of 800 jobs (CE), a gain of 2,100 jobs (OE) and a gain of 4,200 jobs (HJA based on adjustments to CE and OE).

All three of these scenarios point to growth in office-based jobs ranging between 2,500 jobs and 4,300 jobs, and losses of manufacturing jobs ranging between 900 jobs and 3,000 jobs over the twenty year period. There are some differences in terms of distribution jobs, with OE and HJA forecasting growth of 800 jobs compared to a loss of 300 jobs by CE. The labour supply scenario indicates a higher level of B class job growth (5,800 jobs), with gains across office uses (6,100) and distribution uses (1,400), and losses in industrial uses (- 1,700).

The gross employment floorspace requirements related to these scenarios, and past completion rates, range from a gain of 6,200sq.m to 242,600sq.m up to 2036, which implies a need for between a loss of 2.8ha to a gain of 59.1ha of employment land. Under the majority of the scenarios most of the spatial requirements relate to industrial uses given they typically have greater space requirements per worker than office uses.

Given the identified limitations of the economic forecasts used as the basis for the baseline labour demand scenarios by HJA in preparing the draft Swindon and Wiltshire FEMA Assessment, the growth scenarios based solely on the baseline economic forecasts would appear to provide a less robust basis for assessing the employment space requirements for planning for growth in the Borough. In comparison to the other growth scenarios for Swindon, the baseline labour demand scenarios estimate much lower levels of need for employment space in the Borough to 2036.

The adjusted labour demand scenario provides a higher requirement for B class employment space in Swindon, which takes into account the revisions made by HJA to the baseline economic forecasts produced by CE and OE. This future growth scenario effectively identifies the indigenous growth potential of the Borough up to 2036, while the slightly higher requirements from the past completion rates scenario shows the implications of the Borough importing a degree of footloose investment notably by attracting major industrial developments to the Borough.

The Council could also consider planning to accommodate the higher requirement from the labour supply scenario which implies a much higher B class employment growth rate over the period to 2036 than the other growth scenarios. This significant requirement for employment space under this scenario reflects the strong projected population growth in the Borough over this period, which implies a significant need for new employment opportunities in the local economy.

Demand/Supply Balance

Based on the supply of B class employment land in Swindon from allocated office and industrial land that remain undeveloped the demand and supply balance for the Borough suggests there is a sufficient supply of employment land in quantitative terms to meet future office needs under all the growth scenarios, whilst there would be a shortage to meet future industrial needs under the past completion rates scenario.

However, there are barriers to delivering a significant proportion of the presently allocated employment land supply, which will limit availability at least in the short term. These barriers include up-front infrastructure needs, site preparation costs, and landowner aspirations for alternative uses. If these sites were not to come forward for future development, or were to be significantly delayed, the demand and supply balance for employment land would deteriorate significantly and result in shortages under a number of the growth scenarios.

From a more qualitative perspective, the lack of new office development in Swindon during recent years, coupled with an ageing stock in Swindon town centre, has constrained activity in the local office market, whilst the office to residential PDRs has accelerated the historic trend of office losses. There is therefore a need to ensure that new office space is delivered in Swindon in both town centre locations and out-of-centre locations to support the various types of office occupiers that demand space in the Borough.

Swindon is perceived as a strong industrial location with a good level of demand for industrial space, with take-up during recent years particularly characterised by large-scale distribution uses. However, the feedback from local property agents suggests many enquiries for industrial space are not able to be met by the current availability within the market, which points toward a need to deliver additional industrial space in the Borough. In this context, there is a risk that potential economic opportunities will be diverted from the Borough, and the growth potential of existing occupiers in the market will be constrained, unless new industrial developments can be accommodated in the future.

Policy Implications

Based on the findings of the analysis, the study draws the following key implications for future planning policy in Swindon:

1. The Council will need to balance the growth needs of B-class and non B-class sectors which can compete with each other on individual sites. Whilst there is a need to sustain a diversified and resilient economy, the

Council will want to set a clear direction for the role of individual sites particularly where high value employment uses can be supported.

2. The declining supply of good quality office accommodation within Swindon presents a significant challenge to future growth, and delivery of new Grade A supply is therefore important. Whilst there is a sufficient supply of land in quantitative terms, much of the currently identified office supply capacity has some form of delivery barrier and therefore new alternatives may need to be considered. Furthermore, there is a need to accelerate the Kimmerfields Phase 2 scheme which is also important in wider town centre regeneration terms. The level of office to residential conversions have been significant to date, and the Council should give consideration to the introduction of an Article 4 Direction in the town centre so that it can exercise greater control over this process.

3. Swindon has a strong industrial market, driven mainly by the warehousing and logistics sector. The Borough has sufficient supply of land to meet the lower growth scenarios, but again, a significant amount of identified supply has delivery barriers which could result in shortfalls under the higher scenarios. It is therefore likely that additional industrial land in the Borough may be necessary during the period to 2036. This view is supported by the feedback from local property agents who indicated new mixed industrial and distribution sites are required in the market to enable churn and support the requirements of local industrial occupiers who want to move into new industrial premises in more strategic parts of the Borough. This strategy does, however, need to be complemented by stronger policy direction for the scale and type of any new industrial locations.

4. Alongside new industrial allocations, the Council should actively review the scope for intensification and upgrading of some of the Borough's existing older industrial estates. Many of these could benefit from partial or wider masterplanning in order that they can function more efficiently. Sites of greater quality as identified by this study should be the focus of future investment and afforded protection through policy, and those of lower quality or significance to the local economy could be released for other uses.

5. There is a need for the Council to identify a realistic delivery trajectory for employment sites (including both allocations and commitments), particularly in the case of future office space where past delivery has been very limited. However, it is also an issue for industrial sites, where a quantitative requirement for additional supply has been identified against the higher growth scenarios and there are limited immediate new development opportunities on existing sites. Accordingly, it is recommended that the Council should analyse how the portfolio of allocations within the Borough and any other development opportunities will support delivery of new space over the short, medium and long term.

1.0 Introduction

1.1 Swindon Borough Council ('the Council') commissioned Nathaniel Lichfield & Partners ('NLP') to undertake an Employment Land Review (ELR) for Swindon Borough. The objective of the study is to provide a long term assessment of the need for business space and employment land within the Borough over the period to 2036.

1.2 The study provides the Council with an assessment of the current economic situation in Swindon and the future requirements of the local business economy. It assesses the economic development needs of the Borough objectively in line with the National Planning Policy Framework (NPPF) and Planning Practice Guidance (PPG).

1.3 The ELR is broadly based around the following three stages of assessment:

1. **Taking Stock of the Current Position:** an assessment of the prevailing economic strengths and weaknesses of the Borough, the functional economic market area the local economy comprises, and a review of the fitness for purpose of the current portfolio of employment sites.
2. **Generating Economic Growth Forecasts:** an assessment of the effect of various population and household growth scenarios on future B class employment space requirements for the Borough, including the most up-to-date economic forecasts and analysis of housing needs.
3. **Identifying a Portfolio of Sites:** an assessment of the suitability and deliverability of employment sites in the Borough to meet future needs for business space under each growth scenario, including which sites should be retained for employment uses and which should be released for other uses, as well as any need for additional employment sites in Swindon.

Scope of Study

1.4 The purpose of the ELR is to provide the Council with an up-to-date evidence base relating to current and future requirements for B class employment space in Swindon to 2036. The assessment is based on a range of scenarios for how the economy could change in the future, with the employment space and land implications of the following B class uses considered in this study:

- **B1 Business:** offices (B1a), research & development (B1b) and light industrial (B1c).
- **B2 General Industrial**
- **B8 Storage and Distribution:** warehouses, wholesale and distribution.

1.5 The demand for B class employment floorspace and land in Swindon during the period to 2036 is considered in this study, with references to "employment space" in this study referring to both elements. In addition, the term "industrial space" is used to refer to both manufacturing (B1c/B2) and distribution (B8) uses.

1.6 The study also considers forecasts of growth in non B class sectors in Swindon to set out how the economy as a whole could change in the future, although the study does not specifically assess the space implications of the non B class sectors. The space implications of non B class sectors are planned for using different methodologies and are considered by other technical evidence.

1.7 It should be noted that there are a variety of factors and drivers to consider when objectively assessing the business needs for a local economy. The study uses a combination of quantitative and qualitative analysis to examine these issues in the context of Swindon, and syntheses these to draw overall conclusions and policy implications for long-term planning in the Borough. An important consideration for any technical work of this type is that the study is inevitably a point-in-time assessment. This study has used the latest available data and other evidence available at the time of preparation during 2016, while the accuracy of third party data has not been checked or verified by NLP.

1.8 The study has also undertaken consultation with a range of local stakeholders, including local commercial property agents and surveyors, and businesses and organisations. A list of these consultees is provided in Appendix 1.

1.9 It should be noted all references to "Swindon" in this study refers to Swindon Borough, unless explicitly stated otherwise.

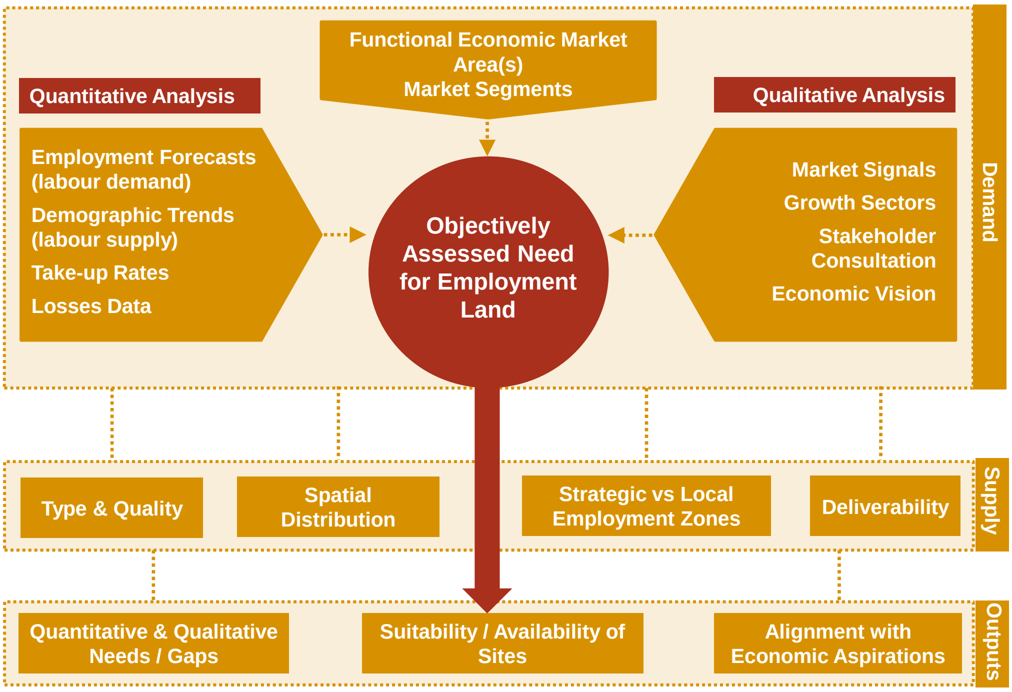
Methodology

1.10 In March 2014 the Government released the Planning Practice Guidance (PPG) to provide technical guidance for practitioners and inform the implementation of the National Planning Policy Framework (NPPF). In regard to assessing economic development needs, the PPG states that local authorities should:

a. consider the prevailing stock of land, identify the demand for and supply of employment land, and determine the likely business needs and future market requirements;
b. consider the locational and premise requirements of particular types of business and sectors;
c. consider projections to help identify where sites have been developed for a specific economic use;
d. analyse supply and demand to identify whether there is a discrepancy between quantitative and qualitative supply and demand for employment sites; and
e. identify where gaps in local employment land provision exists by comparing the available stock of land with the requirements of the area.

1.11 The methodology that has been used to undertake the ELR conforms to the requirements of the NPPF and PPG, and has been summarised in Figure 1.1.

Figure 1.1 Methodological Framework Applied to the Swindon ELR



Source: NLP analysis

Structure of Report

1.12 The report is structured under the following sections:

- **Swindon Economy (Section 2.0):** a review of economic conditions and recent trends in the Borough, and the strengths and weaknesses of the local economy that may influence the future need for employment space.
- **Overview of Employment Space (Section 3.0):** an analysis of the current stock and trends of employment space in the Borough in terms of the range of B class uses, past development rates, and gains and losses.
- **Commercial Property Market Intelligence (Section 4.0):** a review of the local commercial property market including supply of and demand for different types of employment space, and the needs of market segments.
- **Review of Employment Sites Portfolio (Section 5.0):** an assessment of current and potential employment sites in the Borough, including the market attractiveness of these sites and their ability to meet future need.
- **Future Requirements for Employment Space (Section 6.0):** an estimate of future employment space requirements for B class sectors in quantitative terms, drawing on employment forecasts and other factors.
- **Demand / Supply Balance (Section 7.0):** an assessment of the balance between existing land supply and future requirements in both quantitative and qualitative terms.
- **Conclusions and Policy Implications (Section 8.0):** a consideration of planning policy and other strategic measures required to support economic growth and business needs in the Swindon economy.

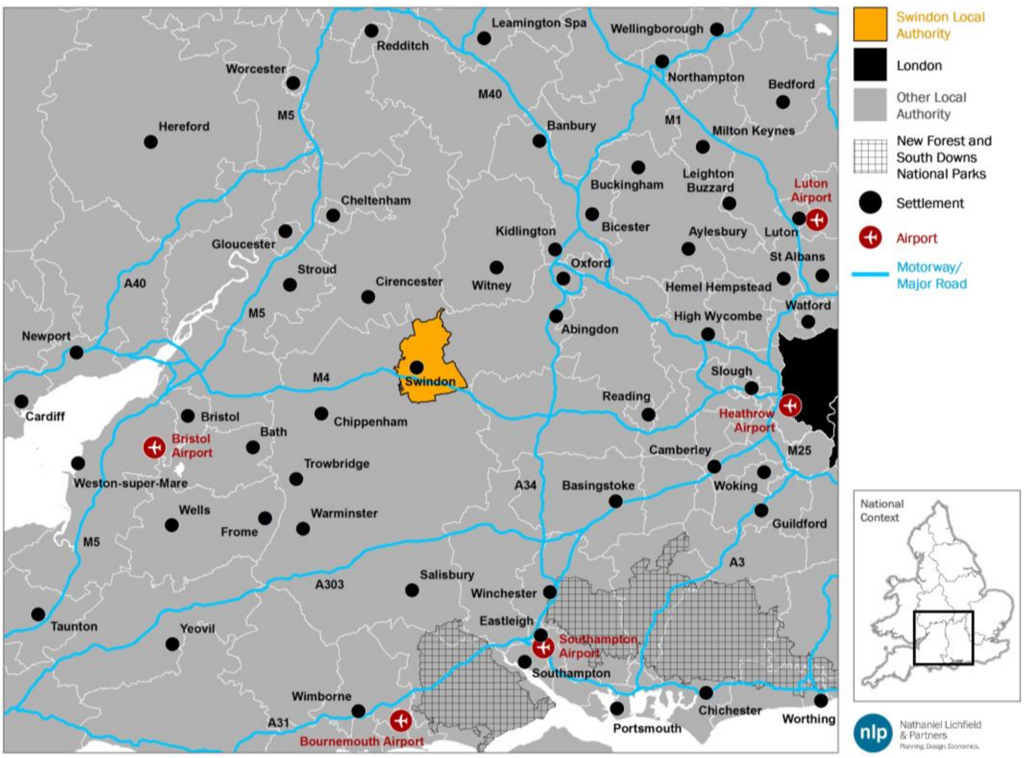
2.0 The Swindon Economy

2.1 This section establishes the economic context for the study by summarising recent economic conditions and trends in Swindon. The analysis identifies the key strengths and weaknesses of the Swindon economy and the factors likely to influence future demand for employment space in the Borough.

Spatial Overview

2.2 Swindon Borough is strategically located on the M4 corridor which provides the Borough with excellent road and rail connections with much of the UK, but particularly the surrounding centres of Oxford, Bristol, Birmingham, Southampton, Cardiff and London. The Borough is adjoined by the local authorities of Wiltshire to the south and west, Cotswold to the north, and Vale of White Horse to the east (Figure 2.1).

Figure 2.1 Spatial Context of Swindon



Source: NLP analysis

2.3 The strategic road network that serves Swindon includes the M4 and a number of ‘A’ roads that provide north-south links, while the Great Western Main Line connects the Borough to the railway network and is currently subject to electrification works which when completed will provide faster and more reliable services. A number of airports are also relatively accessible from Swindon, including Heathrow.

2.4 Swindon has a resident population of approximately 217,000[1], with the majority of the population living in Swindon town. Outside Swindon town, the rest of the population live in Highworth and Wroughton, and a number of smaller villages and hamlets in the Borough. The town's growth historically was dominated by the railway industry but has since diversified with a mix of modern industries. It has attracted considerable inward investment from national and international businesses, including Honda, BMW, Zurich, Nationwide, WH Smith and The National Trust. The remainder of the Borough is characterised by small market towns, villages and high quality landscape, including parts of the North Wessex Downs Area of Outstanding Natural Beauty (AONB) and the Thames Vale.

Economic Overview

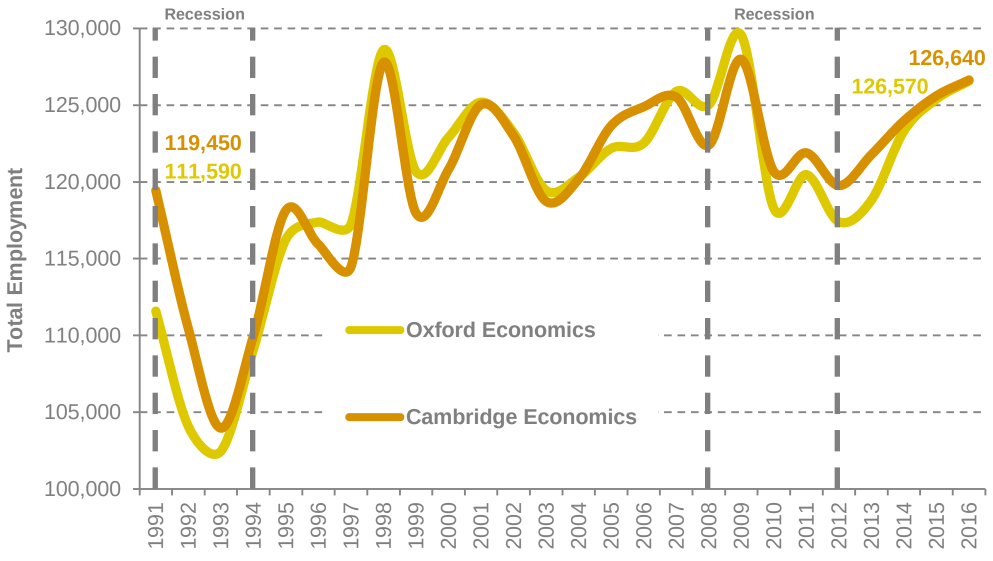
2.5 Recent economic conditions and trends in Swindon are summarised below, with comparisons made, where appropriate, with regional and national benchmarks.

Employment Past Trends

2.6 Past employment trends within Swindon have been analysed with reference to data series produced by Cambridge Econometrics (November 2015) and Oxford Economics (January 2016) covering the period since 1991. These are informed by published national statistics but provide a longer and more consistent time series.

2.7 These time series indicate significant volatility in past levels of employment growth recorded for the Borough. As shown in Figure 2.2, there have been periods of major employment growth and decline in Swindon during the past two decades, which are broadly reflected within both datasets.

Figure 2.2 Changes in Total Employment in Swindon, 1991 - 2016



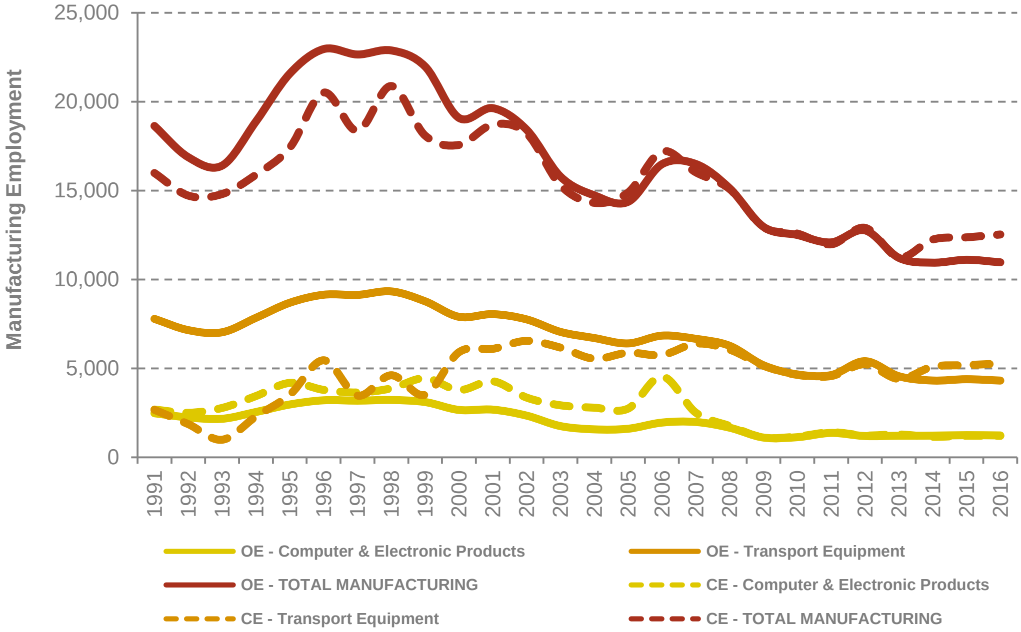
Source: Cambridge Econometrics / Oxford Economics / NLP analysis

[1] ONS Mid-year population estimates, 2015

2.8 A key difference between the two datasets relates to the starting points of the employment series in 1991 with Cambridge Econometrics estimating a much higher level of employment (+ 7,860 jobs) in Swindon during that year than Oxford Economics. However, both datasets indicate a total of about 126,600 jobs in Swindon in 2016.

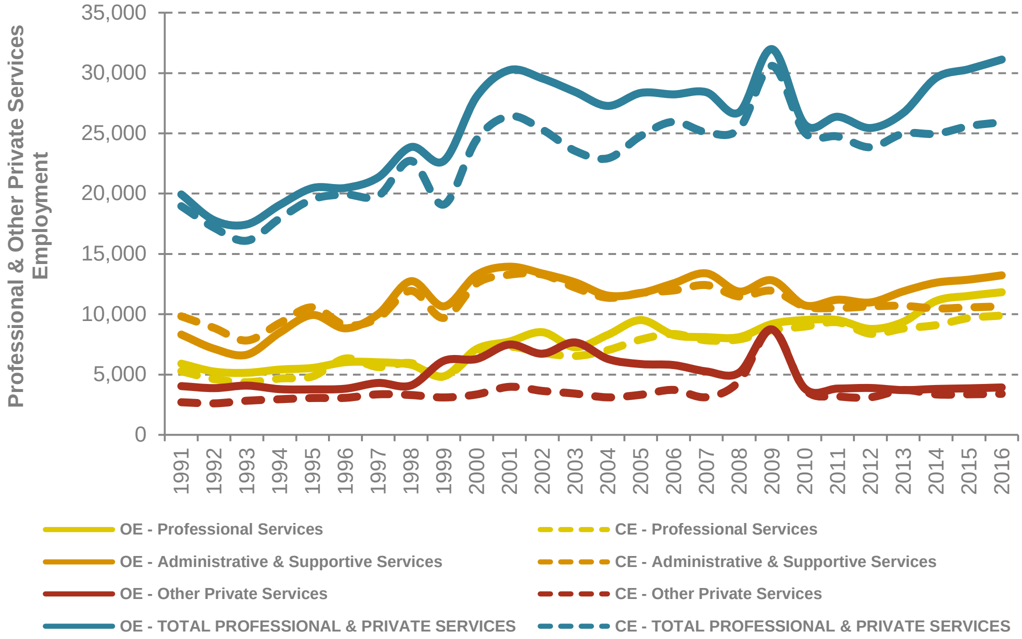
2.9 A significant amount of the volatility in the historic employment growth trends indicated by both for Swindon can be attributed to changes within the manufacturing sector and professional & other private services sector, which represent two of the highest growing and declining sectors in the Borough between 1991 and 2016. As shown in Figure 2.3 and Figure 2.4, the employment trends in these sectors have varied considerably over time.

Figure 2.3 Changes in Manufacturing Employment in Swindon, 1991 - 2016



Source: Cambridge Econometrics / Oxford Economics / NLP analysis

Figure 2.4 Changes in Professional & Other Private Services Employment in Swindon, 1991 - 2016



Source: Cambridge Econometrics / Oxford Economics / NLP analysis

2.10 The volatility in the historic employment series can be partly explained by the fact Swindon supports a number of large employers within these sectors that can be susceptible to fluctuations over time arising from their operational needs and, in some cases, also how the location and sector of employment is classified for statistical purposes.

Sector Trends

2.11 As shown in Table 2.1, the level of employment estimated in Swindon by Cambridge Econometrics and Oxford Economics was almost equivalent in 2016. However the different base figures for the two datasets in 1991 results in significantly different levels of historic employment growth in the Borough, with Oxford Economics estimating a much higher level of growth. The rates of employment growth estimated for Swindon over the period 1991 to 2016 were much lower than the level of growth estimated for Wiltshire by Cambridge Econometrics (27%) and Oxford Economics (26%).

Table 2.1 Changes in Total Employment and B Class Employment in Swindon, 1991 - 2016

	Cambridge Econometrics			Oxford Economics		
	2016	1991 - 2016		2016	1991 - 2016	
		Total	%		Total	%
Total Employment	126,640	7,190	6%	126,570	14,980	13%
B Class Employment	56,580	4,680	9%	57,870	1,850	3%
Office Employment	27,610	9,380	51%	30,260	10,300	52%
Industrial Employment	28,970	- 4,700	- 14%	27,610	- 8,450	- 23%

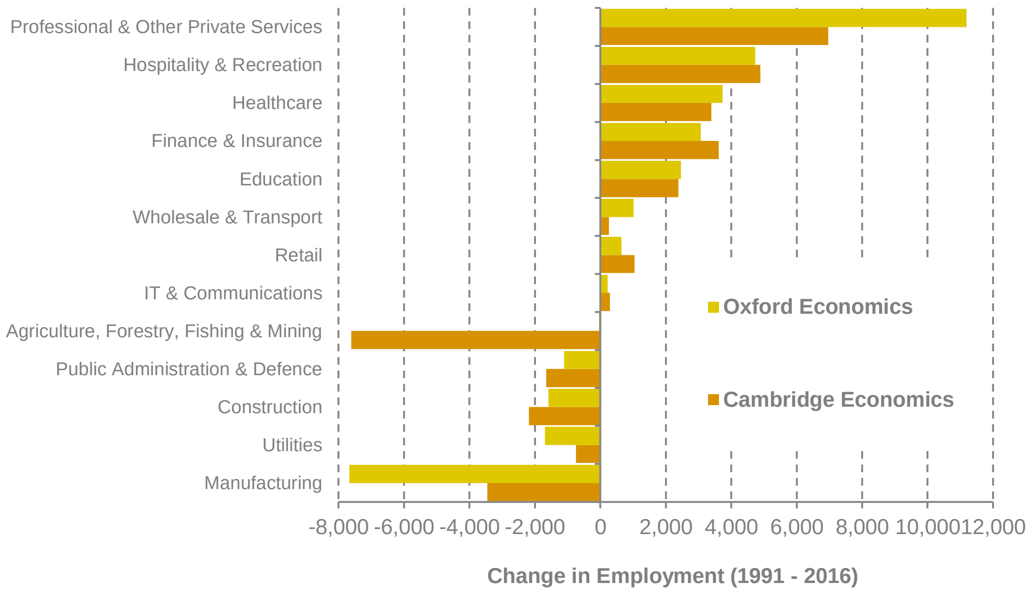
Source: Cambridge Econometrics / Oxford Economics / NLP analysis

2.12 The largest employment sectors in Swindon in 2016 are set out below with the figures showing the proportion of total employment in the Borough (i.e. the first figure is based on Cambridge Econometrics and the second on Oxford Economics):

- Professional & Other Private Services: 20% to 25%
- Wholesale & Transport: 13% to 13%
- Retail: 10% to 10%
- Manufacturing: 10% to 9%
- Healthcare: 10% to 9%
- Hospitality & Recreation: 9% to 8%
- Finance & Insurance: 8% to 8%

2.13 As shown in Figure 2.5, employment growth in Swindon between 1991 and 2016 was mainly driven by professional & other private services (representing growth of 6,960 to 11,180 jobs), hospitality & recreation (4,730 to 4,890 jobs), healthcare (3,400 to 3,730 jobs) and finance & insurance (3,070 to 3,620 jobs). At the same time, large employment losses were recorded in manufacturing (representing a loss of 3,460 to 7,670 jobs), whilst Cambridge Econometrics also estimated a large loss in agriculture, forestry, fishing & mining (7,610 jobs).

Figure 2.5 Changes in Employment by Sector in Swindon, 1991 - 2016



Source: Cambridge Econometrics / Oxford Economics / NLP analysis

2.14 The productivity of employment in Swindon can also be measured by Gross Value Added (GVA) per job. This indicates the level of productivity in Swindon in 2016 was higher than in Wiltshire, which reflects the concentration of higher value sectors in the Borough, including professional & other private services, healthcare, and finance & insurance. The percentage growth in overall GVA in

Swindon was also higher than the equivalent increase in GVA per job in the Borough between 1991 and 2016 (Table 2.2).

Table 2.2 Changes in Total GVA and GVA per Job, 1991 - 2016

	Dataset	Total GVA		GVA per Job	
		2016 (millions)	% Change (1991 - 2016)	2016	% Change (1991 - 2016)
Swindon	Cambridge Econometrics	£7,280	110%	£57,490	98%
	Oxford Economics	£6,672	58%	£52,710	39%
Wiltshire	Cambridge Econometrics	£10,712	81%	£43,790	42%
	Oxford Economics	£10,845	91%	£41,720	51%

Source: Cambridge Econometrics / Oxford Economics / NLP analysis

Business Base

2.15 The local business base in Swindon is characterised as having a slightly lower share of micro firms (0 to 9 workers) and higher share of medium-sized firms (50 to 249) and large firms (more than 250) compared to regional and national averages. The Borough also supports relatively high rates of business start-up compared to the South West region, but lower rates compared to Great Britain. The share of the working-age population in Swindon that are self-employed is lower than in Wiltshire, the South West and Great Britain (Table 2.3).

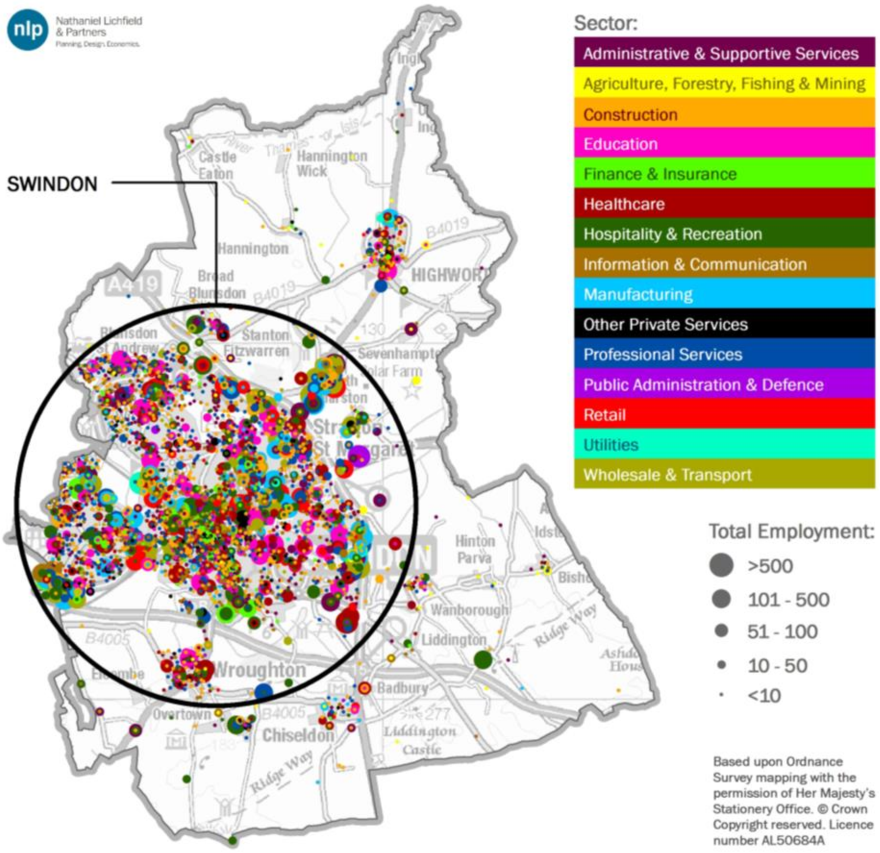
Table 2.3 Key Characteristics of the Business Base

		Swindon	Wiltshire	South West	Great Britain
Business Size (2015)	Micro (0 to 9)	88.0%	89.9%	88.7%	88.7%
	Small (10 to 49)	9.1%	8.5%	9.5%	9.3%
	Medium (50 to 249)	2.1%	1.4%	1.4%	1.6%
	Large (More than 250)	0.8%	0.2%	0.3%	0.4%
Business Births per 10,000 Working-Age Population (2014)		80	-	76	87
Self-Employment (2015)		9%	11%	12%	10%

Source: Inter-Departmental Business Register (ONS) / Business Demography Statistics (ONS) / Annual Population Survey (ONS) / NLP analysis

2.16 Drawing upon Inter-Department Business Register (IDBR) data, the spatial distribution of business sectors in Swindon can be illustrated (Figure 2.6). This underlines the significant concentration of businesses in the Swindon urban area, with only small business clusters located outside the town in Highworth to the north and Wroughton to the south.

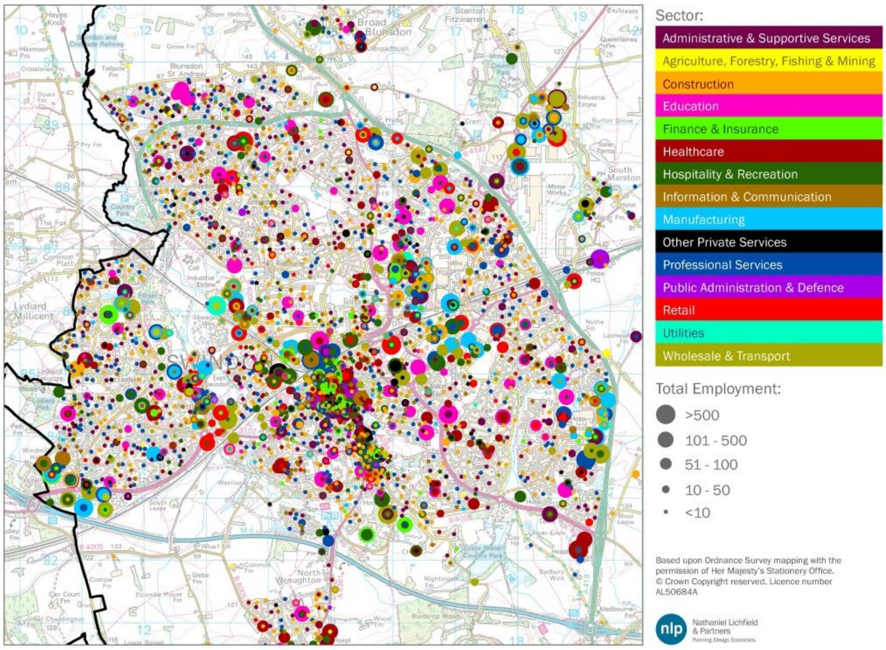
Figure 2.6 Spatial Distribution of Business Sectors in Swindon Borough, 2015



Source: Inter-Departmental Business Register / NLP analysis

Note IDBR data does not record micro businesses that fall under the VAT threshold.

Figure 2.7 Spatial Distribution of Business Sectors in Swindon Urban Area, 2015



Source: Inter-Departmental Business Register / NLP analysis

Note IDBR data does not record micro businesses that fall under the VAT threshold.

2.17 Figure 2.7 provides a more detailed map showing the spatial distribution of business sectors in the Swindon urban area. This highlights the presence of a diverse mix of business sectors in the town, with the most significant concentration of businesses located in and around Swindon town centre. In particular, the town centre supports a focus in retail and hospitality & recreation as well as a range of office-based sectors (e.g. professional services, finance & insurance and administrative & supportive services).

2.18 Other large business clusters are found within the major employment areas in Swindon town, including in South Marston Industrial Estate, Kembrey Park, Blagrove, Dorcan, Westmead, Bridgemead, Stratton St Margaret, and Techno Trading Estate, amongst others. These significant employment areas are, for the most part, characterised as having strong strategic access to the M4 or A419, making them prime locations to support the operations of large employers in wholesale & transport and manufacturing sectors.

Labour Market

2.19 The Swindon labour market is characterised by a similar share of the working-age population being economically active and claiming out-of-work benefits as the South West and Great Britain. However the resident workforce in Swindon has achieved a much lower level of NVQ4 and above qualification attainment compared to the regional and national benchmarks, which points towards a less highly skilled resident labour force in the Borough (Table 2.4).

2.20 The less skilled workforce profile in Swindon aligns with a lower share of the labour force being employed in higher skilled occupations represented by SOC Major Group 1 - 3 compared to Wiltshire, the South West and Great Britain, while a higher share are employed in elementary roles represented by SOC Major Group 8 - 9. Although labour market indicators for the Borough points towards a resident workforce characterised by lower skilled occupations, the earnings level for residents in Swindon deviates from this with a higher earnings level compared to the regional and national levels. In addition, the level of earnings for workers employed in Swindon is also much higher compared to equivalent earnings in Wiltshire, the South West and Great Britain (Table 2.4).

2.21 The high level of earnings in Swindon when compared to the level of qualification attainment is an anomaly likely associated with the local economy supporting several high value sub-sector activities that create a greater level of earnings for workers. Such sectors includes the automotive manufacturing sector, which has a strong presence in the Swindon economy (e.g. Honda and BMW) and supports more specialist manufacturing and assembly roles that are likely to require advanced vocational qualifications rather than normal NVQ4 and above qualifications.

Table 2.4 Key Characteristics of the Labour Market

		Swindon	Wiltshire	South West	Great Britain
Economic Activity Rate (2015)		81%	82%	81%	78%
Out-of-Work Benefits Claimant Count (2016)		1.3%	0.8%	1.2%	1.9%
Resident Qualification Level (2016)	NVQ4 and Above	31%	40%	37%	36%
	NVQ3 and Above	53%	61%	59%	57%
	NVQ2 and Above	72%	78%	77%	73%
	NVQ1 and Above	88%	90%	90%	85%
	Other or No Qualification	12%	10%	10%	15%
Resident Occupation Group (2015)[1]	SOC Major Group 1 - 3	40%	48%	44%	44%
	SOC Major Group 4 - 5	20%	20%	22%	21%
	SOC Major Group 6 - 7	18%	16%	17%	17%
	SOC Major Group 8 - 9	22%	17%	17%	17%
Earnings by Residence (2015)		£547	£518	£499	£530
Earnings by Workplace (2015)		£563	£490	£493	£529

Source: Annual Population Survey (ONS) / Annual Survey of Hours & Earnings (ONS) / NLP analysis

Note: [1] SOC 2010 Major Group 1 - 3 includes managers, directors and senior officials; SOC 2010 Major Group 4 - 5 includes administrative and trade occupations; SOC 2010 Major Group 6 - 7 includes service and sales occupations; and SOC 2010 Major Group 8 - 9 includes machinery, plant & process operatives and elementary occupations.

2.22 Examining commuting flows can also help to identify the extent of the labour market for Swindon, which is an important component for defining a functional economic market area (FEMA) for a local economy. Using latest travel-to-work flow data from the 2011 Census, the commuting patterns for Swindon can be considered.

2.23 In 2011, around 22% of working residents in Swindon commuted outside the Borough for their employment. The self-containment rate for Swindon (i.e. the share of residents who also work in the Borough) was therefore equivalent to around 78% in 2011, which is lower than the self-containment level of 85% for the Borough at the time of the 2001 Census. The most significant commuting outflows and inflows for Swindon based on 2011 Census data are shown in Table 2.5 and Figure 2.8.

2.24 It should be noted that the Council have identified the commuting flow to Winchester is likely to be overstated in the 2011 Census data due to a coding error whereby a Swindon postcode was inadvertently substituted for a Winchester postcode. The possible data limitation means that the share of out-commuting residents from Swindon to Winchester is likely to be lower than that identified in this assessment, while the share of residents that are employed in the Borough is likely to be higher in reality.

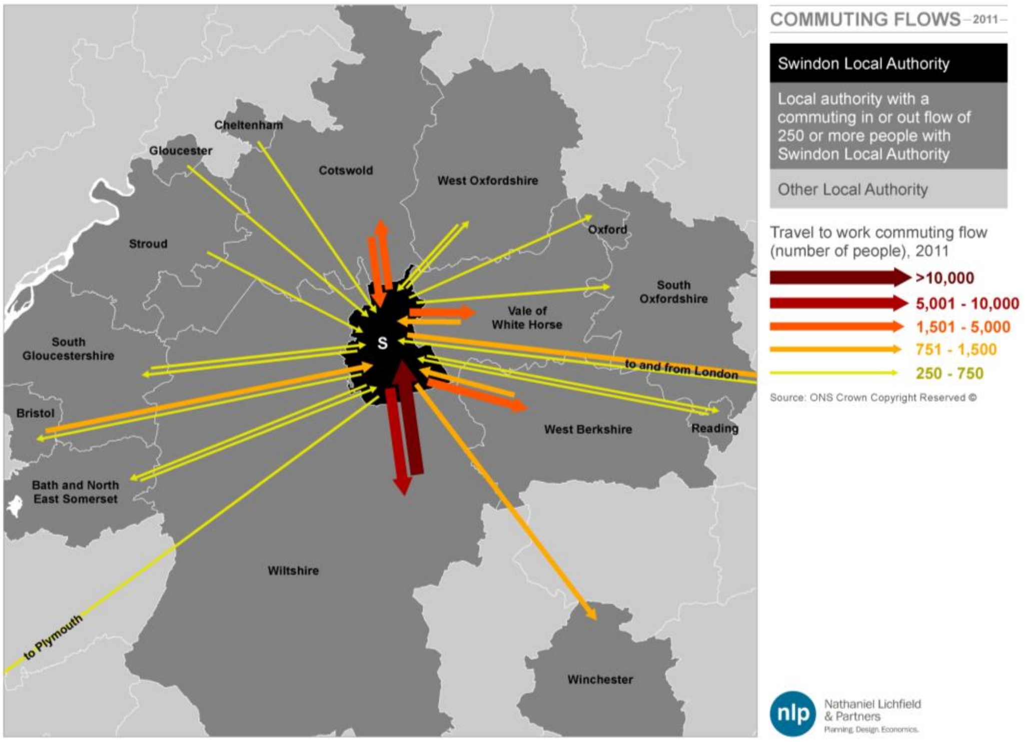
Table 2.5 Key Out-Commuting and In-Commuting Flows for Swindon, 2011

Commuting Type	Total Number	Key Destinations for Out-Commuters and Origins for In-Commuters
Out-Commuting Residents	24,570	Wiltshire (29%), Vale of White Horse (10%), West Berkshire (7%), Cotswold (7%), Winchester (6%)*
In-Commuting Workers	23,840	Wiltshire (44%), Cotswold (8%), Vale of White Horse (6%), Bristol (3%), West Berkshire (3%)

Source: 2011 Census / NLP analysis

* Note: The Council have indicated that the strong commuting flow to Winchester is likely the result of a coding error in the 2011 Census data whereby a Swindon postcode has been substituted for a Winchester postcode which means the share of out-commuting residents to Winchester is likely to be lower and the share of workers retained in the Borough is likely to be higher.

Figure 2.8 Out-Commuting and In-Commuting Flows for Swindon, 2011



Source: 2011 Census / NLP analysis

Note: The Council have indicated that the strong commuting flow to Winchester is likely the result of a coding error in the 2011 Census data whereby a Swindon postcode has been substituted for a Winchester postcode which means the share of out-commuting residents to Winchester is likely to be lower and the share of workers retained in the Borough is likely to be higher.

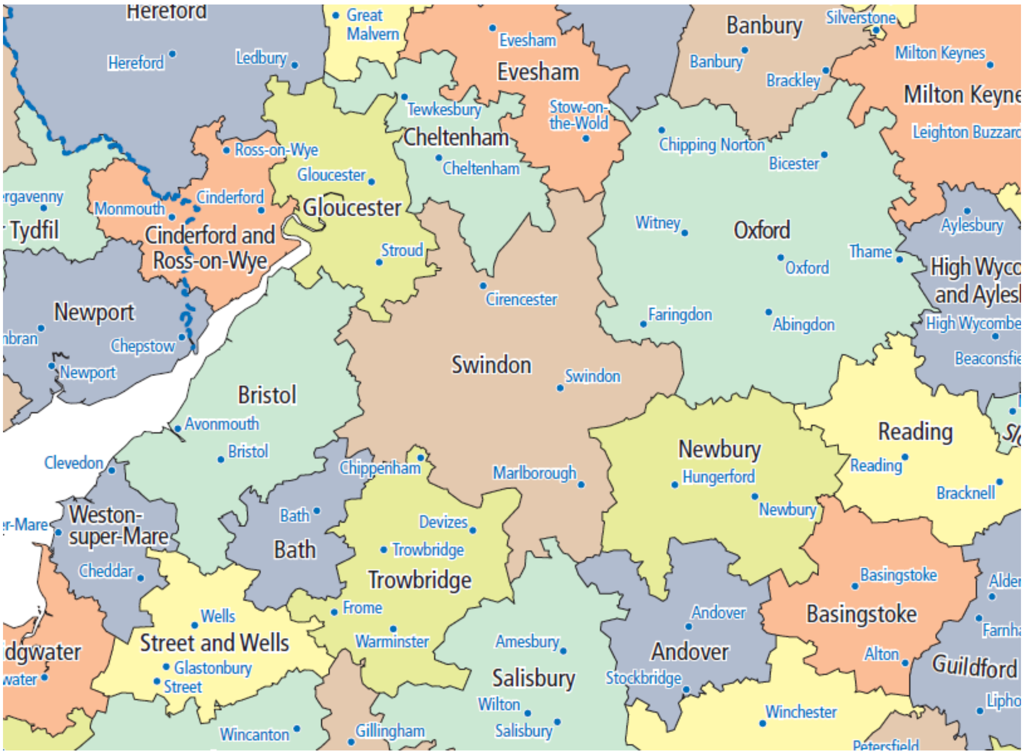
2.25 On this basis, Swindon is characterised as being a net exporter of labour, with a net outflow of approximately 730 workers which is equivalent to about 1% of all resident workers in the Borough at the time of the 2011 Census.

2.26 Between 2001 and 2011, the Borough changed from being a net importer of labour (net inflow of 14,450 workers) to a net exporter of labour (net outflow of 730 workers). This change in commuting patterns is the result of a large increase in out-commuting workers and a small decrease in in-commuting workers, which is likely reflective of housing growth outpacing employment growth in Swindon during this period. As noted above, the increase in the flow of out-commuters from Swindon reduced the self-containment rate for the Borough between 2001 and 2011.

2.27 In addition, the ONS defines labour market areas as those areas where the majority of the resident population is also employed. Defining the labour market area requires an analysis of commuting flows data to identify Travel-to-Work Areas (TTWAs) for a local economy. The current criteria for defining TTWAs is for at least 75% of an area's resident workforce to be employed in the area and at least 75% of the people who work in the area to also reside in the area. This area must also have a working population of at least 3,500 persons.

2.28 In 2015, the ONS used 2011 Census data on home and work addresses to define 228 TTWAs that covers the whole of the UK. This analysis identified a Swindon TTWA that comprises all of Swindon, the southern part of Cotswold, the western part of Vale of White Horse, the north-eastern part of West Berkshire, and the northern part of Wiltshire (Figure 2.9).

Figure 2.9 ONS Defined Swindon Travel-to-Work Area, 2011



Source: 2011 Census / ONS

Functional Economic Market Area

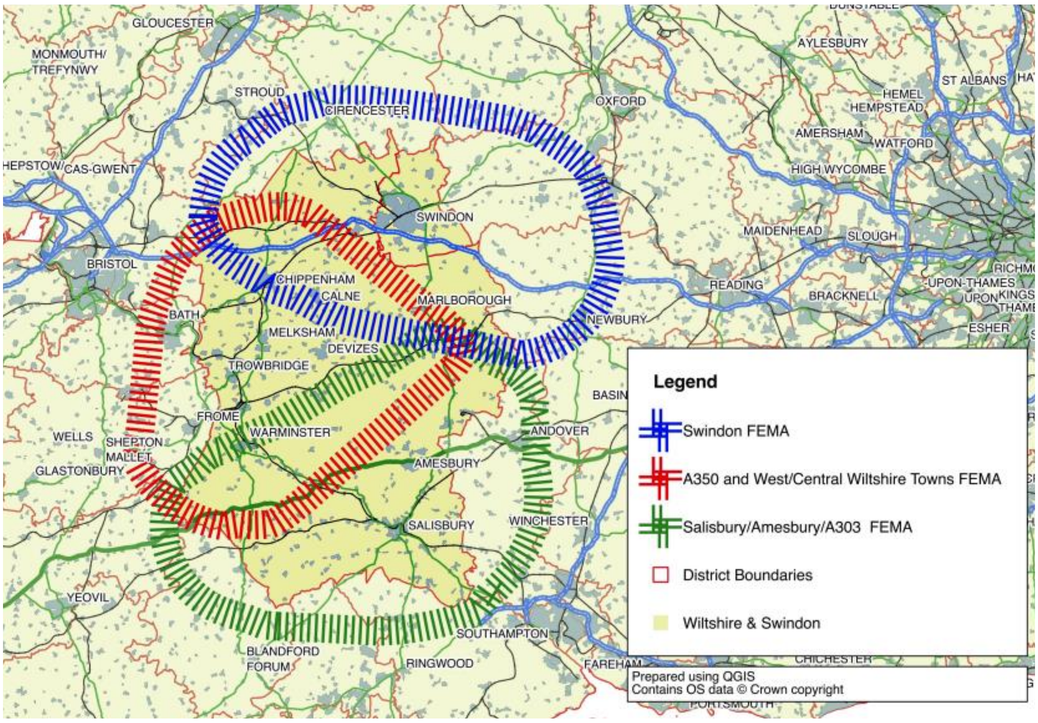
2.29 Recent analysis has been prepared to identify the Functional Economic Market Area (FEMA) for Swindon and Wiltshire.2 This analysis incorporates both quantitative and qualitative evidence, and engagement with stakeholders. The analysis suggests there is some draw into the Swindon and Wiltshire area from beyond the administrative boundaries of these two local authorities, with some

[2] Hardisty Jones Associates, Swindon & Wiltshire Functional Economic Market Area Assessment: Draft Report, April 2016

notable links between Cirencester and Swindon, and Frome and towns located in the western part of Wiltshire.

2.30 In this context, the assessment defined three broad FEMAs for Swindon and Wiltshire that focused around Swindon in the north, Salisbury in the south, and the towns located in the western part of Wiltshire along the A350 (Figure 2.10). These FEMAs were generally validated through stakeholder consultations, although it was indicated the electrification of the Great Western Mainline and construction of Crossrail, as well as the redevelopment plans for Swindon town centre, could change the scale and function of the FEMAs relating to Swindon and Wiltshire over time.

Figure 2.10 Broad Functional Economic Market Areas (FEMAs) for Swindon and Wiltshire



Source: Swindon & Wiltshire Functional Economic Market Area Assessment: Draft Report, April 2016

2.31 The analysis found that the Swindon FEMA has a relatively strong eastward focus towards the Thames Valley and Oxfordshire, which primarily reflects the linkages of large automotive plants in Swindon with parts of Oxfordshire, but is also very much dominated by the major urban centre in Swindon. The A350 corridor FEMA was identified as having a more westward focus towards Bath and the western parts of England, whilst being a more polycentric FEMA with strong interactions between market towns. Finally, the Salisbury FEMA was identified as having some linkages to Southampton and beyond into the south-eastern parts of England.

Summary

2.32 The following key findings and conclusions can be drawn:

1. Swindon is positioned at the heart of the M4 corridor, which provides the Borough with excellent strategic transport links. This strategic road connectivity, coupled with the strong rail connectivity from the Great Western Main Line, represents one of the main strengths of the Borough as a business location, with the future rail electrification also expected to boost the connectivity of Swindon.
2. Past employment trends for Swindon show major volatility in the levels of employment in the Borough during recent decades, with periods of strong growth and decline in the economy. A large part of this volatility relates to manufacturing and professional & other private services, which are two of the highest growing and declining employment sectors in the economy, and are strongly influenced by changes in a few major employers.
3. Employment growth in Swindon has been relatively moderate since 1991 with increases in office jobs offset to a degree by decreases in industrial jobs. Outside growth in office sectors, a range of non B class sectors like hospitality & recreation, healthcare and education have seen good levels of employment growth in the Borough. Although GVA per job is relatively high in Swindon, productivity gains have slowed over recent years.
4. Swindon has a relatively high share of medium and large sized firms, including some headquarter functions choosing to locate in the Borough. Outside the focus of firms in Swindon town centre, other large business clusters can be found in the urban fringe of Swindon town in newer sites that benefit from excellent access to the M4. These strategic business locations are particularly attractive to warehousing, logistics and manufacturing sector activities.
5. Local workers in Swindon tend to have achieved a lower level of NVQ4+ qualification attainment compared to regional and national averages, which points towards a less highly skilled resident labour force in the Borough. The less highly skilled local workforce aligns with a lower share of workers being employed in higher skilled occupations. However, such high value sectors as automotive manufacturing in the Borough are likely to require local workers to attain advanced vocational qualifications rather than normal NVQ4 and above qualifications.
6. Swindon has moved from being a net importer of labour in 2001 to a slight net exporter of labour in 2011, which was mainly the result of an increase in the number of out-commuting workers from the Borough. The increase in out-commuters from Swindon reduced the self-containment rate for the Borough. The draft Swindon and Wiltshire FEMA Assessment defined a broad Swindon FEMA that includes northern areas of Wiltshire and, but does not currently extend as far as other M4 corridor centres such as Reading or Bristol.

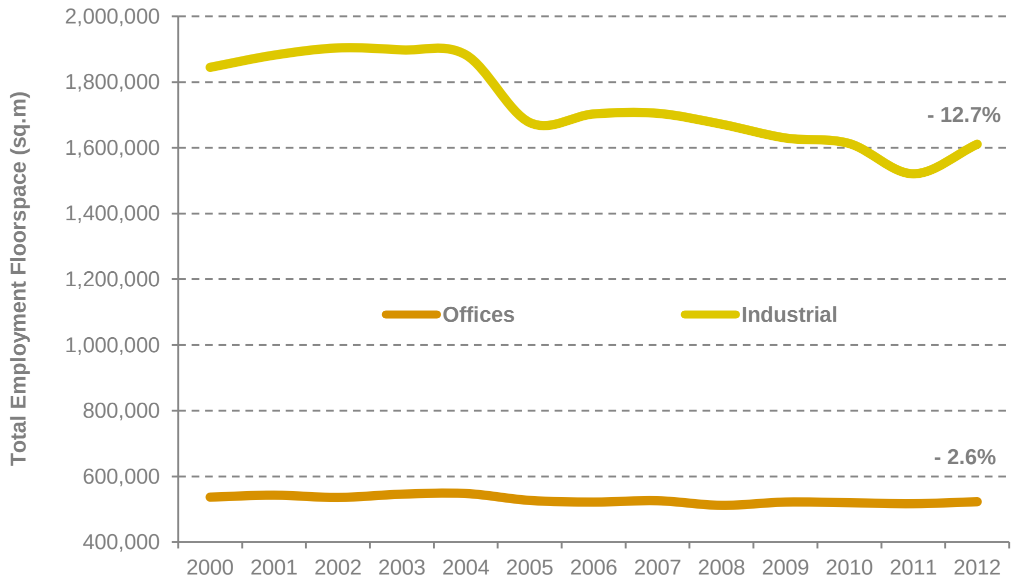
3.0 Overview of Employment Space

3.1 This section provides an overview of the current stock of B class employment space in Swindon, as well as the recent trends and changes to this stock of employment space. This analysis considers the amount of employment space across the three main types of B class employment use: offices (B1a/B1b), manufacturing (B1c/B2), and warehousing and distribution (B8).

Stock of Employment Space

3.2 Swindon contained around 2,134,000sq.m of B class employment space in 2012, which was broadly split between 75% in industrial (including warehousing) uses and 25% in office use. The total stock of employment space in the Borough declined by 10% between 2000 and 2012, which compared with the small growth of 4% in the South West over the same period. The decrease in industrial space in Swindon during this period was more significant than the decrease in office space (Figure 3.1).

Figure 3.1 Changes in Employment Space in Swindon, 2000 - 2012

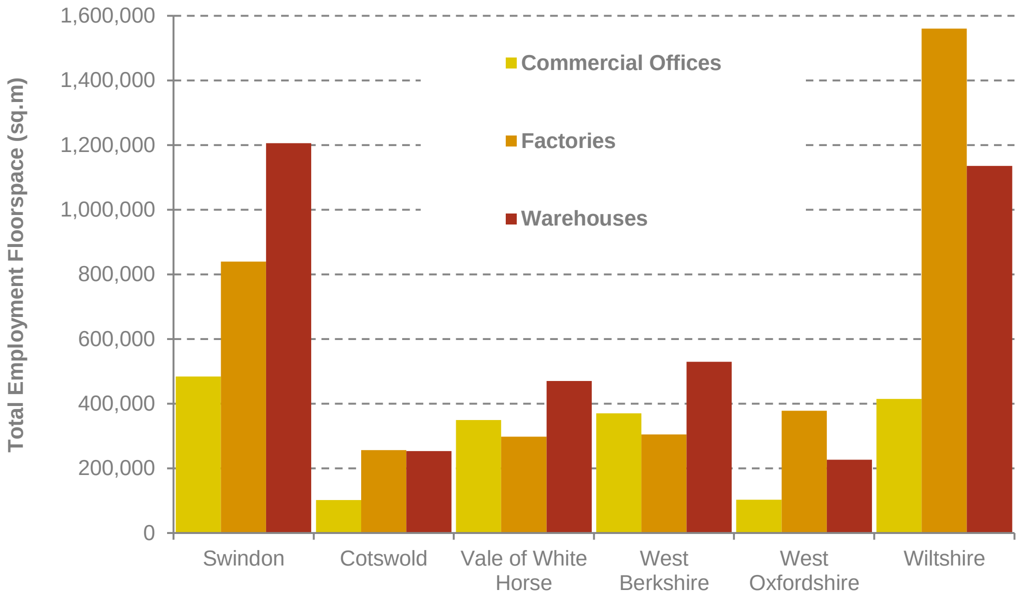


Source: VOA Business Floorspace Data / NLP analysis

3.3 A more detailed breakdown of B class employment space in Swindon is presented in Figure 3.2, including a comparison with the stock of employment space in other local authority areas located in the surrounding sub-region.

3.4 This analysis indicates the stock of industrial space in Swindon is dominated by warehouses, which account for 59% of total industrial space in the Borough. Swindon contains the largest stock of warehouses and second largest stock of factories in the sub-region, with Wiltshire containing the largest factory stock in the sub-region. Swindon also supports the largest stock of commercial offices in the sub-region, followed by Wiltshire, West Berkshire and Vale of White Horse.

Figure 3.2 Overview of Employment Space by Local Authority, 2008*



Source: VOA Business Floorspace Data / NLP analysis * Latest equivalent data available

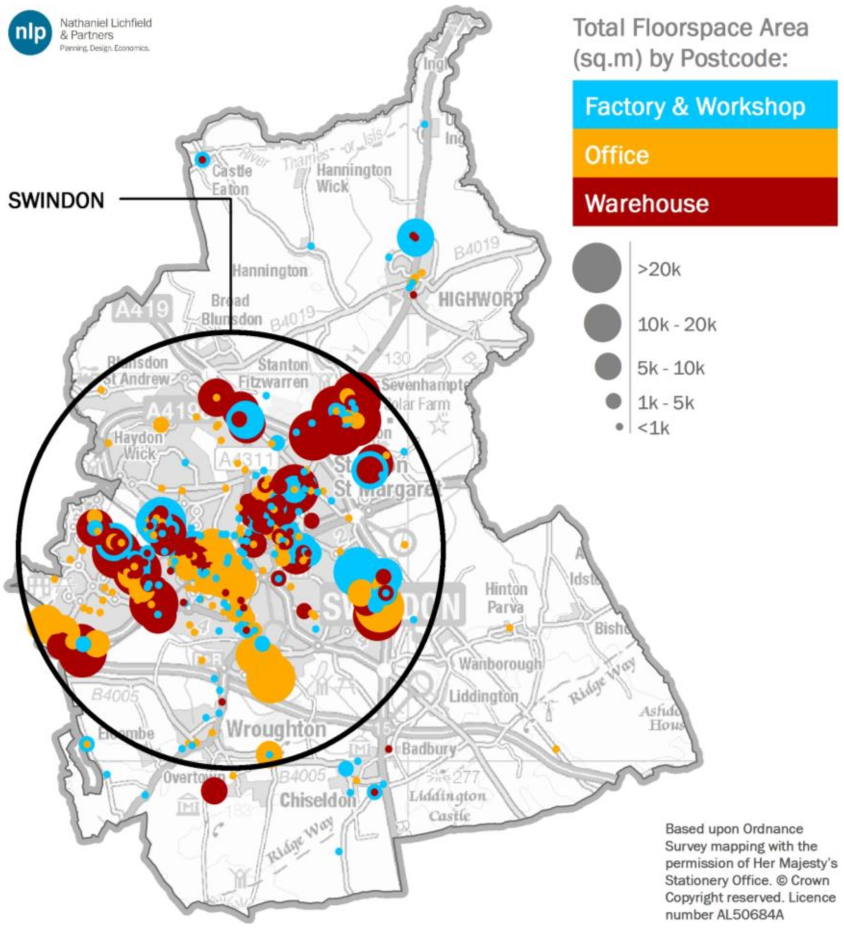
Spatial Distribution

3.5 The spatial distribution of B class employment space in Swindon using latest available data from Valuation Office Agency (VOA) is shown in Figure 3.3. This indicates that employment space in the Borough is overwhelmingly focused in the Swindon urban area, with only small cluster of employment space located outside the town in the smaller settlements of Highworth and Wroughton.

3.6 Figure 3.4 also provides a more detailed map showing the spatial distribution of employment space in Swindon town. This highlights the significant presence of office space in and around Swindon town centre, as well as a corridor of office space that stretches from the town centre south along High Street to the large office premises located in the southern part of the town occupied by such major occupiers as Intel and Nationwide. Other large office floorplates are also located in other parts of Swindon town, with notable smaller clusters found in Blagrove and Dorcan.

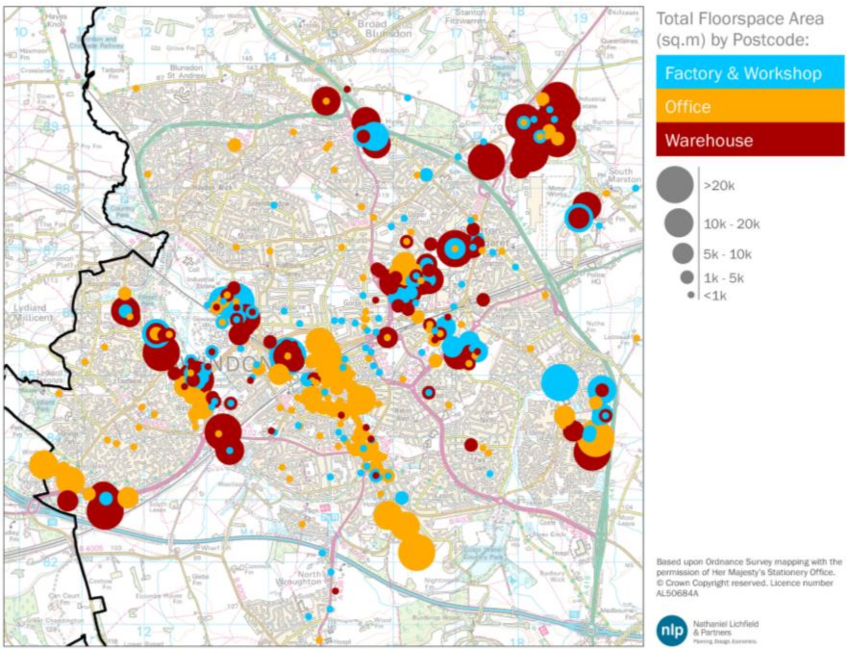
3.7 The existing industrial space in Swindon town is also heavily concentrated in a few major employment areas, including in Westmead, South Marston Industrial Estate, Kembrey Park, Blagrove, Dorcan, Stratton St Margaret, Bridgemead and Techno Trading Estate, amongst others. As noted in Section 2.0, these employment areas are generally characterised by strong accessibility to the M4 or A419, which make them attractive locations for strategic industrial premises that support the space requirements of large operations. The existence of large industrial premises in Swindon town is evident in Figure 3.4, with particularly sizeable warehouse premises found in South Marston Industrial Estate positioned to the north-east of the town.

Figure 3.3 Spatial Distribution of Employment Space in Swindon, 2010



Source: VOA Business Floorspace Data / NLP analysis

Figure 3.4 Spatial Distribution of Employment Space in Swindon Urban Area, 2010



Source: VOA Business Floorspace Data / NLP analysis

Historic Development Rates

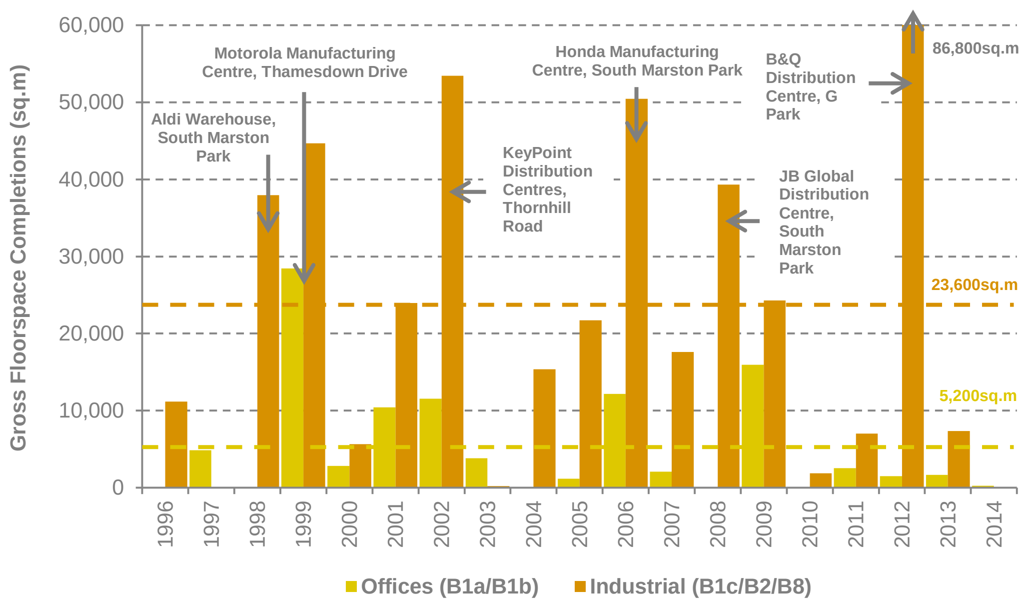
Gross Completions

3.8 The gross amount of B class employment space developed in Swindon during the period 1996 to 2014 equated to about 547,900sq.m, which is equivalent to an annual average gross completion rate of 28,800sq.m during this thirteen year monitoring period. The majority of the new B class employment space developed in Swindon during this period was in industrial use (82%), including 49% in B1c/B2 factory use and 33% in B8 warehousing and distribution use.

3.9 It should be noted that where the monitoring data identifies gross completions of employment space that contains multiple B class uses, this assessment has assumed an even split across these B class uses. For example, a new office and warehouse development would assume a 50:50 split of gross employment space across these two B class uses.

3.10 As illustrated in Figure 3.5, the level of new development in Swindon peaked during the reporting years of 1999, 2002, 2006, and 2012. Each of these years recorded a total gross completion of B class employment space that exceeded 60,000sq.m, and collectively represent more than half of the total employment space developed in Swindon during the period for which data is available.

Figure 3.5 Gross B Class Employment Space Completions in Swindon, 1996 - 2014



Source: Swindon Borough Council / NLP analysis

3.11 The gross completion of industrial space in Swindon during the period 1996 to 2014 was principally driven by a few large developments that are annotated in Figure 3.5. These individual developments represent around 50% of the total industrial space developed in Swindon over this period:

a 23,000sq.m of storage and distribution space developed for Aldi at South Marston Park in 1998;

b 50,200sq.m of office and factory space developed for the Motorola Manufacturing Centre at Thamesdown Drive in 1999;

c 39,980sq.m of storage and distribution space developed for KeyPoint Distribution Centres at Thornhill Road in 2002;

d 33,270sq.m of factory and storage space developed for the Honda Manufacturing Centre at South Marston Park in 2006;

e 28,430sq.m of factory and warehousing space developed for the JB Global Distribution Centre at South Marston Park in 2008; and

f 74,010sq.m of factory and warehousing space developed for the B&Q Distribution Centre at G Park in 2012.

3.12 The annual average gross completion of industrial space in Swindon during this period amounted to 23,600sq.m, which was much higher than the annual average completion of office space of 5,200sq.m. The most notable year of office development during this monitoring period was in 1999, which included the significant development of 50,200sq.m of office and factory space for the Motorola Manufacturing Centre on Thamesdown Drive, which has since been converted to other uses, while 15,090sq.m of office space was developed in Swindon in 2009 on Plot 7 of Windmill Hill (Figure 3.5).

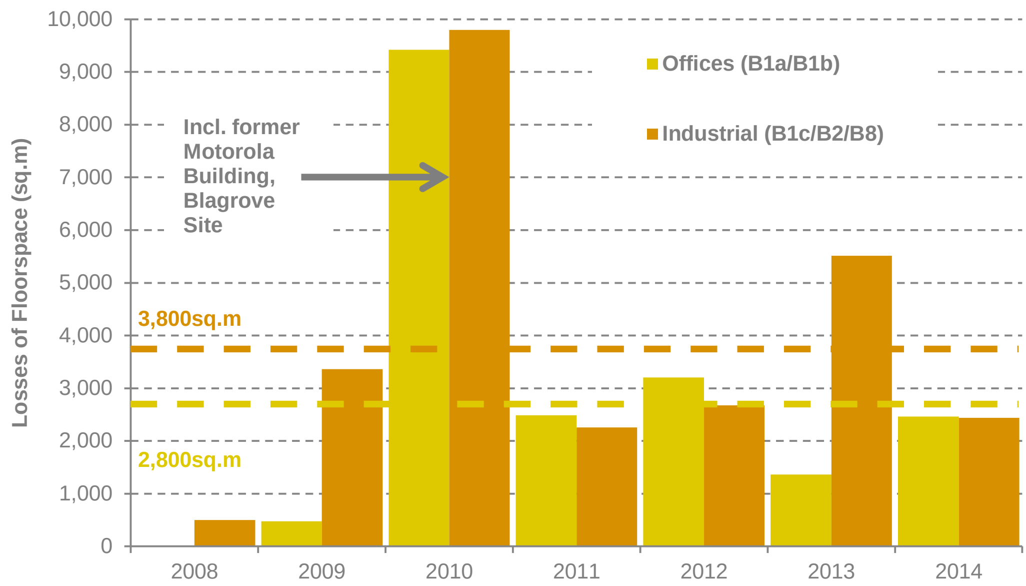
Losses of Employment Space

3.13 Losses of B class employment space in Swindon over the period 2008 to 2014 equated to around 46,000sq.m, which is equivalent to an annual average loss of 6,600sq.m during the period. This loss of employment space in the Borough was mainly related to industrial (75%) uses, with only about 25% of the losses over this monitoring period related to office uses.

3.14 As with the analysis of gross completions in Swindon, where the monitoring data identifies losses of employment space that contains multiple B class uses, this assessment has assumed an even split across these B class uses. For example, the change of use or demolition of an office and warehouse premises would assume that the losses of employment space are split evenly across these two B class uses.

3.15 As shown in Figure 3.6, the most notable year for losses of employment space in Swindon between 2008 and 2014 was during the reporting year of 2010. A total of 19,200sq.m of B class employment space was lost in the Borough in this year, which represents about 42% of the total losses of employment space in Swindon during the monitoring period. The significant losses of employment space in Swindon in 2010 are predominately the result of the Former Motorola Building being demolished at the Blagrove site, which represented a loss of 16,190sq.m of office and industrial space.

Figure 3.6 Losses of B Class Employment Space in Swindon, 2008 - 2015

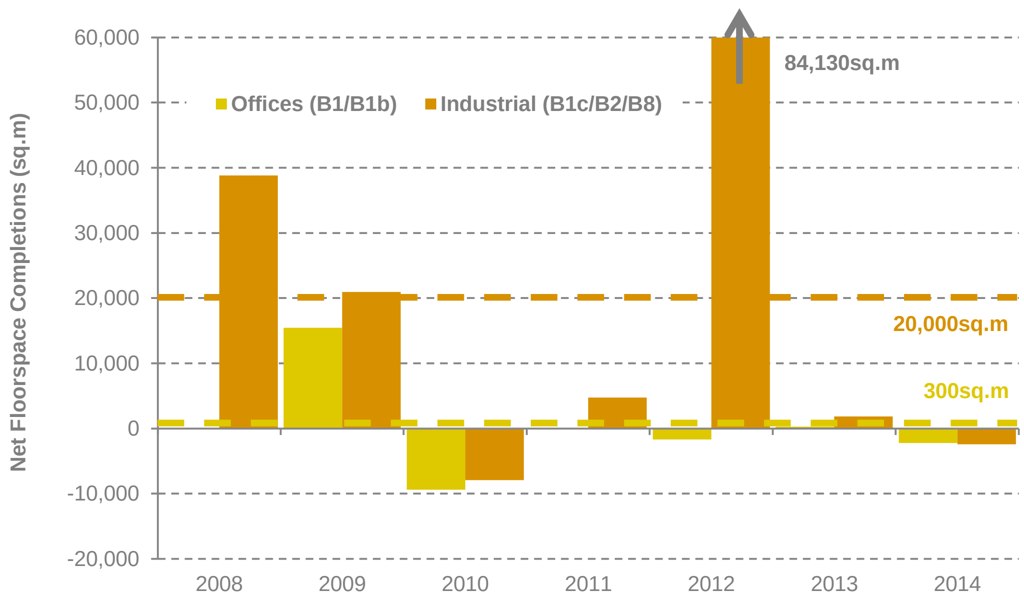


Source: Swindon Borough Council / NLP analysis

Net Completions

3.16 The net completion of B class employment space in Swindon during the period 2008 to 2014 remains positive after taking account the losses of employment space (Figure 3.7). Between 2008 and 2014, the Borough recorded a net completion of about 142,500 sq.m with an annual average net completion rate of 20,400 sq.m for industrial uses and 300 sq.m for office uses.

Figure 3.7 Net B Class Employment Space Completions in Swindon, 2008 - 2014



Source: Swindon Borough Council / NLP analysis

3.17 This means that across all B class uses the gross completion of employment space has exceeded losses during this period, resulting in an increase in the amount of B class employment space in Swindon. As shown in Figure 3.6, the majority of the net completions in Swindon during this period were in industrial uses, with about 98% of the total net completion of employment space in the Borough between 2008 and 2014 for industrial use.

Permitted Development Rights

3.18 In 2013, the Government introduced Permitted Development Rights (PDR) to allow the change of use from office to residential without the need to obtain planning permission from a local planning authority. In October 2015, the Government confirmed that the temporary PDR will be made permanent. In this context, the influence of the new PDR is anticipated to be an increase in the rate of losses of office space over historic rates of loss.

3.19 Monitoring data provided by the Council indicates that 38 prior approval applications have been granted for a change of use from office to residential in the Borough since the introduction of PDR in May 2013. These applications have the potential to deliver an additional 758 new residential units in Swindon if they were all to be implemented.

3.20 Although it is not a requirement under the regulations to monitor the scale of office space losses from PDR, it is important in planning terms to consider the amount of office space that could be lost in the Borough if all 38 granted prior approval applications are implemented in full over time.[3] In this context, these applications would result in a loss of 46,600sq.m of office space, which is equivalent to about 9% of the total office stock in Swindon in 2012. When contrasted against the average annual loss of office space in the Borough between 2008 and 2014, these potential losses through PDR would be equivalent to about sixteen years of historic office space losses in Swindon.

3.21 However, it should be noted that six individual applications comprise the majority of the office space that could be lost in Swindon through PDR with the following six prior approval applications representing approximately 70% of the total office space that could be lost in the Borough:

- Signal Point on Station Road: 9,110sq.m (20% of PDR losses);
- The Quadrant on Stonehill Green: 6,530sq.m (14%);
- Guild House on Farnsby Street: 5,860sq.m (13%);
- Holbrook House on Sheppard Street: 4,200sq.m (9%);
- Electra House on Farnsby Street: 3,720sq.m (8%); and
- Block 2 of One Fifty on Victoria Road: 3,150sq.m (7%).

3.22 In terms of location, the majority of the prior approval applications relate to smaller office premises located in the central parts of Swindon, with 78% of the total office space that could be lost through PDR located in the Swindon

[3] No data was available for the amount of office space that would be lost from the granted prior approval application at Little London Court (S/PRIORC/13/1546), so the total amount of office space that could be lost from the 38 applications would be higher than that identified in this assessment.

Central Area Action Plan (SCAAP) boundary. Outside this central area, the most significant office space with prior approval is The Quadrant on Stonehill Green, which is situated just to the west of the SCAAP boundary in Westmead.

3.23 The introduction of PDR is expected to have a significant effect on the supply of office space in local authorities across the UK, but particularly for those local authorities with the highest residential land values and pressure on lower value uses. With PDR now confirmed as permanent, it will be necessary for the Council to carefully monitor the future loss of office space to determine whether additional provision becomes necessary over and above the requirements set out in Section 6.0.

Summary

3.24 The following key findings and conclusions can be drawn:

1. Long-term trends since 2000 indicate a gradual reduction in the stock of employment space in Swindon particularly industrial uses, whilst office space has been broadly static in overall terms. However, the Council's monitoring data indicates that have been net gains in industrial space since 2008 reflecting completion of a number of large scale distribution developments.
2. Warehouses dominate the stock of industrial space in Swindon, with the Borough comprising the largest stock of warehousing and second largest stock of factories compared to surrounding areas. This reflects the strategic nature of Swindon as a business location for various distribution and logistics activities and which have driven recent completions of space.
3. Office space in the Borough is largely focused in and around Swindon town centre, although some larger office premises are also situated in the urban fringe of Swindon town in business park settings. Industrial space is also clustered in numerous employment areas in the Borough including older industrial estates in inner urban areas and newer industrial sites on the edge of Swindon town that benefit from better strategic road access.
4. The majority of new B class employment space developed in Swindon during recent periods was in industrial use, with the gross completions of employment space in the Borough driven by a few large developments. At the same time, the Borough has been losing some employment space although the net completions of employment space in Swindon remains positive after taking into account these losses, with a strong net gain in industrial space and a negligible net gain in office space.
5. The recent introduction of PDR has started to have an effect in Swindon, with monitoring data indicating 38 prior approval applications have been granted in the Borough. If all 38 applications were implemented in full over time, the local market would lose 46,600sq.m of office space, which is equivalent to 9% of the total office stock in Swindon in 2012. The most significant effect of PDR will be on office space in the town centre.

4.0 Commercial Property Market Intelligence

4.1 This section provides an overview of the commercial property market in Swindon, including recent trends in demand and supply. The findings are mainly based on discussions with a number of commercial property agents and surveyors currently active in Swindon and the wider sub-region (see Appendix 1) and where appropriate this has been supplemented with information derived from a number of sources including commercial property availability databases and published reports. In line with market conventions, figures in this section are expressed in sq.ft.

Market Geography

4.2 Swindon operates within the M4 western market corridor in commercial property terms, which represents a significant property market area within the wider sub-region. Swindon's strategic road and rail connections are considered by local commercial property agents to represent one of the town's key strengths as a business location, and the future rail electrification is expected to enhance the town's attractiveness further, particularly for office occupiers.

4.3 The town is characterised by its lower value profile in both office and industrial market terms than markets closer to London (such as Reading and Slough). Historically the town has been able to use the lower cost base to its advantage, and coupled with good connectivity and ready availability of employment land, has attracted significant levels of investment in the town.

4.4 Swindon tends to be located on the fringes of the typical occupier 'area of search' for London relocations, with examples of firms including JP Morgan and Threadneedle Investments. These occupier flows tend to operate in an East-West direction along the M4 and the majority of enquiries for commercial space in Swindon generally fall within an area of search that extends as far as Bristol in the west and Newbury in the east. By comparison, North-South links tend to be weaker, driven by poorer connectivity and transport links to the north and south of the M4.

4.5 However, the town also faces strong competition from other nearby commercial centres for occupiers, growth and investment. These competitor locations include Bristol, Reading and Milton Keynes with regards to general business and financial services, particularly when it comes to competing for footloose firms looking to locate in the South East, or relocating from London. Reading is closer to London and Heathrow, has a strong image and has attracted significant levels of speculative commercial development ahead of the opening of Crossrail in 2019. However, both Reading and and Bristol represent higher cost locations than Swindon.

4.6 For manufacturing, including high technology manufacturing, Milton Keynes and to a lesser extent Bristol, represent the main competitors to Swindon, although other parts of the UK or Europe, with more surplus labour, lower costs and grant aid appear greater threats. These two locations, alongside some Berkshire centres, also represent strong competitors with regards to large scale distribution activity.

4.7 In the more specialist science-based and medical related sectors, Swindon competes with towns with more and/or longer-established universities, while Reading and Bristol are both seeking to grow in this field. Oxford is likely to remain the strongest player in proximity to Swindon (along with other centres such as Cambridge), with its strong research base and international reputation, despite having greater constraints in terms of land and labour supply.

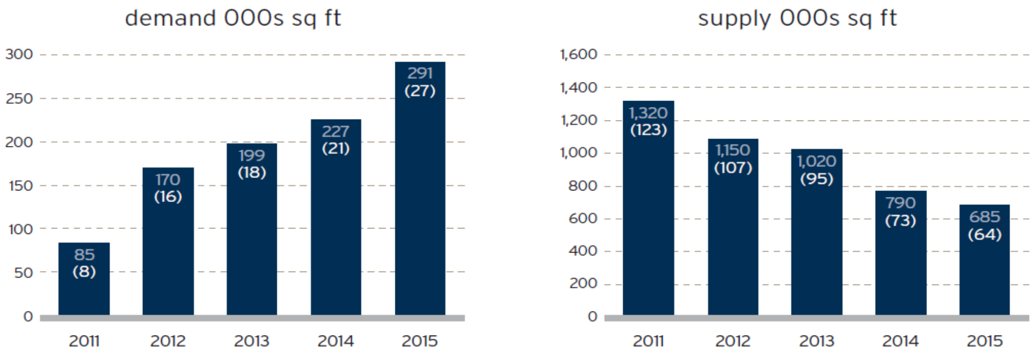
Market Segments

Offices

4.8 The office market in Swindon is currently reported to be performing well with demand having improved considerably in recent months, take-up keeping pace and the outlook remaining positive. The town has a relatively diverse economic base, with office demand driven by a range of different sectors and this helps explain the relative resilience of office take-up in Swindon even during the recession period.

4.9 The general oversupply of office space which occurred in the Western M4 corridor following the 'dot-com' crash in the early 2000s has now largely been taken up, and the supply of office space has gradually been reducing in recent years (Figure 4.1).

Figure 4.1 Swindon Office Demand and Supply



Source: Alder King, Market Monitor: South West of England and South Wales Property Review 2016

4.10 Recent property market intelligence[4] suggests that office take-up in Swindon was strong throughout 2015, with a steady number of transactions resulting in the highest take-up since 2007. 2015 saw the return of competitive bidding for new offices at Churchward which is now widely recognised as one of the town's prime office locations.

4.11 Swindon accommodates a town centre and out of town office market both of which are attractive to different occupier groups. Junction 16 of the M4/West

[4] Alder King, Market Monitor: South West of England and South Wales Property Review 2016

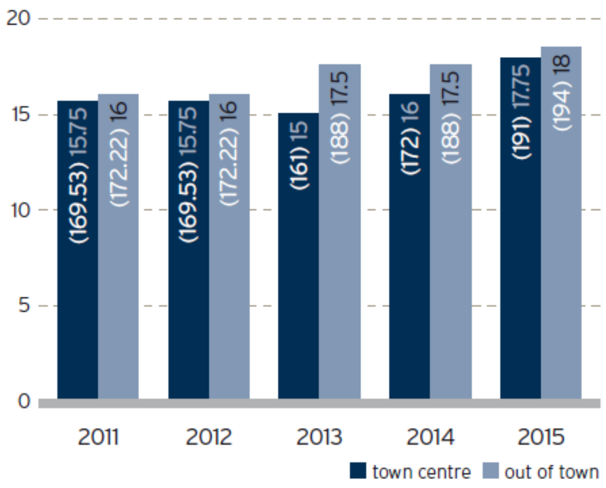
Swindon represents a particularly popular destination for out of town office occupiers due to ease of access for staff commuting from the Chippenham and Bristol area.

4.12 The majority (around three quarters) of office take-up in recent months has occurred within the out of town business parks which tend to command a premium in terms of rents and offer a more modern portfolio of office space. There are also some examples of out of town occupiers moving to the town centre, usually to take advantage of comparatively generous car parking provision (generally associated with older buildings), and local agents consider that the town centre requires more modern, higher quality office stock for it to be able to successfully compete with out of town sites for occupiers.

4.13 Limited levels of new office development have occurred in Swindon over the last few years, which have resulted in much of the office stock becoming dated and in need of modernising, particularly in the town centre area. This issue is considered by local property agents to represent a key risk to the ability of the Borough to effectively compete for higher value office occupiers, as well as to retain current occupiers in the Borough, while low cost car parking is also seen by agents to be vital to attracting and retaining office-based businesses. In this respect the delivery of the long-standing proposals for the Kimmerfields mixed-use scheme, which comprises Grade A office floorspace, is seen as crucial to Swindon's ability to retain and expand office occupiers in the town centre.

4.14 Office rents in Swindon have been increasing steadily recently as demand has continued to grow, with headline rents for the highest quality space now reported to have reached £18sq.ft. Out of town business parks (such as Lydiard Fields and Kembrey Park) command a slight premium in terms of office rents (generally due to the better quality space available to occupiers) and this is a trend that has prevailed historically (Figure 4.2).

Figure 4.2 Swindon Office Headline Rent (£sq.ft)



Source: Alder King, Market Monitor: South West of England and South Wales Property Review 2016

4.15 As shown in Table 4.1, Swindon continues to offer a cost advantage over other office locations within the wider sub-region, including Bristol, Newbury and

Reading. The level of incentives is reported to have fallen steadily throughout last year and early flexible break clauses are being pushed out as tenants are forced to commit to longer leases.

Table 4.1 Commercial Property Rents in Swindon and Comparator locations (£/sq.ft)

Location	Office	Industrial
Swindon	£10 - £18	£5 - £6.75
Bristol	£15 - £28	£4.50 - £8
Chippenham	£11 - £15	£6 - £8
Newbury	£15 - £25	£7 - £8.50
Thatcham	n/a	£6 - £7.50
Reading	£18 to £33	£7.50 - £11
Didcot	n/a	£5 - £6.50
Oxford	£15 - £25	£6.50 - £9

Source: EGi Property Link / Colliers Rents Map 2016 / Consultation with commercial property agents

4.16 Property market intelligence[5] suggests that the overall level of supply for office accommodation in Swindon fell significantly in 2015 as a result of improved take-up and the conversion of redundant buildings to residential use (further details below). Occupiers are reported to find it increasingly difficult to fulfil their requirements. Against this backdrop, construction of the first speculative office building commenced at Westmead and further buildings and schemes are being actively marketed at South Marston and in the town centre. There is also reported to be scope for speculative refurbishment of existing office space over the coming months as demand continues to increase and supply falls.

4.17 As noted in Section 3.0, the recent introduction of Permitted Development Rights (PDR) for change of use from office to residential has begun to impact the local office market in Swindon. Although initially the quality of the office space being lost was of relatively poor condition, there have also been losses of better quality 'core' office stock, meaning there is a risk that the continued loss of such good quality space from the office portfolio will reduce the town's ability to retain and attract office occupiers in the future, particularly if further supply does not come forward. In this respect the Council will need to monitor any future losses of office space to consider whether measures should be put in place to protect this office stock (e.g. an Article 4 Direction), or plan for additional office space provision.

Industrial

4.18 Swindon's industrial market is characterised by a high level of demand from a mix of industrial sectors, but with a particular focus on warehousing and logistics space and increasingly from higher tech engineering/manufacturing sectors. Swindon has representation in a number of specific industrial sectors, including automotive and related supply chains, pharmaceuticals and other specialist engineering activities.

[5] Alder King, Market Monitor: South West of England and South Wales Property Review 2016

4.19 The town is recognised as a strategic industrial location particularly for distribution uses, benefiting from strategic road access via the M4. Swindon's Eastern corridor (in and around Junction 15 of the M4 and the A419) represents the town's strongest industrial location and has tended to provide the focus for much of the town's industrial development historically.

4.20 Demand for industrial space remains strong and very low levels of vacancy reflect a limited supply of industrial accommodation (particularly modern, good quality space). Enquiries for industrial space come from a mix of local and national occupiers and industrial sectors (particularly warehousing/logistics) with requirements generally falling below 5,000sq.ft or above 50,000sq.ft.

4.21 Recent property market intelligence[6] suggests that take-up of industrial space in 2015 was more than double the 2014 level due to the return of larger lettings; six of these were in excess of 50,000sq.ft comprising the former BCA building at Groundwell, 3C Pagoda at Westmead, 67K at Elgin Industrial Estate, Unit 10C South Marston, TNT at G Park and 110 Faraday Park at Dorcan. The number of overall transactions was well above the long-term average with transactions taking place in all size ranges.

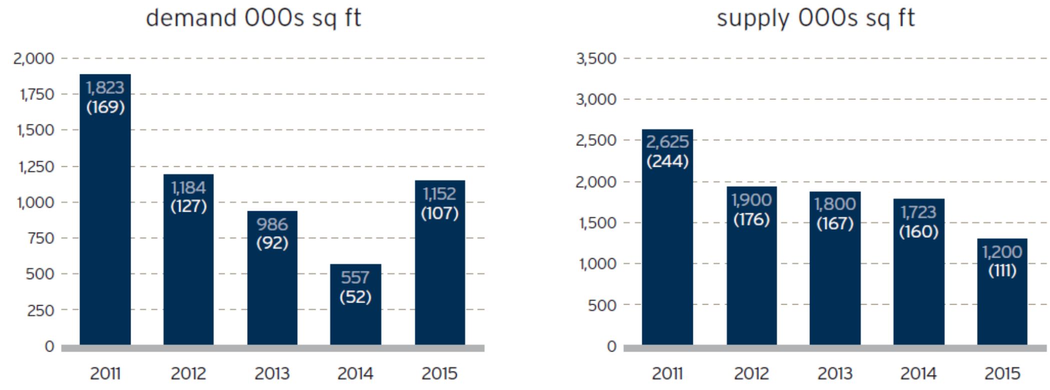
4.22 Outside large-scale distribution and logistics space, development of new industrial space in Swindon has been relatively limited over recent years with much of the existing stock relatively dated and in need of refurbishment. Coupled with strong demand, this lack of supply and shortage of industrial space means that existing firms within Swindon struggle to accommodate expansion and relocation plans. Local commercial property agents report that demand for industrial premises is currently outstripping supply, and that there is little obvious pipeline of new land and/or space to support development going forward. Some occupiers are being forced to look at locations further afield within Swindon's wider FEMA, for example at towns such as Chippenham.

4.23 The historical availability of land for new industrial development has reduced significantly in recent years, and there is estimated by local property agents to currently be around a year's worth of industrial supply in the town. The gradual erosion of industrial supply that has taken place over recent years (mainly involving the loss of older stock to residential and other uses) has not tended to have been replaced by new sites.

4.24 A recent property market report by Alder King[7] indicates that overall industrial supply in Swindon dropped significantly in 2015 as a result of increased take-up. The removal of larger buildings for alternative uses such as the new trampoline centre at Techno and the rock climbing centre at Groundwell are examples of this. As a result, there is an acute shortage of good quality large format industrial accommodation.

[6] Alder King, Market Monitor: South West of England and South Wales Property Review 2016
[7] ibid

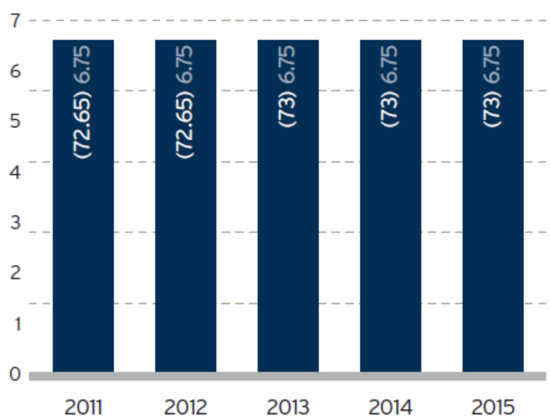
Figure 4.3 Swindon Industrial Demand and Supply



Source: Alder King, Market Monitor: South West of England and South Wales Property Review 2016

4.25 Industrial rents in Swindon have remained largely unchanged over recent years, with headline rents currently standing at £6.75sq.ft (Figure 4.4). Small freehold units in particular are reported to have proved very attractive to occupiers able to purchase through their SIPP and lease the building to the business.

Figure 4.4 Swindon Industrial Headline Rent (£sq.ft)



Source: Alder King, Market Monitor: South West of England and South Wales Property Review 2016

4.26 As shown in Table 4.1, industrial rents in Swindon are currently comparable with nearby locations such as Didcot and Thatcham, but continue to offer a cost advantage over higher value locations like Bristol, Chippenham, Reading and Oxford.

4.27 Local commercial property agents note that two speculative small industrial unit schemes completed during 2015; the Glenmore scheme at Westmead and Rockhaven's at Kembrey Park are both reported to have attracted a good level of interest from owner occupiers and tenants alike.

4.28 In light of the shortage of available industrial stock and sites for new development, there is a risk that Swindon will be unable to accommodate demand from industrial occupiers over the coming years. Local property agents consider there to be scope for a pro-active and holistic strategy to bring forward new sites for multi-use industrial as well as distribution development over the plan period. This would help to enable 'churn' in the existing market by freeing up existing sites for redevelopment as well as providing the opportunity to accommodate new demand and occupiers whose requirements are currently unable to be satisfied within the town.

4.29 If land was to be identified for new industrial development, local property agents consider that the best location would be in and around the eastern area of the town close to Junction 15 of the M4 and the A419 corridor, to benefit from Swindon's strategic road connections and build upon the town's existing well performing industrial areas. There may also be future strategic site opportunities at Junction 16.

Summary

4.30 The following key findings and conclusions can be drawn:

1 Swindon operates within the M4 western market corridor in commercial property terms and the town is considered to constitute the key node at the western end of the M4 corridor. It shares strong economic linkages with the south west region and key centres such as Bristol, with more limited overlap in commercial property market terms with more eastern centres in Berkshire, such as Newbury and Reading.

2 A historic perception of the town as a relatively low cost business location has attracted significant levels of new development in the past. Its locational advantages mean that Swindon tends to be located on the fringes of the typical occupier 'area of search' for London relocations. These occupier flows tend to operate in an East-West direction along the M4 with North-South links comparatively weaker.

3 The office market in Swindon is currently reported to be performing well with demand having improved considerably in recent months, take-up keeping pace and the outlook remaining positive. The majority of office take-up in recent months has occurred within the out of town business parks which tend to command a premium in terms of rents.

4 Limited levels of new office development have occurred within Swindon over the last few years, and as a result much of the existing office stock is dated and in need of modernising, particularly within the town centre. This issue is considered by local property agents to represent a key risk to Swindon's ability to effectively compete for higher value office occupiers in future and to retain the town's existing occupiers.

5 Swindon's industrial market is characterised by a high level of demand from a mix of industrial sectors, but with a particular focus on warehousing and logistics space and increasingly from higher tech engineering/manufacturing sectors. The town is recognised as a strategic industrial location, benefiting from strategic road access via the M4.

6 Development of large-scale logistics space has been relatively high in Swindon over recent periods. However, the development of other types of industrial space has been more limited, which coupled with strong

demand, has resulted in a shortage of certain types of industrial space and meant that some existing businesses in the Borough struggle to accommodate their expansion and relocation plans. In this context, there is considered to be scope for a pro-active and holistic strategy to bring forward new sites for multi-use industrial, as well as distribution development over the plan period. This would help to enable ‘churn’ in the existing market by freeing up existing sites for redevelopment as well as providing the opportunity to accommodate new demand and occupiers whose requirements are currently unable to be satisfied within the town.

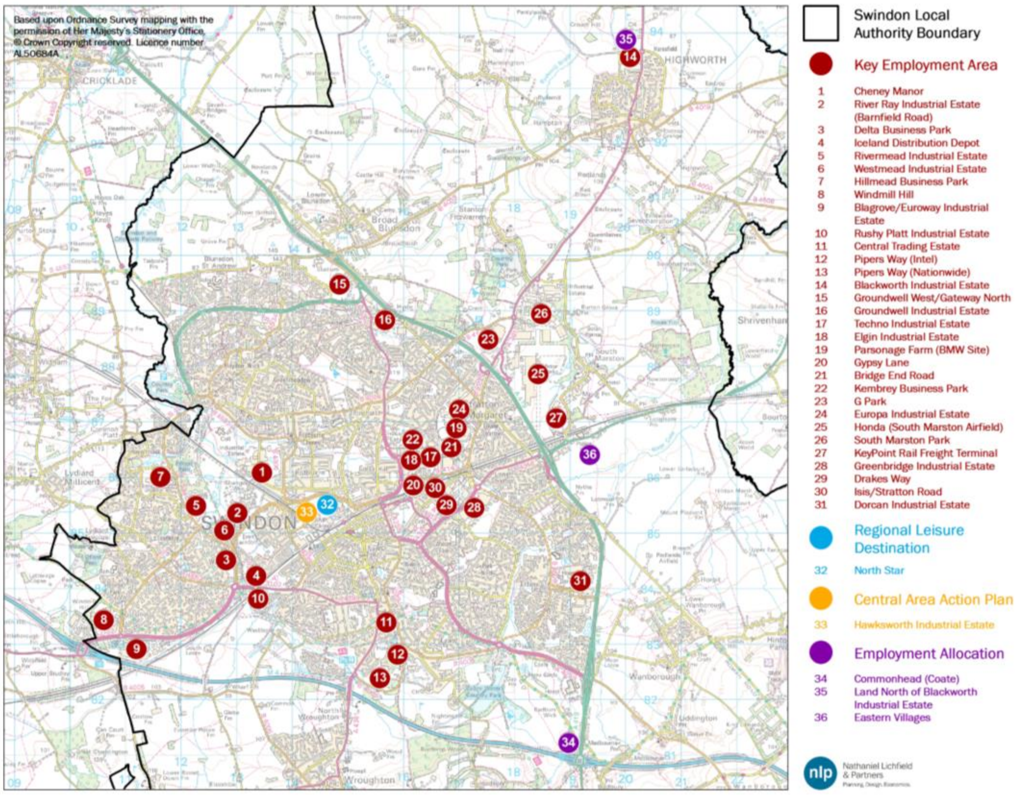
5.0 Review of Employment Sites Portfolio

5.1 This section presents the findings of an assessment of the employment land supply in Swindon, which considered the characteristics and quality of existing and undeveloped employment sites in the Borough and their suitability to meet the future development needs of the local economy.

Site Assessment Overview

5.2 In consultation with Swindon Borough Council, it was agreed the assessment should be structured on 36 employment sites that collectively equate to around 982ha of employment land. The Swindon Borough Local Plan 2026 Policies Map identifies 31 of these sites as ‘Key Employment Areas’, three as ‘Employment Allocations’ and two as not currently allocated for employment use. The location of these employment sites in Swindon is shown in Figure 5.1.

Figure 5.1 Location of the Assessed Employment Sites in Swindon



Source: NLP analysis

5.3 The 36 identified employment sites that were included in this assessment were inspected, and in accordance with the former ODPM guidance on Employment Land Reviews and the PPG, assessed against the following criteria:

a Strategic and local access;

b Proximity to labour and services;

c Adjoining uses that might constrain employment uses;

d Site size, characteristics and potential development constraints; and

e Market attractiveness.

5.4 In addition to the above site criteria, the assessment also considered other site factors such as policy status and planning considerations, suitability for specific uses and barriers to delivery of undeveloped sites, as well as considering the sustainability and sequential preference of sites where relevant. Although flood risk was also considered as part of this assessment, it is recognised that being in a flood risk zone does not necessarily preclude some types of employment development. A full description of the site assessment criteria is set out in Appendix 2.

5.5 A detailed assessment for each site against these criteria is provided in Appendix 3, which includes a summary of the future potential uses for the assessed sites.

5.6 It should be noted this assessment process in itself does not necessarily offer a complete picture of the local significance of certain sites. For example, a site could be assessed to have the potential to satisfy particular business and sector needs (i.e. an important reason for retaining the site) even if it does not perform well against standard site assessment criteria. A wider commentary is therefore provided on each employment site below to supplement the formal scoring exercise.

5.7 It is also important to note that the assessment is based on current conditions and intrinsic qualities of sites and that the associated scoring has been derived on this basis. It is possible that the scoring and relative rankings of sites could change in the future if measures were put in place to enhance their functioning as employment sites (e.g. through new infrastructure and servicing). This is particularly the case for proposed new employment sites or those being delivered as part of urban extensions.

5.8 In this context the following section provides wider commentary on the 36 sites considered as part of the assessment process. Sites are grouped based on their geographic location, site status, or type of employment use supported. The site assessments have also been grouped by their relative performance against the defined site assessment criteria.

Higher Performing Sites

5.9 The ‘higher performing’ employment sites in Swindon scored at least 24 against the site assessment criteria. These sites are generally characterised as having good strategic and local access, generally compatible with adjoining uses, and located in close proximity to urban areas that provide access to local labour and services.

5.10 **Windmill Hill (31ha)** and **Blagrove/Euroway Industrial Estate (50ha)** are a business park and industrial estate respectively positioned to the south-west of Swindon town. These Key Employment Areas benefit from excellent strategic accessibility, being approximately 0.5km from Junction 16 of the M4, as well as benefitting from excellent local accessibility.

- **Windmill Hill** is a good quality business park primarily supporting office uses. The business park is set within a highly attractive environment that contains a varied mix of buildings within a well landscaped and managed setting, including some premises that are beginning to look dated and could benefit from upgrades. There are a small number of vacant plots at the site to the north and south-west, with greenfield land adjoining the site to the north-west.
- **Blagrove/Euroway Industrial Estate** is a large, established industrial estate comprising a variety of premises ranging in size. The western part of the estate is predominately occupied by hotel and car showroom uses, while the eastern part is predominately occupied by warehouse and distribution uses. Generally, the estate is of good quality with few vacancies, although there is presently no obvious space to expand at the industrial estate.

5.11 **G Park (39ha)**, **Honda (South Marston Airfield) (139ha)**, **South Marston Park (94ha)**, and **KeyPoint Rail Freight Terminal (25ha)** are industrial estate located in the north-east of the Swindon Urban Area that support a variety of traditional B class employment uses. These Key Employment Areas are found within a prominent location of the Borough in close proximity to the A419 trunk road, which provides excellent strategic and local accessibility, although South Marston Park is marginally more isolated than the other three sites. A range of bus stops provide regular services to each of the four sites.

5.12 The residential areas situated to the west of the employment sites beyond the A419 trunk road supports a large labour supply. A number of small shops and services are also supported in South Marston Park, while south of KeyPoint Rail Freight Terminal is a sizeable supermarket.

5.13 Generally these employment sites directly adjoin other employment areas or open spaces, with residential areas separated by the A419. The employment activities that take place at these estates will therefore not have any negative effect on proximate residential neighbourhoods. There are also a number of plots of undeveloped land in all four sites which indicates there may be space to expand at the employment sites.

5.14 In this context, the market profile of these four sites is summarised below:

- **G Park** is a new, prominent employment site that supports good quality premises, including a high profile single occupier at the B&Q distribution centre and TNT. The roads serving the estate are wide, with clear access to the estate from a roundabout in the eastern parts of the site. There is currently one remaining undeveloped plot.
- **Honda (South Marston Airfield)** is a large, established employment site occupied exclusively by the Honda manufacturing plant. The premises on site range in age, but were mostly built after 1990. There could be potential to expand the site to the east while some premises at the site

are either under-used or not currently in use, and there are areas within the site boundary which may provide scope for future additional development.

- **South Marston Park** is a large, established industrial estate located to the north of the Honda site. This site supports a diverse mix of occupiers, including some higher value occupiers. Some vacancies are evident at the site that could support office or industrial occupiers, while a 0.48ha vacant plot of land is also located in the western part of the estate. There may be potential for strategic expansion of the site to the north west and north east, subject to relocation of existing sports pitches and investigation of any requirements for upgrading the road network in this location.
- **KeyPoint Rail Freight Terminal** comprises a former rail freight interchange terminal that consists of two large units. This high profile site has additional vacant plots that would be suitable for future development and space for expansion.

5.15 **Commonhead (Coate) (15ha)** is an Employment Allocation forming part of the wider Commonhead Strategic Allocation from the Swindon Local Plan 2026. This greenfield site is positioned outside Swindon town to the south-east, prominently located adjacent to the A419 and Junction 15 of the M5, which gives the site excellent strategic access. In order to access the employment element of the strategic allocation, it will likely be necessary for road access to share the entrance used by the Great Western Hospital, which creates a wide range of potential congestion and queuing issues for the local road network. The position of the hospital in close proximity to the employment allocation also creates likely compatibility constraints for many potential employment activities at the site, such as heavy industrial uses.

5.16 **Eastern Villages (40ha)** is an Employment Allocation forming part of the wider New Eastern Villages Strategic Allocation from the Swindon Local Plan 2026. This greenfield site is positioned outside Swindon town to the east, with its location on the A420 and link to the A419 meaning it would benefit from good strategic accessibility to the wider road network. The site has no incompatible uses nearby and no obvious constraints on development; although to the south of the site is a Flood Risk Zone 2 and 3.

5.17 **North Star (21ha)** is an employment site located in Swindon town that is not currently allocated as a Key Employment Area, but is found in the Central Area Action Plan. The site is identified in the Swindon Local Plan 2026 as a location for a new regional leisure facility, which would involve the redevelopment and expansion of the existing Oasis Leisure Centre. The site also contains a mix of other occupiers in a variety of premises, set within a relatively attractive and spacious environment. This includes a research cluster supported on the northern part of the site which is home to such occupiers as Research Councils UK and BT. The masterplan proposals for Swindon town centre highlights the potential to intensify office and research floorspace at the site which would help to boost B class employment development in the central part of Swindon. The strategic accessibility to the site is reasonable, while the local and internal access in the site is excellent.

5.18 **Iceland Distribution Depot (7ha)** is a medium-sized site with a single, established occupier. This Key Employment Area benefits from good strategic and local access, with the A3102 providing links to Junction 16 of the M4; although the Mannington roundabout located in close proximity to the site can be subject to congestion during certain periods of the day. The buildings and environment characterising the site are generally of moderate quality.

5.19 **Pipers Way (Intel) (5ha)** and **Pipers Way (Nationwide) (12ha)** are two well-landscaped business parks found within a wider office campus on the southern edge of Swindon town. These two Key Employment Areas benefit from good quality, attractive premises, strong local access, and good proximity to services and local labour. The Pipers Way (Intel) site is considered to be a marginally better performing employment site given its less car parking constraints.

5.20 **Kembrey Business Park (23ha)** is a relatively modern business park that contains high quality occupiers set within an attractive, spacious environment. This Key Employment Area supports a mix of office and industrial uses, with good access to local labour and services. The employment site displays a low level of vacancy, with only a few remaining vacant plots of land at the site.

Moderate Performing Sites

5.21 The ‘moderate performing’ employment sites in Swindon scored between 18 and 23 against the site assessment criteria. These sites are characterised as having reasonable strategic and local access, are compatible with adjoining uses and are located in reasonable proximity to urban areas with local labour and services.

5.22 **Drakes Way (20ha)** is a medium-sized employment site located to the south of the London to Bristol railway line in the central part of Swindon town. This Key Employment Area contains industrial premises of older stock, as well as a mix of other non B class employment premises that have taken-up space at the site overtime (e.g. self-storage units, trade counters and car showrooms). Land in the western part of the mixed employment site has remained vacant for several years, which is likely reflective of the level of market attractiveness for the site. However, the site does benefit from reasonable strategic and local access.

5.23 **Greenbridge Industrial Estate (21ha)** is an established, medium-sized industrial estate positioned to the south of the London to Bristol railway line in Swindon town that benefits from reasonable strategic and local accessibility. The site supports a range of premises of different quality and age that largely date from the 1980s to 2000s, with some vacant units evident at the estate. A large part of the site is occupied by WH Smith office and distribution centre.

5.24 **Groundwell West/Gateway North (20ha)** comprises the former Motorola site that is currently occupied by Vygon (UK) Ltd. The employment site is located in the northern part of the Swindon Urban Area, with the former Groundwell West allocation located directly adjacent to the site to the east. The Key Employment Area has good strategic access being adjacent to the A419 trunk road, which links the site to Junction 15 of the M4. There are possible opportunities for expansion to the west of the employment site.

5.25 **Delta Business Park (16ha)** is a large business park located in the western part of Swindon town. This Key Employment Area has good strategic and local access, and is characterised as being generally attractive with a high quality and modern built environment. The overall quality of the premises at the park tends to vary, with some new premises evident at the site. However, the park does not appear to be overly attractive in market terms with a fairly high rate of vacancy, while to the north-west of the site a number of former office units have been converted to residential use.

5.26 **Dorcan Industrial Estate (62ha)** is a large, established industrial estate situated in the south-eastern part of Swindon town. This Key Employment Area is positioned in a prominent location along the A419, which provides excellent access to the M4. The estate includes some slightly ageing office premises in the north-western part of the site that are presently vacant, while the estate as a whole supports a varied quality of premises. A large occupier at the industrial estate is the Post Office.

5.27 **Rivermead Industrial Estate (17ha)**, **Westmead Industrial Estate (19ha)** and **Hillmead Business Park (22ha)** are three employment sites found within the western part of Swindon town. These Key Employment Areas all presently benefit from a reasonable level of strategic and local accessibility.

5.28 In this context, the market profile of these three sites is summarised below:

- **Rivermead Industrial Estate** is a large estate that is dominated by the under-used Grade II Renault Building in the southern part of the site and the Basepoint Business Centre in the northern part of the site. The Basepoint Business Centre comprises of smaller scale premises that are appropriate for office and industrial use. The overall profile of the estate is attractive, while there could be potential for the site to expand to the east, although this land is currently designated as open space.
- **Westmead Industrial Estate** is a large industrial estate that contains a range of office, industrial and distribution premises, with premises at the site characterised as being rather dated and variable in size. While a number of vacancies are evident at the estate, there is evidence of new investment in the western part of the estate.
- **Hillmead Business Park** is a large employment site found in the north-western part of Swindon town. The premises at the park are generally modern and attractive, with a mix of premise sizes, while the business park shows evidence of good management and landscaping. The site supports a mix of office, industrial and distribution uses, as well as some non B class employment uses, with relatively low vacancy levels evident at the site. Any expansion of the business park could be undertaken on a vacant plot of land that is capable of accommodating 75,000sq.ft of new

employment space, with the Council currently in ownership of two vacant plots of land at the business park.

5.29 **Techno Industrial Estate (11ha)**, **Elgin Industrial Estate (22ha)**, **Parsonage Farm (BMW Site) (40ha)** and **Europa Industrial Estate (34ha)** are all located to the north of the Bristol to London railway line in the central part of Swindon town, forming an agglomeration of abutting industrial estates. These large and established estates accommodate a range of traditional B class employment uses. The four estates have reasonable strategic access but poor local access while the premises and environment of all four sites are of average quality. The four industrial estates also have above average levels of vacancy, while the Parsonage Farm (BMW Site) supports an established, single occupier.

5.30 **Rushy Platt Industrial Estate (6ha)** is a relatively small, established industrial estate in the western part of Swindon town that benefits from good strategic and local accessibility. This Key Employment Area has a range of units that are of good quality and reasonable size, with the majority of the estate occupied by a mix of office, distribution and sui-generis use. The level of vacancy at the site is relatively low, with one vacant plot of land identified in the north-western parts of the industrial estate that would be suitable for development.

5.31 **Groundwell Industrial Estate (28ha)** is a large industrial estate located to the north of Swindon town. This Key Employment Area mostly contains a range of light industrial and warehousing units, as well as a small number of office units. The employment site benefits from very good strategic access being located next to the A419, although local access to the site is more limited. The premises at the estate appear of reasonable quality and are largely occupied whilst no clear sensitive uses were identified adjacent to the employment site that would affect the employment activities undertaken at the estate.

5.32 **Cheney Manor (29ha)** is a sizeable industrial estate positioned within the central part of Swindon town. This Key Employment Area comprises a variety of small to medium-sized occupiers that operate in traditional B class employment uses, as well as some non B class employment uses. The strategic access to the site is relatively poor, although the site does benefit from better local access and proximity to local labour and services. The estate is relatively dated, with premises dating from the 1970s-1990s, and generally of an untidy appearance. However, there have been some recent investments in property at the site while there are also a number of remaining plots of vacant land at the site that have potential to accommodate the space requirements of small to medium-sized businesses. A masterplanned approach should be considered in order to help improve the overall functioning of the site and guide investment for appropriate uses.

5.33 In addition, the Kendrick Industrial Estate is located across the railway lines to the west of Chaney Manor. This small employment site has not been formally assessed by the study. The estate suffers from poor strategic and local access, and a low quality local environment beside a sewerage works. It is currently occupied by lower value and bad neighbour uses, which coupled with the general environment, give the estate a very poor appearance. These attributes limit the market attractiveness of the site to certain occupiers, although it is reported that the level of vacancy at the site has traditionally been relatively low.

5.34 **Hawksworth Industrial Estate (13ha)** is an employment site located in the central part of Swindon town that is not allocated as a Key Employment Area. The strategic access to the estate is reasonable, while local access to the estate is good. The premises contained at the site are of a variety of qualities and age, with many older sheds accommodated at the site, as well as some evidence of more recent investments in premises at the employment site. The site contains a number of larger, national businesses such as Nationwide and NTL.

5.35 **Blackworth Industrial Estate (7ha)** and **Land North of Blackworth Industrial Estate (6ha)** are situated north of Highworth in the northern part of the Borough. The Blackworth Industrial Estate is a Key Employment Area that mostly contains light industrial units of reasonable quality, while the strategic access to the estate involves passing through Highworth and some residential areas. The estate is characterised as being relatively isolated despite services being supported in Highworth. Although there is limited evidence of any new investments at the site, the premises are of reasonable age and condition with low vacancy levels. There are no identifiable constraints from adjoining uses for the activities undertaken at the site, while greenfield land to the north of the site has been allocated for employment use. This employment site provides significant employment opportunities to working residents in Highworth.

5.36 **River Ray Industrial Estate (Barnfield Road) (2ha)** is a small industrial estate situated in the central part of Swindon town. This Key Employment Area comprises a range of small to medium-sized enterprise in industrial uses. The strategic access to the site is poor, although the estate does benefit from good local access and close proximity to local labour and services. The employment site is relatively unattractive with the units generally dated and untidy, although the level of vacancy at the site was average. The estate overall appears to function reasonably as a location for small scale industrial occupiers.

Lower Performing Sites

5.37 The ‘lower performing’ employment sites in Swindon scored less than 23 against the site assessment criteria. These sites were mainly characterised as having poor strategic and local access, were less compatible with adjoining uses, and were generally smaller sites with some constraints.

5.38 **Isis/Stratton Road (2ha)** is a small industrial estate located in a predominately residential area, bound to the north by the London to Bristol railway line. The land to the east of this Key Employment Area is presently vacant following the waste transfer site fire in 2014. The site supports a variety of similar sized units of reasonable quality, albeit of ageing stock, supporting a range of B class and non B class employment uses. The estate does not provide a very attractive environment, while the strategic and local access to the site is poor.

5.39 **Central Trading Estate (1ha)** is a small, irregularly shaped estate located in a housing area in the central parts of Swindon town. This Key Employment Area is characterised as having poor strategic access and narrow local road access. However the environment in the industrial estate is of reasonable quality, with low levels of vacancy at the site indicating that the estate is currently meeting a local need in the market.

5.40 **Bridge End Road (2ha)** and **Gypsy Lane (6ha)** are industrial estates located south of the BMW Plant and Elgin Industrial Estate. These Key Employment Areas are bound by the London to Bristol railway line and are characterised as having relatively poor strategic and local access, as well as poor internal road access. These sites have lower quality environments that support employment uses that are likely to be bad neighbours for adjoining housing areas, such as car repair workshops and a fuel storage depot. However the employment sites do still have low vacancy rates and appear to function adequately for the types of lower value occupiers they currently accommodate.

Summary

5.41 The following key findings and conclusions can be drawn:

1. Swindon comprises a reasonable range of employment sites of differing quality and type across the Borough that meets the requirements of local businesses;
2. All the assessed employment sites within Swindon have planning policy status, with all the sites currently safeguarded for employment purposes except for North Star and Hawksworth Industrial Estate;
3. The majority of the employment sites in Swindon accommodate a mix of office and industrial uses, although other non-employment uses are also supported at some of the sites (e.g. vehicle rentals and show rooms);
4. The range of employment sites in Swindon generally comprise good quality, well-maintained stock with relatively low vacancy, demonstrating that much of the existing employment space in the Borough is meeting a need in the local market;
5. Although there is evidence of lower performing employment sites and premises in Swindon, often characterised by poorer access and proximity to local services, these sites are still largely occupied and appear to be servicing a local need for more affordable space from low value activities;
6. Higher performing employment sites in the Borough tend to be focused in the north-eastern and south-western parts of Swindon town, which have excellent strategic and local access and generally better quality buildings; and
7. Lower performing employment sites in the Borough tend to be smaller sites of irregular shape that are constrained by poorer strategic and local access.

5.42 The overall rating of the 36 employment sites assessed in Swindon is presented in Table 5.1 which should be read in conjunction with the qualitative analysis of the sites. A summary of the site assessments against the defined criteria is also provided in Appendix 3, which includes a summary of the future potential uses and functions that could be supported at these assessed sites.

Table 5.1 Overall Rating of Assessed Employment Sites in Swindon

Ref	Site Name	Area (ha)	Site Status	Rating (out of 30)
25	Honda (South Marston Airfield)	138.9	Key Employment Area	28
8	Windmill Hill	30.7	Key Employment Area	28
27	KeyPoint Rail Freight Terminal	25.0	Key Employment Area	28
23	G Park	39.4	Key Employment Area	28
34	Commonhead (Coate)	15.0	Employment Allocation	28
26	South Marston Park	94.0	Key Employment Area	27
36	Eastern Villages	40.0	Employment Allocation	27
32	North Star	20.6	Regional Leisure Destination	26
9	Blagrove/Euroway Industrial Estate	49.9	Key Employment Area	25
4	Iceland Distribution Depot	7.5	Key Employment Area	24
12	Pipers Way (Intel)	5.4	Key Employment Area	24
13	Pipers Way (Nationwide)	11.8	Key Employment Area	24
22	Kembrey Business Park	22.7	Key Employment Area	24
28	Greenbridge Industrial Estate	21.4	Key Employment Area	23
15	Groundwell West/Gateway North	20.1	Key Employment Area	23
17	Techno Industrial Estate	11.5	Key Employment Area	23
3	Delta Business Park	15.9	Key Employment Area	23
31	Dorcan Industrial Estate	61.8	Key Employment Area	23
10	Rushy Platt Industrial Estate	5.9	Key Employment Area	23
6	Westmead Industrial Estate	19.3	Key Employment Area	23
5	Rivermead Industrial Estate	17.3	Key Employment Area	23
7	Hillmead Business Park	22.4	Key Employment Area	23
29	Drakes Way	20.3	Key Employment Area	22

Ref	Site Name	Area (ha)	Site Status	Rating (out of 30)
24	Europa Industrial Estate	34.0	Key Employment Area	21
19	Parsonage Farm (BMW Site)	40.1	Key Employment Area	21
16	Groundwell Industrial Estate	27.6	Key Employment Area	21
33	Hawksworth Industrial Estate	13.0	Central Area Action Plan	21
1	Cheney Manor	28.7	Key Employment Area	20
2	River Ray Industrial Estate (Barnfield Road)	1.6	Key Employment Area	20
18	Elgin Industrial Estate	21.9	Key Employment Area	19
35	Land North of Blackworth Industrial Estate	5.5	Employment Allocation	19
14	Blackworth Industrial Estate	6.9	Key Employment Area	19
30	Isis/Stratton Road	2.0	Key Employment Area	17
11	Central Trading Estate	1.4	Key Employment Area	15
20	Gypsy Lane	5.7	Key Employment Area	13
21	Bridge End Road	2.1	Key Employment Area	13

Source: NLP analysis

6.0 Future Requirements for Employment Space

6.1 This section assesses future economic growth needs in Swindon drawing on several methodologies that are contained in the PPG. These produce a range of scenarios that are used to inform the assessment of the potential scale and type of future economic in the Borough, and the employment land requirements that flow from these.

Methodology

6.2 The NPPF requires local authorities to *"set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth"* [paragraph 21]. In evidence base terms, this should be underpinned by a *"clear understanding of business needs within the economic markets operating in and across their area"* [paragraph 160].

6.3 In this context, a number of potential future economic scenarios have been generated to provide a framework for assessing the future B class employment space requirements for Swindon during the period 2016 to 2036. These growth scenarios reflect the PPG and draw upon the following:

a forecasts of employment growth within B class sectors (**baseline labour demand**) derived from the forecasts produced by Cambridge Econometrics (CE) in November 2015 and Oxford Economics (OE) in January 2016;

b adjusted forecasts of employment growth within B class sectors (**adjusted labour demand**) produced as part of the draft Swindon and Wiltshire Functional Economic Market Area (FEMA) Assessment (2016) derived from the baseline projections produced by CE in November 2015 and OE in January 2016;

c consideration of **past trends in completions of employment space** based on available monitoring data from Swindon Borough Council; and

d estimates of future growth of the **labour supply** drawing upon population forecasts developed in the draft Swindon and Wiltshire Strategic Housing Market Assessment (SHMA) (2016).

6.4 All these approaches have some limitations and consideration needs to be given as to how suitable each is to future circumstances in Swindon. In order to be robust, the economic growth potential and likely demand for employment space in the Borough needs to be considered under a range of future scenarios to reflect both lower and higher growth conditions that could arise in the future.

6.5 It should be noted that the final judgement as to the levels of need for which Swindon should plan for is not purely quantitative and that there are qualitative factors that must be considered alongside the modelled scenarios in this section. These qualitative aspects are discussed in other sections of this study.

A. Forecast Job Growth

Baseline Forecasts

6.6 The forecasts of employment growth in Swindon during the period to 2036 were developed by Cambridge Econometrics (CE) in November 2015 and Oxford Economics (OE) in January 2016, which take account the most recent regional and national macro-economic patterns to estimate future economic growth at the local authority level.

6.7 It should be noted there are limitations to the use of economic forecasts of this type, particularly in the context of changes to the economy. National macro-economic assumptions are taken as the starting point and then modelled down to the regional and local levels by reference to the prevailing economic profile and sector composition of an area. For this reason, data at the local level is less reliable than at the national and regional levels. Similarly, the top-down forecasts do not take account specific factors at the local level that could affect employment growth. However, forecasts are recognised to be a valuable input to indicate the broad scale and direction of future economic growth for different sectors, which helps to assess the future land requirements of an economy. It should be noted that both the CE and OE forecasts pre-date the UK referendum on membership of the European Union, and assume no change to the UK's current membership arrangements.

6.8 The forecasts produced by CE and OE draw upon Office for National Statistics (ONS) 2012 based Sub-National Population Projection (SNPP) data to estimate future changes to population profiles. Such projections are just one of several inputs used to produce economic forecasts in terms of both changes to the working-age population (i.e. creates demand for jobs) and total population (i.e. creates demand for consumption activities). It is important to note that the population projection data is frequently revised, as are assumptions around the working-age population, economic activity levels and the pension age.

Adjusted Forecasts

6.9 The draft Swindon & Wiltshire Functional Economic Market Area (FEMA) Assessment (2016) was prepared by Hardisty Jones Associates Ltd ('HJA') on behalf of Swindon Borough Council and Wiltshire Council to assess the employment needs for the FEMA relating to Swindon and Wiltshire. One of the key components of this study was to develop robust future employment growth scenarios for Swindon and Wiltshire derived from the baseline projections produced by CE in November 2015 and OE in January 2016.

6.10 To validate the baseline employment forecasts produced by CE and OE for Swindon and Wiltshire, the study tested the projections against the following:

- historic economic performance;
- existing policy and strategic ambitions;
- local intelligence on economic drivers and sectoral prospects; and

- demographic analysis undertaken as part of the draft Swindon and Wiltshire Strategic Housing Market Assessment (SHMA) (2016) as a measure of future labour supply and employment need.

6.11 This critical review of the baseline forecast scenarios indicated that both CE and OE are projecting higher level of GVA growth in the Swindon and Wiltshire FEMA than historic levels, with these higher rates of growth driven by productivity gains as opposed to higher levels of employment growth. Although there is a slight variation in the forecast employment growth rate for the FEMA between the two sets of projections, both CE and OE forecast employment growth at a similar rate to their own estimated historic levels.

6.12 The FEMA Assessment also indicated the employment growth forecasts for Swindon and Wiltshire by CE and OE are at least equal, if not in excess, of the policy aspirations for the Swindon and Wiltshire FEMA. However, considering policies for Swindon and Wiltshire separately suggests there is some evidence of disconnect, with policy aspirations for Swindon generally higher than the CE and OE forecasts, and the policy aspirations for Wiltshire generally lower than the projections. This indicates that there is a potential issue with the balance of employment growth forecast for Swindon and Wiltshire by CE and OE, with the FEMA Assessment concluding there is a need to consider rebalancing the forecast growth in the FEMA between the two local authorities.

6.13 In addition, the FEMA Assessment considered whether the baseline forecasts prepared by CE and OE for Swindon and Wiltshire align with their demographic forecasts. This analysis indicated that growth in the FEMA workforce would support a level of employment growth that sits at the upper end of the baseline forecast scenarios prepared by CE and OE but not beyond it. For this reason, it was concluded in the study that there is no evidence of local workforce growth in the FEMA that would necessitate the need to increase the employment growth forecasts for Swindon and Wiltshire.

6.14 Overall, the FEMA Assessment concluded the baseline forecasts produced by CE and OE for Swindon and Wiltshire provide reasonable and robust estimates of future growth in the FEMA. In this context, the study produced an adjusted forecast by sector for Swindon that used the average growth by sector forecast by CE and OE. This approach was used for all sectors in the Borough except for the following:

- The baseline forecasts produced by CE and OE suggest a significant decline in manufacturing jobs in Swindon which is fuelled by a decrease in the large motor vehicle and pharmaceutical manufacturing sectors. However, the FEMA Assessment identified large investment planned by Honda in Swindon that is expected to support employment growth in the motor vehicle manufacturing sector. For this reason, HJA have adjusted the baseline forecasts to reduce the scale of decline in the manufacturing sector and sets the change in employment in the motor vehicle manufacturing sector to essentially zero.

- The adjusted projections produced by HJA adopted the higher growth forecast produced by CE for the retail sector to reflect the ongoing town centre regeneration activities in Swindon.
- The adjusted projections produced by HJA adopted the higher growth forecast produced by OE for the distribution and logistics sector on the basis of local evidence of enquiries and investment opportunities linked to the good transport infrastructure that strongly characterises Swindon.

6.15 These adjustments to the baseline forecast scenarios produced an adjusted forecast for Swindon that estimates future employment growth in the Borough that is above the baseline forecasts produced by CE and OE. A more detailed assessment of the baseline and adjusted forecasts for Swindon is undertaken in the following sections, including estimating the future B class employment space requirements that flow from these labour demand scenarios.

Scenario 1: Baseline Labour Demand

6.16 The forecasts obtained from CE and OE indicate total employment growth of between 8,100 and 9,600 jobs in Swindon over the period 2016 to 2036, which is equivalent to annual average growth of between 410 and 480 jobs. In this context, Table 6.1 shows the highest growing and declining sectors in Swindon over this period, with the majority of sectors forecast to see the highest growth classified as non B class sectors, with only professional services and finance defined as wholly B class. A full breakdown of the forecast job growth by sector in Swindon based on the baseline forecasts is included in Appendix 4.

Table 6.1 Highest Growing and Declining Employment Sectors in Swindon, 2016 - 2036

Sector	Use Class	Change (2016 - 2036)		
		CE	OE	Average
GROWING EMPLOYMENT SECTORS				
Professional Services	B Class	1,800	2,600	2,200
Administrative & Supportive Services	Part B Class	1,400	2,800	2,100
Accommodation & Food Services	Non B Class	1,900	800	1,400
Residential Care & Social Work	Non B Class	1,500	700	1,100
Specialised Construction Activities	Part B Class	1,100	700	900
Recreation	Non B Class	500	1,100	800
Other Private Services	Non B Class	600	900	800
Healthcare	Non B Class	500	1,000	700
Education	Non B Class	1,000	300	700
Land Transport, Storage & Post	Part B Class	100	1,100	600
Construction of Buildings	Non B Class	600	400	500
Retail	Non B Class	1,200	- 200	500
Finance	B Class	800	100	500

DECLINING EMPLOYMENT SECTORS				
Manufacturing	B Class	- 3,500	- 3,200	- 3,400
Public Administration & Defence	Part B Class	- 600	- 300	- 400
Wholesale	B Class	- 600	100	- 200

Source: Cambridge Econometrics / Oxford Economics / NLP analysis

6.17 The overall employment change in Swindon resulting from these forecasts is set out in Table 6.2, alongside the forecast growth in the main B class sectors. This includes an allowance for jobs in other non B class sectors that normally would occupy some office or industrial space, such as in construction, vehicle repairs, courier services, road transport and cargo handling, and some public administration activities (Appendix 6).

Table 6.2 Baseline Forecast Employment Change in Swindon, 2016 - 2036

Use	Number of Jobs		Change (2016 - 2036)
	2016	2036	
CAMBRIDGE ECONOMETRICS			
Offices (B1a/B1b)*	27,600	30,100	2,500
Manufacturing (B1c/B2)**	17,000	14,000	- 3,000
Distribution (B8)***	11,700	11,400	- 300
Total B Class Jobs	**56,300**	**55,500**	**- 800**
Total Jobs in All Sectors	**126,600**	**134,800**	**8,100**
OXFORD ECONOMICS			
Offices (B1a/B1b)*	30,300	34,300	4,000
Manufacturing (B1c/B2)**	15,200	12,400	- 2,800
Distribution (B8)***	12,500	13,300	800
Total B Class Jobs	**57,900**	**59,900**	**2,100**
Total Jobs in All Sectors	**126,600**	**136,200**	**9,600**

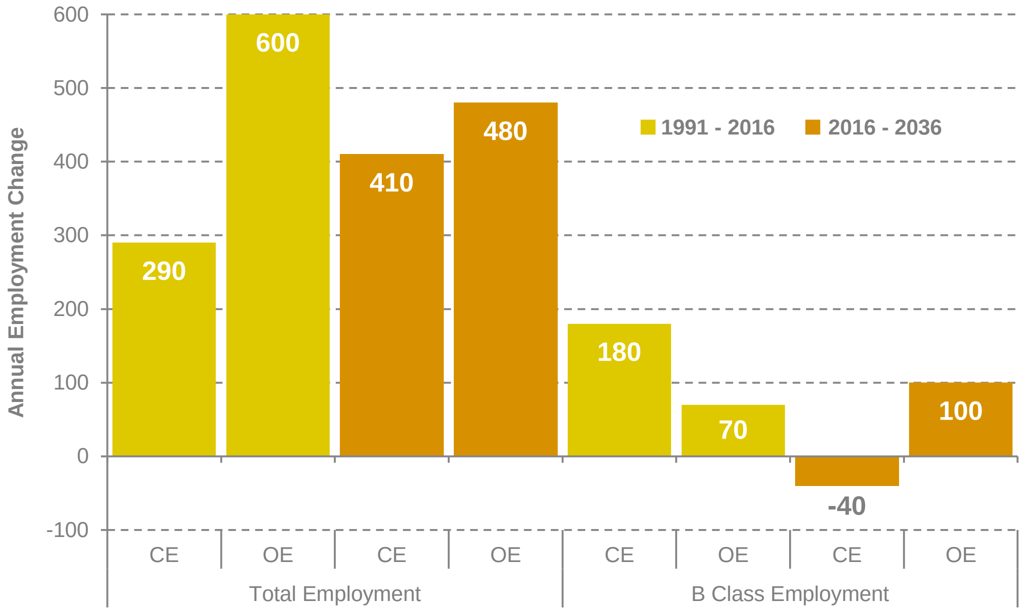
Source: Cambridge Econometrics / Oxford Economics / NLP analysis
Note: * Includes publishing and a proportion of government offices
** Includes vehicle repairs and some construction activities
*** Includes parts of transport and communication sectors that use industrial land

6.18 This analysis indicates a range of employment forecasts for B class sectors in Swindon over the period to 2036, with strong growth and decline forecast for office and manufacturing jobs respectively, and negligible change forecast for distribution jobs. This is in the context of total employment growth of between 8,100 and 9,600 jobs for the Borough during this period, which outside B class sectors will mainly be in accommodation & food services, residential care & social work, recreation, other private services, healthcare and education.

6.19 The forecast change in B class jobs in the Borough up to 2036 between a loss of 800 jobs and a gain of 2,100 jobs is equivalent to an annual average change between a loss of 40 jobs and a gain of 100 jobs over this period. As shown in

Figure 6.1, the forecast loss of B class jobs in Swindon estimated by CE contrasts with strong gains estimated by CE historically, while the forecast gain of B class jobs in Swindon estimated by OE represents a slightly higher growth rate than historically estimated by OE.

Figure 6.1 Historic vs Forecast Annual Employment Growth in Swindon, 1991 - 2036



Source: Cambridge Econometrics / Oxford Economics / NLP analysis

6.20 In addition, total employment growth in Swindon is forecast to be at a higher rate compared to historically by CE, while total employment growth is forecast to be at a lower rate compared to historically by OE. The CE forecasts indicate 410 new jobs will be created in the Borough each year on average up to 2036, which is about 40% higher than the annual average of 290 new jobs estimated by CE between 1991 and 2016. In addition, the OE forecasts indicate 480 new jobs will be created in the Borough each year on average up to 2036, which is about 25% lower than the annual average of 600 new jobs estimated by OE historically.

6.21 Overall, the baseline forecasts produced by CE and OE provide differing views of historic and forecast employment growth in Swindon. Although the growth projections estimate a similar rate of total employment growth in the Borough up to 2036, there are disparities between the forecasts in regard to employment growth in B class sectors. Given the differences between the growth forecasts, the baseline labour demand scenario could be regarded as either a relatively optimistic or pessimistic estimate of future growth in Swindon.

6.22 These employment projections can be converted to future B class employment floorspace requirements for Swindon by assuming the following standard ratios of jobs to floorspace for different types of B class uses:

- **Offices:** 1 job per 12.5sq.m for general office space.

- **Industrial:** 1 job per 43sq.m as an average for light industrial and general industrial uses.
- **Warehousing:** 1 job per 65sq.m for general, small scale warehouses (assumed to account for 20% of all requirements) and 1 job per 74sq.m for large scale, lower density warehouses (assumed to account for 80% of all requirements).

6.23 The assumptions are based on latest Homes & Communities Agency (HCA) guidance on job density ratios produced in 2015. The guidance takes account of recent trends in terms of changing utilisation of employment space, with the key change being the more efficient use of office floorspace due to the higher frequency of flexible working and hot-desking. This has resulted in a reduction in the amount of floorspace per office worker assumed compared to earlier guidance.

6.24 An allowance of 10% is also added to all positive space requirements to reflect a normal level of market vacancy in employment space. From this assessment, the net employment floorspace requirements in Swindon up to 2036 based on the baseline labour demand scenarios are set out in Table 6.3.

Table 6.3 Net Employment Floorspace Requirements based on Baseline Labour Demand, 2016 - 2036

Use	Net Floorspace Requirement (sq.m)	
	Cambridge Economics	Oxford Economics
Offices (B1a/B1b)	34,500	55,500
Manufacturing (B1c/B2)	- 64,400	- 60,200
Distribution (B8)	- 10,800	65,300
Total B Class Floorspace	**- 40,700**	**60,600**

Source: NLP analysis

Scenario 2: Adjusted Labour Demand

6.25 The adjusted forecasts produced by HJA as part of the FEMA Assessment suggests total employment growth of 15,000 jobs in Swindon over the period to 2036, which is equivalent to annual average growth of 750 jobs. In this context, Table 6.4 shows the highest growing and declining sectors in Swindon during this period, with most sectors forecast to see the highest growth defined as non B class sectors, with only professional services defined as being wholly B class in nature. A full breakdown of the employment growth by sector in Swindon based on the adjusted forecasts is included in Appendix 5.

6.26 The overall employment change in Swindon resulting from these forecasts is set out in Table 6.5, alongside the forecast growth in the main B class sectors. This includes an allowance for jobs in other non B class sectors that normally would occupy some office or industrial space, such as in construction, vehicle repairs, courier services, road transport and cargo handling, and some public administration activities (see Appendix 6).

6.27 This analysis indicates strong overall employment gains in B class sectors in Swindon over the period to 2036, with good growth in office jobs and negligible growth and decline in manufacturing and distribution jobs respectively. This is in the context of total employment growth of 15,000 jobs projected for Swindon over this period which outside B class sectors will mainly be in accommodation & food services, residential care & social work, retail, other private services and recreation.

Table 6.4 Highest Growing and Declining Employment Sectors in Swindon, 2016 - 2036

Sector	Use Class	Change (2016 - 2036)	
		Adjusted	Baseline Average
HIGHEST GROWING EMPLOYMENT SECTORS			
Professional Services	B Class	2,900	2,200
Administrative & Supportive Services	Part B Class	2,700	2,100
Specialised Construction Activities	Part B Class	1,900	900
Accommodation & Food Services	Non B Class	1,500	1,400
Residential Care & Social Work	Non B Class	1,400	1,100
Retail	Non B Class	1,400	500
Other Private Services	Non B Class	1,100	800
Recreation	Non B Class	1,000	800
HIGHEST DECLINING EMPLOYMENT SECTORS			
Manufacturing	B Class	- 2,000	- 3,400
Public Administration & Defence	Part B Class	- 500	- 400
Agriculture, Forestry & Fishing	Non B Class	- 400	- 200

Source: Hardisty Jones Associates Ltd / NLP analysis

Table 6.5 Adjusted Forecast Employment Change in Swindon, 2016 - 2036

Use	Number of Jobs		Change (2016 - 2036)
	2016	2036	
Offices (B1a/B1b)*	34,700	39,000	4,300
Manufacturing (B1c/B2)**	19,400	18,400	- 900
Distribution (B8)***	14,600	15,500	800
Total B Class Jobs	**68,700**	**72,900**	**4,200**
Total Jobs in All Sectors	**156,800**	**171,900**	**15,000**

Source: Hardisty Jones Associates Ltd / NLP analysis
Note: * Includes publishing and a proportion of government offices
** Includes vehicle repairs and some construction activities
*** Includes parts of transport and communication sectors that use industrial land

6.28 The forecast increase of 4,200 B class jobs in the Borough up to 2036 is equivalent to annual average growth of 210 B class jobs over this period. This

B class job growth compares with the growth of between 70 and 180 B class jobs on average each year between 1991 and 2016 that was estimated by CE and OE respectively. This suggests that the adjusted projections for Swindon anticipate B class sectors to perform better in the Borough compared to the historic levels estimated by the baseline forecast scenarios.

6.29 In addition, overall employment growth in Swindon is forecast to be at a much higher rate compared to the rate of growth estimated by the baseline forecasts respectively between 1991 and 2016. The adjusted forecasts indicate 750 new jobs will be created in Swindon each year on average up to 2036, which is significantly higher than the 290 to 600 jobs each year estimated to be created historically by CE and OE respectively. This point towards the adjusted labour demand scenario providing an optimistic estimate of future employment growth in Swindon compared to historic levels.

6.30 These employment forecasts can be converted to future B class employment floorspace requirements for Swindon by assuming the same standard ratios of jobs to floorspace for different types of B class uses as set out above. An allowance is also added to all positive space requirements to reflect a normal rate of market vacancy. From this assessment, the net employment floorspace requirements in Swindon up to 2036 based on the adjusted labour demand scenario are set out in Table 6.6.

Table 6.6 Net Employment Floorspace Requirements based on Adjusted Labour Demand, 2016 - 2036

Use	Net Floorspace Requirement (sq.m)
Offices (B1a/B1b)	58,700
Manufacturing (B1c/B2)	- 19,900
Distribution (B8)	66,800
Total B Class Floorspace	**105,600**

Source: NLP analysis

B. Past Development Rates

6.31 Given they reflect market demand and development patterns on the ground, in some cases long term completion rates of B class employment space can offer a good basis for informing future land needs. The completion of employment space over such a period as ten years should even out demand fluctuations in a business cycle and provide a reasonable basis for estimating future needs, given that land supply has not been constrained. Although forecasts show job growth in net terms past trend based analyses take account historic patterns in employment floorspace development and the role that recycling of sites plays in terms of supporting employment uses in an economy.

Scenario 3: Past Completion Rates

6.32 Past completions monitoring data by B class use was provided by Swindon Borough Council for the period 1996 to 2014, with monitoring data on losses of B class employment space only available from 2008 onwards. The analysis of net completions in Swindon can therefore only be considered during the period 2008 to 2014, during which the Borough recorded an average annual net completion of employment space equivalent to 20,400sq.m. Table 6.7 shows that gross completions of employment space was higher in the Borough over the period 1996 to 2014, although this masks the losses of employment space that also occurred over this monitoring period.

Table 6.7 Annual B Class Floorspace Completions in Swindon, 1996 - 2014

Use	Gross Annual Completions (sq.m)	Net Annual Completions (sq.m)*	
		Total	Revised
Offices (B1a/B1b)	5,200	300	300
Industrial (B1c/B2/B8)	23,600	20,000	9,400
Total B Class Floorspace	**28,800**	**20,400**	**9,800**

Source: Swindon Borough Council / NLP analysis

Note: * Monitoring data showing losses of B class employment space in Swindon was only available from 2008 onwards, meaning net completions for the Borough could only be considered using data from this shortened monitoring period.

6.33 The most significant gain of B class employment space over this period was the development of 74,000sq.m of industrial floorspace relating to the B&Q Distribution Centre at G Park in 2012. This single development represents around 45% of the total gross industrial floorspace developed in Swindon over the period 2008 to 2014, which acts to skews the net annual completions data for the Borough. For this reason, this analysis has estimated a revised net annual completions rate for industrial space in Swindon that removes this large industrial development from the data to provide a more accurate view of recent market trends. As set out in Table 6.7, this results in an average annual net completion rate for B class employment space in Swindon of 9,800sq.m.

6.34 One view of future growth in Swindon could therefore simply assume that past completion rates carry on at the long term average. If it were assumed that the revised net completion rates for the Borough were to continue over the period 2016 to 2036, this would amount to an increase of 7,000sq.m of office space and 188,800sq.m of industrial space (Table 6.8). The B class employment floorspace requirement associated with this scenario is therefore higher than the baseline and adjusted labour demand scenarios, although the significant requirement for industrial space estimated under this scenario masks a slightly lower requirement for office space compared to the labour demand scenarios.

Table 6.8 Net Employment Floorspace Requirements based on Past Completion Rates, 2016 - 2036

Use	Assumed Net Annual Completions (sq.m)	Net Floorspace Requirement (sq.m)
Offices (B1a/B1b)	300	7,000
Industrial (B1c/B2/B8)	9,400	188,800
Total B Class Floorspace	**9,800**	**195,800**

Source: NLP analysis

6.35 Using the standard ratios of jobs to floorspace set out earlier, as well as an average between the baseline employment forecasts produced by CE and OE, it is possible to estimate that 3,600 B class jobs would be created in Swindon up to 2036 under the past completion rates scenario. The growth associated with the scenario is equivalent to an increase of 180 B class jobs each year on average during this period, which is similar to the annual average B class employment growth estimated by the labour demand scenarios for Swindon.

C. Future Labour Supply

6.36 The number of jobs and the associated requirement for employment space that would be necessary to match the forecast growth of the resident workforce in Swindon is also an important consideration. In contrast to the other scenario approaches, this approach emphasises the future supply of labour rather than the demand for labour. It identifies the number of jobs that would be required to match the future supply of working-age persons, as well as the amount of new employment space required to support these new B class jobs.

Scenario 4: Labour Supply

6.37 The labour supply scenario has been assessed based on population forecasts used in the draft Swindon and Wiltshire Strategic Housing Market Assessment (SHMA) (2016) produced by HJA. These population forecasts indicate growth of local residents that are economically active in Swindon of about 21,000 over the period 2016 to 2036.

6.38 An adjustment factor for commuting patterns has been applied by NLP based on the latest 2011 Census travel to work data. These commuting trends for the Borough are assumed to remain the same over the period to 2036, meaning Swindon is assumed to continue operating as a very small net exporter of labour during this period. In this context, Table 6.9 summarises the expected growth in the resident and workplace labour supply resulting from the scenario, with the slightly lower workplace labour supply growth in Swindon reflecting Borough's role as a net exporter of labour.

Table 6.9 Forecast Labour Supply and B Class Job Requirements for Swindon, 2016 - 2036

Use	Population and Job Change (2016 - 2036)	
	Annual	Total
Resident Labour Supply	1,050	21,000
Workplace Labour Supply	1,040	20,800
Offices Jobs (B1a/B1b)	*310*	*6,100*
Manufacturing Jobs (B1c/B2)	*- 80*	*- 1,700*
Distribution Jobs (B8)	*70*	*1,400*
Total B Class Jobs	**290**	**5,800**
Total Non B Class Jobs	**750**	**15,100**

Source: Hardisty Jones Associates Ltd / NLP analysis Note: totals rounded

6.39 The number of jobs required to support an increase in economically active persons in the Borough assumes one additional job would be required for each additional person. The share of employment in B class sectors takes account the existing and forecast share of B class jobs to total jobs in Swindon using an average between the baseline employment forecasts produced by CE and OE.

6.40 Table 6.9 also summarises the need for B class jobs in Swindon to support the projected increase in the workplace labour supply up to 2036. This analysis suggests a need for 290 new B class jobs in Swindon each year to support the labour supply growth in the Borough during this period, with a strong need for office jobs estimated under this scenario, alongside a moderate need for distribution jobs and a declining need for manufacturing jobs.

6.41 The forecast requirement for employment floorspace for these B class jobs can then be estimated by applying the same job density ratios set out above, while also adding a 10% allowance for typical vacancy levels. From this analysis, the net employment floorspace requirements for Swindon over the period to 2036 based on the labour supply scenario are set out in Table 6.10.

Table 6.10 Net Employment Floorspace Requirements based on Labour Supply, 2016 - 2036

Use	Net Floorspace Requirement (sq.m)
Offices (B1a/B1b)	83,900
Manufacturing (B1c/B2)	- 36,200
Distribution (B8)	107,900
Total B Class Floorspace	**155,600**

Source: NLP analysis

6.42 This labour supply scenario provides a useful benchmark for comparing with the demand approaches. Based on the population projections used in the draft Swindon and Wiltshire SHMA, this scenario generates a positive B class employment space requirement that is significantly higher than both the labour demand scenarios and the past completion rates scenario.

Summary of Net Employment Space Requirements

6.43 Drawing together the results from each of the future growth scenarios for Swindon, the net B class employment floorspace requirements for the Borough over the period 2016 to 2036 reflect a range of potential scenarios. For office floorspace, the requirements range from 7,000sq.m to 83,900sq.m, while for industrial floorspace, the requirements range from a loss of 75,200sq.m to gain of 188,800sq.m (Table 6.11).

Table 6.11 Net Employment Floorspace Requirements for Swindon by Scenario, 2016 - 2036

Use	1. Baseline Labour Demand		2. Adjusted Labour Demand	3. Past Completion Rates	4. Labour Supply
	Cambridge	Oxford			
Offices (B1a/B1b)	34,500	55,500	58,700	7,000	83,900
Industrial (B1c/B2/B8)	- 75,200	5,100	46,900	188,800	71,700
Total B Class Floorspace (sq.m)	**- 40,700**	**60,600**	**105,600**	**195,800**	**155,600**

Source: NLP analysis

6.45 The net B class employment floorspace requirements for Swindon represent the minimum recommended amount of floorspace that should be planned for in the Borough over the period to 2036. The Council will need to take a view on the extent to which additional space should be planned for over and above the net requirements, in order to allow for such factors as delays in development sites coming forward, an allowance for replacement of ongoing losses of employment space during the Local Plan period, and other relevant factors in the local market. These various factors are considered in further detail below.

Conversion to Gross Employment Space Requirements

6.46 To convert the net employment floorspace requirements for Swindon to gross floorspace requirements (i.e. the amount of floorspace that should be allocated or planned for in the Borough during the period to 2036), this study applies two types of allowance to the net requirements to achieve the following:

1. allow for some additional flexibility in planning for future B class employment space; and
2. offset any potential future losses of existing B class employment space to other non B class uses.

6.47 The effect of these two allowances to the amount of employment floorspace that should be planned for in Swindon is considered in turn below. It should be noted the allowances set out in this study only represent recommendations by NLP based on market feedback, with the actual amount of gross employment floorspace that should be planned for ultimately representing a policy choice for the Council. This is particularly in the context of changing market dynamics and policy aspirations for Swindon that could influence the quantum of gross B class employment space that is most suitable to be planned for up to 2036.

Safety Margin

6.48 The application of a safety margin is intended to allow for some flexibility of provision while avoiding over-provision of space and reflects the fact that there could be potential delays in employment sites coming forward for development in the Borough.

6.49 The former South East of England Partnership Board (SEEPB) guidance on employment land assessments recommends an allowance that is equivalent to the average time for a site to gain planning permission and be built-out, which typically equates to two years. In the absence of more up-to-date Government guidance, the recommendation has been broadly applied to the assessment of employment space requirements for Swindon, with two years of average net completions used as the safety margin allowance.

6.50 In this way, the average annual net completion levels for office and industrial floorspace in Swindon during the period 2008 to 2014 is set out in Table 6.12, alongside the safety margin allowance adopted in this study.

Table 6.12 Safety Margin Allowance for Swindon

Use	Average Annual Net Completion Rates (sq.m)	Safety Margin Allowance (sq.m)
Offices (B1a/B1b)	300	700
Industrial (B1c/B2/B8)	9,400	18,900

Source: NLP analysis

Future Losses Replacement

6.51 An allowance is also made for the replacement of some losses of existing B class employment space in Swindon over the period 2016 to 2036 to provide a degree of protection against the erosion of employment space to other non B class uses. A judgement has to be made as to the suitability and degree to which a future losses replacement allowance should be applied taking account recent trends in the local market. It should be noted that not all future losses of employment space will need to be replaced as some will reflect restructuring in the local economy (e.g. the decline in the need for manufacturing space).

6.52 Analysis of past completions monitoring data provided by Swindon Borough Council over the period 2008 to 2014 suggests Swindon has lost an average of 2,800sq.m of office floorspace and 3,800sq.m of industrial floorspace each year over the monitoring period. Given there is no way of knowing how much B class employment floorspace will be lost in the Borough in the future these past trends have been used as a proxy for the scale of annual floorspace losses that could occur up to 2036.

6.53 Based on a range of market dynamics in Swindon, it is considered to not be appropriate to replace all office and industrial floorspace losses in the Borough in the future. For this reason, the study assumes 15% of office losses recorded over the past monitoring period for Swindon (which excludes other losses associated with office-to-residential conversions) are replaced during the period to 2036, which equates to replacing 8,300sq.m of office floorspace, or 400sq.m each year on average. In terms of industrial losses, this study assumes 25% of industrial losses will need to be replaced through this period, which is equivalent to a replacement of 19,000sq.m of industrial floorspace, or 950sq.m each year on average.

6.54 These allowances do not appear to be excessive in the context of the net employment floorspace requirements estimated for Swindon, and they provide a reasonable guide for the purposes of planning for employment space in the Borough during the period to 2036. However, the Council will need to carefully monitor any future losses of employment space in Swindon, particularly in the context of office to residential conversions via permitted development rights (PDR) that will continue to have an impact on the local supply of office floorspace in the Borough.

Summary of Gross Employment Space Requirements

6.55 Based upon the safety margin and future losses replacement allowances for office and industrial floorspace in Swindon during the period 2016 to 2036, the resulting gross requirements for B class employment floorspace are outlined in Table 6.13. For office floorspace, the requirements range from 16,000sq.m to 92,900sq.m, whilst for industrial floorspace, the requirements range from a loss of 37,300sq.m to a gain of 226,700sq.m

Table 6.13 Gross Employment Floorspace Requirements for Swindon by Scenario, 2016 - 2036

Use	1. Baseline Labour Demand		2. Adjusted Labour Demand	3. Past Completion Rates	4. Labour Supply
	Cambridge	Oxford			
Offices (B1a/B1b)	43,500	64,500	67,700	16,000	92,900
Industrial (B1c/B2/B8)	- 37,300	42,900	84,700	226,700	109,600
Total B Class Floorspace (sq.m)	**6,200**	**107,400**	**152,400**	**242,600**	**202,500**

Source: NLP analysis

Conversion to Land Requirements

6.57 The gross office and industrial floorspace requirements for Swindon can then be converted into land requirements by using the following plot ratio assumptions:

- **Offices:** 50% of new office floorspace would be in lower density, out-of-centre sites with a plot ratio of 0.4, while 50% would be in higher density, town centre sites with a plot ratio of 2.0.
- **Industrial:** plot ratio of 0.4 was applied so a 1ha industrial site would be necessary to support a building footprint with 4,000sq.m of floorspace.

6.58 In respect of the plot ratio assumptions applied to the office space in Swindon, the share of new space developed in town centre and out-of-centre locations in the Borough will ultimately be a policy choice for the Council. However, based on the application of these plot ratios to the forecast gross office and industrial floorspace requirements for Swindon over the period to 2036, the resulting land requirements for the Borough are set out in Table 6.14.

Table 6.14 Land Requirements for Swindon by Scenario, 2016 - 2036

Use	1. Baseline Labour Demand		2. Adjusted Labour Demand	3. Past Completion Rates	4. Labour Supply
	Cambridge	Oxford			
Offices (B1a/B1b)	6.5	9.7	10.2	2.4	13.9
Industrial (B1c/B2/B8)	- 9.3	10.7	21.2	56.7	27.4
Total B Class Land (ha)	**- 2.8**	**20.4**	**31.3**	**59.1**	**41.3**

Source: NLP analysis

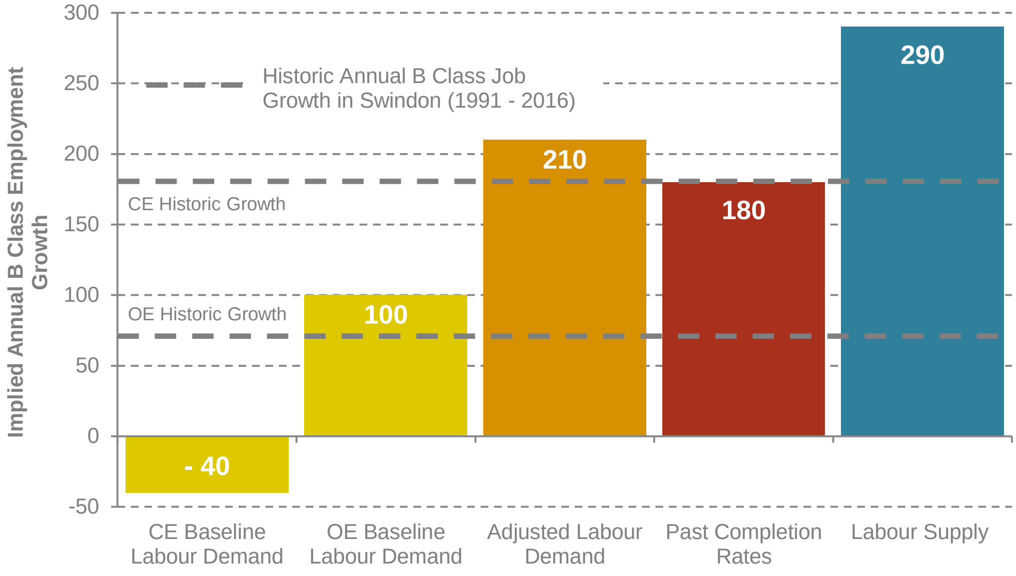
Historic Benchmarking

6.60 Given the breadth of the potential requirements for office and industrial space in Swindon from the growth scenarios, it is important to consider how suitable each requirement appears to be against historic growth trends in the Borough. In this context, it is useful to compare the employment growth implied by the estimated space requirements under each scenario against the historic employment growth recorded in Swindon over recent periods.

6.61 As illustrated in Figure 6.2, the analysis indicates the lowest estimate of B class employment growth for Swindon is based on the baseline labour demand scenario using the forecasts produced by CE, which implies a decrease of 40 B class jobs per year over the period to 2036. This implied employment growth includes strong gains in office jobs offset by strong losses in industrial jobs. In the same way, the highest estimate of B class employment growth for Swindon is based on the labour supply scenario, which implies a growth of 290 B class jobs per year up to 2036. This implied employment growth includes strong gains in office jobs and minor gains in industrial jobs.

6.62 The range of implied B class employment growth in Swindon associated with the growth scenarios compares with the annual average growth of between 70 B jobs between 1991 and 2016 based on the forecasts produced by OE and 180 B class jobs based on the forecasts produced by CE. This suggests that only the adjusted labour demand scenario, past completion rates scenario and labour supply scenario predict higher B class employment growth in Swindon compared to the historic levels estimated by the CE forecasts, while only the baseline labour demand scenario based on the employment forecasts produced by CE predicts a lower B class employment growth in the Borough compared to the historic level estimated by the employment forecasts from OE.

Figure 6.2 Annual B Class Employment Growth Implied by the Scenarios for Swindon, 2016 - 2036



Source: NLP analysis

Note: The estimated B class job growth under each scenario is based upon the net B class floorspace requirements and do not take into account the additional floorspace associated with the safety margin and replacement allowance, which are identified for planning purposes only and may not actually be developed in the future.

Summary

6.63 The following key findings and conclusions can be drawn:

1. Regard should be had to guidance from the PPG when interpreting the outputs of this section, with the PPG stating that local authorities should develop an idea of the future economic needs of their area based on a range of data and forecasts of quantitative and qualitative requirements. In this respect, planning for growth should avoid relying on using single sources of data or projections, which tend to rely on different variables that are inevitably subject to change.
2. Modelling assumptions under any of the future scenarios of growth in Swindon will inevitably have uncertainties and limitations. For example, there are some inherent limitations to the use of local level economic forecasts, particularly in the context of significant recent changes in the economy and the outcome of the UK referendum on membership of the European Union. Such forecasts are regularly updated and the resulting outputs will change over the course of the period to 2036.
3. Various scenarios of future employment space requirements in Swindon during the period 2016 to 2036 have been considered based upon a number of approaches that reflect economic growth, completion rates and labour supply factors. The labour demand forecasts indicate a potential change in total B class jobs between 2016 and 2036 of a loss of 800 jobs (CE), a gain of 2,100 jobs (OE) and a gain of 4,200 jobs (HJA based on adjustments to CE and OE). All three scenarios point to growth in office-based jobs ranging between 2,500 jobs and 4,300 jobs, and

losses of manufacturing jobs ranging between 900 jobs and 3,000 jobs over the twenty year period. There are some differences in terms of distribution jobs, with OE and HJA forecasting growth of 800 jobs compared to a loss of 300 jobs by CE. The labour supply scenario indicates a higher level of B class job growth (5,800 jobs), with gains across office uses (6,100) and distribution uses (1,400), and losses in industrial uses (- 1,700).

4 The gross employment floorspace requirements related to these scenarios, and past completion rates, range from a gain of **6,200sq.m** to **242,600sq.m** up to 2036, which implies a need for between a loss of **2.8ha** to a gain of **59.1ha** of employment land. Under the majority of the scenarios most of the spatial requirements relate to industrial uses given they typically have greater space requirements per worker than office uses.

5 Given the identified limitations of the economic forecasts used as the basis for the baseline labour demand scenarios by HJA in preparing the draft Swindon and Wiltshire FEMA Assessment, the growth scenarios based solely on the baseline economic forecasts would appear to provide a less robust basis for assessing the employment space requirements for planning for growth in the Borough. In comparison to the other growth scenarios for Swindon, the baseline labour demand scenarios estimate much lower levels of need for employment space in the Borough to 2036.

6 The adjusted labour demand scenario provides a higher requirement for B class employment space in Swindon, which takes into account the revisions made by HJA to the baseline economic forecasts produced by CE and OE. This future growth scenario effectively identifies the indigenous growth potential of the Borough up to 2036, while the slightly higher requirements from the past completion rates scenario shows the implications of the Borough importing a degree of footloose investment notably by attracting major industrial developments to the Borough.

7 The Council could also consider planning to accommodate the higher requirement from the labour supply scenario which implies a much higher B class employment growth rate over the period to 2036 than the other growth scenarios. This significant requirement for employment space under this scenario reflects the strong projected population growth in the Borough over this period, which implies a significant need for new employment opportunities in the local economy.

7.0 Demand / Supply Balance

7.1 This section draws together the forecast requirements for B class employment land in the Borough with estimates of the amount of allocated employment land that is available for development to identify any need for additional employment land in Swindon over the period to 2036, or surpluses of it, in both quantitative and qualitative terms.

Quantitative Balance

Demand for Employment Land

7.2 Based on a variety of scenarios, Section 6.0 identified a potential requirement for between 6,200sq.m and 242,600sq.m of gross B class employment floorspace in Swindon during the period to 2036. These gross floorspace requirements converted to land requirements ranging between a loss of 2.8ha and a gain of 59.1ha. In this context, it is clear the forecast growth scenarios for Swindon reflect wide variations in the level of future growth that could be generated in the Borough. The current supply of employment land in Swindon is considered in this context.

Supply of Employment Land

7.3 The supply of employment land in Swindon comprises the allocations set out in Policy SD2: The Sustainable Development Strategy of the Swindon Borough Local Plan 2026 (2015). These employment designations include the following:

- About 38ha of employment land with extant planning permission or allocations carried forward from the Swindon Borough Local Plan 2011 (2026); and
- About 68ha of additional employment land allocated in the Local Plan 2026 to deliver a range of sites that supports employment growth in the Borough.[8]

7.4 In total, these allocations provide in the order of 105ha of employment land in Swindon to support employment growth in the Borough during the plan period for the Local Plan 2026.[9] However, a significant share of this allocated employment land has now been developed, and with 35% currently under development at the time of drafting. This reflects significant levels of take-up in the Borough, with a sizeable share of the total employment land allocations for Swindon already under development (Table 7.1).

7.5 On this basis, approximately 60ha of allocated employment land in Swindon is estimated to be currently available for development although about 33ha of this

[8] Excludes 5.0 ha allocation identified at Highworth outside of the Swindon urban area, 5.0 ha Tadpole Farm which will be taken forward for educational uses, as well as some revisions to site areas which have been made since the Local Plan was adopted.
[9] In addition to employment land allocations, the Local Plan makes general provision for 90,000 sq.m of B1 office floorspace within the Swindon Central Area. This is not included within the demand/supply analysis set out in this section.

remaining undeveloped land has identified barriers to delivery that diminishes their likelihood to come forward for development in the short term. These barriers include upfront infrastructure and site preparation costs, viability issues, and land owner aspirations for alternative uses. Therefore, only about 27ha of the allocated employment land in the Borough is considered to be available and deliverable for development in Swindon over the short term (Table 7.1).

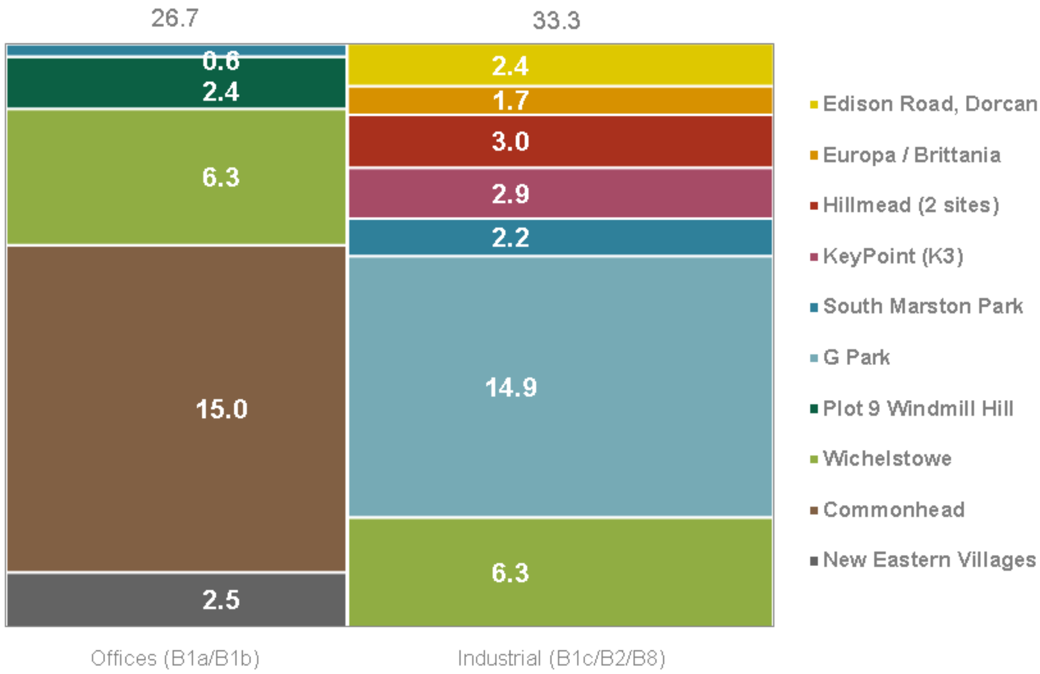
Table 7.1 Development Status of Allocated B Class Employment Land in Swindon

Site	Allocated Use	Site Status (ha)			Total Allocation (ha)
		Under Development	Available for Development	Sites with Delivery Challenges	
Edison Road, Dorcan	Industrial	-	2.4	-	**2.4**
Europa / Brittania	Industrial	-	1.7	-	**1.7**
Hillmead (2 sites)	Industrial	5.0	-	3.0	**8.0**
KeyPoint (K3)	Industrial	-	2.9	-	**2.9**
South Marston Park	Office / Industrial	-	2.8	-	**2.8**
G Park	Industrial	-	14.9	-	**14.9**
Plot 9 Windmill Hill	Office	-	-	2.4	**2.4**
Other Sites	Office / Industrial	2.7	-	-	**2.7**
Land with Extant Planning Permission or Allocations in the Local Plan 2011		**7.7**	**24.7**	**5.4**	**37.8**
Wichelstowe	Office / Industrial	-	-	12.5	**12.5**
Commonhead	Office	-	-	15.0	**15.0**
New Eastern Villages	Office / Industrial	37.5	2.5	-	**40.0**
Land Allocated in the Local Plan 2026		**37.5**	**2.5**	**27.5**	**67.5**
Total		**45.2**	**27.2**	**32.9**	**105.3**

Source: Swindon Borough Council / NLP analysis

7.6 Of the 60ha of allocated employment land that is currently available, 26.7ha is identified for office uses and 33.3ha is identified for industrial uses. As illustrated in Figure 7.1, the most significant undeveloped Local Plan employment allocations include 15.0ha of office land allocated at Commonhead and 12.5ha of mixed office/industrial land at Wichelstowe. These two allocations provide about 45% of the total undeveloped employment land in the Borough. However, both of these large allocations have delivery issues in the short term namely relating to access. Another key implication is that there are no sites of significant scale available for industrial uses, with many comprising relatively small undeveloped plots within existing sites.

Figure 7.1 Undeveloped Office and Industrial Land Allocations in Swindon



Source: Swindon Borough Council / NLP analysis

Employment Land Balance

7.7 A broad comparison of the estimated demand for B class employment land in Swindon with the identified supply from undeveloped employment allocations in the Borough is set out in Table 7.3.

7.8 This comparison implies the Borough would have sufficient employment land in quantitative terms up to 2036 to meet the requirements arising from all scenarios, with the potential surplus ranging from 0.9ha for the past completion rates scenario to 62.6ha for the labour demand scenario based on the CE forecasts.

Table 7.2 Demand / Supply Balance of B Class Employment Land in Swindon up to 2036

Use	1. Baseline Labour Demand		2. Adjusted Labour Demand	3. Past Completion Rates	4. Labour Supply
	Cambridge	Oxford			
Requirements for B Class Land	- 2.8	20.4	31.3	59.1	41.3
Potential Supply of B Class Land	60.0				
Surplus / Shortage (ha)	**62.8**	**39.6**	**28.7**	**0.9**	**18.7**

Source: NLP analysis

7.10 The availability of a choice of sites in a market is also important for meeting the needs of different employment sectors in the Borough, particularly in terms of accommodating a diversity of employment opportunities across a range of different skill sets. The potential supply of employment land in Swindon for both office and industrial uses is therefore compared with the estimated need for these uses under each of the future growth scenarios.

7.11 In this context, the analysis indicates there would be a sufficient supply of undeveloped employment land in Swindon during the period to 2036, purely in quantitative terms, to meet the requirements for office uses for all the future growth scenarios. The surplus amount of office land in the Borough during this period would range from 12.8ha for the labour supply scenario to 24.3ha for the past completion rates scenario (Table 7.4).

Table 7.3 Demand / Supply Balance of B Class Employment Land in Swindon up to 2036

Use	1. Baseline Labour Demand		2. Adjusted Labour Demand	3. Past Completion Rates	4. Labour Supply
	Cambridge	Oxford			
OFFICES					
Requirements for B Class Land	6.5	9.7	10.2	2.4	13.9
Potential Supply of B Class Land	26.7				
Surplus / Shortage (ha)	**20.2**	**17.0**	**16.5**	**24.3**	**12.8**
INDUSTRIAL					
Requirements for B Class Land	- 9.3	10.7	21.2	56.7	27.4
Potential Supply of B Class Land	33.3				
Surplus / Shortage (ha)	**42.6**	**22.6**	**12.1**	**- 23.4**	**5.9**

Source: NLP analysis

7.13 In terms of industrial uses, the analysis also indicates there would be sufficient employment land to support the demand arising from all of the scenarios (a surplus between 5.9 and 42.6 ha) except for the past completion rates scenario where a deficit of 23.4ha would arise.

7.14 It should be noted that this demand and supply assessment assumes that all allocated B class employment land in the Borough that has yet to be developed will come forward for development by 2036. However, as noted earlier, some of these allocations have significant delivery issues that could affect their ability to come forward through this period. Any deviation from the assumption that all undeveloped employment land in the Borough will be available and deliverable over the period to 2036 will influence the demand and supply balance for office and industrial land in Swindon. The large undeveloped employment allocations at Commonhead and Wichelstowe, which together provide around 80% of the undeveloped office land and 30% of the undeveloped industrial land in the Borough, are particularly significant in this respect.

7.15 To illustrate the sensitivity of the future demand and supply balance to whether the current employment allocations are delivered, Table 7.5 presents a 'worst case' supply position based on only the sites currently identified as being available for development coming forward (and assuming no other land is allocated). This would effectively mean a shortage of land to meet future office needs across the majority of scenarios (excluding office capacity in the town centre), and shortfalls of industrial land under the two highest growth estimates.

Table 7.4 'Worst Case' Demand / Supply Balance of B Class Employment Land in Swindon up to 2036

Use	1. Baseline Labour Demand		2. Adjusted Labour Demand	3. Past Completion Rates	4. Labour Supply
	Cambridge	Oxford			
OFFICES					
Requirements for B Class Land	6.5	9.7	10.2	2.4	13.9
Available Supply of B Class Land	3.1				
Surplus / Shortage (ha)	**- 3.4**	**- 6.6**	**- 7.1**	**0.7**	**- 10.8**
INDUSTRIAL					
Requirements for B Class Land	- 9.3	10.7	21.2	56.7	27.4
Available Supply of B Class Land	24.0				
Surplus / Shortage (ha)	**33.3**	**13.3**	**2.8**	**- 32.7**	**- 3.4**

Source: NLP analysis

Qualitative Balance

7.17 Alongside the quantitative need for B class employment space in Swindon over the period to 2036, the Borough would also need additional employment space for more qualitative reasons. This includes for the following reasons:

1 improve the choice of provision for occupiers;

2 meet gaps in the supply of particular types of premises;

3 enhance or modernise the quality of the existing provision, which will help to attract more occupiers; and

4 provide a better spatial distribution of employment sites to meet the needs of different areas of the Borough.

Office Market

7.18 Although the office market in Swindon has been characterised by reasonable levels of demand over recent periods, a notable lack of new office development has taken place in the local market during recent years. This lack of new office development in the Borough has been coupled with a gradually eroding office stock as more space has been lost than gained. Whilst this has mainly involved the loss of poorer quality, functionally obsolete office space in the town centre, this trend has constrained the stock of office space in Swindon while the recently introduced Permitted Development Rights (PDR) for changes of use from office to residential use has already begun to accelerate this trend further in the office market for Swindon.

7.19 The majority of recent office take-up in Swindon has occurred in out-of-centre office locations, characterised by better quality accommodation and higher rental values compared with the supply of mainly older offices in the town centre. In this context, feedback from local property agents indicates a need to deliver more modern ‘Grade A’ office space in Swindon town centre to help ensure this part of the office market is sufficiently catered for, including existing occupiers seeking to expand or new firms seeking a more central location. Delivery of the Kimmerfields project which has outline planning permission for c. 65,000 sq.m of office space as part of a mixed-use scheme represents the most immediate opportunity, albeit which has so far failed to come forward. However, it should be recognised that there will also remain demand for out-of-centre locations which are attractive to occupiers who want efficient access to the strategic road network.

Industrial Market

7.20 Swindon is considered to be a strong industrial location, attracting a good level of demand for industrial space. Take-up in recent years has been particularly characterised by large-scale distribution uses. The low vacancy in the local market reflects the limited supply of available industrial space in the Borough, particularly in terms of good quality, modern space. In this context, property agents indicate that they are unable to satisfy demand for a variety of sizes of industrial premises in the Borough, with a particular shortage of good quality, large premises in the local industrial market.

7.21 This lack of supply limits the potential for expansion and movement of existing businesses in Swindon, while it may also lead to some footloose investment being diverted from the Borough, as firms cannot be accommodated within its boundaries. In order to ensure the local industrial market in Swindon is able to capture these opportunities during the period to 2036, as well as retain current industrial businesses as they grow and expand, market feedback points towards the need for new industrial development in Swindon over the next few years to increase the level of provision and choice in the local market.

7.22 Feedback from property agents suggests that the best location to support new industrial developments in Swindon would be in and around the eastern area of Swindon town in close proximity to Junction 15 of the M4. This part of the Borough benefits from excellent access to the strategic road network as well as being in close proximity to established and strong performing industrial estates. The delivery of industrial developments in the Borough would enable churn and support the requirements of local industrial occupiers who want to relocate to new industrial premises in more strategic parts of the Borough.

Summary

7.23 The following key findings and conclusions can be drawn:

1. Based on the supply of B class employment land in Swindon from allocated office and industrial land that remain undeveloped the demand and supply balance for the Borough suggests there is a sufficient supply of employment land in quantitative terms to meet the future office needs under all the future growth scenarios, whilst there would be a shortage to meet future industrial needs under the past completion rates scenario.
2. However, there are barriers to delivering a significant proportion of the presently allocated employment land supply, which will limit availability at least in the short term. These barriers include up-front infrastructure needs, site preparation costs, and landowner aspirations for alternative uses. If these sites were not to come forward for future development, or be significantly delayed, the demand and supply balance for employment land would deteriorate significantly and result in shortages under a number of the growth scenarios.
3. From a more qualitative perspective, the lack of new office development in Swindon during recent years, coupled with an ageing stock in Swindon town centre, has constrained activity in the local office market, whilst the recently introduced Permitted Development Rights (PDR) for change of use from office to residential has already started to accelerate the historic trend of office losses. There is therefore a need to ensure that new office space is delivered in Swindon in both town centre locations and out-of-centre locations to support the various types of office occupiers that demand space in the Borough.
4. Swindon is perceived as a strong industrial location with a good level of demand for industrial space, with take-up during recent years particularly characterised by large-scale distribution uses. However, the feedback from local property agents suggests many enquiries for industrial space are not able to be met by the current availability within the market, which points toward a need to deliver additional industrial space in the Borough. In this context, there is a risk that potential economic opportunities will be diverted from the Borough, and the growth potential of existing occupiers

in the market will be constrained, unless new industrial developments can be accommodated in the future.

8.0 Conclusions and Policy Implications

8.1 This section draws together the overall conclusions of the study and considers potential policy approaches to delivering appropriate levels of employment space in Swindon over the period to 2036, as well as other measures that may be required to support the economic growth objectives of the Borough.

Economic Characteristics

8.2 Swindon is located at the heart of the M4 corridor, which provides the Borough with excellent access to much of the UK. The strategic transport connections that characterise Swindon represent a key strength for the Borough as a business location, particularly for the distribution sector that values strong access to the national motorway network. Historically, the Borough has been perceived as a cheaper business location, which coupled with the good connectivity and availability of land, has attracted high levels of commercial development. However, much of this take-up of employment land in Swindon has been for large distribution and manufacturing uses that have generally not supported growth in higher value employment opportunities in the Borough.

8.3 In this context, the Borough supports a relatively productive economy with high levels of GVA per job, although productivity gains in the economy has slowed during recent periods. The diverse business base and strong representation of sectors in Swindon provides a diversity of employment opportunities for local workers, with a number of large international companies and headquarters across a number of sectors. The presence of a small number of large employers is part of the explanation why there has been volatility in the historic employment trends within Swindon.

8.4 The local labour force in Swindon is characterised as being less skilled compared with regional and national averages, which aligns with a lower share of the labour force being employed in higher skilled occupations. However, the Borough does support relatively high levels of earnings, which is likely due to the local economy supporting some high value sub-sectors, such as vehicle manufacturing. This sector in particular supports specialist manufacturing and assembly roles that are likely to require advanced vocational qualifications rather than normal NVQ4 and above qualifications. In this context, the Borough has also seen a growing outflow of local workers to other areas in the wider sub-region for their employment (e.g. Wiltshire and Vale of White Horse) which could reflect a lack of appropriate employment growth in Swindon when compared to recent housing growth.

8.5 Long-term trends since 2000 indicate a gradual reduction in the stock of employment space in Swindon, particularly for industrial uses, whilst office space has been broadly static in overall terms. However, the Council’s most recent monitoring data indicates that there have been net gains in industrial space since 2008 reflecting completion of a large number of B8 distribution developments.

Meeting Future Needs

8.6 The future growth scenarios considered in this study indicate the broad scale and type of growth associated with different approaches to modelling employment space requirements for Swindon over the period 2016 to 2036. To varying degrees, these scenarios reflect both the indigenous growth needs in Swindon as well as a degree of footloose demand that operates within a wider sub-regional market. In the context of the NPPF and PPG, the policy approach by the Council should aim to positively plan to support the employment needs of Swindon so that the local economy is not unduly constrained up to 2036, but also recognises the issues around constrained land supply and competing pressures on available development sites.

8.7 In order to ensure a flexible and responsive policy framework for the Borough, it will be necessary to not just concentrate on meeting the forecast quantitative requirements for office and industrial space in Swindon, which will fluctuate over time, but to reflect on the opportunities and risks that flow from particular policy approaches. This could include how the delivery of B class employment land can be prioritised in particular areas and for particular uses, or how scope can be created to deliver inward investment opportunities for Swindon. The Council should also consider the scope to which existing legacy estates in the Borough are no longer productive for employment use and could be better placed to support non B class employment uses in the future.

8.8 In this context, it is important that planning for B class employment growth in the Borough is balanced against pressures from other land uses. B class employment space also competes with a wide range of other non B class uses (outside of the remit of this study), some of which many also generate benefits to the Swindon economy or have identified needs that the NPPF indicates should also be supported.

8.9 To meet the future requirements for office and industrial space in Swindon over the period to 2036, it will be necessary for the Council to make choices in the Local Plan about which employment sites to protect or allocate for employment developments or which to bring forward as mixed-use schemes either in part or whole. These judgements must ultimately take into account of the following:

1. the local benefits of B class employment sectors and the need to sustain a diversified and resilient economy that is able to capitalise on economic growth opportunities as they arise;
2. the economic and market outcomes that would arise if particular sectors become displaced from the economy, or are otherwise constrained from expanding in the Borough;
3. the need to promote growth in high value employment roles in Swindon that meet the aspirations of resident workers and supports the relatively productive nature of the economy; and
4. the requirement to set targets for delivery of new B class employment space particularly on strategic sites to provide clarity and certainty for

developers, which will require a practical assessment of what the market can deliver at any point in time.

8.10 The policy choices ultimately adopted by the Council in the Local Plan should, as far as possible, seek to plan for a choice of employment sites and locations to support the needs of particular businesses and sectors. In this context, some further commentary around the potential options for accommodating the needs of the office and industrial market in Swindon over the period to 2036 is set out below.

Office Uses

General Position

8.11 The demand for office space in Swindon has historically been relatively limited in comparison to the local industrial market, with the Borough facing competition to attract investment and occupiers from other nearby commercial centres such as Reading and Bristol. These competitor office locations have fostered higher profile images over time with greater availability of Grade A accommodation and vibrant centres, and attracted firms relocating out of London.

8.12 In this context, Swindon’s current strengths are broadly to offer a highly accessible but more cost effective location. These advantages have supported the Borough in attracting some high profile office occupiers from London over recent years, including JP Morgan and Threadneedle Investments. After a long period of slow activity, take-up in the local market has grown year-on-year since 2011 with the amount of take-up in Swindon in 2015 at its highest point since 2007. Rising demand has supported the first speculative development in the local market in some time at Westmead. Recent activity has been mainly focused within out-of-centre locations, such as Windmill Hill Business Park, but the town centre where much of the stock is older and in need of refurbishment (and now under pressure from office-to-residential conversions) has proved less competitive.

8.13 The lack of quality office space in Swindon is seen by property agents as one of the key risks to the local market being able to effectively compete for higher value office occupiers in the future, as well as in terms of the Borough being able to retain existing businesses in the town centre. The declining supply of office space in the Borough has made it increasingly difficult for businesses to find appropriate office space in the Borough to meet their requirements, which has the effect of reducing the growth potential of existing firms and increasing the chance that Swindon will not be in a position to capture new entrants to the market.

8.14 Looking ahead, the town centre will benefit from the electrification of the Great Western Main Line, which will improve the general reliability and quality of services. This major infrastructure project was identified through stakeholder consultations in the draft Swindon and Wiltshire FEMA Assessment (2016) as having the potential to change the FEMAs that relate to Swindon, with the improved rail connectivity expected to make Swindon town centre more attractive to office occupiers, which could attract new businesses to the town centre area. The other important future economic driver is the wider regeneration of the town centre which is subject to overarching masterplan proposals being prepared for the Council. Over time, these proposals will help improve the quality and range of amenities within the town centre, supporting greater investment and vibrancy. Research indicates that these factors are important to office occupiers, in order that they can attract and retain staff.[10]

Meeting Future Requirements

8.15 Against this backdrop, the scenarios in Section 6.0 indicate an office requirement of between 16,000sq.m and 92,900sq.m, which equivalent to between 2.4ha and 13.9ha through the period to 2036. However, it should be noted that the lower end range of 2.4ha is based on the past completion rates scenario that reflects the lack of new office development in the Borough in the past, which means a requirement between 6ha and 14ha (43,000sq.m and 93,000sq.m) would represent a more realistic basis for future planning. This takes account the fact that all of the labour demand scenarios indicate office-based jobs will be the main driver of future employment growth in the Borough.

8.16 The emerging supply of office space in the Borough from undeveloped employment land that has been allocated for office use appears to be sufficient to meet the forecast requirements estimated under each of the future growth scenarios to 2036 in quantitative terms. Based upon the analysis in Section 7.0, the potential surplus of office land in Swindon over this period would range from 12.8ha to 24.3ha. Excluding the past completions scenario (as above), realistically this surplus reduces to between 12.8ha and 20.2ha. This excludes additional capacity provided for within central Swindon (90,000sq.m) by the Local Plan.

8.17 However, the majority of the undeveloped office land (i.e. not including capacity within the town centre) in Swindon is considered to have some type of delivery barrier, which diminishes the amount of developable land likely to come forward over the short term, but also potentially during the entire plan period up to 2036. The remainder of the potential office supply mainly comprises smaller plots of land on other sites, but few offering a genuinely strategic product.

8.18 In particular, the main challenges in terms of future potential office capacity revolves around the delivery of the large land designations at Commonhead and Wichelstowe which have been identified as having challenges to delivery (e.g. the need for significant new infrastructure to unlock the sites for development). In the absence of these land allocations coming forward by 2036, Swindon could have a shortfall of land to support the forecast requirements under each of the growth scenarios, which highlights the

[10] *Working Futures: the changing dynamics of office locations*, Nathaniel Lichfield & Partners, 2015 http://nlpplanning.com/uploads/ffiles/2015/04/589259.pdf

importance of these two large allocations (or equivalent alternatives) for the Council supporting the future growth potential of the local office market.

8.19 Delivery of some form of strategic office / business park product is important for Swindon, both to meet the Borough's own office needs and, potentially, to support an opportunistic approach to securing future inward investment that capitalises upon the strategic connectivity of the town on the wider M4 corridor. Recent office market interest in out-of-town locations around Swindon can give increasing confidence of the market potential for making such an investment. The focus should be on a high quality, premium Grade A product, with appropriate branding and design standards. In this context, if current strategic allocations cannot be unlocked in the medium-term, the Council should consider new alternatives close to strategic routes. Proximity to existing established employment areas would be an advantage, although not necessarily a pre-requisite.

8.20 A balanced approach, will however, be important in order to protect and enhance the role of Swindon town centre in office terms. As noted above, the town centre office market has strengthened in recent years but remains relatively weak compared to other centres in the M4. There is some sense that it "punches below its weight" given the general locational advantages of the town, and relative cost effectiveness of the location. This is not to detract from the fact that there is a strong existing base of office occupiers within or close to the town centre. In addition, the rail upgrading and town centre masterplan proposals noted above point to potential for a much improved and more competitive town centre environment in the future. However, the critical challenge is to bring forward new Grade A space at a time when much of the existing stock is older and in need of refurbishment. The recent trend of office-to-residential conversions has helped to remove some older stock from the system, but is now potentially reaching a tipping point at which better quality accommodation is also at risk. Latest data indicates that, if fully implemented, current prior approvals would equate to nearly 10% of Swindon's existing office stock being converted (mainly focused in the town centre). This would suggest there may be a case for the Council to consider introducing an Article 4 Direction to remove these Permitted Development Rights. This would not necessarily be in order to prevent all changes of use, but to give the Council greater control to manage this trend through the conventional planning application process on a case-by-case basis.

8.21 The Local Plan already makes broad provision for 90,000sq.m of office accommodation within the town centre; in this respect the key potential development is the Kimmerfields scheme which was granted outline planning permission in 2012 and provides for c. 65,000 sq.m, or effectively the majority of the central area allocation. This scheme is intended to create an extension to the Central Business District, and above all allow for the creation of a new office 'core' within the town centre and close to the station. Delivery of the scheme has stalled within recent years following the period of recession, but given an estimated lead-in time for delivery of at least three years for the office accommodation as part of Phase 2, there is a pressing need for this scheme to be activated.

8.22 It is understood under the Council's current development agreement that the development of Kimmerfields is contingent on securing pre-lets to commercial occupiers before works can commence, which has been challenging in recent market conditions. The improving office market in Swindon evidenced by recent take-up may, in time, help to remedy this situation. However, there is a risk in the interim that existing (or potential new) occupiers in the town become frustrated by the lack of modern space to expand, particularly if office-to-residential conversions continue to erode space. The result could be relocations to the popular out-of-centre sites or even other locations beyond Swindon, which would only serve to undermine the long-term role of the town centre in office terms. This suggests that the Council should explore opportunities to accelerate delivery of even a first phase of offices within the scheme.

Industrial Uses

General Position

8.23 Swindon has a strong industrial market, which reflects the strengths of the location in terms of accessibility but also the proactive approach taken by the Council in recent periods to make strategic sites available with good access to the M4. The Borough benefits from a diverse industrial base, comprising major automotive operations (e.g. Honda, BMW) and their supply chains, high value engineering and specialist manufacturing sectors such as pharmaceuticals, and an increasingly important role in logistics/distribution activities.

8.24 In particular, the strategic location of the Borough at the heart of the M4 corridor makes it a highly attractive location for warehousing and logistic sector activities, with a large share of the take-up of industrial land in Swindon over recent periods associated with the development of large distribution centres. In this context, some examples of major industrial developments in Swindon over recent years includes 74,000sq.m for the B&Q Distribution Centre at G Park, 50,200sq.m for the Motorola Manufacturing Centre at South Marston Park, and 40,000sq.m for the KeyPoint Distribution Centre along Thornhill Road. Each of these large developments are characterised by their location benefitting from good access to the strategic road network, which is particularly vital to the activities of large distribution uses.

8.25 Alongside the significant demand for industrial space in Swindon from large distribution activities, the local market also supports the space requirements for a wide range of small to medium-sized industrial occupiers operating at the local, regional and national levels. However, as with the Swindon office market, the strong demand for industrial space in the Borough combined with relatively limited levels of new development during recent years has meant that the availability of industrial space in the market has not adequately kept up with the continually strong levels of occupier demand.

8.26 This lack of available industrial space in the Borough constrains the operations of existing businesses in the local economy, as the market is unable to suitably accommodate the expansion or relocation needs of these industrial firms. The feedback from local property agents in Swindon suggests that in some cases it is necessary for businesses to look outside the Borough to locations in the sub-region to identify suitable industrial premises or sites that meet their needs.

8.27 The nature of industrial space within the town can be broadly characterised into two categories: older industrial areas within the fabric of the urban area originally laid out from the 1950s onwards, and larger more modern sites around the edges of the urban area closer to the road network. These sites cater for different needs in the market, but also offer create different issues in policy terms which are discussed further below.

Meeting Future Requirements

8.28 The scenarios in Section 6.0 indicate a broad range of future requirements for industrial land. The requirements range from a loss of 9.3ha (CE) through to a gain of 56.7ha (past completions). As discussed in Section 6.0 the CE and OE baseline forecasts appear less robust in terms of future industrial needs and therefore the HJA adjusted baseline of 21.2ha appears a more reasonable minimum starting point for future planning, and in line with market feedback. The past completion rates scenario implies 56.7ha and is driven by the significant recent rate of development (largely from B8 uses), and to some degree represents the uplift associated with demand ‘imported’ to Swindon as a result of making land available for industrial development. This suggests that Swindon’s industrial requirements range between 20ha and 60ha depending on the degree to which the Borough wants to continue to provide for footloose inward investment.

8.29 The current supply of industrial land is estimated at about 33ha, which would meet the lower end of the range of identified requirements. However, if sites with identified delivery challenges are excluded, the more realistic available supply would fall to about 24ha. More generally, some of the existing identified supply comprises relatively small sites and undeveloped plots within existing sites that may be less attractive to the market. On this basis, Swindon could have a shortfall of land to meet the upper end of the identified range but also, potentially, some delivery challenges in meeting the lower end of the range.

8.30 As with the local office market, the supply of industrial land in Swindon to meet the needs of the local market up to 2036 comprises allocated land that has yet to be developed, including some sites which are identified as having delivery issues. This reduces the quantum of developable land that is available in the Borough in the short term. If larger industrial allocations (e.g. Wichelstowe) do not come forward by 2036, Swindon could also have a shortfall of land to support the forecast need under the labour supply scenario, which adds to the already large shortfall observed for the past completion rates scenarios.

8.31 Given the supply of industrial land in Swindon is not currently sufficient to meet the demand arising from some of the future growth scenarios for the Borough, even if it is assumed all the allocations with delivery issues are brought forward by 2036, additional industrial land in the Borough may be necessary during the period to 2036. This view is supported by the feedback from local property agents who indicated new mixed industrial and distribution sites are required in the market to enable churn and support the requirements of local industrial occupiers who want to move into new industrial premises in more strategic parts of the Borough.

8.32 In this context, any new industrial allocation in Swindon would need to be located with good access to the M4 and ideally in close proximity to other good performing industrial estates. This would provide the opportunity to consolidate some existing industrial activity from the inner urban areas of Swindon town to more suitable sites in close proximity to the strategic road network, as well as to create the capacity to support any enquiries for industrial space coming from outside the Borough. As identified earlier, the eastern areas of Swindon town were identified by local property agents as the most attractive location for new industrial developments in the Borough because of the proximity to Junction 15 of the M4 and the A419 corridor, but Junction 16 may also have potential for strategic employment site opportunities.

Maximising Existing Industrial Land

8.33 Alongside the larger more modern industrial sites located on the edge of Swindon, the supply comprises a number of smaller older sites within the urban area. As noted in Section 5.0, to varying degrees these sites require investment and upgrading, with much of the older 1960s and 1970s stock reaching the end of its economic life. A number of these sites also face constraints in terms of local road access, and in some cases encroachment from non B-class uses and residential development.

8.34 The Council's traditional approach has been to, as far as possible, protect these sites from redevelopment to other uses, and in some cases has taken an active investment role in upgrading premises and land assembly, for example at Cheney Manor. This approach is important, particularly at a time when the larger undeveloped sites within Swindon have been rapidly taken up or have barriers which are likely to delay their availability for future industrial development. In the absence of maintaining existing supply, there is a risk that industrial occupiers could be displaced from the Borough because of a lack of alternatives. Until such time as new industrial land (with a strong prospect for delivery) can be identified, a cautious approach is therefore required.

8.35 Better utilisation of the stock on these estates could be achieved either through gradual redevelopment of individual plots (e.g. replacing a large older unit with development of modern small units for which there is good demand) or the sub-division of larger units. Based on experience elsewhere, qualitative improvements on the larger estates could also include refurbishment of older industrial units (e.g. repainting, improved environmental performance), and making environmental, security and traffic management improvements through a Business Improvement District (BID) mechanism.[11] Similar processes of gradual upgrading could be encouraged on larger industrial areas to ensure they can make a positive contribution to meeting some of Swindon's future growth requirements.

8.36 However, it needs to be recognised that such an approach may not be realistic in all cases or may not be cost effective where sites are under-performing. It is therefore suggested that the Council seek to confirm those existing industrial sites which it expects will be the focus of future investment, and continue to safeguard these through planning policy. The quality ranking of sites within Section 5.0 gives an indication on which sites such an approach could be focused, but the contribution of sites to the local economy (e.g. presence of business/sector clusters) may also be important as noted in para 8.9 above. Preparation of development briefs for these sites would be advisable to help better frame the basis for which sites will be expected to evolve, including the approach to mixed-use where this is deemed necessary or appropriate. This will also give greater certainty to existing occupiers and potentially help to draw new investment into these sites.

8.37 This strategy does, however, need to be complemented by stronger policy direction for the scale and type of any new industrial locations. As it stands, much of the recent take-up of industrial land within Swindon has been characterised by large-scale distribution and logistics activities. There is a market requirement for these uses and they have supported job growth within the Borough. However, by their very nature these uses are land intensive, and have potential to 'crowd out' small and medium industrial space which are also required in the local market. It is therefore advised that the Council should seek to ensure that any new strategic industrial land that is identified is broadly masterplanned to allow for a mix of different industrial uses to be provided. This will help ensure that, if some older estates are gradually released, there are opportunities for existing industrial firms within Swindon to be relocated.

Constructing a Delivery Trajectory for Employment Sites

8.38 One of the key points arising from the earlier analysis is the need to identify a realistic delivery trajectory for employment sites (including both allocations and commitments), particularly in the case of future office space where past delivery has been very limited. However, it is also an issue for industrial sites, where a quantitative requirement for additional supply has been identified against the higher growth scenarios and there are limited immediate new development opportunities on existing sites.

8.39 Accordingly, it is recommended that the Council should consider how the portfolio of allocations within the Borough and other development opportunities will support delivery of new space over the short, medium and long term. The

[11] See for example Brackmills industrial estate (Northampton) and Manor Royal (Crawley) where Business Improvement Districts have been established.

Council should keep the supply of employment land under continuous review to ensure that appropriate levels of supply are available.

8.40 Where any gaps are identified, the Council will want to consider options for how this can be addressed (potentially in the form of new allocations). It is helpful for sites to be assessed on a consistent basis in order to determine at broadly what point in the Plan period they may become available, and how important any individual site is for meeting either office or industrial needs within any rolling five-year period. This is particularly critical given the delivery issues that have been identified in respect of a large amount of the Borough's potential employment land supply.

8.41 In determining the likely timing and availability of land, this delivery trajectory should have regard to:

a the planning status of sites (extant planning permission, allocation etc);

b development constraints/costs and known requirements for infrastructure (more detailed assessment work may be required);

c current developer/landowner aspirations; and

d market delivery and viability factors.

The assessment provides the opportunity to identify and map out the Local Plan's 'when', 'whom' and 'how' employment space delivery actions for each site. In turn, it will also offer a basis to continually assess the potential role of a site in meeting employment land and other Local Plan objectives (and, inter alia, the policy benefits that would accrue if earlier delivery of the site was encouraged). The trajectory should be linked to the annual monitoring process and periodically updated to ensure the rolling supply of employment land during the new Local Plan period.

Appendix 1 List of Consultees

Commercial Property Agents and Surveyors

Alastair Andrews, Loveday

Chris Brooks, Whitmarsh Lockhart

Bradley Forbes, Loveday

James Gregory, Alder King

James Lockhart, Whitmarsh Lockhart

George Paton, WebbPaton

Daniel Smethurst, Smethurst Property Consultants

Jeremy Sutton, Kenningtons Chartered Surveyors

Giles Weir, JLL

Ralph Wells, Wells Commercial Property Consultants

Businesses and Organisations

Lyn Chapman, Swindon Basepoint Business Centres

Alexandros Mertikas, BMW Group

David Potter (Planning Consultant), Honda of the UK Manufacturing Ltd

Rupert Turk, Great Western Hospitals NHS Foundation Trust

Appendix 2 Site Assessment Criteria

The criteria used to assess the quality and condition of sites in Swindon is set out below. These criteria principally relate to the inherent value of a site rather than its current conditions, although such characteristics are also taken into account as part of the assessment.

Each site is given a score between 1 and 5 against each assessment criteria, with 1 representing a poor score and 5 a very good score. No individual weight is attached to different criteria. Scoring can reflect a combination of different factors applying to the same criteria, which means a balanced judgement need to be made as to an appropriate overall score.

Strategic Road Access

5 = Very Good: within 2km of a strategic road junction; access through good unconstrained roads.

1 = Poor: more than 5km from a strategic road junction; access through constrained roads; access through town centre or residential areas.

NB: A strategic road is typically defined as a motorway or 'A class' trunk road.

Local Accessibility

5 = Very Good: via free moving, good roads that avoid residential areas and difficult junctions; unconstrained vehicle access to the site with good visibility and lack of queuing; close to a range of town centre public transport routes.

1 = Poor: via difficult and narrow roads; through residential areas; difficult site access junctions with congested road; minimal range and/or infrequent public transport services nearby.

Proximity to Urban Areas and Access to Labour and Services

5 = Very Good: near centre of urban area with wide range of services nearby; proximity to sizeable residential areas that provide a strong local labour supply.

1 = Poor: remote and isolated site; no local services and/or residential areas nearby.

Site Characteristics and Development Constraints

5 = Very Good: generally level site, regular shape and over 3ha in size; low flood risk (Zone 1); no conservation or landscape constraints on development; no adverse ground conditions or abnormal development costs; no other major constraints on the scale of new development.

1 = Poor: sloping and/or uneven site under 0.5ha in size with an irregular and/or narrow shape; high flood risk (Zone 3); conservation and/or landscape constraints on scale of new development; adverse ground conditions or other abnormal development costs.

Proximity to Incompatible Uses

5 = Very Good: within a large employment area with no incompatible uses in the surrounding area.

3/4 = Average: B1 uses adjoining residential or other sensitive uses.

1 = Poor: B2 or B8 uses adjoining residential or other sensitive uses.

Market Attractiveness

5 = Very Good: high profile and/or high quality appearance; managed site with good environment and quality of occupiers; under 10% vacancy; viewed as an attractive location by agents and occupiers; recent investment or development activity with strong demand and units rarely available.

1 = Poor: run-down and unattractive appearance and/or location; attracts low end occupiers; more than 25% vacancy; vacant units not marketed and remain vacant for lengthy period of time; no recent investment or development activity.

Sequential Status

Only applies to the existing office locations in the Borough. This assessment identifies whether a site is located in a town centre, edge-of-centre or out-of-centre location in NPPF terms.

Barriers to Delivery

This assessment identifies any factors that would constrain development of the site for future B class employment uses, such as a fully occupied site and need for enabling infrastructure.

Planning Factors

This assessment identifies any planning designations or policy constraints that could affect development of the site for future B class employment uses.

Appendix 3 Site Assessment Proformas

Site Name:	Cheney Manor	Reference:	1

Total Site Area (ha)	28.72	Current Uses	B1 / B2 / B8 / Sui Generis (Car Rental)
Undeveloped Land (ha)	0.81	Sequential Status	Edge-of-centre
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Located just off the B4587 (Akers Way), a wide, clear road free of on-street parking. Access to the M4 is relatively poor with the site being about 6km north of Junction 16 of the M4, and requires entry through central Swindon along residential roads.	2
Local Accessibility	Good, clear and wide site access off the B4587 via a roundabout. Internal road quality is good with some on-street parking. The No. 13 bus specifically serves the industrial estate during peak hours only, while the more frequent No. 12 and No. 15 can be accessed from the B4587.	4
Proximity to Urban Areas and Access to Labour and Services	Located in central Swindon. Residential areas are located some distance away to the north (across the B4587) and to the east.	4
Proximity to Incompatible Uses	The site is located within a large area of industrial uses around the railway. Residential areas are located to the east and north. To the west is a sports ground and Moredon Golf Course. To the south is the railway line and Swindon Sewage Treatment Works.	3
Site Characteristics and Development Constraints	Large and flat with limited opportunity to expand. The site has no obvious development constraints.	4
Market Attractiveness	Fairly unattractive estate, buildings with untidy appearance and built predominantly between 1970 and 1990. There has been some recent investment in property at the site, while there are also a number of remaining vacancies and a large plot of vacant land in the centre of the site that could be attractive for small to medium-sized businesses.	4
Planning Factors	Allocated as a Key Employment Area in the Swindon Urban Area.	
Barriers to Delivery	Developed site, predominantly occupied with reasonably modern units.	
Potential Employment Uses	B1 / B2 / B8 / Sui Generis	
Timescale / Availability	Immediately for vacant plots, while medium to long term for redevelopment.	

Total Score: 21

Site Name:	River Ray Industrial Estate (Barnfield Road)	Reference:	2

Total Site Area (ha)	1.61	Current Uses	B1c / B2
Undeveloped Land (ha)	0	Sequential Status	-
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	The site lies approximately 5km from Junction 16 of the M4, located off the B4006 (Great Western Way) via Barnfield Road. This B road connects onto the A3102 dual carriageway, which connects onto Junction 16 of the M4.	3
Local Accessibility	The estate is located off Barnfield Road near to Barnfield roundabout on the B4006. The approach road is of suitable quality with wide and clearly visible junction splays, and no on-street parking. The No. 22 bus serves the site on a frequent basis.	3
Proximity to Urban Areas and Access to Labour and Services	The estate lies in an established industrial area in a central location of Swindon. There is a large residential area to the south east, while a supermarket is located adjacent to the site.	4
Proximity to Incompatible Uses	The estate is bounded by retail uses to the west, a sewerage plant to the north, residential to the south and an area of green space to the west. There are areas of open space directly bounding the site to the west and south.	4
Site Characteristics and Development Constraints	Small, level and regular shaped estate. The southern part of the site is located in Flood Zones 2 and 3. No other development constraints.	3
Market Attractiveness	The estate appears rather unattractive, with some untidy premises. Approximately 10 to 15% of the units on-site were vacant with units generally small and dated.	3
Planning Factors	The west of the site is identified as a Key Employment Area in the Swindon Urban Area, with the open land to the west and south of the site designated open space.	
Barriers to Delivery	Developed site and partial location in Flood Zones 2 and 3.	
Potential Employment Uses	B1 / B2 / B8	
Timescale / Availability	Medium term for redevelopment.	

Total Score: 20

Site Name:	Delta Business Park	Reference:	3

Total Site Area (ha)	15.94	Current Uses	B1a / B1c / B2 / C1 (Hotel) / C3 (Residential) / D1 (Church) / Sui Generis (Car Showroom)
Undeveloped Land (ha)	0.38	Sequential Status	Edge-of-centre
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Access is good with the business park accessible from the B4006 (Great Western Way) dual carriageway from both the north-west and east of the site which links after a short distance onto the A3102 dual carriageway. Junction 16 of the M4 lies 3km away from the site	4
Local Accessibility	Adequate site access off the B4006. Roads are uncongested with no substantial on-street parking as most units have dedicated car parks. No bus routes on-site. The No. 19 and No. 19A serve the B4006 to the north-west of the site on a frequent basis.	5
Proximity to Urban Areas and Access to Labour and Services	Located in the Swindon Urban Area, with a large residential area to the south-west. A small local shop is nearby along Welton Road.	4
Proximity to Incompatible Uses	Site is bounded by the Westmead Industrial Estate to the north and Iceland Distribution Deport to the south. Residential areas lie to the south and west, but are separated by landscaping and roads.	3
Site Characteristics and Development Constraints	Relatively large and level site. No obvious development constraints.	4
Market Attractiveness	This is generally an attractive site with a good quality and modern built environment. Quality of premises varies throughout the site with a number of new employment uses present. However, it does not appear to be overly attractive to the market with a relatively high level of vacancy. To the north-west of the site, a number of former offices have been converted to residential use.	3
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area.	
Barriers to Delivery	Recently developed site.	
Potential Employment Uses	B1 / B2 / B8 / C3 / D1 / Sui Generis	
Timescale / Availability	Long term for redevelopment.	

Total Score: 23

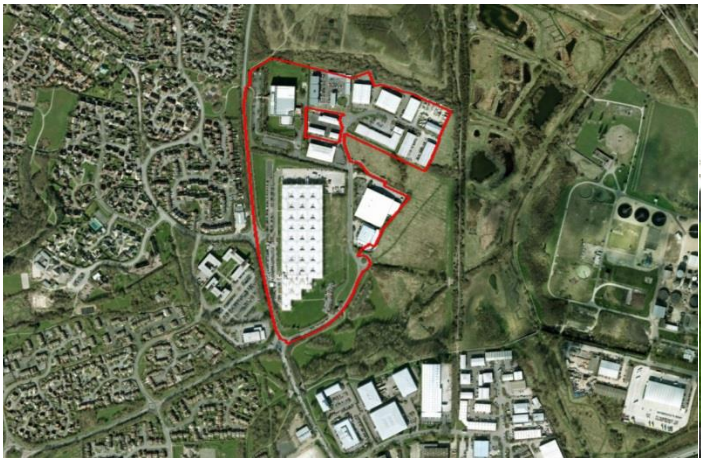
Site Name:	Iceland Distribution Depot	Reference:	4

Total Site Area (ha)	7.48	Current Uses	B8
Undeveloped Land (ha)	0	Sequential Status	-
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Access is good. The distribution centre is located off Penzance Drive which links after a short distance onto the A3102. The site is situated approximately 3km from Junction 16 of the M4.	4
Local Accessibility	Good site access off Penzance Drive, with the site well served by the frequent bus service that can be found on Penzance Drive to the east of the site.	4
Proximity to Urban Areas and Access to Labour and Services	Located in the Swindon Urban Area, with residential areas beyond the B4006 to the west, A3102 to the south and Paddington Drive to the east. A large supermarket is located directly to the north of the employment site.	5
Proximity to Incompatible Uses	The site lies in close proximity to Delta Business Park and Rushy Platt Industrial Estate. Some retail uses are also positioned to the north of the site.	3
Site Characteristics and Development Constraints	Site is of regular shape with level topography. No obvious constraints on development.	4
Market Attractiveness	The buildings and general environment are generally of a moderate quality. There is presently an established single occupier on the site.	4
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area.	
Barriers to Delivery	Site entirely occupied by one large, established business.	
Potential Employment Uses	B8	
Timescale / Availability	Established single occupier therefore limited scope for redevelopment in the medium to long term.	

Total Score: 24

Site Name:	Rivermead Industrial Estate	Reference:	5



Total Site Area (ha)	17.31	**Current Uses**	B1 / B2 / D2 / Sui Generis (Cash and Carry)
Undeveloped Land (ha)	0.58	**Sequential Status**	Edge-of-centre
Policy Status	Key Employment Area	**Density**	Low

Criteria	Comment	Score (out of 5)
Strategic Road Access	Located just off the B4534 (Mead Way), which provides an adequate but slightly long linkage to the A3102 dual carriageway (Great Western Way) and Junction 16 of the M4 which is approximately 4km away.	3
Local Accessibility	Access into the estate off the B4534 is via Withy Mead roundabout, with good, clear junctions on approach, in and out of the site. Internal roads are of good quality with some on-street parking. The estate is poorly served by buses with the No. 154 only available at peak times.	4
Proximity to Urban Areas and Access to Labour and Services	Situated within the north-west of Swindon, adjacent to areas of open space. Residential areas lie to the south-west but are separated from the estate by the B4534.	4
Proximity to Incompatible Uses	Nearest residential areas are positioned some distance away from the site. These areas do not adjoin the site and are separated by the B4534 to the west. A sewerage works is located beyond the eastern edge of the site and an industrial area adjoins the south. To the north is the Shaw Forest Park.	4
Site Characteristics and Development Constraints	Large and level site dominated by the Grade II Renault building. No obvious development constraints. Open land adjacent to the site to the north and east is allocated open space and part of the green corridor. Land to the east is located in Flood Zones 2 and 3.	4
Market Attractiveness	The estate has a generally attractive appearance with new units of good quality. The Renault building is currently under-used, perhaps, restricted by the Grade II listing. The other units are good quality and modern, which includes a mix of small office and light industrial units and non B class uses.	4
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area. The vacant land to the east and north is designated open space.	
Barriers to Delivery	Relatively modern site with the majority of the units occupied. Policy constraints may restrict expansion to the east.	
Potential Employment Uses	B1 / B2 / B8 / Sui Generis	
Timescale / Availability	Long term for redevelopment.	

Total Score: 23

Site Name:	Westmead Industrial Estate	Reference:	6

Total Site Area (ha)	19.33	Current Uses	B1 / B2 / B8
Undeveloped Land (ha)	0.32	Sequential Status	Edge-of-centre
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Access is reasonable. The site is positioned just off the B4006. This access point is very close to the A3102 dual carriageway (Great Western Way), with the site approximately 3km from Junction 16 of the M4.	4
Local Accessibility	Main access route is via Westmead roundabout on the B4006 (Mead Way) onto Westmead Drive. The B4006 has no on-street parking and has open and clear junctions into the estate. Internal roads are of a reasonable quality. There is some on-street car parking in the estate. Frequent bus services from the B4006, including bus routes No. 19 and No. 19A, and the less frequent No. 154.	4
Proximity to Urban Areas and Access to Labour and Services	Centrally located within a predominantly industrial area. A significant residential area is located to the west and south-east of the site.	4
Proximity to Incompatible Uses	Located in a predominantly industrial area, with Delta Business Park to the south-west and the Rivermead Industrial Estate to the north. Some residential areas lie to the west and south-east of the estate. Open space lies to the north and south of the site.	4
Site Characteristics and Development Constraints	Flat, square and large site. Two main central access roads with a range of unit sizes. The far east of the site is located in Flood Zones 2 and 3, while there are no further clear constraints on development.	4
Market Attractiveness	The estate is relatively attractive based on its reasonably accessible location. The built environment is rather dated with a variety of unit sizes present. There are a significant number of vacancies, although evidence of new investment in the west of the site is present.	3
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area. Open land to the north-west of the site is designated open space.	
Barriers to Delivery	Developed site with the majority of the units occupied. Some flooding constraints.	
Potential Employment Uses	B1 / B2 / B8	
Timescale / Availability	Medium to long term for redevelopment.	

Total Score: 23

Site Name:	Hillmead Business Park	Reference:	7


Total Site Area (ha)	22.41	**Current Uses**	B1 / B2 / B8 / D2 (Gym) / Sui Generis (Car Showroom)
Undeveloped Land (ha)	3.63	**Sequential Status**	Edge-of-centre
Policy Status	Key Employment Area	**Density**	Low

Criteria	Comment	Score (out of 5)
Strategic Road Access	Lies around 9km from Junction 16 of the M4. The motorway can be accessed via the B4534 (Mead Way), which joins the larger A3102 dual carriageway. The B4534 is a good quality road which provides an adequate but rather lengthy link to the A3102 dual carriageway.	3
Local Accessibility	The site is located just off the B4534, a straight, non-residential, quality A road. The site can also be accessed from Peatmoor Way to the north of the site. Internal roads are good quality and the junctions off the B road into the park are clear with good visibility splays. No on-street parking. Bus services can be accessed on the B4534 to the east of the site, with the No. 19A bus running at peak times.	4
Proximity to Urban Areas and Access to Labour and Services	Residential areas lie to the north, south and west of the site. No shops are located in close proximity to the business park.	4
Proximity to Incompatible Uses	The site is bounded by residential uses to the north, west and south with Shaw Forest Park situated to the east. There is the Rivermead Industrial Estate to the south west.	3
Site Characteristics and Development Constraints	Large site with room for future expansion. A level site of regular shape. The west and north-east of the site are in Flood Zones 2 and 3 with potential ecological constraints may limit scope for expansion.	4
Market Attractiveness	Attractive, modern units with evidence of good management and landscaping. A number of units are occupied by high tech enterprise. Mixture of unit sizes. Vacancy is low, whilst there could be room for future expansion with some presently vacant plots of land at the site.	5
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area.	
Barriers to Delivery	No identified barriers to delivery.	
Potential Employment Uses	B1 / B2 / B8 / D2 / Sui Generis	
Timescale / Availability	Immediately for the two vacant plots. Long term for the rest of the site.	

Total Score: 23

Site Name:	Windmill Hill	Reference:	8

Total Site Area (ha)	30.74	**Current Uses**	B1a
Undeveloped Land (ha)	1.50	**Sequential Status**	Out-of-centre
Policy Status	Key Employment Area	**Density**	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Excellent access. Located 0.5km off Junction 16 of the M4, with strong access via the A3102 (Great Western Way) dual carriageway.	5
Local Accessibility	Access to the site can be gained from the A3102 to the south or the B4534 (Whitehall Way) to the east. Internal roads are good. Good provision of car parking at the site. There are a number of bus stops within the site and on the B4534 and the A3102.	5
Proximity to Urban Areas and Access to Labour and Services	The site is located in the south-west of Swindon and is bounded by residential areas to the north and east. The site is self-contained but found close to residential uses, while no shops or other services are nearby or on-site.	4
Proximity to Incompatible Uses	Located away from residential areas which lie across Hook Road and the B4534 to the north and east of the site. A hotel and further commercial uses are located to the south-west, and vacant land to the north-west. Industrial estates to the south are separated from the edge of Windmill Hill by the A3102 dual carriageway.	4
Site Characteristics and Development Constraints	Large, regular, spacious and slightly sloping site. No development constraints and some vacant plots to north and south-west of the site.	5
Market Attractiveness	Very attractive environment, with modern, high quality units set in a managed and landscaped site. Relatively low vacancy rates. Some vacant land to the north and south-west of the site. Potential to accommodate further prestigious, headquarter buildings at the park.	5
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area. The site is bounded on all sides by a green corridor. To the west is designated open space.	
Barriers to Delivery	No identified barriers to delivery.	
Potential Employment Uses	B1	
Timescale / Availability	The vacant plots are available for development immediately.	

Total Score: 28

Site Name:	Blagrove / Euroway Industrial Estate	Reference:	9


Total Site Area (ha)	49.93	**Current Uses**	B1 / B2 / B8 / D1 (Training Centre) / C1 (Hotel) / Sui Generis (Car Showroom)
Undeveloped Land (ha)	0	**Sequential Status**	Out-of-centre
Policy Status	Key Employment Area	**Density**	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Excellent access with the site only 0.5km from Junction 16 of the M4 via the A3102 (Great Western Way) dual carriageway.	5
Local Accessibility	Good and wide site access to the centre of the site from the A3102 via a roundabout and Ramsden Road. Additional access is provided to and from the west of the site to the A3102 via Frankland Road. Internal roads are of a reasonable quality with some on-street car parking. Bus routes are available from Blagrove with regular service.	5
Proximity to Urban Areas and Access to Labour and Services	Residential units are located to the north of the site separated by the A3102. Land to the south-east forms part of the strategic allocation for Wichelstowe. No shops or services are situated nearby or on-site.	3
Proximity to Incompatible Uses	The estate is bounded by the M4 and the A3102 carriageway. To the north-west and beyond the A3102 are Windmill Hill and commercial uses, and to the north-east and beyond the A3102 are housing uses.	5
Site Characteristics and Development Constraints	Level site that is relatively large and linear. No obvious constraints on development.	4
Market Attractiveness	The estate contains a variety of units ranging in quality and size. Non B class employment uses at the site. The west of the site is occupied by a hotel and car show room uses, and the east of the site is mainly in B8 use. Generally, the estate is of good quality with low vacancies.	3
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area. The wooded area found to the west of the site is a Country Wildlife site and an area of open space. There is an additional linear area of open space to the west of Ramsden Road. Land to the south-east forms part of the Wichelstowe Strategic Allocation.	
Barriers to Delivery	The site is fully developed with buildings of good quality.	
Potential Employment Uses	B1 / B2 / B8	
Timescale / Availability	Limited scope for redevelopment in the long term.	

Total Score: 25

Site Name:	Rushy Platt Industrial Estate	Reference:	10


Total Site Area (ha)	5.93	Current Uses	B1 / B8 / Sui Generis (Car Showrooms and Dealers)
Undeveloped Land (ha)	0.46	Sequential Status	Edge-of-centre
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Located approximately 3km from Junction 16 of the M4 via the A3102 dual carriageway.	5
Local Accessibility	Site access off Redpost Drive off Wooton Bassett Road via a wide junction with good quality visibility splays. Good quality internal roads and sufficient car parking. There are no bus stops on-site, although the estate is well served from frequent bus services along the A3102.	4
Proximity to Urban Areas and Access to Labour and Services	The estate lies in the southern part of Swindon. Residential areas are located to the east, and to the south and west is greenfield land that forms part of the Wichelstowe Strategic Allocation. To the north are the A3102 and railway lines, and beyond is the Iceland Distribution Depot. The site is self-contained with a local supermarket located to the north of the site.	3
Proximity to Incompatible Uses	Commercial uses are found to the north of the site. Small residential area lies to the east of the site but separated by a road. The northern boundary adjoins the railway line with designated open space to the south-west.	3
Site Characteristics and Development Constraints	Site is regular in shape with a level topography. The estate is fairly small in comparison to other industrial estates. A railway line on the northern boundary may constrain some uses, while to the north-west of the site has room for expansion.	4
Market Attractiveness	Units are modern, high quality and of reasonable size, with some parking. Vacancy is low and there is a vacant plot that is suitable for development.	4
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area. There is a narrow green corridor that runs along the western boundary. Land to the south-west forms the Wichelstowe Strategic Allocation.	
Barriers to Delivery	The site is relatively new and largely developed.	
Potential Employment Uses	B1 / B8 / Sui Generis	
Timescale / Availability	Immediately for undeveloped plot of land. Limited scope for redevelopment in the medium to long term for the rest of the estate.	

Total Score: 23

Site Name:	Central Trading Estate	Reference:	11

Total Site Area (ha)	1.43	Current Uses	B1 / B2 / B8
Undeveloped Land (ha)	0	Sequential Status	-
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Approximately 6km from the A419 trunk road via A roads but passing through residential areas, and 8km from Junction 15 of the M4.	2
Local Accessibility	Accessed via unconstrained roundabout on the B4289 (Marlborough Road) and narrow residential streets. Narrow roads with on-street car parking and little room for turning. There are no bus stops on-site, although the estate is well served from frequent bus services from the B4289.	2
Proximity to Urban Areas and Access to Labour and Services	Centrally located in Swindon, with local services found nearby and a large residential area surrounding the site.	5
Proximity to Incompatible Uses	The surrounding uses are not compatible with the industrial estate. Residential uses surround the site to the north, east and south, with retail units located to the north-west.	2
Site Characteristics and Development Constraints	Relatively small site with a level topography, but irregularly shaped. Residential areas located adjacent to the estate.	2
Market Attractiveness	Lower profile site. Environment of the estate is of reasonable quality, with some ageing premises. Relatively low vacancy level with limited room for expansion.	2
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area and Central Area Action Plan.	
Barriers to Delivery	The site is developed and occupied.	
Potential Employment Uses	B1 / B8	
Timescale / Availability	Limited scope for redevelopment in the medium term.	

Total Score: 15

Site Name:	Pipers Way (Intel)	Reference:	12


Total Site Area (ha)	5.37	Current Uses	B1a
Undeveloped Land (ha)	0	Sequential Status	Out-of-centre
Policy Status	Key Employment Area	Density	Low

Criteria	Comment	Score (out of 5)
Strategic Road Access	Lies approximately 6km from Junction 15 of the M4, accessed via the B4006, which joins the A4259 onto the A419 trunk road.	3
Local Accessibility	The main access route is via the B4006, which runs through some residential areas. There is sufficient on-site parking. Bus routes can be taken from the B4006.	4
Proximity to Urban Areas and Access to Labour and Services	The site is found in the southern part of Swindon. Some residential uses lie to the west and east of the site. There are no local services on-site or located nearby.	3
Proximity to Incompatible Uses	The surrounding uses are predominantly compatible with the site. Offices can be found to the south of the site. Some residential uses lie to the west and east of the site. A hotel and additional residential uses lie to the north of the site.	4
Site Characteristics and Development Constraints	Large, generally flat site containing office premises within landscaped grounds. No obvious development constraints.	5
Market Attractiveness	Proven employment location with such high profile occupants as the Nationwide Building Society located nearby. There is potential space for expansion to the north of the site.	5
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area. Land to the west and south is designated as a Country Wildlife site and open space.	
Barriers to Delivery	No identified barriers to delivery.	
Potential Employment Uses	B1a	
Timescale / Availability	Limited scope for redevelopment in the medium to long term.	

Total Score: 24

Site Name:	Pipers Way (Nationwide)	Reference:	13

Total Site Area (ha)	11.84	Current Uses	B1a
Undeveloped Land (ha)	0	Sequential Status	Out-of-centre
Policy Status	Key Employment Area	Density	Low

Criteria	Comment	Score (out of 5)
Strategic Road Access	Lies approximately 6km from Junction 15 of the M4, accessed via the B4006, which joins the A4259 onto the A419 trunk road.	3
Local Accessibility	The main access route is via the B4006, which runs through some residential areas. Internal roads are suitably wide and good quality. There is some on-street parking and Nationwide are currently using surplus park and ride space, which is situated to the south of the B4006, to accommodate their staff. The site is well served by public transport. A park and ride facility exists near the site and bus routes both directly serve the site and can be accessed from the B4006.	4
Proximity to Urban Areas and Access to Labour and Services	The site is found in the southern part of Swindon. Some residential areas are located some distance away to the north, while no shops are located nearby or on-site.	3
Proximity to Incompatible Uses	The surrounding uses are predominantly compatible with the site. Offices can be found to the north of the site, while residential uses can be found to the north-west.	4
Site Characteristics and Development Constraints	Large, level and landscaped employment site.	5
Market Attractiveness	Managed and secure site with the largest employer in Swindon occupying the site. High profile occupants such as Intel can be found to the north of the site. Attractive landscaped site with a good quality, modern built environment. Limited scope for future expansion.	5
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area. The site is bounded in all directions by designated open space and a green corridor.	
Barriers to Delivery	No identified barriers to delivery.	
Potential Employment Uses	B1a	
Timescale / Availability	Limited scope for redevelopment in the medium to long term.	

Total Score: 24

Site Name:	Blackworth Industrial Estate	Reference:	14


Total Site Area (ha)	6.94	Current Uses	B1 / B2 / B8 / Sui Generis (Car Dealership)
Undeveloped Land (ha)	0	Sequential Status	-
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Approximately 6km from the A419 trunk road and 10km from Junction 15 of the M4, passing through residential areas in Highworth.	2
Local Accessibility	Dedicated site entrance off an unconstrained roundabout. Some on-street parking within the estate. Internal estate roads of reasonable quality. No bus stops on site. Closest bus stop is on the A361 to the north of Highworth, which is served by the No. 7, No. 64 and No. 74.	3
Proximity to Urban Areas and Access to Labour and Services	The employment site is located on the northern edge of the small town of Highworth, with some local services found within the town.	3
Proximity to Incompatible Uses	Open land to the north is allocated for employment use, with some residential units to the south of the site but open space designation offers a barrier between the estate and nearby residential areas.	4
Site Characteristics and Development Constraints	Level topography and regular in shape. No obvious constraints to development.	4
Market Attractiveness	Relatively attractive site albeit in an isolated location. There are a number of small units with limited vacancy. Little evidence of recent investment, but occupants of fair quality, including TS Tech who is the main occupier. Vacant land to the north of the site which may be suitable for expansion.	3
Planning Factors	Identified as a Key Employment Area. Greenfield land to the north of the site is allocated for employment uses. Land to the south-east of the site is designated open space.	
Barriers to Delivery	No identified barriers to delivery.	
Potential Employment Uses	B1 / B2 / B8	
Timescale / Availability	Scope for development of the allocated land to the north of the employment site in the short to medium term.	

Total Score: 19

Site Name:	Groundwell West / Gateway North	Reference:	15


Total Site Area (ha)	20.07	**Current Uses**	B1 / B8 / D2
Undeveloped Land (ha)	0	**Sequential Status**	-
Policy Status	Key Employment Area	**Density**	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Site adjoins the A419 trunk road and is located 11km from Junction 15 of the M4 via a dual carriageway.	5
Local Accessibility	Direct access from Thamesdown Drive, which links to the A419 trunk road. Sufficient on-site car parking. No proximate connections to public transport. Closest bus stop is on Thresher Drive to the south of the site which has a frequent service.	3
Proximity to Urban Areas and Access to Labour and Services	The site is located in the northern part of Swindon. Residential areas are found to the south and west, with some retail services to the east.	4
Proximity to Incompatible Uses	The site is bounded by residential uses to the south and west. There is a large supermarket adjacent to the south-east of the site.	4
Site Characteristics and Development Constraints	Large, regularly shaped site with level topography. No obvious development constraints.	4
Market Attractiveness	A highly prominent site overlooking the A419. Possible opportunity for expansion of the site to the west. Currently accommodates some non B class employment uses on-site.	3
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area.	
Barriers to Delivery	No identified barriers to delivery.	
Potential Employment Uses	B1 / B2 / B8	
Timescale / Availability	Medium to long term for redevelopment.	

Total Score: 23

Site Name:	Groundwell Industrial Estate	Reference:	16

Total Site Area (ha)	27.55	**Current Uses**	B1a / B1c / B8
Undeveloped Land (ha)	0	**Sequential Status**	Out-of-centre
Policy Status	Key Employment Area	**Density**	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Immediately accessible from the A419 trunk road and around 11km from Junction 15 of the M4 via a dual carriageway.	4
Local Accessibility	Site access via a single, constrained road with large amounts of on-street car parking, with a junction affected by an incline and on-street parking. Internal roads of good quality with one bus route serving the estate at peak hours.	2
Proximity to Urban Areas and Access to Labour and Services	Surrounded by large residential areas to the south and east, with limited services provided on-site.	4
Proximity to Incompatible Uses	Employment uses located to the north-west of the site. The estate is located near to residential areas to the south, but open space between these and the site. Open land to the north beyond the A419 trunk road.	4
Site Characteristics and Development Constraints	Large, regularly shaped site that slopes gently to the south. No obvious development constraints.	4
Market Attractiveness	Potentially prominent and accessible location near the Honda site. There are no sensitive adjoining uses and units appear of reasonable quality and are mostly occupied. Fully developed site with no obvious room for extension.	3
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area.	
Barriers to Delivery	The site is developed with no vacant plots.	
Potential Employment Uses	B1 / B2 / B8	
Timescale / Availability	Limited scope in the medium to long term.	

Total Score: 21

Site Name:	Techno Industrial Estate	Reference:	17

Total Site Area (ha)	11.47	Current Uses	B1c / B8 / D2
Undeveloped Land (ha)	0	Sequential Status	-
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Approximately 4km from the A419 trunk road accessed via an unconstrained A road, but 10km from Junction 15 of the M4.	3
Local Accessibility	Access into the estate from the A4311, via a roundabout and through Kembrey Business Park. Internal estate roads of generally good quality with little on-street parking. No constrained junction or difficult bends. The site is served by the No. 27 bus route which operates on a frequent basis.	4
Proximity to Urban Areas and Access to Labour and Services	Centrally located within a large employment area. Residential uses located to the north and west of the site with no local services nearby.	3
Proximity to Incompatible Uses	Surrounded by employment uses.	5
Site Characteristics and Development Constraints	Large, established industrial estate with a level topography. Adjoins the BMW manufacturing plant to the east. No obvious development constraints.	5
Market Attractiveness	A well connected and located site, although a number of premises appear to be ageing with above average vacancy rates apparent at the estate.	3
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area.	
Barriers to Delivery	No obvious barriers but also no readily available undeveloped plots of land.	
Potential Employment Uses	B1c / B8	
Timescale / Availability	Limited scope for redevelopment in the medium to long term.	

Total Score: 23

Site Name:	Elgin Industrial Estate	Reference:	18


Total Site Area (ha)	21.93	**Current Uses**	B1 / B2 / B8 / Sui Generis (Quasi Retail)
Undeveloped Land (ha)	0	**Sequential Status**	-
Policy Status	Key Employment Area	**Density**	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Approximately 4km from the A419 trunk road accessed via an unconstrained A road, but 10km from Junction 15 of the M4.	3
Local Accessibility	Access into estate off the A4311, via wide roundabout. Internal estate roads of reasonable quality despite some on-street parking. No public transport routes serve the estate although access to bus route No. 27 can be gained from Kembrey Street to the north of the site.	3
Proximity to Urban Areas and Access to Labour and Services	Located near the central parts of Swindon, within a larger built-up area. Located near to residential areas to the south and west. No local services are supported on-site or located nearby.	3
Proximity to Incompatible Uses	Positioned in the western parts of a larger employment area. Adjoins the Kembrey Business Park to the north and Techno Industrial Estate to the east, while residential uses are located to the west.	4
Site Characteristics and Development Constraints	Level site and relatively large. Parts of the centre and the west of the site are located in Flood Zones 2 and 3. Aside from this, there are no obvious constraints on development.	4
Market Attractiveness	Relatively unattractive site with predominantly ageing units of lower quality. Higher than average vacancy rates, with limited development capacity. Non B class employment uses are supported within the site. Part of the site has been cleared with potential for redevelopment.	2
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area.	
Barriers to Delivery	Parts of the site are located in Flood Zones 2 and 3, and there are no obvious undeveloped plots.	
Potential Employment Uses	B1 / B2 / B8	
Timescale / Availability	Scope for partial redevelopment in the short to medium term.	

Total Score: 19

Site Name:	Parsonage Farm (BMW Site)	Reference:	19


Total Site Area (ha)	40.11	Current Uses	B2
Undeveloped Land (ha)	2.60	Sequential Status	-
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Approximately 3.5km from the A419 trunk road accessed through some residential roads, and about 9.5km from Junction 15 of the M4.	3
Local Accessibility	Access route from the east is via residential roads through a relatively constrained roundabout. Access for heavy vehicles is via Europa Industrial Estate with wide roads and unconstrained junctions, but accessed via residential roads. The residential roads can often be congested. The site is well served by frequent bus services, which can be found on Swindon Road to the east of the site and Bridge End Road to the south of the site.	3
Proximity to Urban Areas and Access to Labour and Services	Residential areas are located to the east of the site. Services at Greenbridge Retail Park are located to the south-east of the site.	3
Proximity to Incompatible Uses	Located in a wider employment area, although a small number of residential units are located opposite the main entrance and to the east of the site.	3
Site Characteristics and Development Constraints	Level site and very large. No obvious constraints on development.	5
Market Attractiveness	The premises and general environment are of average quality. There is presently an established and high profile single occupier at the site, while there is potential for expansion to the north-west of the site.	4
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area.	
Barriers to Delivery	Currently occupied by a single, established business.	
Potential Employment Uses	B2	
Timescale / Availability	Established single occupier means there is limited scope for redevelopment in the medium to long term.	

Total Score: 21

Site Name:	Gypsy Lane	Reference:	20

Total Site Area (ha)	5.70	Current Uses	B1a / B1c / Sui Generis (Gas Works, Recycling)
Undeveloped Land (ha)	0	Sequential Status	Edge-of-centre
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Approximately 3.5km from the A419 trunk road and 9.5km from Junction 15 of the M4.	2
Local Accessibility	The site is accessed through a constrained roundabout from the B4143. The internal roads are congested and often used by heavier vehicles with limited room for turning. There are frequent bus routes adjacent to the site on the B4143.	1
Proximity to Urban Areas and Access to Labour and Services	The site adjoins a small residential area to the north, while a larger residential area is located to the west and south across the railway line.	3
Proximity to Incompatible Uses	Parsonage Farm (BMW Site) and Elgin Industrial Estate are found to the north of the employment site. Residential uses are situated to the south, separated by the railway line.	3
Site Characteristics and Development Constraints	A long thin employment site of irregular shape, but generally level. Adjoins the railway line to the south.	2
Market Attractiveness	Low profile site, containing some lower quality occupiers. Relatively low quality environment, with little evidence of recent investment but no vacant units. Contains some bad neighbour uses.	2
Planning Factors	Identified as a Key Employment Area in the Swindon Urban Area.	
Barriers to Delivery	Narrow, irregular shaped site with poor access. Appears fully developed.	
Potential Employment Uses	B1 / B2 / B8	
Timescale / Availability	Medium term for redevelopment.	

Total Score: 13

Site Name:	Bridge End Road	Reference:	21

Total Site Area (ha)	2.09	Current Uses	B2 / B8 / Sui Generis (Car Hire)
Undeveloped Land (ha)	0	Sequential Status	-
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Approximately 3.5km from the A419 trunk road and 9.5km from Junction 15 of the M4, with access via the B4143 (Bridge End Road).	2
Local Accessibility	Access is taken via the B4143 to the north of the site. Internal access is fairly poor. There are frequent bus routes adjacent to the site along the B4143, including No. 7, No. 64 and No. 74.	1
Proximity to Urban Areas and Access to Labour and Services	The employment site adjoins a small residential area to the east and a larger residential area to the east and the south across the railway line.	3
Proximity to Incompatible Uses	Parsonage Farm (BMW Site) and Elgin Industrial Estate are located to the north of the employment site, while Gypsy Lane is located to the west. Residential uses are located to the south separated by the railway line.	3
Site Characteristics and Development Constraints	A long thin employment site of irregular shape, but generally level. Adjoins the railway line to the south.	2
Market Attractiveness	Low profile site containing some low quality occupiers. Relatively low quality environment with limited evidence of recent investment but no vacant units. Contains some bad neighbour uses.	2
Planning Factors	Identified as a Key Employment Areas in the Swindon Urban Area.	
Barriers to Delivery	Narrow, irregular shaped site with poor access. Appears to be fully developed.	
Potential Employment Uses	B1 / B2 / B8 / Sui Generis	
Timescale / Availability	Medium term for redevelopment.	

Total Score: 13

Site Name:	Kembrey Business Park	Reference:	22

Total Site Area (ha)	22.70	Current Uses	B1a / B1c / B2
Undeveloped Land (ha)	0.31	Sequential Status	Edge-of-centre
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Approximately 4km from the A419 trunk road accessed via unconstrained A roads, but 10km from Junction 15 of the M4.	3
Local Accessibility	Access into the park off the A431, via a roundabout. Internal roads of good quality with limited on-street parking. Frequent bus service from the centre of the site provided by the No. 27.	4
Proximity to Urban Areas and Access to Labour and Services	Located near the central parts of Swindon within a larger employment area, as well as near to residential areas to the west and north. Some services are located in close proximity to the site.	4
Proximity to Incompatible Uses	Positioned to the west of a wider employment area, and bounded by Elgin Industrial Estate to the south and Techno Industrial Estate to the south-east. Residential uses are separated to the west of the site by the A4311.	4
Site Characteristics and Development Constraints	A large, level site that is regular in shape and with no obvious development constraints.	5
Market Attractiveness	Attractive appearance with the buildings generally of good quality. Principally office uses. There are some vacancies and one plot of vacant land to the north-west.	4
Planning Factors	Key Employment Areas in the Swindon Urban Area.	
Barriers to Delivery	No identified barriers to delivery.	
Potential Employment Uses	B1a / B1c / B2	
Timescale / Availability	Immediately for the vacant plot.	

Total Score: 24

Site Name:	G Park	Reference:	23

Total Site Area (ha)	39.39	Current Uses	B8
Undeveloped Land (ha)	8.26	Sequential Status	-
Policy Status	Key Employment Area	Density	Low

Criteria	Comment	Score (out of 5)
Strategic Road Access	Immediately accessible from the A419 trunk road and 7km from Junction 15 of the M4 via a dual carriageway.	5
Local Accessibility	Access taken from a wide roundabout just off the A419. Wide internal roads with no on-street parking. Although there are no bus routes that service within the site, there is a regular bus service from Highworth Road adjacent to the site.	5
Proximity to Urban Areas and Access to Labour and Services	Large site with residential areas located nearby to the south, while local services are found adjacent to the site.	4
Proximity to Incompatible Uses	Industrial and commercial uses are located to the east of the site across the A419. This includes South Marston Park to the north-east and the sizeable Honda site to the east. Residential areas are found to the south.	4
Site Characteristics and Development Constraints	Level topography with no obvious development constraints.	5
Market Attractiveness	A prominent new employment location with very good strategic and local accessibility. The buildings are of good quality with a relatively high profile single occupier at the B&Q distribution centre. It is understood that there is interest in the market for the two remaining vacant plots of land at the estate to be developed over the near future.	5
Planning Factors	Key Employment Areas in the Swindon Urban Area.	
Barriers to Delivery	No identified barriers to delivery.	
Potential Employment Uses	B8	
Timescale / Availability	Provided that the interest in the two remaining plots of land goes through, there will be no vacant readily available plots of land for development at the estate.	

Total Score: **28**

Site Name:	Europa Industrial Estate	Reference:	24

Total Site Area (ha)	33.98	Current Uses	B1c / B8
Undeveloped Land (ha)	0	Sequential Status	-
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Approximately 3.5km from the A419 trunk road via residential roads and congested junctions, and around 9.5km from Junction 15 of the M4.	2
Local Accessibility	Site accessed via residential roads from the north and south, but via unconstrained junctions. Internal estate roads of good quality, with no on-street parking. Although there are no bus routes within the site, bus routes No. 7 and No. 74 can be accessed from the B4006, which bounds the site to the north-east and from Swindon Road which bounds the site to the south-east.	3
Proximity to Urban Areas and Access to Labour and Services	Located in close proximity to residential areas, with a range of local services located nearby, including a large supermarket.	5
Proximity to Incompatible Uses	Site is located within the north-east of a larger employment area. Site adjoins Parsonage Road (BMW Site) to the south. However, the site is located in close proximity to residential areas to the east, north and west.	3
Site Characteristics and Development Constraints	A large site with a level topography, with no obvious constraints on development.	5
Market Attractiveness	Relatively high quality environment with a variety of occupiers. Units are a mix of ages dating between the 1980s and the 2000s. There are some vacant units including a large distribution warehouse to let, with the site generally viewed as poorer quality by local agents.	3
Planning Factors	Key Employment Area in the Swindon Urban Area.	
Barriers to Delivery	The site is fully developed.	
Potential Employment Uses	B1 / B2 / B8	
Timescale / Availability	Limited scope for redevelopment in the medium term.	

Total Score: 21

Site Name:	Honda (South Marston Airfield)	Reference:	25

Total Site Area (ha)	138.94	Current Uses	B2 / B8
Undeveloped Land (ha)	42.78	Sequential Status	-
Policy Status	Key Employment Area	Density	Low

Criteria	Comment	Score (out of 5)
Strategic Road Access	Immediately accessible from the A419 trunk road and 7km from Junction 15 of the M4 via a dual carriageway.	5
Local Accessibility	Site has a number of dedicated entrances via large, unconstrained roads that support direct access to the dual carriageway. Served by a frequent bus service on the western boundary of the site including the bus routes No. 7, No. 64 and No. 74.	5
Proximity to Urban Areas and Access to Labour and Services	Extremely large site situated on the north-eastern fringes of Swindon. Residential areas are found to the south of the site. Some local services found in South Marston Park to the south of the employment site.	4
Proximity to Incompatible Uses	Some residential units found to the south-west of the site, but across a dual carriageway. South Marston Park is located to the north of the site and the sizeable G Park is found to the west.	5
Site Characteristics and Development Constraints	The Honda manufacturing plant is located on an old airfield site. Very large site, with level topography. A small part of the west of the site is located in Flood Zone 2. No further development constraints. Located near to the KeyPoint rail freight terminal to the south.	5
Market Attractiveness	Relatively high profile site with large single occupier. Buildings are a mix of ages but predominantly post 1990. Room for expansion to the east. Some buildings within the site are under-used or not in use.	4
Planning Factors	Key Employment Area.	
Barriers to Delivery	No identified barriers to delivery.	
Potential Employment Uses	B2 / B8	
Timescale / Availability	Short to medium term for redevelopment.	

Total Score: 28

Site Name:	South Marston Park	Reference:	26

Total Site Area (ha)	94.02	Current Uses	B1 / B2 / B8 / A3
Undeveloped Land (ha)	0.48	Sequential Status	-
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Immediately accessible from the A419 trunk road and 7km from Junction 15 of the M4 via a dual carriageway.	5
Local Accessibility	Dedicated access from two large roundabouts with limited on-street car parking on-site. Access through unconstrained roads with no tight junctions. Internal roads of reasonable quality. The site is served by a regular bus service, including bus routes No. 7, No. 64 and No. 74.	5
Proximity to Urban Areas and Access to Labour and Services	Site situated on the edge of the built up area of Swindon, with some small residential areas located to the south. Some local services are provided on-site.	3
Proximity to Incompatible Uses	Adjoins the large Honda production plant to the south and open land to the north and east. The Triangle employment site is located to the west.	5
Site Characteristics and Development Constraints	Large, established industrial estate. Generally level topography and regular in shape. No obvious development constraints.	5
Market Attractiveness	Good quality site located in close proximity to the prominent Honda production plant. The site supports a diverse mix of occupiers, some of higher quality. Some vacancies suitable for B1, B2, B8 use. One vacant plot to the west. Non B class employment uses present at the site. There may be potential for expansion to the north-west of the site (approximately 20ha) and to the north-east of the site (approximately 15ha).	4
Planning Factors	Key Employment Area. Land to the north of the site is protected open space.	
Barriers to Delivery	Predominantly occupied premises.	
Potential Employment Uses	B1 / B2 / B8.	
Timescale / Availability	Vacant plot of land available immediately, and potential for strategic expansion to the north-west and north-east. The rest of the site has scope for redevelopment in the medium term.	

Total Score: 27

Site Name:	KeyPoint Rail Freight Terminal	Reference:	27

Total Site Area (ha)	24.95	Current Uses	B8
Undeveloped Land (ha)	7.50	Sequential Status	-
Policy Status	Key Employment Area	Density	Low

Criteria	Comment	Score (out of 5)
Strategic Road Access	Easily accessible from the A419 trunk road via the newly constructed roundabout, and approximately 6km from Junction 15 of the M4 on a dual carriageway.	4
Local Accessibility	Dedicated access road with unconstrained roundabout. No on-street parking. A regular bus service can be accessed from the A420 to the south of the site, including bus routes No. 23 and No. 66.	5
Proximity to Urban Areas and Access to Labour and Services	Located to the east of the Swindon urban area. Some residential units are located in South Marston to the north-east and some retail services are located to the south of the site including a supermarket.	4
Proximity to Incompatible Uses	Located between a supermarket and retail warehouses to the south, and the sizeable Honda site to the north.	5
Site Characteristics and Development Constraints	Large site with a level topography. No obvious development constraints.	5
Market Attractiveness	High profile site located near to the Honda site. Recently constructed with further vacant plots suitable for development, and possible room for expansion.	5
Planning Factors	Key Employment Area. Land to the east forms a part of the New Eastern Villages Strategic Allocation. Land to the north-east is designated as a housing brownfield opportunity.	
Barriers to Delivery	No identified barriers to delivery.	
Potential Employment Uses	B1 / B2 / B8	
Timescale / Availability	Vacant plots for immediate development.	

Total Score: 28

Site Name:	Greenbridge Industrial Estate	Reference:	28

Total Site Area (ha)	21.43	Current Uses	B1 / B2 / B8
Undeveloped Land (ha)	0	Sequential Status	Edge-of-centre
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Approximately 4km from the A419 trunk road via A roads, but passing through residential areas and around 8km from the Junction 15 of the M4.	3
Local Accessibility	Reasonable site access from industrial road off the B4006. Unconstrained road of good quality runs through the estate. The site is served by regular bus services including bus routes No. 1, No. 1A, No. 23, No. 66 and No. 155.	4
Proximity to Urban Areas and Access to Labour and Services	Located within easy access from the nearby residential areas. Retail park also found to the north of the estate, with some services near to the site.	5
Proximity to Incompatible Uses	Some residential areas adjoin the employment site to the west while the site adjoins industrial and commercial uses to the north. A rugby club is located to the south.	3
Site Characteristics and Development Constraints	Large site with a level topography and regular in shape. No obvious development constraints.	5
Market Attractiveness	Variety of premises of mixed quality and age that date from the 1980s to 2000s, with some vacant units evident at the estate. A large part of the site is occupied by the WH Smith office and distribution centre.	3
Planning Factors	Key Employment Area in the Swindon Urban Area. The rugby ground to the south is designated open space.	
Barriers to Delivery	Largely occupied.	
Potential Employment Uses	B1 / B2 / B8	
Timescale / Availability	Limited scope for redevelopment in the medium to long term.	

Total Score: 23

Site Name:	Drakes Way	Reference:	29

Total Site Area (ha)	20.30	Current Uses	B1 / B2 / B8 / Sui Genesis (Car Showroom)
Undeveloped Land (ha)	0.60	Sequential Status	Edge-of-centre
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Approximately 4km from the A419 trunk road via A roads but passing through residential areas, and 8km from the Junction 15 of the M4.	3
Local Accessibility	Good site access from Drakes Way via wide junction. Site comprises two large industrial units each with independent access, as well as a partially constructed business park. Internal roads are of good quality with unconstrained junctions. Significant levels of on-street parking, with the site served by regular bus services from Drakes Way.	4
Proximity to Urban Areas and Access to Labour and Services	Located within easy access from residential areas, with a retail park located to the north-east of the employment site. Some services are found near to the site.	5
Proximity to Incompatible Uses	Adjoins employment areas to the north-east, a retail park to the east, a college to the west and some residential use to the north-west and south.	4
Site Characteristics and Development Constraints	Large site with a level topography and regular in shape. No obvious development constraints.	4
Market Attractiveness	The industrial buildings to the east of the site are dated but of reasonable quality. The emerging business park is of high quality and in office use. There are some vacant plots that are being marketed to the west of the business park that have remained vacant for several years, which is likely reflective of the level of market attractiveness for the site.	2
Planning Factors	Key Employment Area in the Swindon Urban Area.	
Barriers to Delivery	No identified barriers to delivery.	
Potential Employment Uses	B1 / B2 / B8	
Timescale / Availability	Vacant plots are available for development immediately.	

Total Score: 22

Site Name:	Isis / Stratton Road	Reference:	30

Total Site Area (ha)	2.04	Current Uses	B1c / B8 / D2
Undeveloped Land (ha)	0	Sequential Status	-
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Approximately 4km from the A419 trunk road via A roads but passing through residential areas, while also being around 6km from Junction 15 of the M4.	2
Local Accessibility	Good site access from Shrivenham Road, although the central estate road is of poor quality with minimal on-street parking. Site access is via residential roads. The site is served by a regular bus service from Shrivenham Road and Stratton Road provided by bus route No. 7A.	2
Proximity to Urban Areas and Access to Labour and Services	Located within easy access from nearby residential areas. A retail park lies to the north-east of the site, while some services are also found near to the site.	5
Proximity to Incompatible Uses	Adjoins employment uses to the north and south, and a number of residential properties to the west and east. A retail park is located to the south-east of the employment site.	3
Site Characteristics and Development Constraints	A smaller employment site of regular shape with a level topography. The waste transfer site directly to the east of the site burnt down in 2014 and is now currently vacant. No obvious development constraints.	3
Market Attractiveness	Most of the premises are of reasonable condition but considered as poorer quality by estate agents due to their limited accessibility and lack of prominence. Land to the east (the former waste transfer site) is currently vacant and may be suitable for expansion.	2
Planning Factors	Key Employment Area in the Swindon Urban Area.	
Barriers to Delivery	Many occupied units on site.	
Potential Employment Uses	B1 / B2 / B8 / D2	
Timescale / Availability	Medium term development opportunity.	

Total Score: 17

Site Name:	Dorcan Industrial Estate	Reference:	31

Total Site Area (ha)	61.81	Current Uses	B1 / B2 / B8
Undeveloped Land (ha)	0	Sequential Status	Out-of-centre
Policy Status	Key Employment Area	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Direct access through dedicated entrance from the A419 trunk road via unconstrained roundabout, while also being around 1.5km from Junction 15 of the M4 on a dual carriageway.	5
Local Accessibility	Dedicated site entrance and exit positioned at the eastern side of the estate. Internal estate roads of good quality with no on-street parking and unconstrained roads. Site served by frequent bus routes, including No. 13, No. 14 and No. 155.	4
Proximity to Urban Areas and Access to Labour and Services	Site adjoins residential areas to the north, west and south, with local services located in close proximity to the site.	4
Proximity to Incompatible Uses	Residential areas to the north, south and west. Greenfield land is found beyond the A419 to the east.	2
Site Characteristics and Development Constraints	Large site with a level topography. No obvious development constraints.	4
Market Attractiveness	Site in prominent location adjacent to the A419 and on the main access route into Swindon from the M4. Some slightly ageing vacant office premises located in the north-west of the estate. Varied quality of premises at site with the majority of the building stock mostly from the 1970s. A large occupier at the site includes the Post Office.	4
Planning Factors	Key Employment Area in the Swindon Urban Area. Land to the east, beyond the A419, forms part of the Eastern Villages Strategic Allocation.	
Barriers to Delivery	None obvious but no undeveloped plots.	
Potential Employment Uses	B1 / B2 / B8	
Timescale / Availability	Long term for redevelopment.	

Total Score:	23

Site Name:	North Star	Reference:	32

Total Site Area (ha)	20.61	Current Uses	B1a / D1 / D2
Undeveloped Land (ha)	0	Sequential Status	Town centre
Policy Status	Central Area Action Plan	Density	Low

Criteria	Comment	Score (out of 5)
Strategic Road Access	Approximately 5km from Junction 16 of the M4 via the Great Western Way.	3
Local Accessibility	Accessed off unconstrained roundabout along roads that are of good quality and recent construction. No on-street car parking. Site served by frequent bus routes, including the No. 12 and No. 15, and in close proximity to Swindon Railway Station and the main London-Bristol railway line.	5
Proximity to Urban Areas and Access to Labour and Services	Situated in the central parts of Swindon, with some residential areas found nearby although they do not adjoin the site. Some services are also located in close proximity to the employment site.	5
Proximity to Incompatible Uses	Located next to Hawksworth Industrial Estate to the west, with no residential properties adjoining the site.	5
Site Characteristics and Development Constraints	Relatively large, regularly shaped site with a level topography. No obvious development constraints.	4
Market Attractiveness	Relatively prominent site. Some high quality occupiers set within an attractive environment. Some vacant space in large office premises. The environment and buildings at the site are of good quality.	4
Planning Factors	The site is located in the Central Area Action Plan in the Swindon Urban Area. The north-west of the site, which covers land presently occupied by Oasis Leisure Centre, is designated as a Regional Leisure Destination. The Oasis Leisure Centre presently has outline planning consent for an arena, snowdome, hotel and other leisure facilities (Ref: S/OUT/15/0943). The site is not an allocated Key Employment Area.	
Barriers to Delivery	No identified barriers to delivery.	
Potential Employment Uses	B1a / D1 / D2	
Timescale / Availability	Medium term for redevelopment.	

Total Score: 26

Site Name:	Hawksworth Industrial Estate	Reference:	33

Total Site Area (ha)	13.02	Current Uses	B1 / B2 / B8 Sui Generis (Car Repair, Car Hire)
Undeveloped Land (ha)	0	Sequential Status	-
Policy Status	Central Area Action Plan	Density	Medium

Criteria	Comment	Score (out of 5)
Strategic Road Access	Approximately 5km from Junction 16 of the M4 via the Great Western Way.	4
Local Accessibility	Access directly from the B4289 or off unconstrained roundabout, and through North Star Business Park. Wide roads with limited on-street car parking. No bus stops within site. The closest bus stop is on North Star Avenue within the North Star Business Park, with frequent bus services from the area. Located in close proximity to Swindon Railway Station.	4
Proximity to Urban Areas and Access to Labour and Services	The site is located in the central parts of Swindon, with residential areas located to the north and west.	3
Proximity to Incompatible Uses	Located next to North Star Business Park to the west. No residential properties directly adjoin the site.	4
Site Characteristics and Development Constraints	Relatively large, regularly shaped site with a level topography. No obvious development constraints, although it is fully developed.	3
Market Attractiveness	Units at the site are of a variety of qualities and ages with many older sheds but some evidence of more recent investment. The estate does contain some national firms such as Nationwide and NTL. Other small premises are occupied by small to medium-sized enterprise.	3
Planning Factors	The site is located in the Central Area Action Plan in the Swindon Urban Area. The site is not an allocated Key Employment Area.	
Barriers to Delivery	None obvious but no undeveloped plots.	
Potential Employment Uses	B1 / B2 / B8 / Sui Generis	
Timescale / Availability	Medium to long term for redevelopment.	

Total Score: 21

Site Name:	Commonhead (Coate)	Reference:	34


Total Site Area (ha)	15.00	Current Uses	Greenfield Land
Undeveloped Land (ha)	15.00	Sequential Status	-
Policy Status	Employment Allocation	Density	N/A

Criteria	Comment	Score (out of 5)
Strategic Road Access	The site is situated adjacent to the A419 trunk road in close proximity to Junction 15 of the M4 which provides the site with excellent access to the strategic road network.	5
Local Accessibility	In order to access the employment element of the strategic allocation, it will likely be necessary for road access to share the entrance used by the Great Western Hospital, which will create a variety of potential congestion and queuing issues for the local road network.	4
Proximity to Urban Areas and Access to Labour and Services	The site is found in the extensive Commonhead Strategic Allocation. Site located near to the Great Western Hospital with public transport routes serving the area.	4
Proximity to Incompatible Uses	The positioning of the Great Western Hospital within close proximity to the employment allocation is likely to create some compatibility constraints for many potential employment activities at the site, such as heavy industrial uses.	5
Site Characteristics and Development Constraints	Large greenfield site with a generally level topography. No obvious development constraints.	5
Market Attractiveness	A potentially prominent employment location adjacent to the M4 motorway, with the possibility for future uses at the site to relate to the science and medical activities supported at the Great Western Hospital.	5
Planning Factors	The site is an Employment Allocation that form part of the wider Commonhead Strategic Allocation. The site is located outside of the Swindon Urban Area with the land the north of the site designated as a setting protection for Coate Water.	
Barriers to Delivery	Upfront infrastructure requirements to enable the delivery of the site, including new or improved road infrastructure to adequately unlock the employment site.	
Potential Employment Uses	B1 / B2 / B8	
Timescale / Availability	Short to medium term for development.	

Total Score: 28

Site Name:	Land North of Blackworth Industrial Estate	Reference:	35

Total Site Area (ha)	5.53	Current Uses	Greenfield Land
Undeveloped Land (ha)	5.53	Sequential Status	-
Policy Status	Employment Allocation	Density	N/A

Criteria	Comment	Score (out of 5)
Strategic Road Access	6km from the A419 trunk road and 10km from Junction 15 of the M4, with access to the site passing through residential area in Highworth.	2
Local Accessibility	The site is positioned adjacent to the A361 with the potential for dedicated site access from an unconstrained roundabout. There are no bus stops in proximity to the site. Closest bus stop is on the A361 to the north of Highworth, which is served by the No. 7, No. 64 and No. 74 routes.	3
Proximity to Urban Areas and Access to Labour and Services	The employment allocation is positioned on the northern fringe of the small town of Highworth with some local services found nearby in the town.	3
Proximity to Incompatible Uses	Land to the south of the employment allocation is an existing established industrial estate.	3
Site Characteristics and Development Constraints	Level topography with a regular shape. No obvious constraints to development.	5
Market Attractiveness	Relatively attractive site albeit in an isolated location to the north of Highworth.	3
Planning Factors	The site is an Employment Allocation, while the land to the south of the site is a Key Employment Area.	
Barriers to Delivery	No identified barriers to delivery.	
Potential Employment Uses	B1 / B2 / B8	
Timescale / Availability	Short to medium term for development.	

Total Score: 19

Site Name:	Eastern Villages	Reference:	36

Total Site Area (ha)	40.00	Current Uses	Greenfield Land
Undeveloped Land (ha)	40.00	Sequential Status	-
Policy Status	Employment Allocation	Density	N/A

Criteria	Comment	Score (out of 5)
Strategic Road Access	The site is located adjacent to the A419 trunk road and the A420. The site is located approximately 5km from Junction 15 of the M4.	5
Local Accessibility	Potential to provide local road access from the A420 that links to the A419 dual carriageway.	4
Proximity to Urban Areas and Access to Labour and Services	Located in close proximity to residential areas to the west, but across the A419 dual carriageway. The site is located in the New Eastern Villages Strategic Allocation. A range of local services are located nearby including a large supermarket. Site is well served by local bus services, including the No. 23 and No. 66.	4
Proximity to Incompatible Uses	The site lies close to the existing Honda manufacturing plant. Other nearby uses includes agriculture and retail.	4
Site Characteristics and Development Constraints	The southern part of the employment allocation is located in Flood Zones 2 and 3.	5
Market Attractiveness	High profile location close to the A419, with the Honda manufacturing site and other proven areas of demand for employment uses found in the local area.	5
Planning Factors	The site is an Employment Allocation that forms part of the wider New Eastern Villages Strategic Allocation. The far south of the allocation is situated in Flood Zones 2 and 3.	
Barriers to Delivery	No identified barriers to delivery.	
Potential Employment Uses	B1 / B2 / B8.	
Timescale / Availability	Short to medium term for development.	

Total Score: 27

Appendix 4 Baseline Employment Forecasts

Cambridge Econometrics

Future employment growth by sector from the economic forecasts produced by Cambridge Econometrics (CE) in November 2015 is summarised below, which was used as part of the baseline labour demand scenario.

Sector	Employment in Swindon		
	2016	2036	2016 - 2036
Agriculture, Forestry & Fishing	870	520	- 360
Mining & Quarrying	50	10	- 40
Food, Drink & Tobacco	100	40	- 60
Textiles	70	30	- 40
Wood & Paper	160	60	- 110
Printing & Recording	380	460	90
Coke & Petroleum	280	320	40
Chemicals	530	550	20
Pharmaceuticals	1,590	1,220	- 360
Non-Metallic Mineral Products	380	190	- 190
Metals & Metal Products	930	520	- 410
Electronics	180	20	- 160
Electrical Equipment	1,020	800	- 220
Machinery	800	420	- 380
Motor Vehicles	5,130	3,100	- 2,030
Other Transport Equipment	140	150	0
Other Manufacturing & Repair	850	1,140	280
Electricity & Gas	540	560	30
Water, Sewerage & Waste	820	870	50
Construction	6,990	8,880	1,880
Motor Vehicles Trade	3,140	3,260	120
Wholesale Trade	4,020	3,340	- 670
Retail Trade	12,590	13,790	1,200
Land Transport	2,090	1,920	- 170
Water Transport	20	10	- 10
Air Transport	10	10	0
Warehousing & Postal	6,770	7,080	310
Accommodation	1,250	1,350	100
Food & Beverage Services	6,360	8,170	1,810
Media	370	270	- 100

Sector	Employment in Swindon		
	2016	2036	2016 - 2036
IT Services	3,780	4,110	330
Financial & Insurance	9,830	10,630	810
Real Estate	1,620	1,130	- 490
Legal & Accounting	1,560	1,610	50
Head Offices & Management Consultancies	3,520	4,630	1,110
Architectural & Engineering Services	2,320	2,390	70
Other Professional Services	2,490	3,060	570
Business Support Services	10,650	12,090	1,440
Public Administration & Defence	5,060	4,510	- 550
Education	8,320	9,360	1,040
Health	7,630	8,100	470
Residential & Social	4,500	6,020	1,530
Arts	1,480	1,710	240
Recreational Services	2,070	2,290	230
Other Services	3,400	4,050	650
Total	**126,640**	**134,750**	**8,110**

Oxford Economics

Future employment growth by sector from the economic forecasts produced by Oxford Economics (OE) in January 2016 is summarised below which was used as part of the baseline labour demand scenario.

Sector	Employment in Swindon		
	2016	2036	2016 - 2036
Crop & Animal Production, Hunting	190	160	- 30
Forestry & Logging	10	0	0
Fishing & Aquaculture	0	0	0
Mining of Coal & Lignite	0	0	0
Extraction of Crude Petroleum	0	0	0
Mining of Metal Ores	0	0	0
Other Mining & Quarrying	0	0	0
Mining Support Service Activities	30	20	- 20
Manufacture of Food Products	40	30	- 10
Manufacture of Beverages	0	0	0
Manufacture of Tobacco Products	0	0	0
Manufacture of Textiles	110	70	- 40
Manufacture of Wearing Apparel	0	0	0

Sector	Employment in Swindon		
	2016	2036	2016 - 2036
Manufacture of Leather & Related	70	50	- 30
Manufacture of Wood & of Products	140	100	- 40
Manufacture of Paper & Paper Products	40	30	- 10
Printing & Reproduction of Records	440	340	- 100
Manufacture of Coke & Refined Petrol	260	180	- 80
Manufacture of Chemicals & Chemicals	340	240	- 100
Manufacture of Basic Pharmaceutical	1,310	1,210	- 90
Manufacture of Rubber & Plastic Products	290	190	- 100
Manufacture of Other Non-Metallic Minerals	90	60	- 30
Manufacture of Basic Metals	20	10	- 10
Manufacture of Fabricated Metal Products	590	420	- 170
Manufacture of Computer, Electronic	90	60	- 30
Manufacture of Electrical Equipment	1,140	830	- 310
Manufacture of Machinery & Equipment	790	550	- 240
Manufacture of Motor Vehicles, Trailers	4,240	2,750	- 1,490
Manufacture of Other Transport Equipment	80	60	- 20
Manufacture of Furniture	280	200	- 80
Other Manufacturing	460	290	- 170
Repair & Installation of Machinery	140	90	- 40
Electricity, Gas, Steam & Air Conditioning	480	340	- 140
Water Collection, Treatment & Supply	0	0	0
Sewerage	630	540	- 80
Waste Collection, Treatment	330	260	- 70
Remediation Activities & Other Waste Activities	0	0	0
Construction of Buildings	1,670	2,090	420
Civil Engineering	760	960	190
Specialised Construction Activities	3,020	3,770	750
Wholesale & Retail Trade & Repairs	3,250	3,330	80
Wholesale Trade, except of Motor Vehicles	4,730	4,720	- 10
Retail Trade, except of Motor Vehicles	12,500	12,280	- 230
Land Transport & Transport via Pipe	2,720	3,030	320
Water Transport	10	20	0
Air Transport	0	10	0
Warehousing & Support Activities	3,930	4,520	590
Postal & Courier Activities	2,390	2,540	150
Accommodation	1,170	1,300	130
Food & Beverage Service Activities	5,690	6,370	680

Sector	Employment in Swindon		
	2016	2036	2016 - 2036
Publishing Activities	400	410	0
Motion Picture, Video & Television	180	190	10
Programming & Broadcasting Activities	0	0	0
Telecommunications	1,340	1,400	60
Computer Programming, Consultancy	2,810	3,220	400
Information Service Activities	70	80	10
Financial Service Activities	7,130	7,170	40
Insurance, Reinsurance & Pension Funds	1,270	1,320	50
Activities Auxiliary to Financial Services	1,340	1,440	100
Real Estate Activities	1,550	1,940	390
Legal & Accounting Activities	1,810	2,080	260
Activities of Head Offices	3,970	5,080	1,110
Architectural & Engineering Activities	3,030	3,640	620
Scientific Research & Development	1,840	2,190	350
Advertising & Market Research	170	200	30
Other Professional, Scientific	650	780	130
Veterinary Activities	360	440	80
Rental & Leasing Activities	960	1,200	240
Employment Activities	4,920	5,930	1,010
Travel Agency, Tour Operator & Other	200	240	40
Security & Investigation Activities	1,520	1,900	380
Services to Buildings & Landscape	3,770	4,520	750
Office Administrative, Office Support	1,860	2,290	420
Public Administration & Defence	3,460	3,170	- 290
Education	7,980	8,250	270
Human Health Activities	7,380	8,350	970
Residential Care Activities	1,470	1,660	190
Social Work Activities	3,040	3,510	470
Creative, Arts & Entertainment Activities	330	420	70
Libraries, Archives, Museums & Other	730	910	190
Gambling & Betting Activities	210	270	60
Sports Activities & Amusement	2,380	3,150	770
Activities of Membership Organisation	1,720	2,170	450
Repair of Computers & Personal	360	440	80
Other Personal Service Activities	1,850	2,240	390
Total	**126,570**	**136,200**	**9,630**

Appendix 5 Adjusted Employment Forecasts

Adjusted employment growth forecasts by sector produced by Hardisty Jones Associates (HJA) as part of the draft Swindon & Wiltshire Functional Economic Market Area (FEMA) Assessment (2016) is summarised below. These adjusted employment forecasts are based on the economic forecasts produced by Cambridge Econometrics and Oxford Economics (see Appendix 4), and are used as the basis of the adjusted labour demand scenario.

Sector	Employment in Swindon		
	2016	2036	2016 - 2036
Agriculture, Forestry & Fishing	1,440	1,070	- 370
Mining & Quarrying	130	60	- 70
Food, Drink & Tobacco	180	90	- 90
Textiles	170	100	- 70
Wood & Paper	270	160	- 110
Printing & Recording	470	460	- 10
Coke & Petroleum	270	250	- 20
Chemicals	510	470	- 50
Pharmaceuticals	1,540	1,270	- 270
Non-Metallic Mineral Products	540	320	- 220
Metals & Metal Products	950	600	- 350
Electronics	260	90	- 170
Electrical Equipment	1,270	940	- 330
Machinery	910	550	- 360
Motor Vehicles	4,700	4,690	- 10
Other Transport Equipment	180	160	- 20
Other Manufacturing & Repair	1,030	1,050	20
Electricity & Gas	570	500	- 60
Water, Sewerage & Waste	1,150	1,080	- 70
Construction	9,380	11,790	2,410
Motor Vehicles Trade	3,760	3,900	150
Wholesale Trade	6,450	6,380	- 70
Retail Trade	14,800	16,150	1,350
Land Transport	2,860	3,170	310
Water Transport	20	20	0
Air Transport	60	60	0
Warehousing & Postal	6,930	7,690	760
Accommodation	2,090	2,270	170
Food & Beverage Services	7,700	9,050	1,350

Sector	Employment in Swindon		
	2016	2036	2016 - 2036
Media	700	650	- 50
IT Services	4,930	5,510	580
Financial & Insurance	10,500	11,010	510
Real Estate	2,030	1,970	- 60
Legal & Accounting	2,330	2,580	240
Head Offices & Management Consultancies	4,840	6,280	1,430
Architectural & Engineering Services	3,440	3,910	470
Other Professional Services	3,240	4,020	780
Business Support Services	14,930	17,670	2,740
Public Administration & Defence	4,850	4,390	- 460
Education	10,900	11,690	790
Health	8,190	8,980	800
Residential & Social	6,090	7,470	1,390
Arts	1,430	1,730	300
Recreational Services	3,070	3,730	660
Other Services	4,760	5,860	1,100
Total	**156,820**	**171,850**	**15,030**

Appendix 6 Definition of B Class Sectors

The method for apportioning employment forecasts by sector into B class uses is summarised below which draws upon 2014 BRES data.

Sector	Share of Workforce Jobs by Use		
	Offices	Industrial	Warehouse
Agriculture, Forestry & Fishing	Non B Class		
Extraction & Mining	Non B Class		
Food, Drink & Tobacco (manufacture of)	0%	100%	0%
Textiles & Clothing (manufacture of)	0%	100%	0%
Wood & Paper (manufacture of)	0%	100%	0%
Printing & Recorded Media (manufacture of)	0%	100%	0%
Fuel Refining	0%	100%	0%
Chemicals (manufacture of)	0%	100%	0%
Pharmaceuticals (manufacture of)	0%	100%	0%
Non-Metallic Products (manufacture of)	0%	100%	0%
Metal Products (manufacture of)	0%	100%	0%
Computer & Electronic Products (manufacture of)	0%	100%	0%
Machinery & Equipment (manufacture of)	0%	100%	0%
Transport Equipment (manufacture of)	0%	100%	0%
Other Manufacturing	0%	100%	0%
Utilities	0%	19%	0%
Construction of Buildings	Non B Class		
Civil Engineering	Non B Class		
Specialised Construction Activities	0%	59%	0%
Wholesale	0%	27%	73%
Retail	Non B Class		
Land Transport, Storage & Post	0%	0%	73%
Air & Water Transport	Non B Class		
Accommodation & Food Services	Non B Class		
Recreation	Non B Class		
Media Activities	100%	0%	0%
Telecoms	100%	0%	0%
Computing & Information Services	100%	0%	0%
Finance	100%	0%	0%
Insurance & Pensions	100%	0%	0%
Real Estate	100%	0%	0%
Professional Services	100%	0%	0%
Administrative & Supportive Services	15%	0%	0%
Other Private Services	Non B Class		
Public Administration & Defence	10%	0%	0%
Education	Non B Class		
Health	Non B Class		
Residential Care & Social Work	Non B Class		

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