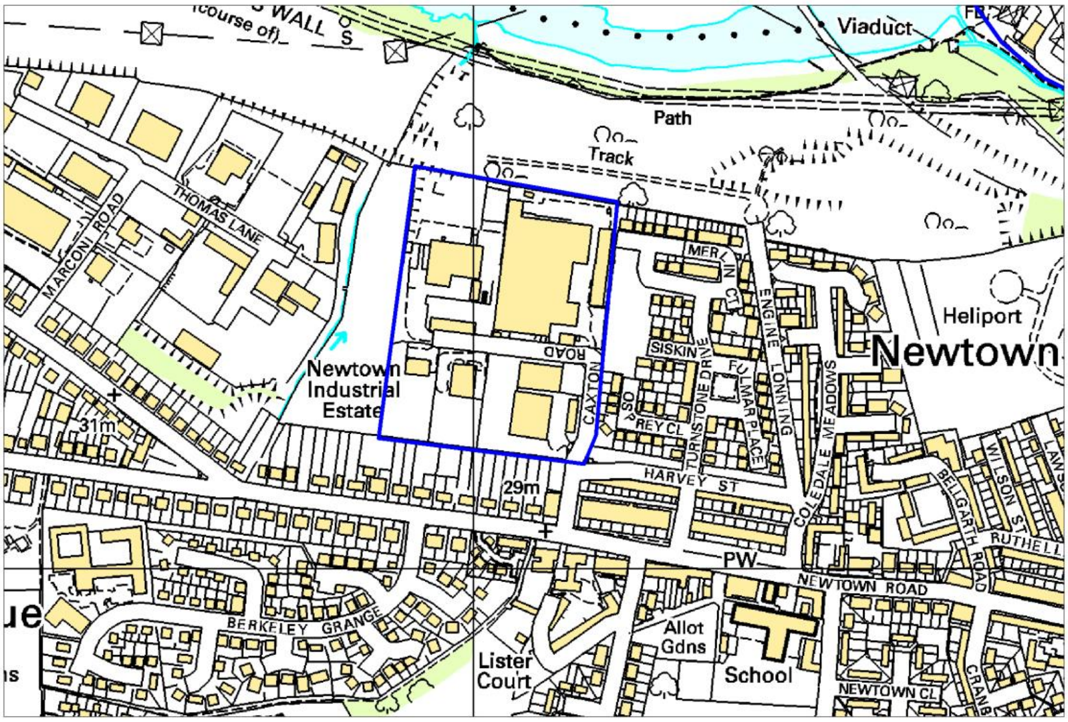
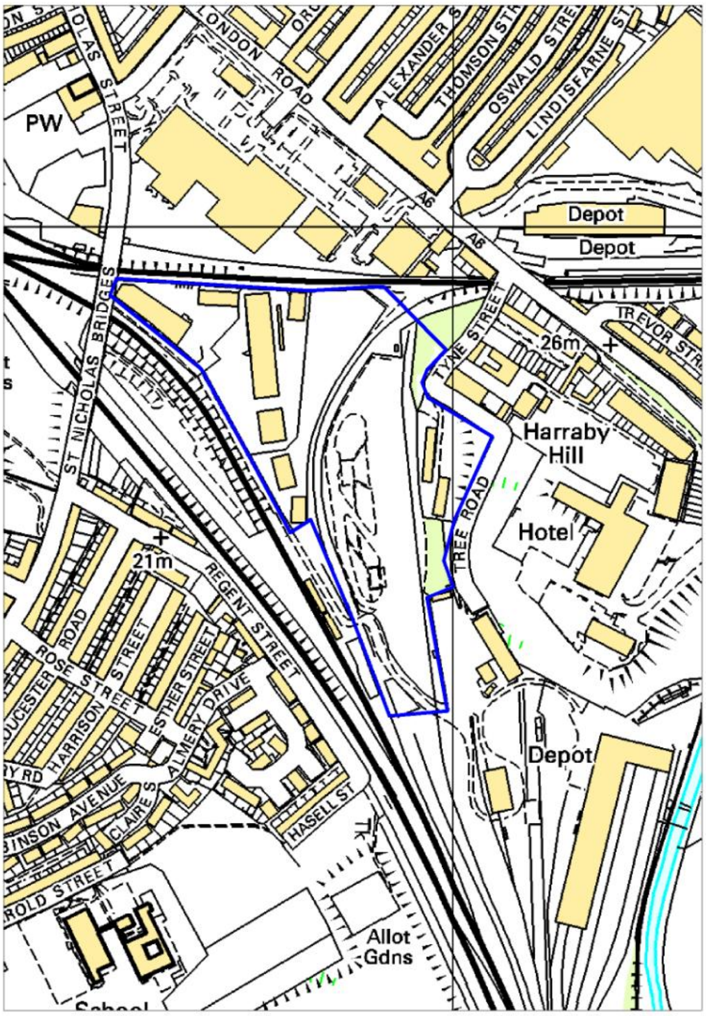
Site Ref & Name	42 City Centre: Botchergate & Lancaster Street
Key Actions	▪ Implement parking and movement strategy for City Centre ▪ Undertake soft market testing as part of preparation of City Centre Strategic Framework and site masterplan review (linked to Sites 44 and 45) ▪ Undertake viability assessment as part of Masterplanning work

Site Ref & Name	7 Newtown Industrial Estate



Size (ha)	4.87	
Available for Development (ha)	0	
Site Opportunities	▪ Profile and accessibility of site will improve with completion of CNDR ▪ Understood to be redevelopment opportunities within estate (but delivery constraints - see below)	
Potential Use (to be defined in policy)	Retain for general industrial use.	
Key Delivery Issues	▪ Poorly maintained estate, low grade users ▪ New residential adjacent ▪ Potential site clearance and contamination issues should site come forward for development ▪ Complex ownership ▪ Ownership and values likely to make reconfiguration unviable	
Recommended Delivery Mechanism	**Public sector funding for access and environmental improvements.** Important given increased profile of site with CNDR.	
Sustainability	Good public transport access. Brownfield site.	
Key Actions	▪ Public sector focus should be on working with owners and occupiers to implement environmental improvements within estate ▪ Investigate potential for facelift grant scheme	

Site Ref & Name	12 Harraby



Size (ha)	5.50	
Available for Development (ha)	2.50	

Site Opportunities	▪ Site is understood to be available for development, subject to resolution of access constraints ▪ Located in high priority deprived parts of City ▪ Close to food and drink manufacturing at Durranhill ▪ St Nicholas Bridge Business park is popular location ▪ Opportunity to address access issues via Harraby Junction (Site 49)
Potential Use (to be defined in policy)	Retain in employment use and allocate vacant site for general employment development. Potential for starter/follow on units to build on success of St Nicholas Bridge Business Park and encourage business development among local population.

Site Ref & Name	12 Harraby
Key Delivery Issues	▪ Parts of site are landlocked requiring new access - explore option of linking in to Harraby Junction (site 49) to open up for development ▪ Potential contamination given previous rail related use ▪ Limited visibility of development site - again link to Harraby Junction could help this
Recommended Delivery Mechanism	**Public sector coordinating partners and supporting delivery of starter/follow on units**
Sustainability	Public transport access is good on London Road, however walking and cycling routes to nearby residential need to be improved as part of any development proposals.
Key Actions	▪ Enter into discussions with DB Schenker about site potential. Undertake joint investigation of market opportunities and develop access solution, including possible incorporation into Harraby Junction (Site 49) ▪ Public sector has key role in brokering discussions between Network Rail, DB Schenker and other private sector interests

Appendix G

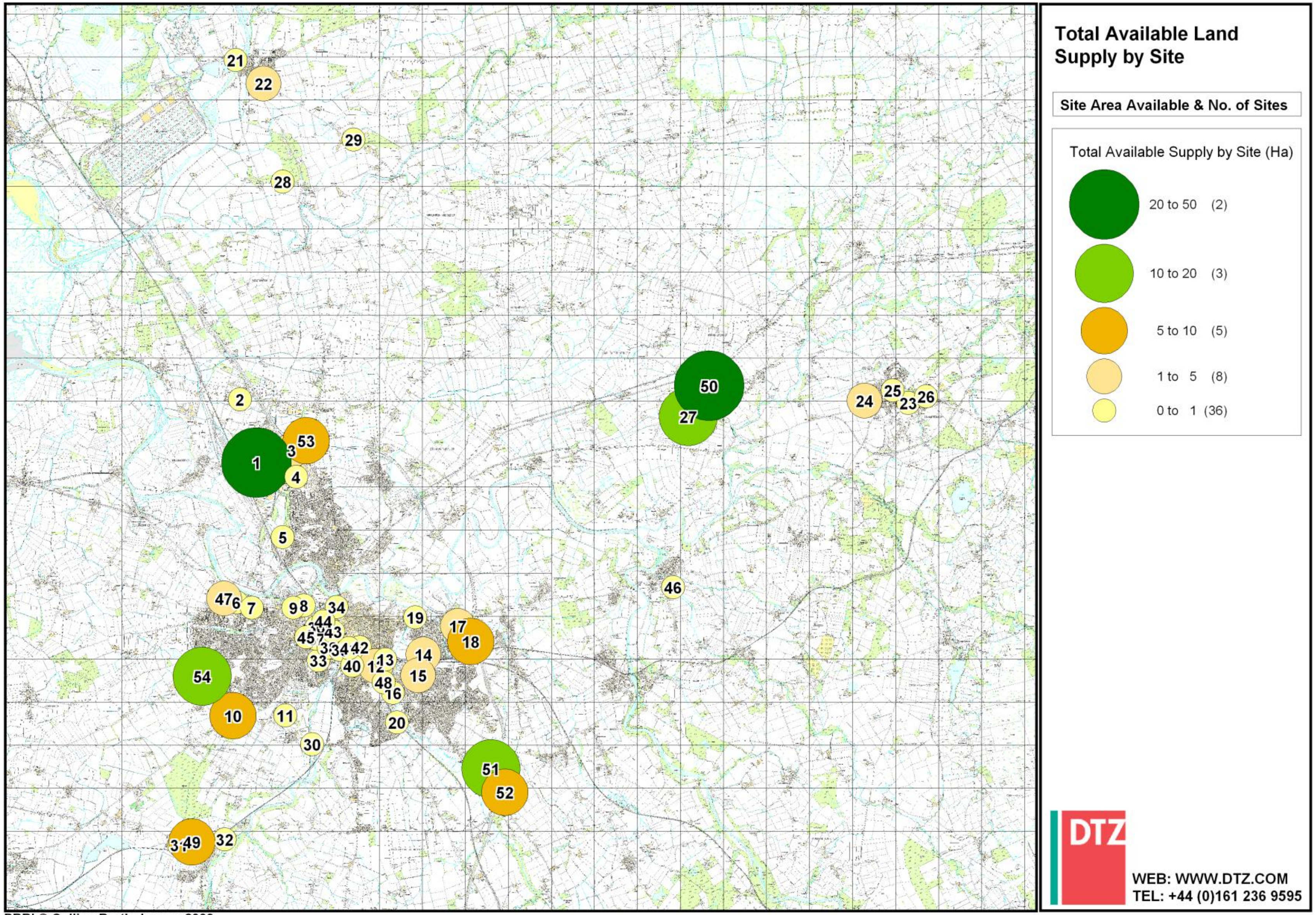
Summary Table of Sites

Site No.	Site Name	Area	A: Site Area (Total)	B: Under Construction	C: With Planning Permission	D: Remaining Available Land	E: Total Available Supply (B+C+D)	Site Category	Recommendation
1	Kingmoor Park & Brunthill	North	97.50	3.22	4.08	34.55	41.85	Regional Investment	Priority Investment Location
2	Kingmoor Park - Northern Sites	North	32.84	0.00	0.00	0.00	0.00	Local Employment	Consider Alternatives
3	Parkhouse (north of devpt route)	North	16.05	0.00	0.00	4.01	4.01	Business Park	Retain & Manage - Monitor
4	Kingstown Industrial Estate	North	62.70	0.00	0.00	0.00	0.00	Local Employment	Retain & Manage - Intensive
5	Kingmoor Industrial Estate	North	2.80	0.00	0.00	0.00	0.00	Local Employment	Retain & Manage - Monitor
6	Burgh Road Industrial Estate	West	8.55	0.00	0.00	0.00	0.00	Local Employment	Retain & Manage - Monitor
7	Newtown Industrial Estate	West	4.87	0.00	0.00	0.00	0.00	Local Employment	Priority Investment Location
8	Willowholme Industrial Estate	West	29.00	0.00	0.00	0.45	0.45	Local Employment	Retain & Manage - Intensive
9	Port Road Business Park	West	4.70	0.02	0.00	0.15	0.17	Local Employment	Retain & Manage - Monitor
10	South West of Morton	West	8.00	0.00	8.00	0.00	8.00	Business Park	Retain & Manage - Monitor
11	Pirelli, Dalston Road	West	26.29	0.00	0.00	0.00	0.00	Local Employment	Consider Alternatives
12	Harraby	South East	5.50	0.00	0.00	2.50	2.50	Local Employment	Priority Investment Location
13	Harraby Depot	South East	2.10	0.00	0.00	0.00	0.00	Local Employment	Consider Alternatives
14	Durranhill Sidings	South East	10.86	0.00	0.00	1.60	1.60	Local Employment	Change of Use/Consider Alternatives
15	Durranhill Industrial Estate	South East	27.50	0.00	0.00	1.03	1.03	Local Employment	Priority Investment Location
16	Harraby Green Business Park	South East	2.00	0.00	0.00	0.20	0.20	Business Park	Retain & Manage - Monitor
17	Rosehill Industrial Estate	South East	26.50	0.00	0.00	2.70	2.70	Local Employment	Priority Investment Location
18	Botcherby / Rosehill Extension	South East	8.80	0.00	0.00	8.80	8.80	Local Employment	Consider Alternatives
19	Riverside, Warwick Road	South East	1.08	0.00	0.00	0.42	0.42	Local Employment	Retain & Manage - Monitor
20	Upperby Depot	South East	1.80	0.00	0.00	0.00	0.00	Local Employment	Consider Alternatives
21	Longtown Bridge	KSC	6.26	0.00	0.00	0.00	0.00	Local Employment	Consider Alternatives
22	Borders Business Pk, Longtown (4)	KSC	7.63	0.00	0.00	2.85	2.85	Local Employment	Retain & Manage-Intensive/Consider Alternatives
23	Brampton East (2)	KSC	0.92	0.00	0.00	0.00	0.00	Local Employment	Consider Alternatives
24	Townfoot Industrial Estate	KSC	11.76	0.00	0.00	1.15	1.15	Local Employment	Priority Investment Location
25	Brampton Irthing Business Centre	KSC	1.50	0.00	0.00	0.00	0.00	Business Park	Retain & Manage - Monitor
26	Brampton Garage (2 sites)	KSC	0.37	0.00	0.00	0.00	0.00	Local Employment	Change of Use
27	Carlisle Airport	Rural	21.00	0.00	11.83	7.37	19.20	Strategic Employment	Priority Investment Location
28	Sandisyke, South of Longtown	Rural	22.40	0.00	0.00	0.00	0.00	Local Employment	Retain & Manage - Monitor
29	Whitesyke, SE of Longtown	Rural	24.00	0.00	0.00	0.00	0.00	Local Employment	Retain & Manage - Monitor
30	Stead McAlpin, Cummersdale	Rural	5.12	0.00	0.00	0.00	0.00	Local Employment	Consider Alternatives
31	Barras Lane Industrial Estate	Rural	12.09	0.00	0.00	0.00	0.00	Local Employment	Retain & Manage - Monitor
32	Nestle, Dalston	Rural	5.95	0.00	0.00	0.00	0.00	Local Employment	Consider Alternatives
33	Nelson & Norfolk Street (3 sites)	Central	2.93	0.00	0.00	0.00	0.00	Local Employment	Consider Alternatives
34	Peter Street (North City Centre)	Central	0.21	0.00	0.00	0.21	0.21	Local Employment	Change of Use
35	Denton Holme Trading Estate	Central	1.90	0.00	0.00	0.00	0.00	Local Employment	Retain & Manage - Monitor

Site No.	Site Name	Area	A: Site Area (Total)	B: Under Construction	C: With Planning Permission	D: Remaining Available Land	E: Total Available Supply (B+C+D)	Site Category	Recommendation
36	Caldewgate (north of Junction Street)	Central	2.96	0.00	0.00	0.00	0.00	Local Employment	Change of Use
37	Caldewgate (south Junction St)	Central	9.40	0.00	0.00	0.00	0.00	Local Employment	Change of Use
38	Denton Business Park	Central	3.78	0.00	0.00	0.00	0.00	Local Employment	Retain & Manage - Monitor
39	Carlisle Enterprise Centre/James St	Central	6.20	0.00	0.00	0.39	0.39	Local Employment	Retain & Manage - Intensive
40	Currock Road East (Rickerby's) & West	Central	6.01	0.00	0.00	0.00	0.00	Local Employment	Retain & Manage - Monitor
41	James Street and Water Street	Central	7.66	0.00	0.00	0.00	0.00	Local Employment	Retain & Manage - Monitor
42	Botchergate and Lancaster Street	Central	7.81	0.00	0.00	0.00	0.00	Local Employment	Priority Investment Location
43	Viaduct Estate Road South	Central	1.68	0.00	0.00	0.00	0.00	Local Employment	Priority Investment Location
44	Viaduct Estate Road North	Central	0.92	0.00	0.00	0.00	0.00	Local Employment	Priority Investment Location
45	Laings, Dalston Road	Central	1.91	0.00	0.00	0.00	0.00	Local Employment	Change of Use
46	Warwick Mill Business Centre	Rural	2.44	0.00	0.00	0.00	0.00	Local Employment	Retain & Manage - Monitor
		Allocated Sites Total	**554.25**	**3.24**	**23.91**	**68.38**	**95.53**		
Call for Sites									
47	Burgh Road Ind Estate Extension	West	2.74	0.00	0.00	2.74	2.74	Call for Sites	Priority Investment Location
48	Harraby Junction	South East	6.90	0.00	0.00	0.00	0.00	Call for Sites	
49	Barras Lane Ind Estate Extension	Rural	6.68	0.00	0.00	6.68	6.68	Call for Sites	
50	Carlisle Airport Extension	Rural	29.07	0.00	0.00	29.07	29.07	Call for Sites	
51	Junction 42, Carleton Road	Rural	12.65	0.00	0.00	12.65	12.65	Call for Sites	
52	M6 NE of J42, Newlands Farm	Rural	7.00	0.00	0.00	7.00	7.00	Call for Sites	
53	Grearshill Extension	North	7.93	0.00	0.00	7.93	7.93	Call for Sites	
54	Land at Orton Road	Rural	11.17	0.00	0.00	11.17	11.17	Call for Sites	
		Call for Sites Total	**84.14**	**0.00**	**0.00**	**77.24**	**77.24**		
		Grand Total	**638.39**	**3.24**	**23.91**	**145.62**	**172.77**		

Changes to previous employment land analysis include:

- Willowholme Industrial Estate: Additional 0.45 ha which became available 2009/10
- South West of Morton: Reduction of allocation from 12 ha to 8 ha following approved planning application for urban extension
- Harraby: Additional 2.5 ha which became available 2009/2010
- Botcherby/Rosehill Extension: Additional 8.8 ha which was not included in previous study due to restrictions of use for auction relocation
- Peter Street: Additional 0.21 ha previously omitted


Total Available Land Supply by Site
Site Area Available & No. of Sites
Total Available Supply by Site (Ha)
20 to 50 (2)
10 to 20 (3)
5 to 10 (5)
1 to 5 (8)
0 to 1 (36)
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Appendix H

Business Survey

H. Business Survey: Key Findings

H.1 A business survey was carried out in February 2010 with 300 businesses in Carlisle via 10-minute telephone consultations undertaken by Research Resource on behalf of DTZ.

H.2 The sample of businesses was selected primarily on the basis of geography, but also balanced to reflect views by sector (B1, B2, B8) and by business size. In total, there are approximately 2,100 businesses in B1, B2, and B8 sectors within the City. The contact database was established from the Carlisle Business Directory and the Carlisle City Council database which provided approximately 1,000 contacts once it was 'cleaned' to ensure a representative sample.

H.3 The survey was structured around three main areas and remainder of this section outlines the key findings under each of these:

- **Background information** - including type of activity, number of employees, growth trends, location and market etc
- **Current business premises** - focusing on usage, size of facility, rental costs, levels of satisfaction and future requirements
- **General perceptions of business premises and sites** - perceptions by sector and other comments

H.4 Each chart and table in this section has a reference to 'Base' underneath it. This refers to the number of businesses who answered a particular question.

Background

H.5 A total of 300 surveys were completed. The geographical coverage of responses are illustrated in Figure H1. The sample was skewed by geography to ensure it was representative of B1, B2, and B8 land uses, as well as providing sufficient insight by key employment sites.

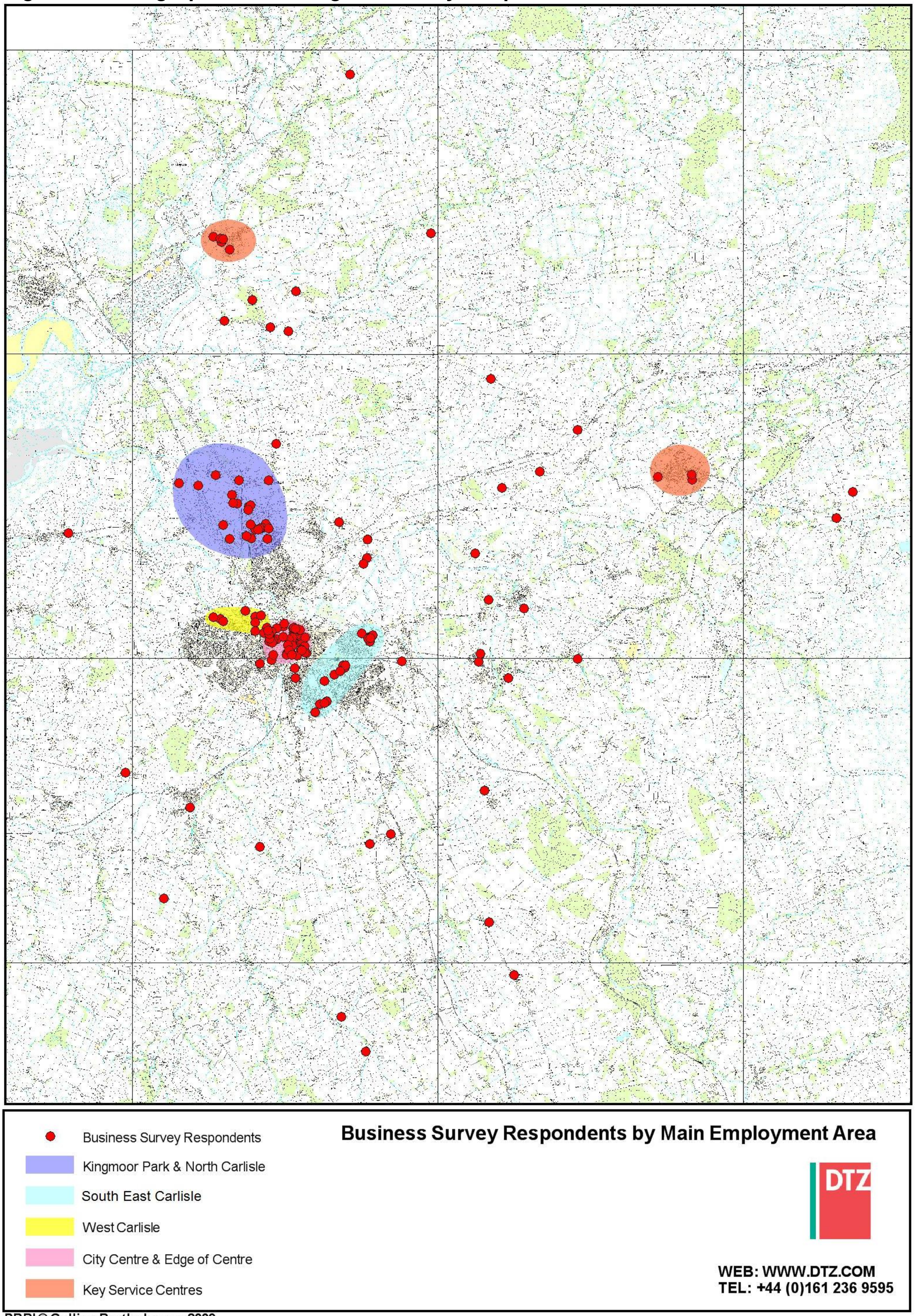
H.6 The survey asked about whether Carlisle was the company's sole premises or not. Of the 300 responses, the survey found:

- 65% of businesses reported that Carlisle was their company's sole premises
- 1% of businesses identified that Carlisle was a branch/division of their company with the HQ located outside the UK
- 24.7% of businesses identified that Carlisle was a branch/division of their company with the HQ located elsewhere within the UK
- 9.3% of businesses identified that Carlisle was their company's headquarters and they had premises elsewhere

H.7 These findings are positive as they reflect the level of business ownership within Carlisle which suggests a degree of commitment to the local area and an ability of business owners to "be in charge of their own destiny". In contrast, businesses with headquarters outside Carlisle (approximately 26% of respondents) can be vulnerable to external decision-making.

H.8 Of the 77 responses identifying their Carlisle presence was a branch/division with HQ's located outside Carlisle, concentrations can be found in North Carlisle (20 responses), City Centre (14 responses) and West Carlisle (11 responses).

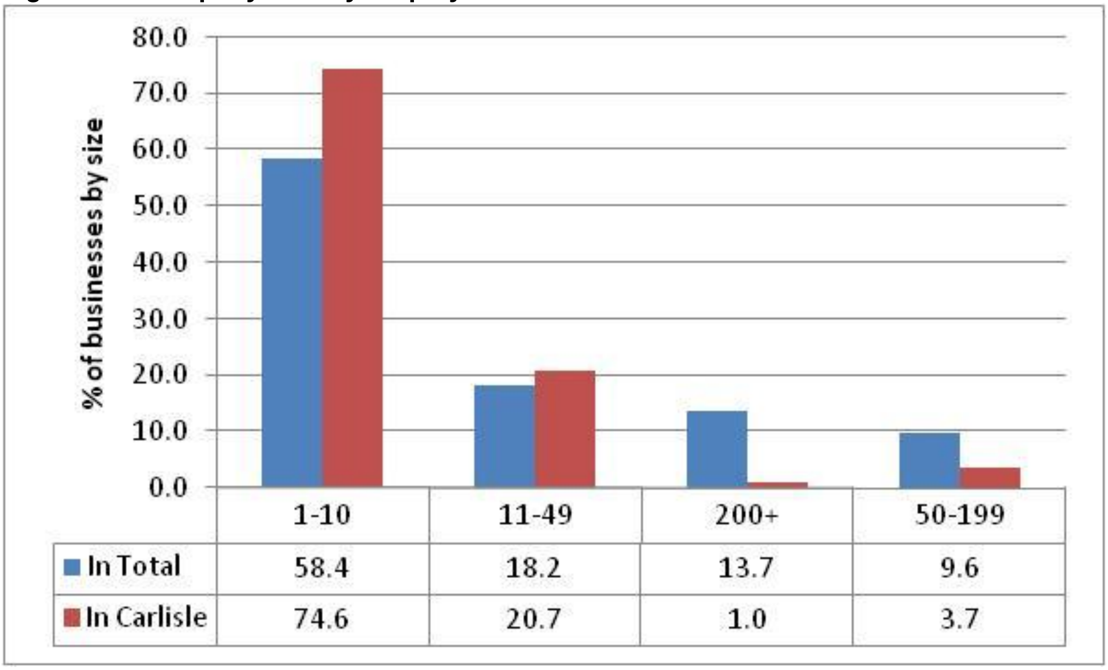
Figure H1 Geographical Coverage of Survey Responses



PBBI © Collins Bartholomew 2009

H.9 Figure H2 illustrates the number of people the firms' surveyed employ. It identifies the total number of employees for the businesses surveyed and the total number of employees based in Carlisle.

Figure H2 Company Size by Employment



Base: In total = 291

Base: In Carlisle = 299

H.10 It is clear that small businesses dominate the responses, in line with the business trend information outlined in Section 3. Approximately 75% of surveyed firms employ ten or fewer people within Carlisle, with a further 21% employing 11-49 employees. Only a minority of firms surveyed (less than 5%) employ more than 200 people within Carlisle. This has clear implications for the size of premises sought to accommodate businesses of this size.

H.11 When asked what proportion of employees live within the borough of Carlisle, it is apparent that self-containment is a feature of the Carlisle economy, with 204 firms of the 295 who answered the question identifying that 100% of their workforce live and work within the borough. This has implications for transport and accessibility in terms of linkages between employment sites and residential areas. Table H1 illustrates the findings.

Table H1 What % of employees reside within the borough of Carlisle?

	No.	%
0 - 49%	17	5.8
50 - 75%	30	10.2
75 - 99%	44	14.9
100%	204	69.2
Total	**295**	**100**

Base = 295

H.12 Over the last three years, the size of the Carlisle workforce has generally remained the same amongst the firms surveyed. Of the 300 responses, 173 (57.7%) said they had remained the same, whilst 87 (29%) had decreased, and only a minority (35 or 11.7%) had increased. This is to be expected given the recent economic downturn.

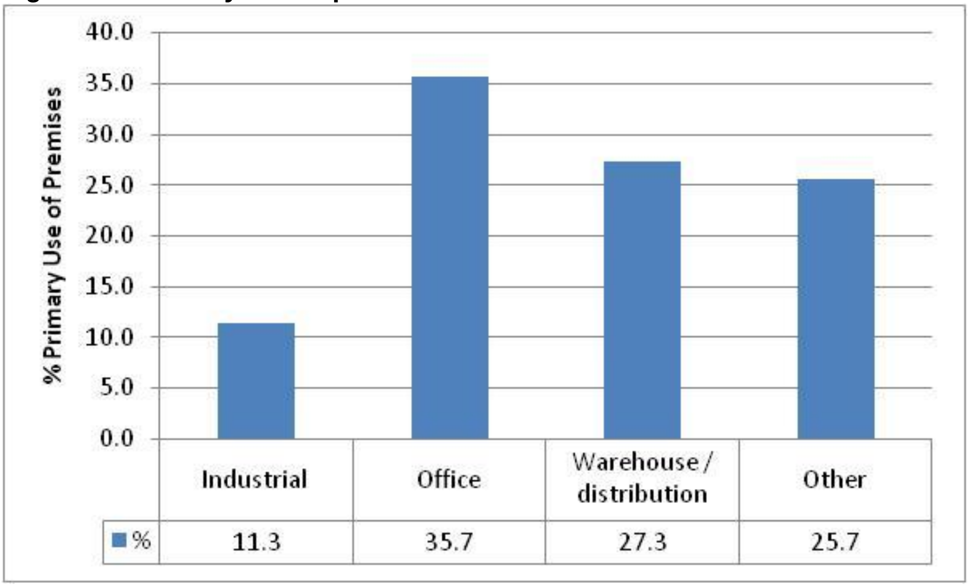
H.13 It is apparent that the market of Carlisle-based businesses is wide in scope, with only 74 firms of the 300 responses identifying that they **only** serve a 'local' market with the goods or services they supply. The remainder identified that they also serve sub-regional, regional and national markets. Indeed, 17 firms identified they only serve international markets. Supply chain analysis revealed a similar pattern, with 53 firms sourcing their supplies within the local market, and 44 firms sourcing supplies internationally. The remainder identified that they source supplies from a range of local, sub-regional, regional, national and international sources. This has implications for connections in and out of Carlisle, including transport and other business support infrastructure such as broadband connectivity.

Current Business Premises

H.14 Respondents were asked about their primary use of their main premises in Carlisle. Of those surveyed, principal uses were identified as office (by 36% of respondents) followed by warehouse/distribution (27%) and industrial (11.3%). 'Other' activities were identified by a further 26% of respondents and when asked to expand typical uses included:

- Storage/garage
- Motor retail
- Petrol station
- Showrooms

Figure H3 Primary use of premises

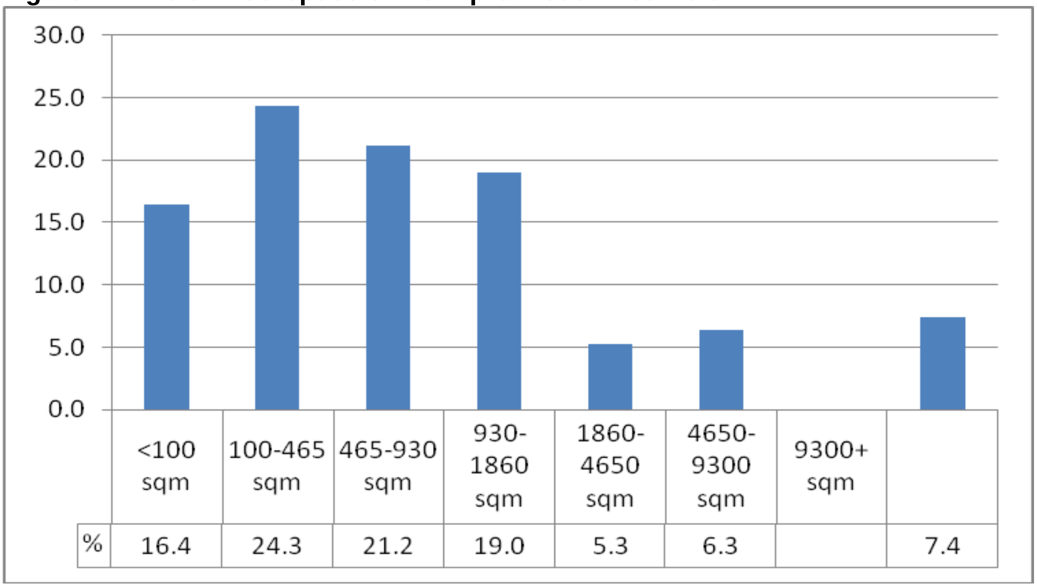


Base = 300

H.15 Other uses such as cattery, kennels, farming, flight school, motel, and home office space also featured.

H.16 When asked about the size of their main premises in Carlisle many respondents (111 out of the 300, or 37%) did not know. The responses from the remainder are illustrated in Figure H4.

Figure H.4 Total Floorspace of main premises in Carlisle



Base = 189

H.17 It is apparent that smaller premises are the norm, which is to be expected given the size of the businesses reported in Figure H2. Key points include:

- 40.7% of respondents occupied premises less than 465 sq m (5,000 sq ft)
- 40.2% of respondents occupied premises sized between 465 sq m and 1,860 sq m (5-20,000 sq ft)
- 19% of respondents are accommodated within premises 1,860 sq m (20,000 sq ft) and above

H.18 When asked about the size of other Carlisle premises 243 respondents said they had no other premises, and a further 41 did not know the floorspace of these premises. Only 16 respondents answered the question and the trend was similar to the main premises, with 31.3% less than 465 sq m (5,000 sq ft), and 37.5% less between 465 and 1,860 sq m (5-20,000 sq ft).

H.19 This analysis indicates that existing demand is predominantly for small to medium sized premises.

H.20 The survey asked how long firms had been trading at their current/main business premises. The majority of businesses have been established in their current premises for a long time, with 62% of respondents reporting a duration of 10 years or more.

Table H2 How long have you been trading at your current/main premises?

	Total	%
<1 year	8	2.7
1-5 years	40	13.3
5-10 years	66	22.0
10-20 years	88	29.3
20+ years	98	32.7
Total	**300**	**100.0**

Base = 300

H.21 Only a minority of firms (16%) consulted have been located at their current premises less than five years. This analysis could infer a number of considerations:

- An established business with high levels of satisfaction with current premises
- Limited supply of sites/premises deters movement
- Ageing stock which may be in need of reinvestment

H.22 When asked whether their premises are rented or owned, the survey revealed that of the 291 responses to the question:

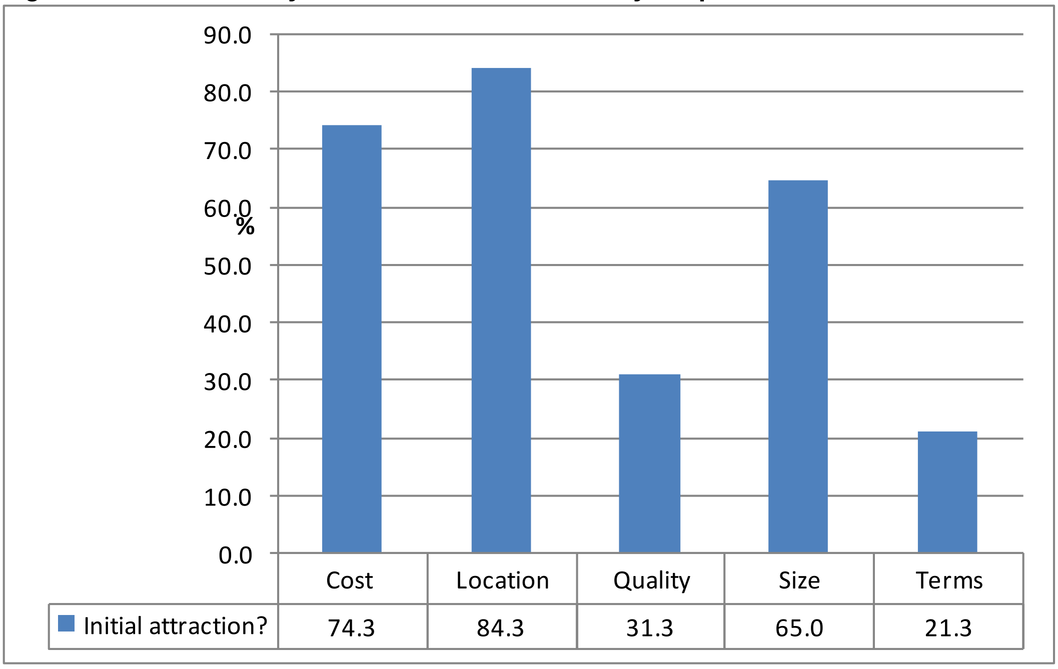
- 107 (36.8%) respondents said they owned their premises
- 184 (63.2%) respondents said their premises were rented

H.23 This analysis suggests either a lack of freehold supply, or a lack of freehold demand, for premises which are owned.

H.24 The survey asked a number of questions about the factors that initially drew occupiers to their current premises and whether these factors are still valid.

H.25 The criteria considered attractive at the time of choosing business premises by respondents was location, cost and size, at 84%, 74% and 65% respectively of the 300 businesses surveyed.

Figure H5 What initially attracted the business to your premises?



Base = 300

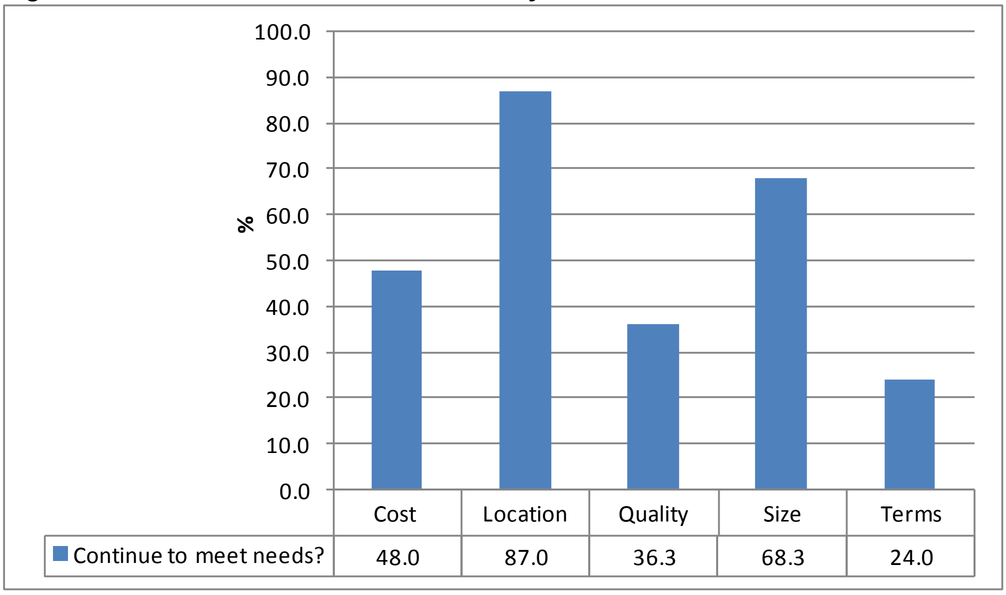
H.26 Comments given which expanded upon the factors which initially attracted the business to their current premises included:

- Access to the M6
- Family business/historical reasons
- Proximity to the airfield
- Freehold opportunity

H.27 A commonly cited theme was that the premises were "the only one available". Further investigation reveals that the businesses that cited this reason had been located in their current premises for varying lengths of time, indicating a historical lack of supply in Carlisle.

H.28 The survey asked what factors continue to meet their business needs. Location continues to be a key factor in meeting business needs, with 87% of respondents identifying this as a current consideration. Size is the second determinant of current business needs. Cost does not feature as highly as at the stage of selecting a property/site.

Figure H6 What factors continue to meet your business needs?



Base = 300

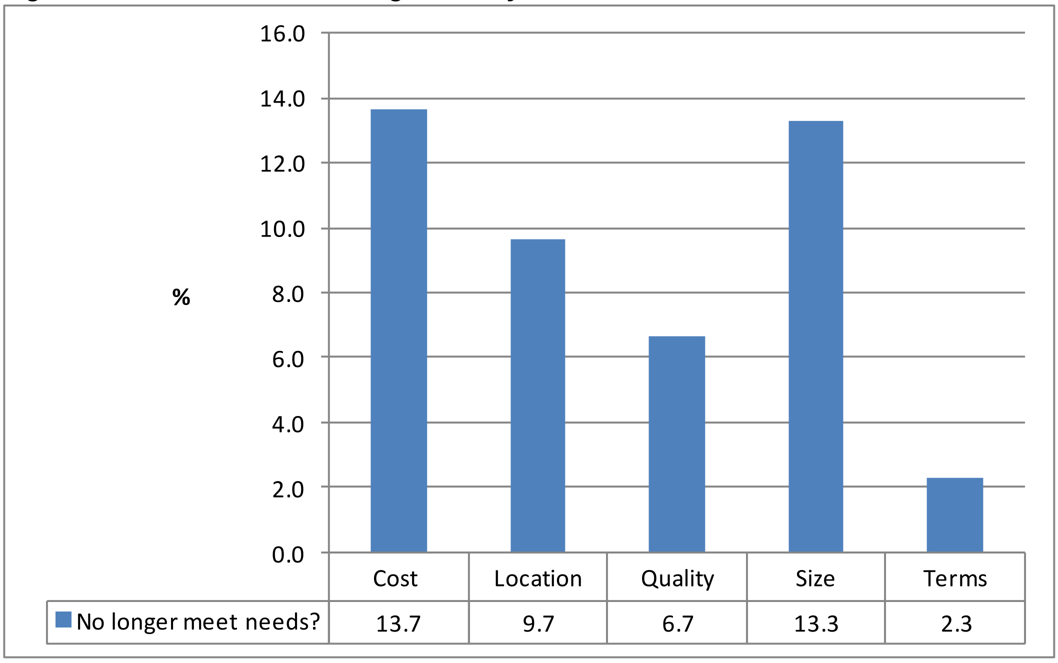
H.29 When asked to expand, factors that continue to meet their needs include:

- Lease agreement
- Access to the M6 and CNDR
- Site attributes, i.e. mineral deposit in land

H.30 The survey then went on to ask what factors no longer meet their needs. A lower number of participants responded to this question, which provides a guide to the quantum of firms dissatisfied with their current premises/looking elsewhere.

H.31 Respondents to the question identified that cost (13.7% of the survey sample) followed by size (13.3%) are the factors that no longer meet their business needs.

Figure H7 What factors no longer meet your business needs?



Base = 300

H.32 Sixty additional comments were given which elaborated upon this. Common themes are summarised in the table below:

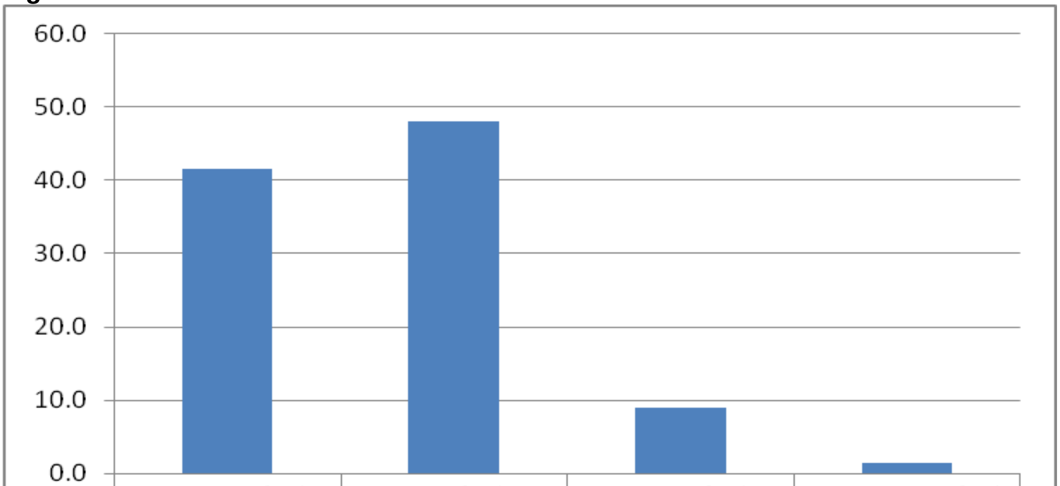
Table H3 What factors no longer meet your business needs?

▪ Poor access to site	▪ Poor quality of existing premises
▪ Car parking limitations	▪ Existing premises not DDA compliant
▪ Traffic congestion	▪ Incompatibility between industrial and residential uses leading to complaints and conflict
▪ Prohibitive lease costs	▪ Perceived lack of Council strategy for estates
▪ Poor relationship with landlord	▪ Flood risk
▪ Perceived lack of investment in Council owned estates	▪ Growth of company/need bigger premises
▪ Freehold premises sought	▪ Poor broadband connectivity
▪ Current premises too big	▪ Want to be closer to the M6 and CNDR

H.33 It is clear from this analysis that the key drivers of sites/premises interest are principally location, followed by size and cost. This criteria can be used in developing recommendations for future employment land provision in the district.

H.34 Overall levels of satisfaction with current premises are given illustrated in Figure H8.

Figure H8 Satisfaction with Current Premises



	Very satisfied	Satisfied	Unsatisfied	Very unsatisfied
%	41.6	48.1	8.9	1.4

Base = 291

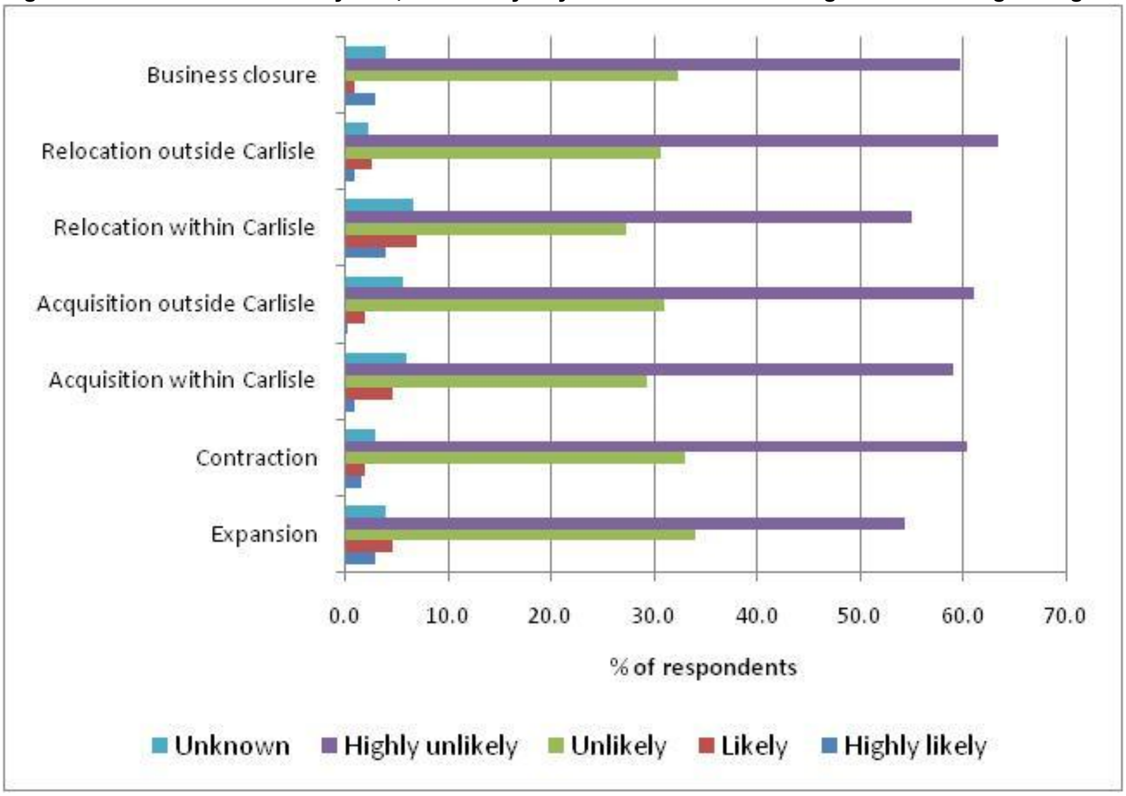
H.35 Levels of satisfaction are visibly high, with 89.7% of respondents identifying they are either 'very satisfied' or 'satisfied' with their current premises. In contrast, dissatisfaction only accounts for the remaining 10.3%.

H.36 Of those dissatisfied firms, factors that no longer meet their needs included:

- Flooding
- Poor location
- Poor access
- High costs
- Poor parking
- Too big for needs

H.37 The survey went on to ask about future plans as illustrated in Figure H9.

Figure H9 Over the next five years, how likely is your business to undergo the following changes?



Base = 300

H.38 Key areas of concern from an economic development perspective include the likelihood of business contraction, business closure, and relocation outside Carlisle. Although similar responses are likely to be gained in many parts of the country given the recent recession. It is clear that these are the minority of cases, however, factors such as the size, cost, location, quality and lease terms of premises were cited as factors that no longer met their needs.

H.39 Key areas of opportunity for Carlisle include those firms with expansion plans and those planning to relocate within Carlisle. The firms planning to relocate previously cited factors that no longer meet their needs at their current premises as being accessibility, cost of rates and utilities, DDA compliance needed, poor quality premises, and not big enough to accommodate growth. These firms need to be targeted with appropriate support.

Relocation or Acquisition of New Premises

H.40 When asked where those respondents who are anticipating a relocation or acquisition of new business premises would prefer to be located if land/premises were available, the following preferences were given by the 49 respondents[4] who answered the question:

[4] Question 17 was multiple choice, and therefore the number of responses given does not match the number of respondents who answered the question

Table H4 Location Preferences and Reasoning

Location Preference	Number who identified this preference	Reasoning given
Carlisle City Centre	5	▪ Access i.e. road infrastructure ▪ Central location
Within Carlisle District	40	▪ Service provision, i.e. shops ▪ Access i.e. road infrastructure ▪ Freehold opportunity ▪ Employees live in the area ▪ Want to co-locate activity, i.e. retail, warehouse, office etc ▪ Areas sought included Kingstown, Kingmoor, Durranhill, Rosehill
Elsewhere in Cumbria	9	▪ Areas sought included Penrith and West Cumbria
Outside Cumbria	4	▪ Areas sought included Newcastle and SW Scotland

Base = 49

H.41 Table H.4 illustrates some insights into motivations of those firms looking to move, as well as identifying competitor locations. Of the 49 firms who indicated that they are looking to move or acquire further premises, 43 identified difficulties they have had to date in finding suitable sites and premises **within Carlisle**, including:

- Lack of land/premises to buy in target areas
- Lack of choice/limited range of sites and premises
- General lack of availability in target areas
- Lack of sites/premises of the size and facilities sought
- Lack of affordable options, including prohibitive rent and rates
- Planning restrictions
- Lack of quality premises

H.42 Those businesses looking to relocate/acquire new premises outside Carlisle offered reasons such as a lack of suitable premises within Carlisle, a lack of DDA compliant premises within Carlisle, and those firms seeking additional premises around their market area to provide a service network.

H.43 Those businesses looking to relocate/acquire new premises were asked about their property requirements. The following characteristics were given.

Table H5 Property Requirements

		No. of respondents	% of Base	Other comments
Type of Premises	Industrial	7	14.3	Want co-location of uses; land purchase opportunities sought
	Office	27	55.1	
	Warehouse or distribution	15	30.6	
	Base	**49**	**100.0**	
Type of Location	City centre	14	28.6	Depends on availability; Durranhill/Rosehill specified; planning permission requirements
	Edge of town	27	55.1	
	Out of town	4	8.2	
	Outside Carlisle district	4	8.2	
	Base	**49**	**100.0**	
Access	Near motorway	45	91.8	Parking; cycle lanes/parking; and

		No. of respondents	% of Base	Other comments
	Near public transport	4	8.2	Kingstown specified amongst responses
	Base	**49**	**100.0**	
Size sq m (sq ft)	<93 (<1,000)	4	10.3	N/A
	93-465 (1-5,000)	8	20.5	
	465-930 (5-10,000)	9	23.1	
	930-1,860 (10-20,000)	10	25.6	
	1,860-4,645 (20-50,000)	6	15.4	
	4,645+ (50,000+)	2	5.1	
	Base	**39**	**100.0**	
Quality	New build	9	18.4	DDA compliance; parking; quality
	New build grade A	21	42.9	
	Refurbished	3	6.1	
	Second hand	16	32.7	
	Base	**49**	**100.0**	
Terms	Long lease	22	44.9	N/A
	Purchase	20	40.8	
	Short/flexible lease	7	14.3	
	Base	**49**	**100.0**	

H.44 Table H5 offers some clear messages about the property requirements sought. In summary this includes:

- The majority seek office accommodation (55%) followed by warehousing and distribution (30.6%), with only the minority seeking industrial (14.3%)
- Edge of town locations are particularly popular, accounting for 55.1% of responses, followed by City Centre at 28.6%
- Access to the motorway is a principal driver of interest, with 91.8% of respondents citing that as a factor for consideration
- Predominantly small to medium sized premises are sought, with 80% of respondents seeking premises up to 1,860 sq m (20,000 sq ft)
- A range of quality premises are sought, 42.9% specified new build grade A, whereas a further 32.7% were looking for second hand premises
- The opportunity to purchase is a big driver, with 40.8% looking for these opportunities. Long lease terms are also sought after, at 44.9%

H.45 The survey also asked what the main constraints to growing businesses in Carlisle are. In total, 148 respondents did not identify any constraints. Of those that did, the following responses were given.

Table H6 What do you consider to be the main constraints to your business growing in Carlisle?

Constraints	Number who identified this issue
Lack of suitable premises in the right location	21
Lack of suitable land in the right location	8
Lack of capacity in workforce	5
Lack of a skilled workforce	11
Accessibility to M6/major highways	5
Accessibility to workplace by workforce	9
Other	126

Base = 152

H.46 A further 15 comments were given to expand upon the main constraints to growing business in Carlisle, including:

- A lack of freehold opportunities
- A lack of small and affordable premises
- Parking limitations
- Limited choice of sites and premises
- Lack of large space in city centre

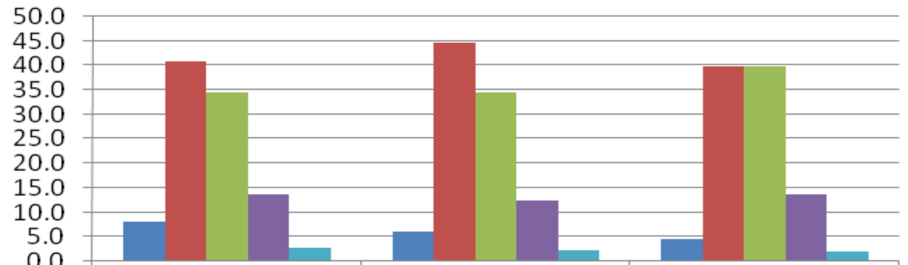
General Perceptions of Business Premises and Sites

H.47 A number of questions were asked about perceptions about existing sites and premises. The following analysis considers these responses.

Existing Employment Sites

H.48 It is apparent that most respondents feel that the existing employment sites are good to average within Carlisle in terms of availability, location and quality of choice. Only a minority felt these characteristics were 'very good'. In contrast, approximately 15% of respondents in each case felt that provision is poor or very poor within Carlisle.

Figure H10 Perceptions of Existing Employment Sites



	Availability	Location	Quality of Choice
Very good	8.0	6.0	4.5
Good	41.0	44.6	39.8
Average	34.5	34.5	39.8
Poor	13.7	12.4	13.8

Base: Availability (249); Location (249); Quality of Choice (246)

H.49 When asked to elaborate, commonly cited issues were once again raised, including:

- Traffic congestion
- Lack of affordable sites, particularly lease and rates costs
- Lack of freehold opportunities
- Perceived lack of investment in Council owned estates

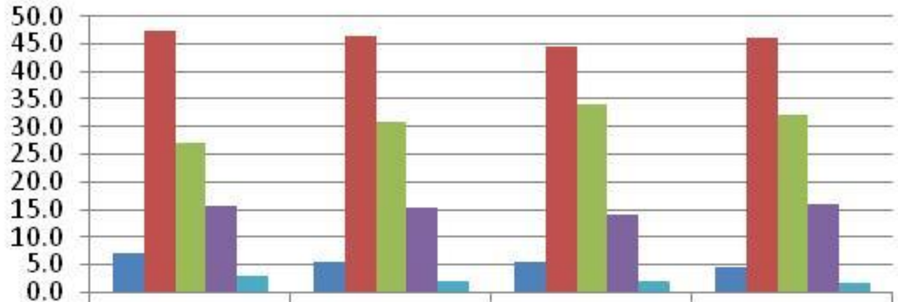
- Poor quality
- The motorway and CNDR were seen as opportunities
- Lack of parking

H.50 Contrasting views featured, with some citing a lack of supply whilst others identified sites/premises are available but do not meet their needs.

Office Space

H.51 Office space provision is considered generally good to average, although a minority of approximately 17% felt provision is poor to very poor on indicators of availability, location, quality and type mix.

Figure H11 Perceptions of Office Space



	Availability	Location	Quality	Type
Very good	6.9	5.4	5.4	4.5
Good	47.5	46.6	44.6	46.0
Average	27.0	30.9	34.2	32.2
Poor	15.7	15.2	13.9	15.8

Base: Availability (204); Location (204); Quality of Choice (202); Type mix (202)

H.52 Additional comments included:

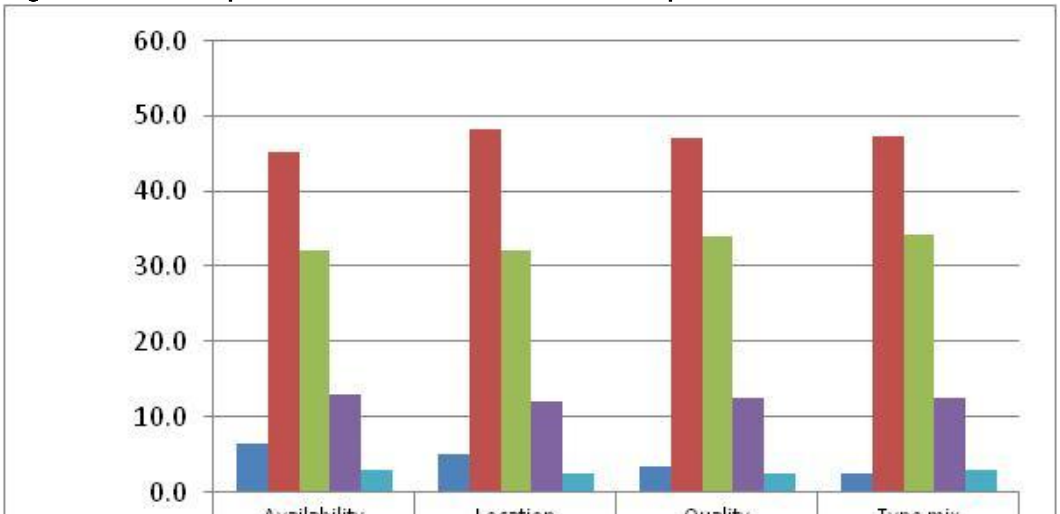
- Lack of affordable premises, especially for small companies
- Lack of smaller premises
- Newer premises considered more adaptable and therefore more suited to needs
- Poor parking and congestion in City Centre
- Some identified a preference to be in out of town locations but planning restrictions have contributed to a lack of supply in these areas
- Lack of quality and new space, particularly within the City Centre

H.53 In general, respondents felt there was a lot of supply but that it did not necessarily meet their needs, particularly because of the perceived expense.

Warehouse/Distribution Space

H.54 Perceptions of warehousing and distribution space followed previous trends for employment sites and office space, with the majority rating provision good - average, with a minority identifying either very good, or poor/very poor.

Figure H12 Perceptions of Warehouse/distribution space



	Availability	Location	Quality	Type mix
Very good	6.5	5.0	3.5	2.5
Good	45.2	48.2	47.2	47.5
Average	32.2	32.2	34.2	34.3
Poor	13.1	12.1	12.6	12.6
Very poor	3.0	2.5	2.5	3.0

Base: Availability (199); Location (199); Quality of Choice (199); Type mix (198)

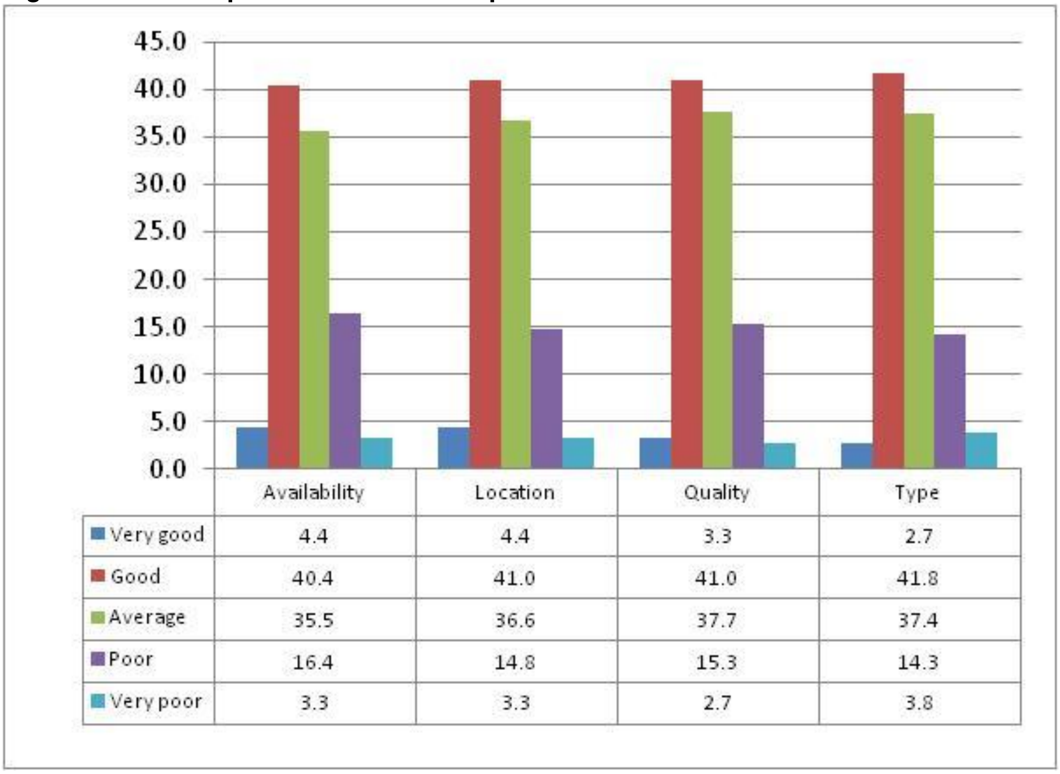
H.55 Additional comments included:

- Availability but considered too expensive
- Limited choice for small companies
- Expensive, particularly rates
- Conflict between retail and warehouse/distribution uses when located adjacent to each other
- Poor condition of available properties
- High prices compared to other areas, i.e. Newcastle
- Available premises are close together and there is limited choice in location

Industrial Space

H.56 As before, in general the majority of respondents felt industrial provision in Carlisle was good/average. However, the proportion of respondents who identified provision as poor/very poor, was slightly higher at approximately 18% on each indicator.

Figure H13 Perceptions of Industrial space



Base: Availability (183); Location (183); Quality of Choice (183); Type mix (182)

H.57 Common themes are apparent in the additional comments:

- Lack of affordable premises
- Current availability but don't necessarily meet characteristics of current demand
- Lack of small/medium sized space
- Lack of freehold opportunities
- Incompatible uses (retail and industrial) located adjacent to each other

Additional Comments

H.58 The survey asked whether participants felt there were any other comments which may be of importance to the study. The majority of participants provided additional comments. Common themes included:

- Poor broadband connectivity

- Difficulties in sourcing business support services and perception that Council are not sufficiently supportive of business
- Transport and public transport provision is key with commonly cited issues including poor parking provision, traffic congestion, poor road condition, and poor public transport
- CDNR is seen as a key opportunity. A southern relief road was also proposed
- Car parking limitations
- Lack of freehold opportunities and perceived domination of Council
- Lack of start up premises
- Poor provision of DDA compliant properties
- Empty rates charges undermining investment
- Skills mismatch and graduate retention issues, but recognition of the role of the University in addressing gaps
- Poor signage to sites
- Need for clarity on role and contribution of Carlisle Renaissance to the economy