APPENDIX 5 – DEMAND DATA ANALYSIS

This Appendix provides the more detailed analysis of demand data referred to in Section 4 'Property Market – General'.

A5.1 Each local authority monitors enquiries from businesses looking for land and premises in its area. These companies are directed towards the relevant vacant commercial property registers. Each local authority has provided the enquiries received during 2006 and 2007. Although provided, 2008 has been excluded because it does not encompass a complete year. The results are analysed below. It should be noted that differences in marketing and promotion may skew the level of enquiries; Sefton outsources its enquiry monitoring to The Mersey Partnership; while each organisation records data differently, e.g. size bands, making a like-for-like comparison difficult in certain instances. Sefton observe that because of technical issues with the shared monitoring system with TMP not all enquiries have been recorded. As such the level of interest identified from the supplied data is less than the reality.

A5.2 Tables A.5.1 and A.5.2 divide the enquiries between those for industrial space and those for offices. There were almost twice as many for industrial space, 699 compared to 356, as for offices. This holds true (generally) for all the individual local authority areas except Halton, where the industrial: office ratio is more like three-to-one.

A5.3 Almost 40 percent of the industrial enquiries are for premises of 101-500 sqm; almost 60 percent are for units up to 500 sqm in general. There are limited enquiries for larger space of above 3500 sqm. This trend of demand for smaller units applies across each of the LA areas.

Table A.5.1 – Industry Enquiries Size 2006 – 2007

Area	Size Band, sqm						
	0 - 100	**101 - 500**	**501 - 1000**	**1001 - 3500**	**3501 - 5000**	**5001 +**	**Total**
Halton	54	63	21	11	2	5	156
Knowsley	48	95	31	47	10	15	246
Sefton	7	23	18♦	-	-	-	48
West Lancashire	44	80	51	74 *	-	-	249
Total	**153**	**261**	**121**	**132**	**12**	**20**	**699**
Proportion, percent	**21.9**	**37.3**	**17.3**	**18.9**	**1.7**	**2.8**	**100.0**

Source: Local Authorities 2008
Note: ♦ Enquiries are for 500+ sqm units
** Figure includes 26 enquiries of 2500+ sqm*

A5.4 Almost 60 percent of the office enquiries are for premises of up to 100 sqm. Beyond this, enquiries fall off quite dramatically. There is only one enquiry for space of above 3500 sqm. This trend of demand for smaller units applies across each of the LAs, although Sefton has roughly equal demand for 0-100 and 101-500 sqm units, albeit from a small data sample.

Table A.5.2 – Office Enquiries Size 2006 – 2007

Area	Size, sqm						
	0 - 100	101 - 500	501 - 1000	1001 - 3500	3501 - 5000	5001 +	Total
Halton	28	11	5	3	-	-	47
Knowsley	104	38	8	2	1	-	153
Sefton	12	11	5 ♦	-	-	-	28
West Lancashire	58	38	18	14 *	-	-	128
Total	**202**	**98**	**36**	**19**	**1**	**-**	**356**
Proportion, percent	**56.7**	**27.5**	**10.1**	**5.3**	**0.2**	**0.0**	**100.0**

Source: Local Authorities 2008
Note: ♦ Enquiries are for 500+ sqm units
** Figure includes 8 enquiries of 2500+ sqm*

A5.5 Compared to the number of enquiries for industrial and office space there were only 122 enquiries for sites. They show the same trends – small sizes, Knowsley dominates (see Table A.5.3).

Table A.5.3 – Land Enquiries Size 2006 – 2007

Area	Size, ha							
	0 - 0.40	0.41 - 1.20	1.21 - 2.00	2.01 - 4.00	4.01 - 8.00	8.01 - 12.00	12.01 +	Total
Halton	19	1	1	-	-	-	-	21
Knowsley	27	22	18	12	3	1	3	86
Sefton	3	1	1*	-	1*	1*	-	7
West Lancashire	8	-	-	-	-	-	-	8
Total	**57**	**24**	**20**	**12**	**4**	**2**	**3**	**122**

Source: Local Authorities 2008
*Note: * Sefton enquiries are matched to the most appropriate size band*

A5.6 The Mersey Partnership (TMP) market Merseyside to investors from outside of the study area. Table A.5.4 shows enquiries received by TMP for land and premises for each complete calendar year since 2005. Although there are enquiries from around the world, almost 80 percent (of those whose source is known) come from North West England.

Table A.5.4 – TMP Enquiry Source

Continent	Country/Region	Year			
		2005	2006	2007	Total
Asia		3	2	5	10
Australia		-	-	1	1
North America	Canada	1	-	2	3
	USA	3	-	7	10
	Mexico	-	-	1	1
South America		-	1	-	1

Continent	Country/Region	Year			
		2005	2006	2007	Total
Rest of Europe		4	3	4	11
United Kingdom	Northern Ireland	1	-	-	1
	Scotland	1	-	3	4
	North West	92	114	95	301
	Midlands	4	5	5	14
	South	2	6	11	19
	Wales	1	1	2	4
Not known		81	146	99	326
Total		**193**	**278**	**235**	**706**

Source: TMP 2008

A5.7 Tables A.5.5 and A.5.6 show the split between industrial and office demand with regard to TMP's property enquiries. There are just under 50 percent more industrial enquiries than office. This is the case across most sub-areas except Liverpool. In terms of industrial enquiries, Liverpool received the most (171), with all other areas receiving between 122 and 140. The same trends are apparent in the office enquiries – Liverpool dominates, all other areas are similar. Although not shown here, there were also 534 enquiries for sites, again displaying the same location trends.

Table A.5.5 – TMP Industrial Enquiries Location

Area	Year			Total
	2005	2006	2007	
Halton	60	46	34	140
Knowsley	51	45	40	136
Liverpool	58	56	57	171
Sefton	48	44	38	130
St Helens	51	45	35	131
Anywhere Merseyside	34	17	8	59
Wirral	41	43	38	122
Not Known	17	27	14	58
Total	**360**	**323**	**264**	**947**

Source: TMP 2008

Table A.5.6 – TMP Office Enquiries Location

Area	Year			Total
	2005	2006	2007	
Halton	32	27	24	83
Knowsley	32	29	27	88
Liverpool	55	55	62	172
Sefton	33	29	30	92
St. Helens	35	25	24	84

Area	Year			Total
	2005	2006	2007	
Anywhere Merseyside	25	11	7	43
Wirral	29	29	24	82
Not Known	9	22	20	51
Total	**250**	**227**	**218**	**695**

Source: TMP 2008

A5.8 It should be noted that the way TMP recorded these enquiries makes it impossible to separate between each local authority area individually. Most enquiries were for more than one LA area. Therefore these figures record every time an enquiry mentions the LA, resulting in substantial duplication when compared to the original number of enquiries actually received.

A5.9 Tables A.5.7 and A.5.8 analyse the size of property enquiries received by TMP (where the size was known). For this sample of enquiries, the split is even between industrial and office demand. In terms of the industrial enquiries almost 60 percent were for units larger than 1000 sqm. There were relatively few for micro-business space, say up to 250 sqm. This probably reflects the marketing strategy of TMP in attempting to attract larger inward investors, as opposed to small businesses.

Table A.5.7– TMP Industrial Enquiries Size

Size Range, sqm	Year			Total
	2005	2006	2007	
Not Known	6	10	11	27
0 - 100	3	5	3	11
101 - 250	4	8	9	21
251 - 500	9	11	4	24
501 - 1000	8	15	6	29
1001+	54	54	48	158
Total	**84**	**103**	**81**	**268**

Source: TMP 2008

A5.10 The office enquiries are much more evenly spread through all the size bands as provided by TMP's analysis. Again, the largest demand was for units larger than 1000 sqm. But there was still reasonable demand up to 500 sqm.

Table A.5.8 – TMP Office Enquiries Size

Size Range, sqm	Year			Total
	2005	2006	2007	
Not Known	9	13	18	40
0 - 100	13	26	19	58
101 - 250	9	16	15	40
251 - 500	11	13	11	35
501 - 1000	3	8	7	18

Size Range, sqm	Year			Total
	2005	2006	2007	
1001+	27	23	25	75
Total	**72**	**99**	**95**	**266**

Source: TMP 2008

A5.11 Although no analysis table is provided here, TMP also received 134 enquiries for sites. Where the size was known 56 percent were for sites of up to 1.2 hectares.