

business premises survey



March 2007



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## foreword

The provision of the right type, quality and location of commercial premises for businesses in Hull is vital to the success of our economy.

We all know that the city boundaries are tight and land is at a premium. Added to this is major regeneration, particularly in the city centre, and the likelihood of further investment over the next decade, which will put more pressure on the land we have at our disposal.

I'm delighted that the Forum's Business Advisory Group has been able to contribute to debate with this survey, the results of which highlight some crucial issues for partners in the city to address together.

One of the key findings was the significant dynamics in the local property market. Nearly half of the businesses that responded had moved or sought new premises in the past five years and one in four will do so in the next two years. A significant amount of this movement was for existing businesses looking to expand or develop their business. It is therefore essential that the city has the right mix, quality and locations of sites and premises to make sure these businesses can develop and grow in Hull.

We also explored crucial issues such as the linkages with the East Riding; the role of the public sector in providing facilities for start ups and small firms; the availability of premises to buy; and the need to get the balance right between retail, industrial and office development.

The findings point to a range of actions that the city could take to ensure we get this issue right for our economy. These include the need to retain as much of our designated 'employment' land as possible; encourage our public sector partners to continue to invest in premises and provide support to develop our economy; and look at the other planning and transport policies which impact on business location, particularly in the city centre.

There are lots of issues we need to look at as we address the business premises issue. This survey should help set the parameters for the next phase of the debate.

**Barry Schofield**  
Chair  
HBF Business Advisory Group



# Executive Summary

## Key messages

### Business premises is a critical issue for the local business community

The importance of the premises issue is demonstrated by the fact that 90% of respondents believe the improvement of business premises is 'essential' (50%) or 'important' (40%) to the local economy.

However, 57% agreed that 'the quality of premises isn't good enough' in Hull and only 15% disagreed. 58% agreed that the 'lack of premises holds back the local economy' with only 12% disagreeing.

### Businesses are mobile

44% of respondents had moved to their current premises within the last five years demonstrating the significant dynamics in the property market. As businesses change, their property needs change and 46% said they had moved recently because their previous site was 'no longer suitable for their business' and 36% said they moved 'to expand'.

45% of businesses intend to move some or all of their operations within the next two years. 27% of these are to 'expand or develop a new business opportunity', 5% because their 'lease is coming to an end' and 13% because their 'current location is no longer suitable'. The development of good quality sites in the right locations is therefore crucial to the local business community.

### Location, location, location

Nearly three quarters of survey respondents said location of their premises was a high priority factor in determining the current site of their business. 50% thought the quality of premises was a high priority and 60% said cost was important.

Despite the earlier findings that businesses are mobile there is a high level of loyalty and commitment to the area from local firms. 68% said their business was located in Hull & East Riding because 'it has always been here' and this could be a threat to the economy as competition bites and businesses review their business location.

### City could lose firms unless it's business friendly

The mobility of businesses is further demonstrated by the fact that 11% of businesses said they were likely to move out of Hull & East Riding if they moved in the next two years. Whilst most would stay in the local area, this is still a significant figure. 8% would move elsewhere in Yorkshire & Humber and 3% 'elsewhere in the UK'. This shows that competition between places for business investment is a very real issue. The provision of business premises is a huge factor for these businesses. 29% highlighted the 'lack of suitable premises' as a reason why they could move out of Hull and 26% said a 'lack of business in the local market' would be an important factor.

### Strong demand for office space and support for managed workspace

65% of respondents said that if they moved in the next two years they would be seeking office space. Whilst in part this reflects the nature of business of the respondents, it does demonstrate the need for the city to develop its stock of office



premises. 66% said the provision of 'managed workspace for start ups and small firms' was a priority for Hull and 46% said the provision of 'high quality office space' was a priority'.

### Strong support for public sector investment in business premises in Hull

44% of respondents think the public sector should provide property for businesses compared to 56% who believe it's primarily an issue for the private sector to resolve. 76% of businesses said they would support more public sector investing in the provision of appropriate business premises.

#### Key findings

<b>90%</b>	believe the improvement of business premises is either 'essential' (50%) or 'important' (40%)
<b>76%</b>	would support more investment by the public sector in business premises provision
<b>75%</b>	said 'location' was high priority factor in determining their current location
<b>66%</b>	believe the provision of 'managed workspace for start ups and small firms' is a priority for the city
<b>65%</b>	would be seeking office space if they moved in the next two years
<b>57%</b>	agree the 'quality of premises available locally isn't good enough'
<b>27%</b>	intend to move some or all of their operations to expand or develop a new business opportunity in the next two years
<b>11%</b>	would locate outside of Hull & East Riding if they moved in the next two years



## section one

### introduction

This survey was commissioned by the Forum's Business Advisory Group in January 2007 following concerns about the availability and quality of business premises in the city.

A range of key questions were being considered by the Business Advisory Group:

- Does the city have the right mix of premises to meet the needs of the local economy?
- Given Hull's tight boundaries and lack of readily available sites for commercial development, what impacts would result from developments in the East Riding?
- What should be the respective roles of the public and private sectors in the provision of business premises?
- Does Hull need particular facilities in the city to stimulate economic development, for example a science/technology park, incubator units, managed workspace etc?

The core primary research element of this report comprised of a survey of local businesses carried out between 30<sup>th</sup> January and 26<sup>th</sup> February 2007. The survey was sent to all members of Hull Business Forum.

The purpose of the survey was to collate the views and opinions of local businesses on the stock and availability of business premises in Hull, assess business requirements needs and identify where sites and premises could best be developed.

114 local businesses responded to the survey and a full breakdown of respondents is included in Annex B. Companies of all sizes and sectors responded to the survey from postcodes across the city and its immediate economic hinterland.

This number of responses does not provide a base of respondents large enough to provide definitive conclusions about these issues. What it does however is bring to the fore some key trends and issues faced by local businesses. If it stimulates further discussion, research and activity it will have served a useful purpose.

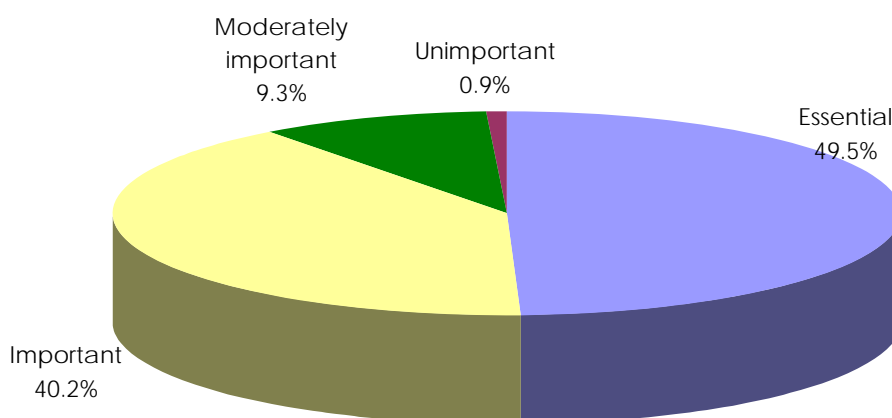


## section two

### importance of business premises

#### Getting business premises 'on the agenda'

The survey results show that businesses locally believe that the improvement of business premises is a critical priority for the local economy. We asked how high a priority it should be and 49.5% of respondents believe it is 'essential' whilst 40.2% feel that it is 'important'. This combined total of 90% is significant in demonstrating the importance of business premises provision to local businesses. Only 0.9% believe that the improvement of business premises is unimportant.



**Figure 1: How high a priority should the improvement of business premises be to the local economy (all responses)**

Whilst it is not entirely surprising that businesses completing a survey on business premises should regard it as an important issue, it is a significant finding because the premises issue does not feature strongly in many other business surveys. Issues such as skills, transport, planning, red tape and taxation often feature more strongly in other surveys, and this piece of work is valuable if it does nothing else than focus the collective mind of the city onto the provision of business premises.

#### Perceptions on the available premises in Hull

Once we had established the importance of business premises to local businesses, we asked about their perceptions on whether Hull's overall business stock was, in their opinion, getting better or worse.

The feedback was mixed. 35.7% believed the overall stock was 'improving', whilst the same percentage believed that it was 'staying the same'. 28.6% of respondents felt that the overall stock was 'deteriorating', which is a significant finding given the investment which has gone into premises in the city in recent years such as Humber Quays, Shine and The Deep Business Centre.

It should however be noted that this is a perception on the overall stock of premises available locally and it does not directly reflect the respondents own premises or indeed identify whether their views refer to premises owned by the private or public sectors.

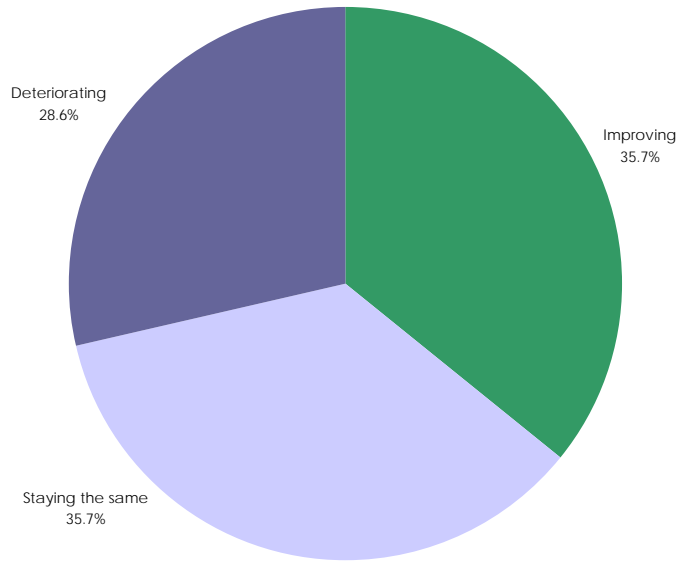


Figure 2: Is the overall stock of business premises in Hull... (all responses)

Views on Hull’s business premises market

Respondents were asked to agree or disagree with a number of statements about Hull’s property market. 38% of businesses agreed that ‘there aren’t enough sites to meet demand’ locally with 27% disagreeing. Whilst the question was specifically asking about Hull’s business premises market, we should expect some respondents to answer from a ‘greater Hull’ or Hull Travel to Work Area boundary. This is a significant issue on land availability because part of what the survey was designed to draw out was the specific issues relating to the city of Hull and the East Riding. The perception of the Business Advisory Group has been that Hull is ‘nearly full’ with very few major available sites likely to come to the market in the near future. In contrast, there is development and further potential in the East Riding at places such as Melton, Priory Park West, Humber Bridge and a little further afield at J36 at Goole.

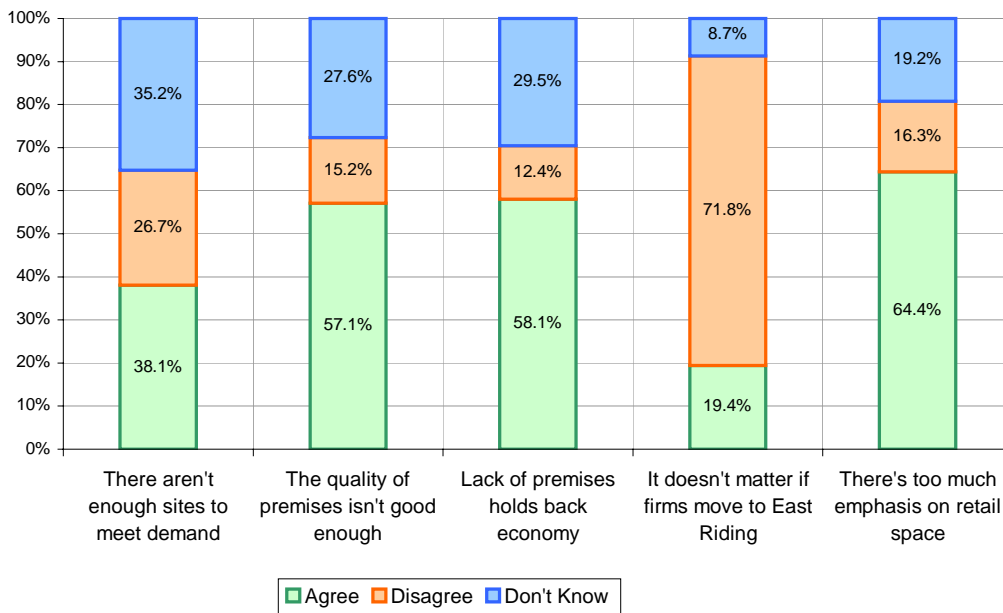


Figure 3: Please tell us whether you agree or disagree with the following statements about Hull’s property market (all responses)



We also asked whether it mattered if firms moved from Hull to the East Riding. 19.4% believed it doesn't matter, whilst a clear majority of 72% felt that it does matter if firms move from Hull to the East Riding. It shows that from a business perspective the boundary between Hull & East Riding is insignificant and the 'city-region' functions as an economic unit.

There are however real issues, which arise from this, which concern the Business Advisory Group. Firstly, whilst we recognise that Hull City Council and East Riding of Yorkshire Council work closely together on a number of economic development and planning issues such as the Joint Structure Plan, there would be business benefits to a clear strategic and statutory approach to planning in the 'economic boundaries'. The Business Advisory Group strongly supports the continuation of joint working between the two authorities on economic development.

Secondly, there are transport implications if companies and jobs are moving from Hull to the East Riding in the future. Clearly there could be extra pressure on key routes such as the A63 which is, in places, already at capacity. Public transport provision outside of the city centre hub is a barrier to employment which could potentially have an adverse impact on the worklessness agenda in the city. There are therefore transport and employability issues for the city which may need to be addressed should there be any significant 'westward drift' of businesses.

Finally, from a ONE HULL and City Council perspective businesses and employment moving the short distance into the East Riding impacts on Hull's socio-economic profile. Hull already has challenging targets on enterprise, business stock and employment, all of which will be made much more difficult by any shifts into the East Riding. Whilst this may appear to be a technical issue, it would have implications for the performance of ONE HULL in meeting its Community Strategy targets, perhaps something that could be overcome by developing a Multi-Area Agreement with the East Riding on the 4<sup>th</sup> Block for Economic Development.

57% agreed that the quality of business premises in Hull 'isn't good enough' and 58% agreed that the 'lack of premises holds back the local economy' - both of these findings underline the importance of addressing the business premises issue for the city.

Given the substantial investment in retail in the city centre, we asked whether businesses felt there was 'too much emphasis on retail space'. 64% agreed with this statement although it should be noted that only 13% of respondents were in the retail sector. It does however demonstrate that a 'retail led' regeneration needs to be balanced with the need for wider economic development, of which the development of employment sites and premises is an important factor.

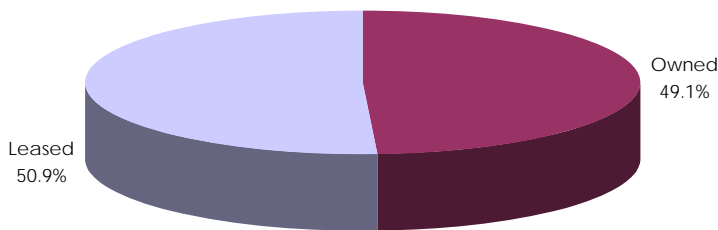


## section three

### dynamics of the business property market

#### Ownership status of premises

One of the issues the Business Advisory Group has discussed has been the apparent lack of premises for businesses to buy in the city. We therefore asked about the ownership status of respondents current premises and 50.9% highlighted that their business premises were leased, whilst 49.1% owned their premises.



**Figure 4: What is the ownership status of your business premises (all responses)**

“  
*There seems to be very limited opportunity to buy decent business premises. Are we unusual in looking for this?*  
 ”  
**Business consultants, 7 employees, 7 years trading**

Different businesses will of course have different needs and a range of provision in terms of size, cost, quality and terms are needed in the local economy. The evidence from the Business Advisory Group tends to suggest that there is currently more demand from established businesses in the city to buy their premises and this may be an issue worthy of further work.

#### Length of time at current site and reasons for moving in the past four years

One of the key findings of this survey is that it reveals how dynamic the business property market is in Hull and East Riding. The following series of questions were designed to assess how often businesses were moving and why.

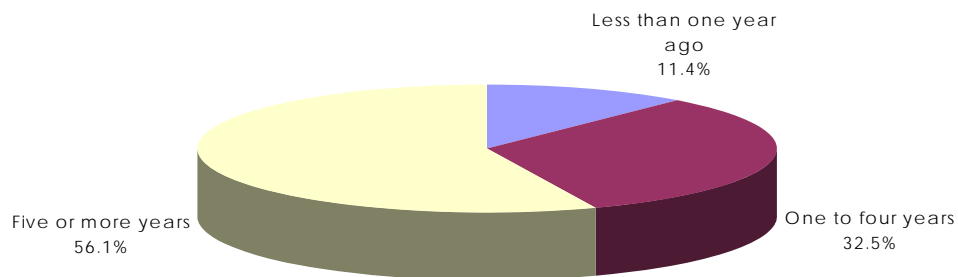
The results show just how mobile many businesses are, especially small firms. There are both opportunities and threats for places such as Hull arising from this and it demonstrates the importance of the city being ‘business friendly’ to attract and retain as much business, investment and employment locally.

It is also important to recognise that we are not simply talking about a business moving its premises ‘lock, stock and barrel’ from one place to another. The following series of questions could relate to the total or partial relocation of a business to new premises or indeed the requirement for new premises to expand or the development of new business opportunities.

Looking after our existing businesses is therefore crucial to ensure that we don’t just keep our jobs, but we can offer the opportunities to expand or locate new ventures in the city.



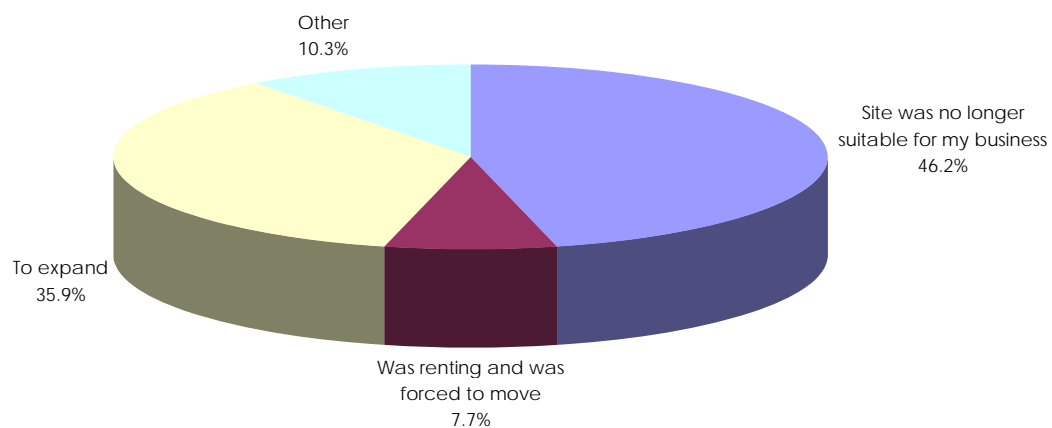
We asked how long the respondent had been located at their current site. Over half of respondents reported that their businesses had been based in their current site for 5 years or more (56.1%). That means that a very significant 44% had moved in the past four years. 11.4% of these had been located at their current site for under a year and 32.5% for one to four years.



**Figure 5: How long have you been at your current site (all responses)**

It should be highlighted that a small number of respondents' businesses have been trading for less than five years which has slightly increased this figure. Nonetheless it is still relevant as it shows the new enterprises that are actively seeking premises.

We then asked those businesses who had moved in the past four years why they had done so. 46.2% of these respondents highlighted their reason for moving was that their site was no longer suitable for their business and 35.9% needing to expand. Other reasons for moving included their previous premises being subject to CPO (for the St Stephen's development) and the desire to move from rented into owned premises.



**Figure 6: If you have moved in the last four years, why did you make this move?**

It is not surprising that fierce local and global competition for some businesses means that they need to move premises because the business needs were changing. A



number of factors come into play as part of this 46% including size of premises, location, cost and occasionally the type of premises. It is also significant that 36% of respondents moved to expand. If these figures are representative of the wider business community and we have established that 44% have moved in the past five years, 36% of which has been to expand, we can start to understand that it's essential to get business premises right in the city otherwise we either constrain our growing businesses or they move some or all of their operations outside of the area.

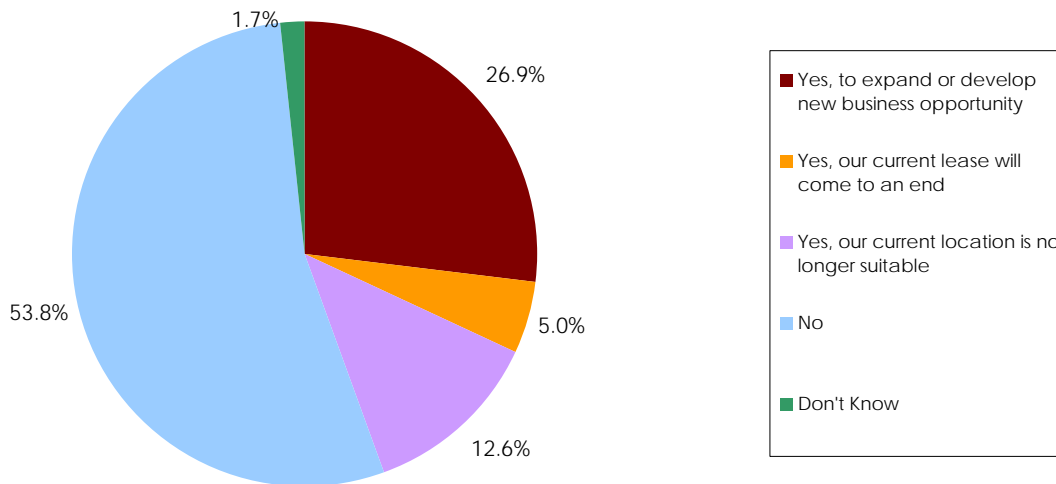
**Reasons for moving in the past four years**

- End of contract
- Moved from rented to owned
- Previous premises were in St Stephen's development
- Moved House
- Business start up

**Intention to move within the next two years**

Further evidence of the dynamics in the local market are shown when we asked about firms intentions to move in the next two years. 53.8% respondents are not planning to move within the next two years and a further 1.7% don't know. This means that almost all businesses have clear plans about their future premises requirements, and 44% will be moving some or all of their operations in the next two years.

26.9% of respondents intend to move in order 'to expand or develop new business opportunity', 12.6% because 'their current location is no longer suitable' and 5.0% due to their 'current lease term coming to an end'.



**Figure 7: Do you intend to move some or all of your operations in the next 2 years? (all responses)**

The fact that 27% of businesses will be looking for premises in the next two years to expand or develop a new business opportunity is a hugely significant figure. Hull needs to ensure that it has the sites, premises and support services to ensure these firms are expanding and developing their business locally and to the maximum potential.



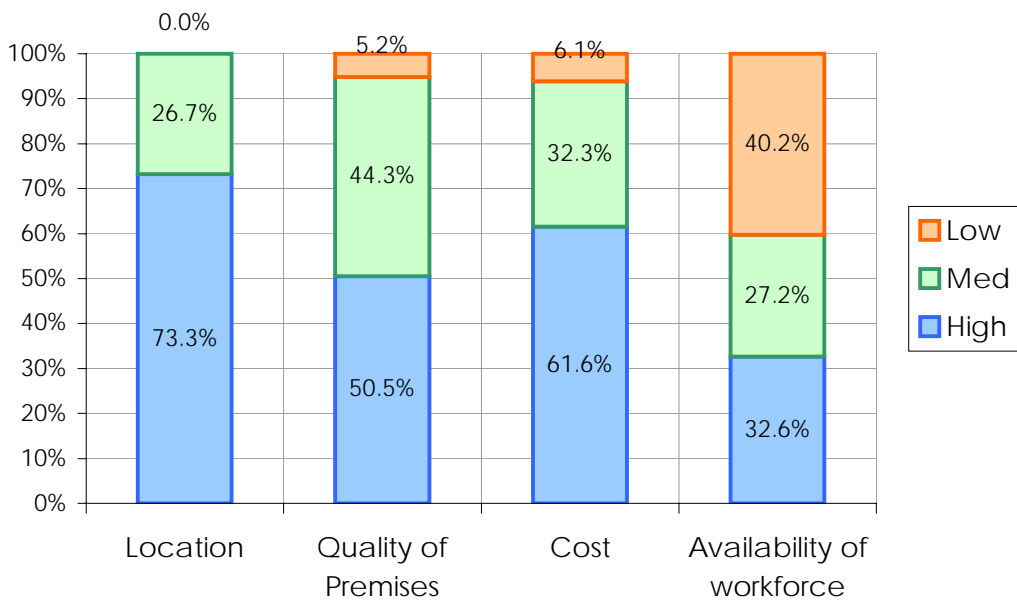
## section four

### location, location, location

We have already considered a range of factors which are relevant to the location of businesses in Hull and the East Riding including location, cost, quality, transport, workforce etc. All decisions on business location balance a number of these factors however a number of questions underline that the most significant of them is location.

Four options were given to respondents, with an additional 'other' option, and they were asked to highlight the level of importance for each of the following four factors from high to low.

- Location;
- Quality of Premises;
- Cost; and
- Availability of workforce.



**Figure 8: What were the most Important factors in choosing current location? (multiple responses, all respondents)**

The results suggest that 'location' was the most important factor when choosing their current premises with 73% of respondents ranking it as being of 'high' importance. No respondents regarded location as being of 'low' importance. Cost was regarded as second highest importance at 61.6%. 40.2% of respondents regarded availability of workforce as a low important factor. The quality of premises was also regarded as an important factor with only 5.2% considering it as of low importance.

The 'availability of workforce' was a lower ranked priority for selecting premises, which is perhaps unsurprising given that the other three options were directly related to property issues. Indeed skills and labour market issues do come through strongly as local priorities in other business surveys.



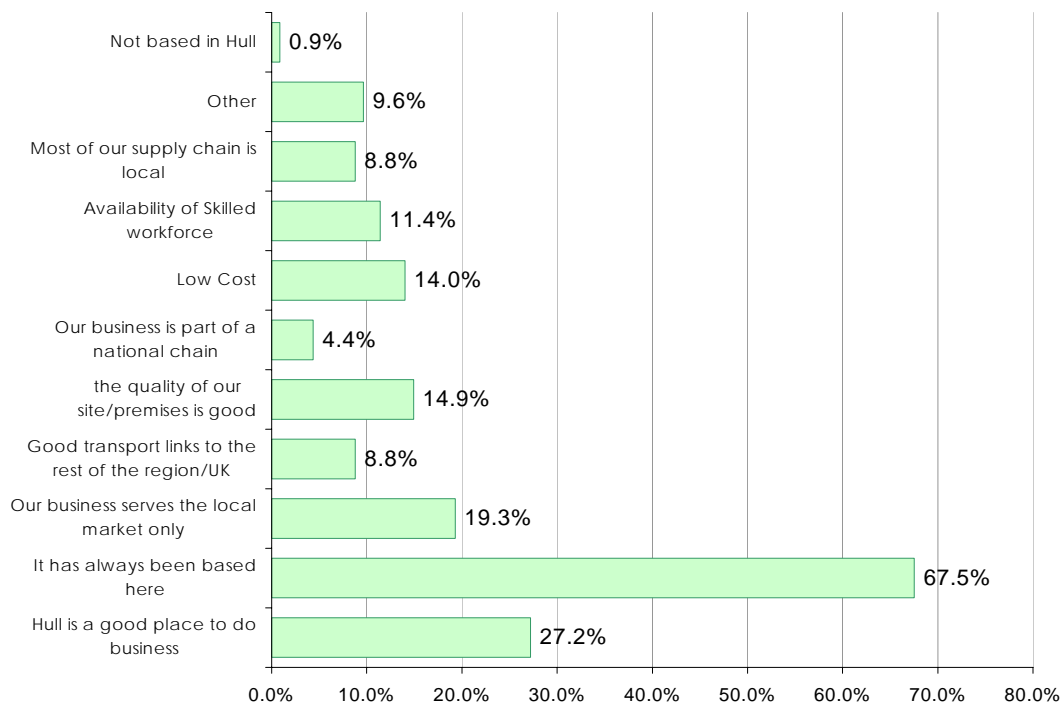
A number of respondents suggested other factors of importance when choosing location, which included good car parking and access, proximity to public transport connections and old town/city centre facilities.

**Other important factors when choosing current location**

- Good car parking
- Size
- Historical
- Parking & Access
- Proximity to public transport connections, old town/city centre facilities
- Suitability so can work from home
- Facilities
- Built on own site
- Services

**Why is your business located in Hull & East Riding**

Respondents were asked to highlight their reasons for being located in Hull and the East Riding. 67.5% of respondents stated that their company was in Hull & East Riding because 'it has always been here'. This finding can be read two ways. The optimistic point of view would be that local firms have deep connections with the area that we can expect to continue into the future. The less positive conclusion could be that the city still has a high number of businesses who are based here because of historical reasons rather than sound business reasons and could well move out of the area in the future if and when they review their business operations.



**Figure 9: Why is your business located in Hull & East Riding (multiple ticks, all responses)**

The second most popular response was the 27% that said they were based here because 'Hull is a good place to do business'. It's positive that this was the second most favoured response, but 27.2% is a relatively low figure.



### Reasons for businesses being located in Hull & East Riding

Due to business opportunities available  
Local market currently but expanding  
Opportunity  
Accident

Live in Hull  
Purchased site in 1967  
Proximity to North Sea Ferries

Historical accident, this is not the best place for our company  
Based in Leeds and London but could move to Hull  
Operational office covering Humber region

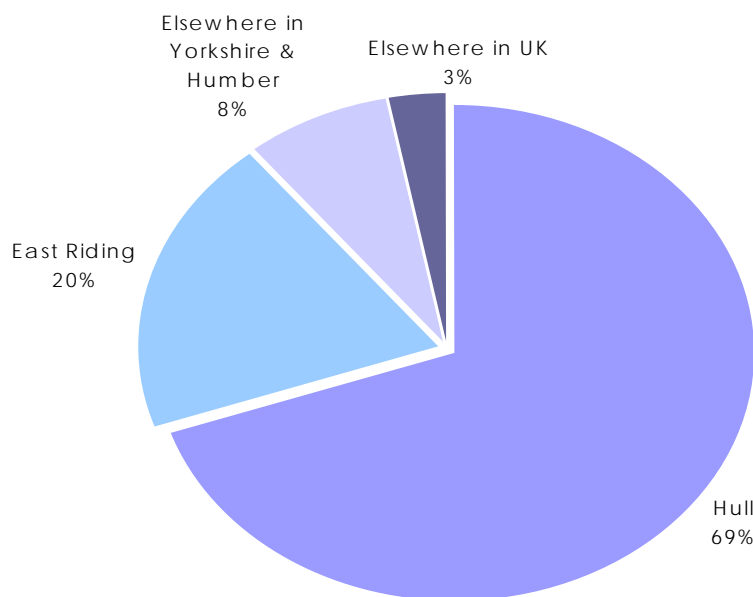


## section five

### city could lose firms unless it's business friendly

We have already established in section 3 that the market for commercial premises locally is dynamic with a high proportion of firms moving or seeking new premises to meet the changing needs of their business, to expand or to develop new business opportunities.

The survey suggested that 45% of businesses were likely to move some or all of their operations in the next two years (figure 7). We asked companies if they moved in the next two years where would they go.



**Figure 10: If you did move in the next two years, where would you move to? (all responses)**

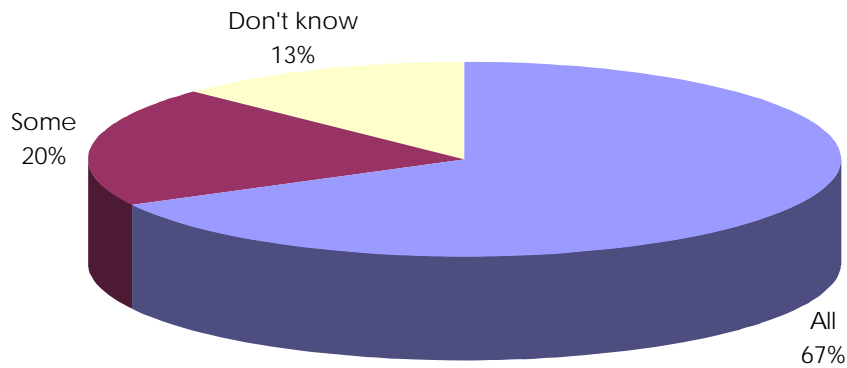
69.6% of those highlighted that they would remain in Hull and a further 20% would locate in the East Riding. This is not to say all of these firms would move from Hull to East Riding (or vice versa) as a number of respondents were based in East Riding postcodes (see annex b).

11% of firms, who are currently based in Hull & East Riding, said they would move either elsewhere in Yorkshire & Humber (8%) or elsewhere in the UK. We should not regard this survey as definitive, but if these figures are representative – 45% of firms will move in the next two years and 11% will leave the area – then Hull & East Riding has a major challenge in providing a business friendly environment in which to run and grow their businesses.

One of the concerns the Business Advisory Group has discussed in its development of the business premises issue has been a perception that regeneration organisations are putting more effort into attracting new firms into the city at the expense of helping our existing firms to grow. This may or may not be a fair point to make, but perception in reality is that our existing businesses can, and will, provide significant new investment, economic growth and employment locally and the public sector has a role in supporting this in terms of sites and premises as well as planning, transport, business support etc.



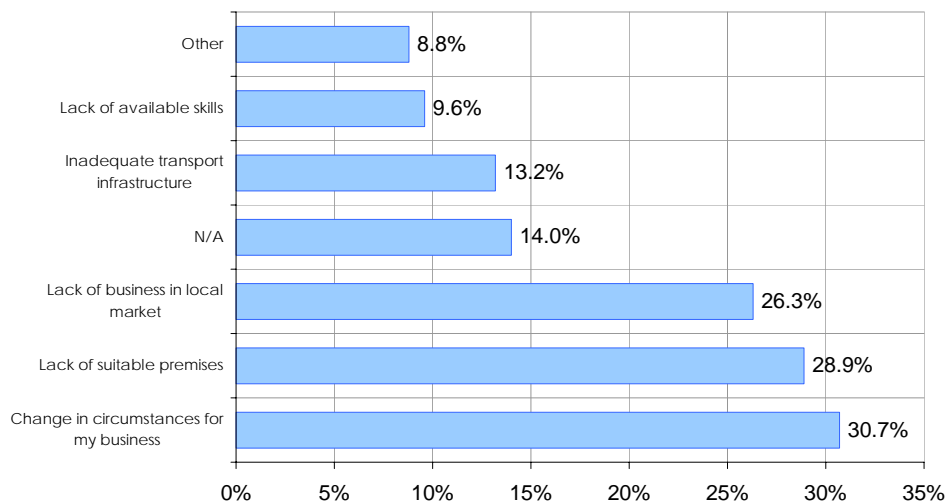
We asked businesses how much of their staffing or operations they were likely to move. 67% said they would move 'all of their staff/operations' and 19.8% would move only a proportion of all their staff/operations.



**Figure 11: How much of your operations would you move? (all responses)**

**Reasons for moving out of Hull**

The survey then explored the reasons why businesses might move out of the area. Options provided were lack of suitable premises, change in circumstances, inadequate transport infrastructure, lack of available skills and lack of business in local market.



**Figure 12: If you decided to move out of Hull, why would this be? (all responses)**

There were some interesting findings. Whilst 30.7% respondents commented that they would move due to a change of circumstances within their business and 26.3% because of a 'lack of business in the local market' i.e. factors largely outside of the city's control, 28.9% said they would move due to a lack of suitable premises, which again underlines the importance of this issue.



Other reasons for moving out of Hull were highlighted as being 'tired of the trading climate in this country/area', 'having to move house', 'to enable their company to cover a larger geographical area' and 'the negative Image of Hull'.

### Reasons for potentially moving out of Hull

- |   |                  |
|---|------------------|
| Moving house  | Road pricing     |
| To cover larger geographical area                                     | High local rates |
| Better Environment  | Feedstock costs  |
| Negative Image of Hull  |                  |
| A town going down hill – going for retail, not manufacturing and jobs |                  |
| Trading is very difficult in this country for a small business        |                  |
| Sick of trading climate in this country/area                          |                  |



## section six

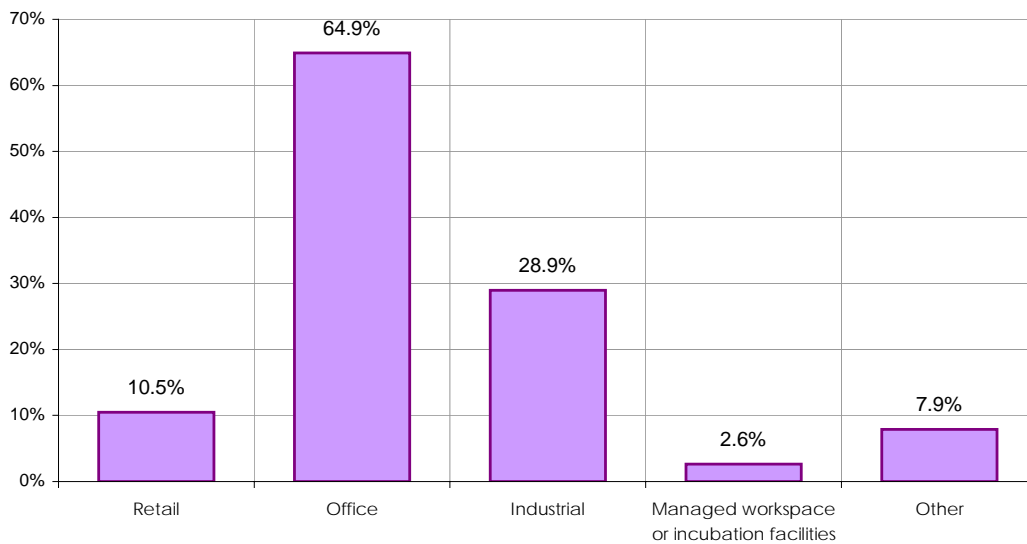
### demand trends

The following section describes businesses responses to a series of questions regarding the types and locations of premises they would seek. One important factor to take into account is that the responses will be shaped largely by the nature of businesses that responded. It would therefore be helpful to consider the profile of respondents (annex b) when interpreting this section.

Key features of the respondents profile are as follows:

- 59% of respondents current premises was office with 21% light industrial.
- 66% have a single site based in Hull & East Riding.
- 68% of respondents employ less than 20 people.
- 35% are in production, construction and manufacturing with 65% in services.

### Priority type business premises

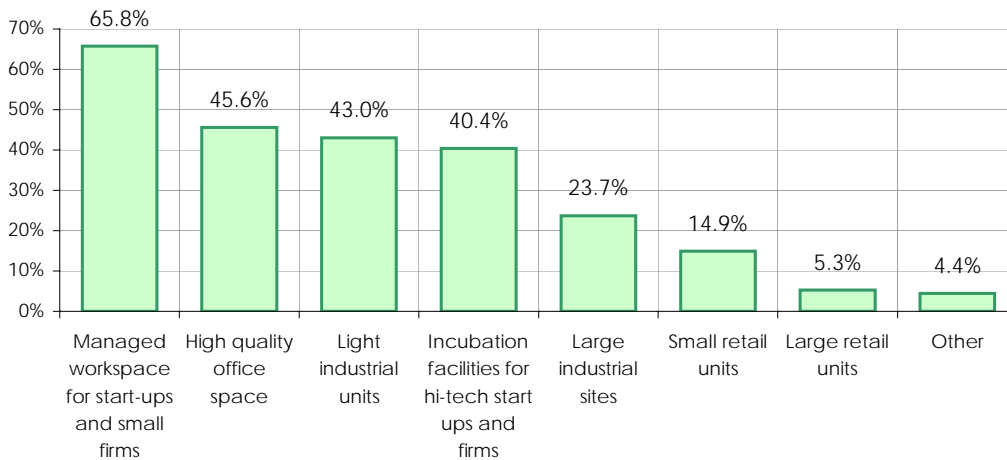


**Figure 13: If you did move in the next two years, what type of premises would you seek? (all responses)**

The survey asked businesses about the type of premises they would be seeking if they moved in the next two years. 64.9% highlighted that they would be seeking office space and 28.9% would be seeking industrial premises. The lowest sought for premises were suggested as managed workspace or incubation facilities, the reason being that the respondents are already established businesses, who are unlikely to require such facilities unless it is possibly to develop new ventures. 10.5% respondents would be requiring retail based premises, which generally reflects the proportion of respondents from the retail sector (13% for retail and wholesale).



Later in the survey we asked businesses what type of premises they felt should be developed in Hull.



**Figure 14: What type of business premises do you feel should be a priority for Hull? (all responses)**

Despite answers to a previous question that only 3% of respondents themselves would seek managed workspace / incubation for start-ups, there was strong support for the development of these types of facilities in the city to stimulate enterprise and business development. 65.8% of respondents felt that 'managed workspace for start-ups and small firms' and 40.4% felt 'incubation facilities for hi-tech start ups and firms' should be a priority. 'High quality office space' (45.6%) and light industrial units (43%) were also well supported.

“  
 More thought is needed to bring commercial and industrial jobs to the city. I agree that new retail space is important, but without other jobs it could be a white elephant!  
 ”  
**Office supplies, 23 employees, 19 years trading**

Given the current investment already underway in retail space in the city centre, there was less support for the development of these types of premises.

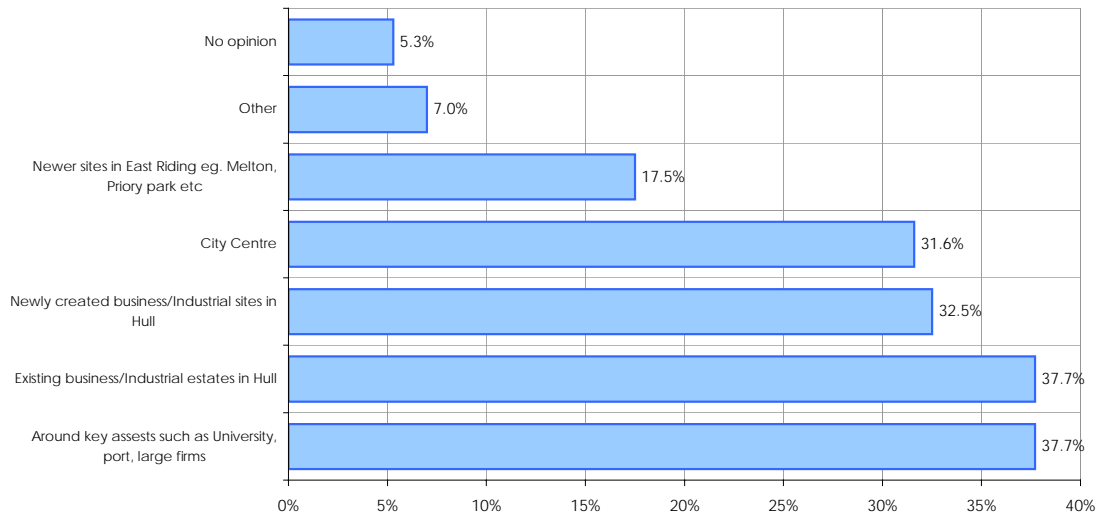
Other priorities suggested by respondents included workspace for young entrepreneurs and 'units with good yards', reflecting the fact that many businesses will not start up in new, high quality premises. The key is to get the right mix of provision, competitively priced for a range of businesses and in the right locations.

**Types of premises required if moving**

Storage Facility  
 Warehouse  
 Specialist Clinic

Food manufacturing  
 Possibly purpose built  
 With HGV parking facilities

We then asked businesses where they felt business premises should be developed in the city.



**Figure 15: Taking into account your answer to the previous question, where do you believe these premises should be developed? (multiple response, all responses)**

Four of the six options offered featured strongly in the results. 38% of respondents said they would like to see development ‘around key assets such as the University, port or large firms’ with the same number citing ‘existing business/industrial estates in Hull’. There was also support for newly created or developed industrial estates (33%) and the city centre (32%).

It is worth highlighting that a relatively low figure of 18% said they believed these new premises should be developed on newer sites in the East Riding, which contrasts quite sharply with the majority of respondents (72%) who were unconcerned about businesses moving out to new sites at Melton, Humber Bridge etc. One interpretation would be that there is preference to strengthen Hull’s offering of business premises as a priority, but businesses will ultimately locate in the most suitable available location for them, be it in Hull, the East Riding or elsewhere.

**Suggested locations for new businesses**

A balanced structure of all options stated  
 Suburbs and estates  
 Placed with easy staff access

Brownfield Site Development  
 Good access – away from traffic jams  
 Old Town



## section seven

### role of the public sector

One of the issues, which the Business Advisory Group has been keen to explore, is the respective roles of the public and private sectors in providing business premises in Hull. Whilst it can be argued that the provision of business premises should be left to the market there are a number of areas which make the role of public sector particularly important:

- **Market failure and economic development:** Hull has got ambitious targets in the Community Strategy to increase business starts; increase employment which will require business growth; and increase the number of higher skilled jobs as a proportion of the local economy. Business premises is an important factor in meeting all of these targets whether that be providing managed workspace or incubation facilities to encourage start ups, ensuring there is a good mix of sites and premises to help existing businesses grow and attract new investment; or 'creating a market' for higher value employment by providing high quality office space which currently doesn't exist in city e.g. Humber Quays.
- **Strategic planning and policy:** the public sector, particularly the City Council, has a key role to play from a policy perspective in ensuring the city has the land and planning frameworks to support and encourage economic development. Not only is it important to secure the right amounts of land in the right places for development in the Regional Spatial Strategy, Joint Structure Plan and Local Development Frameworks, but it is also vitally important to get the right transport links into these sites. A number of agencies will be involved in this process in addition to the Council, such as Citybuild and Yorkshire Forward.
 

“  
*Access to industrial areas is still an issue, in particular Sutton Fields. I also believe that hotel accommodation in north Hull is poor*  
 ”

**Grocery suppliers, 140 employees, 5 years trading**
- **Statutory planning system:** Hull City Council clearly has an important role in the provision of commercial premises through the statutory planning system. Clearly there are balances between economic, social and environmental factors which come into play, but it is crucial that businesses are supported by a quick, consistent and responsive planning system which encourages appropriate development.
- **'Landlord':** we also recognise that public bodies are major owners of land and premises in the city. This will include their own estates, many of which are potentially of strategic importance, but also in the ownership of various other sites and premises across the city which are either awaiting development or are leased to businesses.

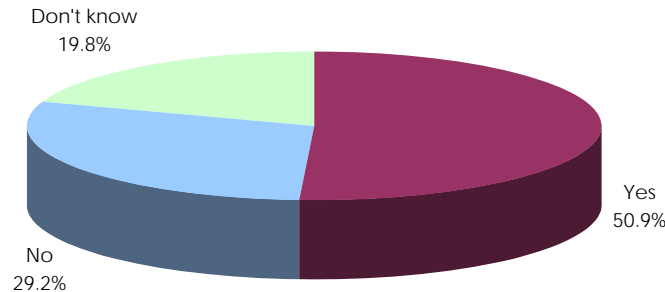
### Finding premises in Hull

We have already established that 45% of respondents intend to move some or all of their operations in the next two years, indicating a very dynamic local market.

We asked businesses whether they felt it would be difficult to find new premises in Hull and 51% said they thought it would be difficult and 29% believing it wouldn't. Given the range of support and advice on finding premises from the range of excellent



commercial property agents and in some instances the public sector, we can infer that the difficulties business envisage are likely to be the lack of suitable premises (either by location, cost or quality) rather than a lack of help finding it.

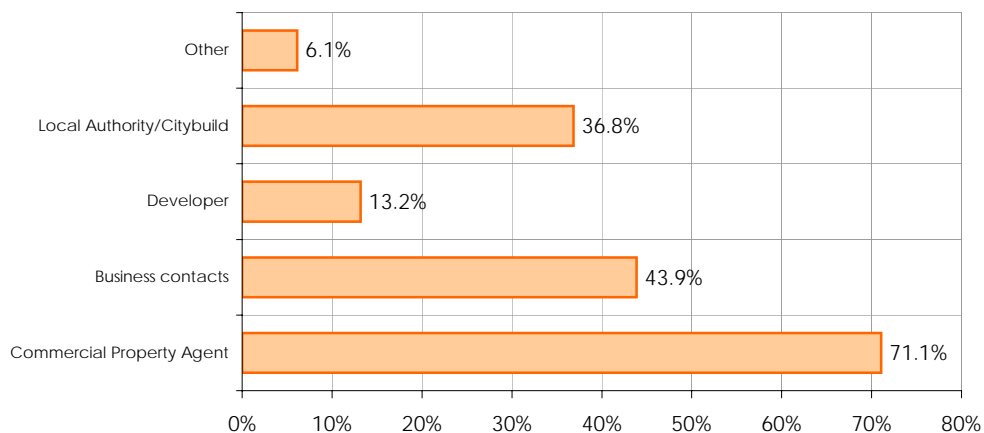


**Figure 16: Do you think it would be difficult to find new premises in Hull? (all responses)**

The survey then asked who businesses would approach if they were seeking new premises and 71.1% of respondents reported that they would contact a 'commercial property agent' and 44% would discuss with 'business contacts'. The majority of respondents selected more than one type of organisation who they would approach when seeking advice and support.

Other options stated included 'estate agents', 'source in house' or 'the local newspaper'.

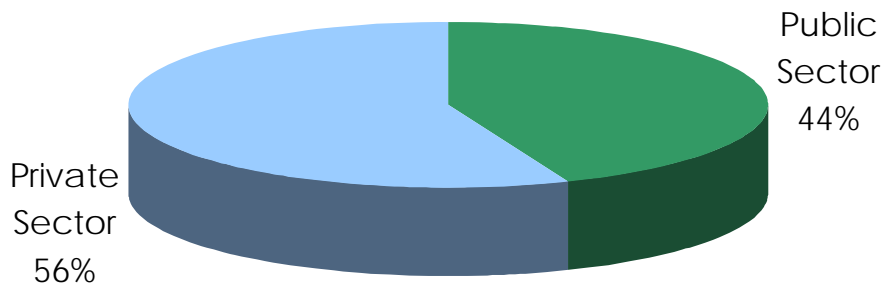
The high proportion of businesses that will use private sector advice and support to find premises suggests that the public sector's role is less about advice but more about using its statutory powers and influence to shape provision. However, a significant number of businesses (37%) will seek advice from the Council, Citybuild or public bodies as appropriate.



**Figure 17: If you needed advice and support on new premises where would you go? (multiple responses, all responses)**



When it came to seeking views on who should provide property for business, 44% believed it should be the public sector but 56% believed that it should be the private sector.



**Figure 18: Who do you think should provide property for business? (all responses)**

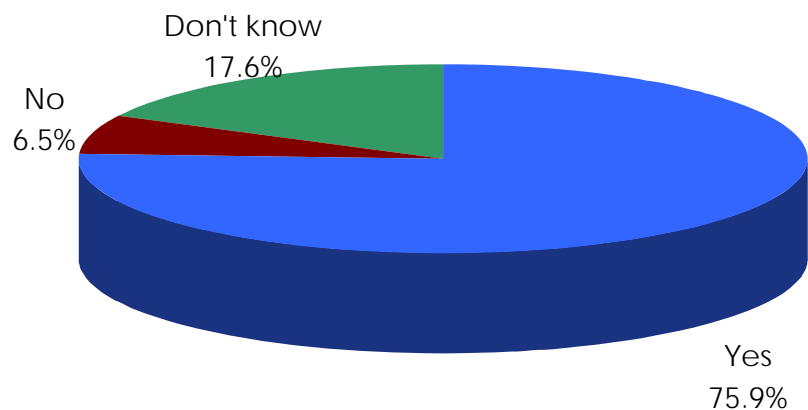
It is striking that such a high proportion chose the public sector in an 'either/or' question indicating that the primary responsibility for business premises was the public sector ahead of the market. However, there are several comments to make:

- A number of respondents would have liked to have ticked both boxes reflecting the fact that both public and private sectors have roles in the provision of business premises.
- The public sector has a huge role to play in the provision of business premises from a planning and economic development perspective even if it wasn't a provider.
- The Council has historically been a significant owner of land and premises in the city and this 'hands on' approach creates a culture in which businesses perceive its role to be more substantial than other cities. To some extent, 44% reflects what the Council and public sector has done or is doing, rather than perhaps it should do in the future.
- Businesses have clearly stated that they believe the provision of business premises is vital for the city's economic development. Support for managed workspace and incubation facilities are generally investments made by the public sector (in Hull and elsewhere) and it is likely that a proportion of the 44% are not relying on public sector provision themselves, but believe the Council and others can and should play a strong role in premises provision from an economic development perspective.

### Public sector investment

This interpretation is largely supported by the responses to the next question. We asked businesses whether they were supportive of public sector investment in the provision of business premises in Hull.

Overall 76% of respondents commented that they would support more public sector investment in the provision of appropriate business premises and only 6.5% said that they wouldn't be in support.



**Figure 19: Would you support more public sector investment in the provision of appropriate business premises in Hull? (all responses)**

This finding supports the efforts to date of Hull City Council, Citybuild, Yorkshire Forward and others in developing and investing in business premises in Hull. Discussions with the Business Advisory Group have highlighted that a number of other options which are appropriate for consideration.

- The importance of issues such as higher value jobs and innovation may support the case for more investment in incubation space. This could range from small, relatively low cost options such as the space provided at Stream, or substantial investments for incubation space around key assets such as the University if a strong business case could be made. We are concerned that the city does not have genuine science park or substantial incubation space, and we would like to see this option explored to identify whether there is sufficient demand, whether it would fit the economic development strategy for the city and whether it is feasible.
- The Council could assess its managed workspace programme, which has been successful for many businesses and is in principle, an important part of the property mix. The issues to consider are whether these facilities are best owned and managed in the public sector; whether the support services offered to small firms in these facilities are of sufficient quality to make real and positive impacts on tenants; and whether there is sufficient 'turnover' of tenants to ensure the facility is meeting its 'enterprise' aims of providing flexible and low cost premises for new and small firms, helping them grow and then move on before repeating the cycle for new start-ups.
- The provision of high quality office space such as Humber Quays is clearly one of the most high profile premises issues. This high cost and high impact development will ultimately be judged by the business community in five or ten years time. It is crucially important for the credibility of public sector interventions in commercial premises that the scheme is successful in helping secure higher value jobs (from existing or new businesses) and stimulate substantial further development of the site. The Business Advisory Group believes that it is important that these new

“

*As a Hull company we have found it very difficult to move out of managed workspace into our own property. This has become quite restrictive to our continual growth*

”

**Business services, 11 employees, 7 years trading**



facilities can and should be used to stimulate the development and expansion of existing Hull companies as well as provide an attractive product for inward investment.



## section eight

### any other comments

Note: all comments are unedited.

"The Council managed workspaces are 'cheap and cheerful' and offer lots of flexibility and support. The standards of decoration and appearance could be better, which would let start ups give a more professional appearance to visitors." **Business Services, 1 employee, ½ year trading**

"As a Charity, I would welcome subsidised, quality office premises or managed workspace." **Charity, 2 employees, 4 years trading**

"More thought is needed to bring commercial and industrial jobs to the city. I agree that new retail space is important, but without other jobs it could be a white elephant!" **Office supplies, 23 employees, 19 years trading**

"New business should be encouraged in start-up/incubator units. However, there should be facilities suitable for encouraging the same businesses to achieve steady growth without them leaving the area. In essence start-up/incubator units – larger units (less assistance – good sized units (no assistance). Generally there are no clear commercial progression routes for businesses. Businesses should be encouraged to grow and prosper. To do this the city needs to provide ranges of units in different types and sizes. For example what does Hull have for a start-up business that has out grown its start up unit? There may be something available but in a different location. Provide a mix in the same location so prospering businesses are not forced to relocate." **Quantity Surveyors, 0 employees, 25 years trading**

"Land needs to be made available for the private sector to develop." **Food Production, 1000 employees, 155 years trading**

"There is a need for more ownership office spaces." **Communications, 20 employees, 2.5 years trading**

"Small firms/start ups need support initially with reduced overheads, i.e. reduced rent/business rates. Therefore its best that the public provide property, as the private sector will be unable to offer reduced rent and have no impact on business rates. Small/start up firms should have generous support in the form of cheaper business rates/rent, like Doncaster did – who built up big business park including IKEA (ideally just off the ferry). As well as supporting small businesses in the area, why are we not attracting businesses like this? We could really do something with a Honda, Datsum, Nissan and an IKEA. Offer FREE business rates for 5 years! That will pull them in! Do something dramatic! Get the public sector to really put their money where their mouth is." **Construction, 2 employees, 20+ years trading**

"Existing sites (industrial) should be cleaned/tidied and vitalised rather than building new, e.g. Sutton Fields/Clough Road." **Social Enterprise, 2 employees, 15 months trading**

"Offices need to be near the bus station and train station. Not on the bloody congested A63 = NONSENSE." **IT Games, 10 employees, 2 years trading**

"Too many tired old properties. Poor planning for retail expansion. Lack of co-ordination with the East Riding." **Retail, 11 employees, 60 years trading**



"We have staff who travel to work via public transport/cycle. Premises should be developed in places with easy staff access. There is already a huge lack of skills so could not jeopardise this by moving out of the area." **Construction 13 employees, 30 years trading**

"Hull needs businesses and quality jobs without these the city will continue to be poor." **Design & Marketing Consultancy, 10 years trading**

"There seems to be very limited opportunity to buy decent business premises. Are we unusual in looking for this?" **Business Consultants, 7 years trading, 7 employees**

"As we are based in Hessle it is hard to comment on premises in Hull. More smaller affordable units in Priory Park would be beneficial to a lot of smaller companies." **Communications, 0 employees in Hull, 10 years trading**

"There should be more premises like the PRNDC Freedom Centre on Preston Road Estate. There needs to be provision for teens as well." **Business Support, 1 employee, 1 year trading**

"Utilise existing and operational business premises, which have capacity to accommodate start-up or small businesses. This would help both parties by providing additional income for one and lower costs with valuable experience on top for others." **Office Supplies, 24 employees, 58 years trading**

"An opportunity was missed when Clive Sullivan Way was built and the swing bridge at the Bottom of Castle Street. An uninterrupted road and rail link to the Ferry terminals should have been erected. River Hull traffic should be limited to vessels that do not require the bridges to be raised if the benefit outweighs the economic impact." **Voluntary Services, 58 employees, 31 years trading**

"Indicates complete lack of understanding/ability within the Council as to the required elements necessary in order to improve the city. Concentration on retail space is the easy option, requiring a lower level of ability to staff these premises, which in turn reflects the low education standards within the city. Why would outside industrial concerns move to Hull?" **Anon, 25 employees, 22 years trading**

"We need a large corporate business to be attracted to or near to Hull. The slide towards western Hull fringes is not proportionate to the labour stock in eastern Hull suburbs. The 'docklands' area should be developed." **Manufacturing, 25 employees, 25 years trading**

"It is necessary to raise the profile the local business and to encourage Hull people to become involved in running their own businesses. Premises should be geared accordingly." **Construction, 150 employees, 130 years trading**

"More encouragement needed to persuade landlords to rent to young businesses. Those owned by women – have been let down at final stage for 2 properties in last month alone, which is threatening to cripple my business. I am currently stuck operating a market stall whilst waiting for premises. Also city centre rents – apart from Whitefriargate are unrealistically high, leading to abandoned units." **Publications, 1 employee, ½ year trading**

"Due to the geographical location of Hull it needs to offer high quality business locations to entice companies to establish themselves in the area. There needs to be



something to positively differentiate Hull from other areas." **Healthcare, 800 employees, 151 years trading**

"I am seeking help in any form to enable me to move office. Are there any grants available to improve a building when purchasing?" **Marketing/Media, 5 employees, 19 years trading**

"Graffiti in the town centre is becoming a severe problem, with a deferential effect of making the town look poor and uncared for." **Recruitment Consultancy, 7 employees, 11 years trading**

"I am unable to move my business outside of Hull as we are in a specialist industry having to train our own staff, most of which do not drive. I would lose staff if I moved due to lack of adequate public transport infrastructure." **Accident Management, 26 employees, 8 years trading**

"Being in haulage I note that out of town sites such as Melton will cause greater pollution as every occupant uses a haulier based closer to the centre of town." **Haulage, 20 employees, 14 years trading**

"There are not enough high quality, good value sites in the City Centre aimed at small enterprises (10-50 employees)." **Human Resources, 15 employees, 11 years trading**

"Access to industrial areas is still an issue, in particular Sutton Fields. I also believe that Hotel accommodation in North Hull is poor." **Grocery Suppliers, 140 employees, 5 years trading**

"An incentive has to be given for manufacturing business to move to Hull to create the jobs. The port will loose out badly to Immingham outer Harbour – fragmented retail areas over the city are no good." **Chartered Surveyors, 9 employees**

"Ease of access – public transport – car park locality are essential. Many companies cannot operate without staff cars being available for van/lorry delivery being easy." **Surveyors, 8 employees, 129 years trading**

"The community strategy rightly recognises how vital an improved economy is for Hull, the city needs to provide for this with as wider range of options to cater for growing local business, start-ups, new technology, and the bigger requirements for both office and shed space. Failure to do this will just continue the leakage and constrained growth." **Urban Regeneration, 10 employees, 43 years trading**

"The development of sector driven clusters of business will bring mutual benefits and allow the area to develop a national/international reputation, which will attract business and high calibre staff." **Healthcare, 6 employees, 2 years trading**

"Land not available to build small/industrial unit/studio to become my business base/pension fund." **Commercial Photographers, 2 employees, 15 years trading**

"As a Hull company we have found it very difficult to move out of managed workspace into our own property. This has become quite restrictive to our continual growth." **Human Resources, 11 employees, 7 years trading**

"Problem with the industrial/commercial sites is transport for workers – they have to drive/move a car or rely on a bus service, which although good is not frequent enough." **Communications, 5 employees, 1 year trading**



## section nine

### conclusions

This survey is intended to provide the basis for a debate in the city about the type and location of business premises in the city and the respective roles of public and private sectors.

It is very clear that premises is a vital issue for the local economy and companies need the right mix and locations to grow and expand. There is a strong feeling in the business community that our city's overall property offer needs to be strengthened in order to help existing businesses grow, as well as to encourage start ups and attract investment.

The survey and discussions of the Business Advisory Group also suggests that businesses are concerned at the lack of available premises to buy.

Clearly the city has a limited amount of land to develop and this means it is crucial we retain land for commercial use within the strategic planning system to support employment and business growth. This is important at a time when land is attractive for residential development and whilst there are examples where the business community would support a shift to residential use, e.g. the development of 'city living', the overall strategic approach needs to retain land designated for commercial and industrial use and where appropriate identify new sites for business to support the local economy.

Linked to this objective is a need to ensure our city's transport system compliments development. Location comes through a key factor in this survey, and a huge factor in location is high quality transport links. For some businesses this will be road access but many businesses prioritise access to public transport. Access to the city centre is vital and Hull needs to think very carefully about issues such as parking, roads and public transport if it has serious aspirations about developing a mixed economy in the city centre rather than simply a retail economy.

Transport links with the East Riding need to be improved and developed if sites are extensively developed there to link new sites at the Humber Bridge, Melton etc into the Hull supply chain and labour market.

In addition to planning and transport, the role of the public sector is also important particularly on issues on managed workspace or incubation, which are generally things the market doesn't do. Public bodies should also consider its role in owning and managing assets once they have been established. Decisions should be taken on the basis of what will improve the economy, jobs and prosperity for the city as a whole.



## annex a

### full survey results

All values are percentages.

About your business and premises				
<b>1. What sector is your business in? (tick all that apply)</b>				
	Production	9.0		
	Manufacturing	14.8		
	Construction	10.7		
	Transport / communications	5.7		
	Retail/wholesale	13.1		
	Hotel / catering	3.3		
	Professional and business services	36.1		
	Consumer services	1.6		
	Public / voluntary sector	5.7		
	Other	12.5		
<b>2. Please tell us the type of business premises you have? (tick all that apply)</b>				
	Office	59.1		
	Retail	8.1		
	Light industrial	20.8		
	Heavy industrial	3.4		
	Other	8.7		
<b>3. Please tell us about the nature of your business sites and premises? (tick one)</b>				
	Single site, based in Hull & East Riding	65.8		
	Multi-site, all based in Hull & East Riding	9.6		
	Multi-site, with HQ in Hull & East Riding	13.2		
	Multi-site, with HQ outside of Hull & East Riding	11.4		
	Franchise	0.0		
<b>4. What were the most important factors in choosing your current location? (tick high/medium/low for each)</b>				
<b>Importance...</b>	<b>High</b>	<b>Med.</b>	<b>Low</b>	
Location	73.3	26.7	0.0	
Quality of premises	50.5	44.3	5.2	
Cost	61.6	32.3	6.1	
Availability of workforce	32.6	27.2	40.2	
Other	14.9			
<b>5. Why is your business located in Hull &amp; East Riding? (tick no more than three)</b>				
	Hull is a good place to do business	27.2		
	It has always been based here	67.5		
	Our business serves the local market only	19.3		
	Good transport links to the rest of the region/UK	8.8		
	The quality of our site/premises is good	14.9		
	Our business is part of a national chain	4.4		
	Low cost	14.0		
	Availability of skilled workforce	11.4		
	Most of our supply chain is local	8.8		
	Other	9.6		
	Not based in Hull	0.9		
<b>6. What is the ownership status of the site of your premises (tick one)?</b>				
	Owned	49.1		
	Leased	50.9		
<b>7. How long have you been based at your current site?</b>				
	Less than one year	11.4		
	One to four years	33.3		
	Five or more years	56.1		
<b>8. If you have moved in the past four years, why did you make this move? (tick all that apply)</b>				
	Site was no longer suitable for my business	46.2		
	Was renting and was forced to move	7.7		
	To expand	35.9		
	Other	10.3		
<b>9. Do you intend to move some or all of your operations in the next two years (tick all that apply)?</b>				
	Yes, to expand or develop new business opportunity	27.4		
	Yes, our current lease will come to end	5.1		
	Yes, our current location is no longer suitable	12.8		
	Yes, our business is moving away from the local area	0.0		
	No	54.7		
	Don't Know	1.7		



About your business and premises (continued)																									
<b>10. If you did move in the next two years, where would you most likely move to? (tick one)</b> <table border="0"> <tr> <td>Hull</td> <td>69.6</td> </tr> <tr> <td>East Riding</td> <td>19.6</td> </tr> <tr> <td>Elsewhere in Yorkshire &amp; Humber</td> <td>7.8</td> </tr> <tr> <td>Elsewhere in UK</td> <td>2.9</td> </tr> </table>	Hull	69.6	East Riding	19.6	Elsewhere in Yorkshire & Humber	7.8	Elsewhere in UK	2.9	<b>13. If you did move in the next two years, what type of premises would you seek? (tick all that apply)</b> <table border="0"> <tr> <td>Retail</td> <td>10.5</td> </tr> <tr> <td>Office</td> <td>64.9</td> </tr> <tr> <td>Industrial</td> <td>28.9</td> </tr> <tr> <td>Managed workspace or incubation facilities</td> <td>2.6</td> </tr> <tr> <td>Other</td> <td>7.9</td> </tr> </table>	Retail	10.5	Office	64.9	Industrial	28.9	Managed workspace or incubation facilities	2.6	Other	7.9						
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<b>11. How much of your staff or operations would you move?</b> <table border="0"> <tr> <td>All</td> <td>67.3</td> <td>Some</td> <td>19.8</td> </tr> <tr> <td></td> <td></td> <td>Don't know</td> <td>12.9</td> </tr> </table>	All	67.3	Some	19.8			Don't know	12.9	<b>14. Do you think it would be difficult to find new premises in Hull?</b> <table border="0"> <tr> <td>Yes</td> <td>50.9</td> <td>No</td> <td>29.2</td> </tr> <tr> <td></td> <td></td> <td>Don't know</td> <td>19.8</td> </tr> </table>	Yes	50.9	No	29.2			Don't know	19.8								
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<b>12. If you decided to move out of Hull, why would this be? (tick all that apply)</b> <table border="0"> <tr> <td>Lack of suitable premises</td> <td>28.9</td> </tr> <tr> <td>Change in circumstances for my business</td> <td>30.7</td> </tr> <tr> <td>Inadequate transport infrastructure</td> <td>13.2</td> </tr> <tr> <td>Lack of available skills</td> <td>9.6</td> </tr> <tr> <td>Lack of business in local market</td> <td>26.3</td> </tr> <tr> <td>Other</td> <td>8.8</td> </tr> <tr> <td>N/A</td> <td>14.0</td> </tr> </table>	Lack of suitable premises	28.9	Change in circumstances for my business	30.7	Inadequate transport infrastructure	13.2	Lack of available skills	9.6	Lack of business in local market	26.3	Other	8.8	N/A	14.0	<b>15. If you needed advice and support on new premises where would you go? (tick any that apply?)</b> <table border="0"> <tr> <td>Commercial property agent</td> <td>71.1</td> </tr> <tr> <td>Business contacts</td> <td>43.9</td> </tr> <tr> <td>Developer</td> <td>13.2</td> </tr> <tr> <td>Local authority / Citybuild</td> <td>36.8</td> </tr> <tr> <td>Other</td> <td>6.1</td> </tr> </table>	Commercial property agent	71.1	Business contacts	43.9	Developer	13.2	Local authority / Citybuild	36.8	Other	6.1
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Your opinions of business premises in Hull																															
<b>16. How high a priority should the improvement of business premises be to the local economy? (tick one)</b> <table border="0"> <tr> <td>Essential</td> <td>49.5</td> </tr> <tr> <td>Important</td> <td>40.2</td> </tr> <tr> <td>Moderately important</td> <td>9.3</td> </tr> <tr> <td>Unimportant</td> <td>0.9</td> </tr> </table>	Essential	49.5	Important	40.2	Moderately important	9.3	Unimportant	0.9	<b>20. What type of business premises do you feel should be a priority for Hull? (tick no more than three)</b> <table border="0"> <tr> <td>Managed workspace for start-ups and small firms</td> <td>65.8</td> </tr> <tr> <td>Incubation facilities for hi-tech start-ups and firms</td> <td>40.4</td> </tr> <tr> <td>High quality office space</td> <td>45.6</td> </tr> <tr> <td>Large retail units</td> <td>5.3</td> </tr> <tr> <td>Small retail units</td> <td>14.9</td> </tr> <tr> <td>Light industrial units</td> <td>43.0</td> </tr> <tr> <td>Large industrial sites</td> <td>23.7</td> </tr> <tr> <td>Other</td> <td>4.4</td> </tr> </table>	Managed workspace for start-ups and small firms	65.8	Incubation facilities for hi-tech start-ups and firms	40.4	High quality office space	45.6	Large retail units	5.3	Small retail units	14.9	Light industrial units	43.0	Large industrial sites	23.7	Other	4.4						
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<b>17. Is the overall stock of available premises in Hull...</b> <table border="0"> <tr> <td>Improving</td> <td>35.7</td> <td>Staying the same</td> <td>35.7</td> </tr> <tr> <td>Deteriorating</td> <td>28.6</td> <td></td> <td></td> </tr> </table>	Improving	35.7	Staying the same	35.7	Deteriorating	28.6			<b>21. Taking into account your answer to Q20, where do you believe these premises should be developed?</b> <table border="0"> <tr> <td>City centre</td> <td>31.6</td> </tr> <tr> <td>Existing business/Industrial estates in Hull</td> <td>37.7</td> </tr> <tr> <td>Newly created business/industrial sites in Hull</td> <td>33.5</td> </tr> <tr> <td>Around key assets such as University, port, large firms</td> <td>37.7</td> </tr> <tr> <td>Newer sites in East Riding e.g. Melton, Priory Park etc</td> <td>17.5</td> </tr> <tr> <td>No opinion</td> <td>5.3</td> </tr> <tr> <td>Other</td> <td>7.0</td> </tr> </table>	City centre	31.6	Existing business/Industrial estates in Hull	37.7	Newly created business/industrial sites in Hull	33.5	Around key assets such as University, port, large firms	37.7	Newer sites in East Riding e.g. Melton, Priory Park etc	17.5	No opinion	5.3	Other	7.0								
Improving	35.7	Staying the same	35.7																												
Deteriorating	28.6																														
City centre	31.6																														
Existing business/Industrial estates in Hull	37.7																														
Newly created business/industrial sites in Hull	33.5																														
Around key assets such as University, port, large firms	37.7																														
Newer sites in East Riding e.g. Melton, Priory Park etc	17.5																														
No opinion	5.3																														
Other	7.0																														
<b>18. Please tell us whether you agree or disagree with the following statements about Hull's property market?</b> <table border="0"> <thead> <tr> <th></th> <th>Agree</th> <th>Dis-agree</th> <th>Don't know</th> </tr> </thead> <tbody> <tr> <td>There aren't enough sites to meet demand</td> <td>38.1</td> <td>26.7</td> <td>35.2</td> </tr> <tr> <td>The quality of premises isn't good enough</td> <td>57.1</td> <td>15.2</td> <td>27.6</td> </tr> <tr> <td>Lack of premises holds back the economy</td> <td>58.1</td> <td>12.4</td> <td>29.5</td> </tr> <tr> <td>It doesn't matter if firms move to East Riding</td> <td>19.4</td> <td>71.8</td> <td>8.7</td> </tr> <tr> <td>There's too much emphasis on retail space</td> <td>64.4</td> <td>16.3</td> <td>19.2</td> </tr> </tbody> </table>		Agree	Dis-agree	Don't know	There aren't enough sites to meet demand	38.1	26.7	35.2	The quality of premises isn't good enough	57.1	15.2	27.6	Lack of premises holds back the economy	58.1	12.4	29.5	It doesn't matter if firms move to East Riding	19.4	71.8	8.7	There's too much emphasis on retail space	64.4	16.3	19.2	<b>22. Would you support more public sector investment in the provision of appropriate business premises in Hull?</b> <table border="0"> <tr> <td>Yes</td> <td>75.9</td> <td>No</td> <td>6.5</td> <td>Don't know</td> <td>17.6</td> </tr> </table>	Yes	75.9	No	6.5	Don't know	17.6
	Agree	Dis-agree	Don't know																												
There aren't enough sites to meet demand	38.1	26.7	35.2																												
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Yes	75.9	No	6.5	Don't know	17.6																										
<b>19. Who do you think should provide property for business?</b> <table border="0"> <tr> <td>Public sector</td> <td>44.0</td> </tr> <tr> <td>Private sector</td> <td>56.0</td> </tr> </table>	Public sector	44.0	Private sector	56.0																											
Public sector	44.0																														
Private sector	56.0																														



# annex b

## profile of respondents

This report has been produced from feedback from locally based businesses and business support organisations.

The Business Premises survey engaged most businesses with 114 responses received. Given the tight deadlines in place, this encouraging response rate reflects a clear commitment of the business community to contribute to the issue of the stock of business premises available in Hull.

### Company size

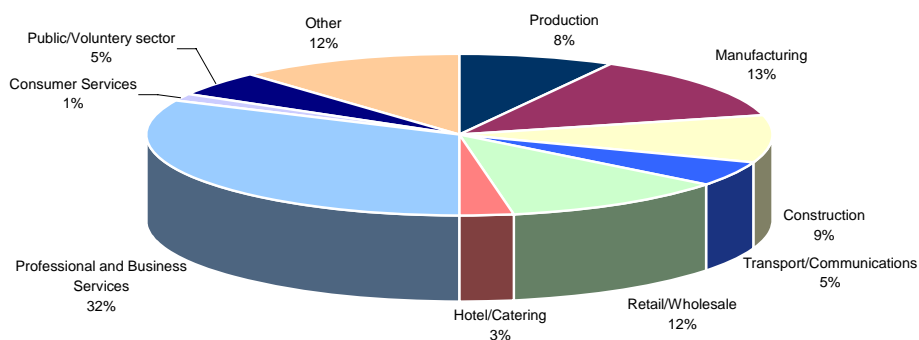
The companies who responded to the survey employ circa 6,156 employees locally, which constitute a significant proportion employed in the private sector in Hull.

Number of employees	Percentage
0 employees	0.9%
1-5 employees	32.7%
6-20 employees	34.6%
21-50 employees	9.4%
51-250 employees	16.8%
251 or more employees	5.6%

Responses range from large employees such as Smith & Nephew, BP and William Jackson & Son Ltd to the self employed in their first year of trading.

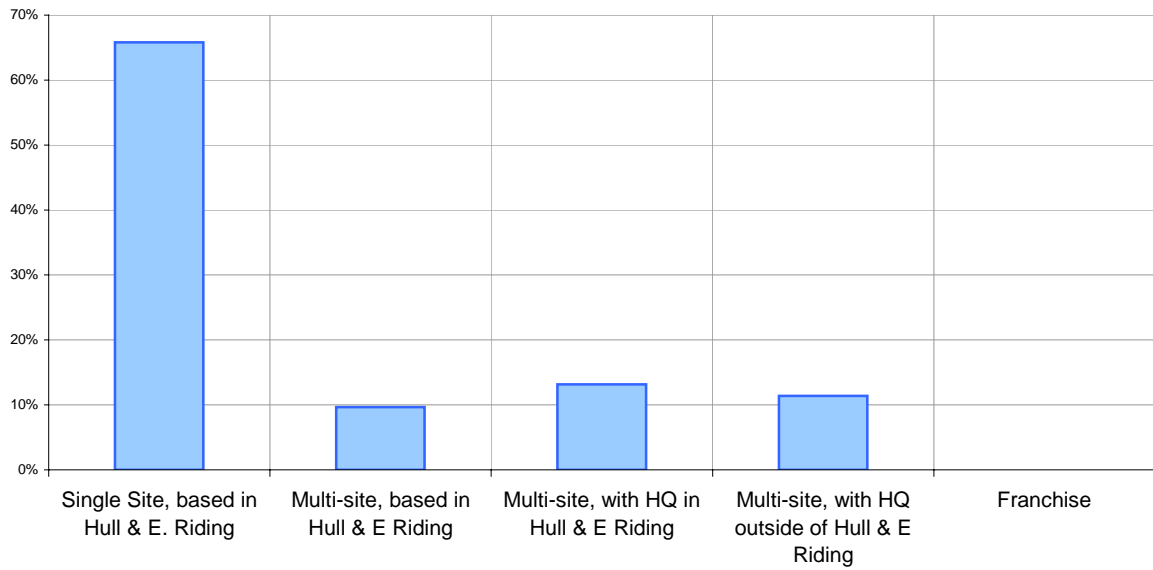
### Business Sector

Respondents were drawn from a wide range of sectors and professions including retail, production, manufacturing, engineering, IT, hotel and leisure, banking, marketing and media, accountancy, legal, consumer services, business support and many others.

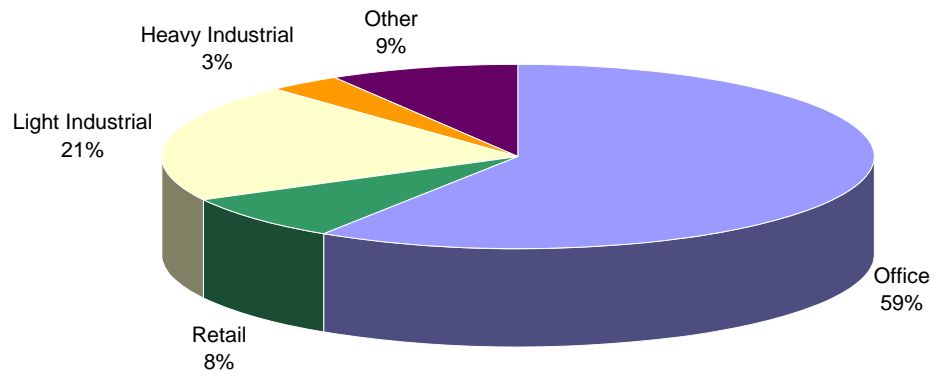




**Current business premises**



A majority of respondents premises were currently office based (59%) followed by light industrial (21%).



Other types included warehousing, home office, clinics, haulage yard, conference and leisure space and design studios.



### Company age

**58.5% of respondents businesses have been trading for 20 years or less**, with 28.3% trading for less than 5 years.

Years Trading	Percentage
Under a year	2.8%
1-5 years	25.5%
6-20 years	30.2%
21-50 years	17.9%
51 or more years	23.6%

Where appropriate varying trends between these different types of respondents are highlighted. **In total these businesses have circa. 3725.5 years of experience running businesses locally.**

### Company location

All of the respondents are active in Hull's economy (although some are based outside of the city's boundary). **The most prominent postcodes were HU1 (25.9%), HU5 (10.7%) and HU3 (9.8%).** The lowest responses from a Hull postcode were from HU4, HU11, HU12, HU15 and HU16, all at 0.9%.

Postcode	Percentage	Postcode	Percentage	Postcode	Percentage
HU1	25.9%	HU7	3.6%	HU13	6.3%
HU2	7.1%	HU8	8.0%	HU14	1.8%
HU3	9.8%	HU9	9.8%	HU15	0.9%
HU4	0.9%	HU10	1.8%	HU16	0.9%
HU5	10.7%	HU11	0.9%	HU17	2.7%
HU6	6.3%	HU12	0.9%	Out of Hull	1.8%

#### **For more information:**

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