



**Nathaniel Lichfield  
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Planning. Design. Economics.

**Employment Land Requirement Study**

**High Peak and Staffordshire  
Moorlands ELR Demand Update**

High Peak Borough Council and  
Staffordshire Moorlands District Council

25<sup>th</sup> July 2014

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- Appendix 3 Projected Employment Changes in High Peak and Staffordshire Moorlands  
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## 1.0 Introduction

1.1 Nathaniel Lichfield & Partners [NLP] was commissioned by High Peak Borough Council [HPBC] and Staffordshire Moorlands District Council [SMDC] to prepare an update to both authorities' Employment Land Reviews [ELR]. This update forms part of the evidence base to inform High Peak's emerging Local Plan and Staffordshire Moorland's Core Strategy Review. This update covers the period 2011 to 2031 and will help to ensure that the plans are sound, positively prepared, justified, effective and consistent. It will aid the formulation of a clear economic strategy and assist in ensuring the necessary delivery of employment sites.

1.2 This study is an update study of employment land requirements for High Peak and Staffordshire Moorlands. It does not include an assessment of employment sites as this work is being completed by the respective Local Planning Authorities. The Study has the following objectives:

- 1 To update the economic factors driving the demand for employment land in the districts, including the results of the 2013 Oxford Economics forecasts<sup>1</sup> and also labour supply factors, including the relationship of jobs and economically active population;
- 2 To provide commentary on the nature of employment typologies in the long-term and its implications for floorspace and land requirements, including the requirements of specific sectors, use classes and types of B-Class and non B-Class employment uses;
- 3 To consider the significance of all employment including non-B class uses on overall employment land requirements and the potential nonlinear relationship between (net) job growth and land/floorspace requirements;
- 4 To forecast the likely floorspace and land requirements for the districts based on the above, to guide employment land provision; and,
- 5 To provide commentary of the current state of comparative market demands on the districts and immediate vicinity for different types and locations of employment land provision.

## Context

1.3 The National Planning Policy Framework [The Framework] requires Local Plans to set out priorities for homes and jobs needed in the area and to provide suitable amounts of land for housing and employment. Local Plans are required to allocate sites to promote development, based on adequate, up-to-date and relevant evidence about the economic characteristics of the area.

1.4 The High Peak Local Plan was adopted in March 2005. It sets a target of providing an additional 76 hectares of land developed for business, general

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<sup>1</sup> Oxford Economics 2013

industrial and distribution development between 1991 and 2011. In terms of progress towards this target of 76 ha, the total gross amount of land developed up to 31<sup>st</sup> March 2012 was 41.68ha.<sup>2</sup>

- 1.5 The Staffordshire Moorlands Local Plan was adopted in 1998 and covered the period to 2001. It identified a requirement of 19.7ha new industrial land over the plan period. The Preferred Options Regional Spatial Strategy Phase 2 Revision (2007) required the provision of 18 hectares of employment land which was consistent with the findings of the Council's Employment Land Study (2006). However, the provision in the RSS was for the period to 2021 only and an assessment of future needs to 2026 was undertaken through a review of the Employment Land Study, to reflect the plan period of the Core Strategy from 2006-2026. The findings of the Employment Land Study Review of 2008 proposed 24 hectares between 2006-2026.
- 1.6 In January 2014 the Council received the final report from the Inspector on the examination into the Staffordshire Moorlands Core Strategy. The Revised Submission Version Core Strategy was, with various modifications, adopted by the Council in March 2014. The Core Strategy states that provision will be made for at least 24 hectares of additional employment land in Staffordshire Moorlands (excluding the Peak District National Park) during the period 2006 – 2026. Sufficient deliverable land will be identified to provide at least 6 hectares of employment land at all times.

## **Approach and Methodology**

- 1.7 The approach to addressing these requirements follows the principles of the Government's National Planning Practice Guidance<sup>3</sup> [the Practice Guidance] which includes guidance on the assessment of housing and economic development and contains a methodology for assessing economic development.
- 1.8 Whilst the study predominantly focuses on employment space needs for the group of B Use Classes indicated in Table 1.1, the Framework provides a wider definition of economic development than just B class uses, and many of these uses produce jobs and create pressures on employment land. As such the 2013 Quantitative Retail Study Update and the associated Addendum Report (February 2014) prepared by GVA for HPBC and SMDC will inform the ELR to provide an overview of the demand for retail (including bulky goods), leisure and other employment accommodation in addition to typical B-Class uses. This is to ensure that the ELR is consistent with the findings and recommendations of recent retail studies.

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<sup>2</sup> High Peak AMR 2011/12

<sup>3</sup> National Planning Practice Guidance, CLG (March 2014)

Table 1.1 NLP B-class Employment Land Definitions

<b>B1a/b</b>	<p><b>Office</b></p> <ul style="list-style-type: none"> <li>• Offices other than in a use with Class A2</li> <li>• Research and development – laboratories and studios (B1)</li> </ul>
<b>B1c/B2</b>	<p><b>Industrial</b></p> <ul style="list-style-type: none"> <li>• Light industry (B1c)</li> <li>• General industry (B2) (unless in B1c)</li> </ul>
<b>B8</b>	<p><b>Storage or Distribution</b></p> <ul style="list-style-type: none"> <li>• Storage or distribution centres – wholesale warehouses, distribution centres and repositories</li> </ul>

- 1.9 A key input to this process was consultation with various organisations with an interest in the supply of employment land including local businesses, economic development officers, and property agents. Early consultation with key stakeholders has helped the consultants to form a view on key economic issues, delivery assumptions, gaps in the market, constraints, market failure, and opportunities in the area. Market intelligence has been used to help understand the market in relation to economic uses, including close liaison with the business community to understand their current and potential future requirement.
- 1.10 The stakeholder consultation process also involved discussions with local agents with regard to a number of issues including: sectors driving demand; the locational requirements of particular types of business, the key factors attracting/deterring business; the adequacy of existing sites to meet requirements; market signals such as rental levels; and, imbalances between available sites and where businesses would prefer to locate. In accordance with the Duty to Cooperate, consultation has taken place with adjoining local authorities to identify cross boundary work being undertaken and understand the extent of available employment land in adjoining authorities and any major new economic developments which might compete with High Peak and Staffordshire Moorlands for future demand.
- 1.11 The study draws upon employment land studies in adjoining districts and other relevant documents including planning policy guidance, property market information, local and regional economic strategy documents, planning policy documents, economic sector studies and published economic statistics.
- 1.12 A key issue underlying the study concerns how the recession and subsequent economic downturn should be reflected in the analysis. However, it should also be emphasised that the Local Plan processes of the Councils will be planning for longer term needs to 2031. Therefore, the analysis is based not only on where the commercial/industrial property market has been historically but also takes a view on how it is likely to recover and perform in future.

- 1.13 In producing this Employment Land Requirement Study, it should be noted that within this report, any reference to High Peak or Staffordshire Moorlands relates to the whole administrative area of each Local Authority, unless otherwise stated. It should be noted that the Oxford Economics forecasts used in the production of this report cover those parts of the Peak District National Park which fall within High Peak and Staffordshire Moorlands local authority areas (the National Park covers parts of several local authority areas).
- 1.14 The employment land take-up and loss information covers the areas of each local authority outside of the National Park. However, it is not considered that this anomaly has any discernible impact upon the findings of the OAN for employment because the majority of industrial centres in High Peak and Staffordshire Moorlands are located outwith the National Park. In addition, the vast majority of jobs in the National Park are related to non-B class uses, such as tourism, mining and quarrying, and leisure, which do not have a direct impact upon the requirement and supply of B class employment land. The apportionment of any land requirement to the National Park Authority area is therefore likely to be minor in nature. We would advise that this apportionment is the subject of discussion, and agreement, between HPBC, SMDC and the National Park Authority in accordance with the Duty to Cooperate.
- 1.15 The employment portfolio will be refined based on consultation and further evidence gathering prior to informing the Local Plan processes of HPBC and SMDC.

## Structure of Report

- 1.16 This document is structured as follows:

<ul style="list-style-type: none"> <li>• Economic Context (Section 2.0)</li> </ul>	An overview of current economic conditions and recent trends in High Peak and Staffordshire Moorlands and adjoining areas that may affect the need for employment space.
<ul style="list-style-type: none"> <li>• Policy Review (Section 3.0)</li> </ul>	An overview of High Peak and Staffordshire Moorlands from a planning policy perspective, including an analysis of relevant regeneration studies and employment land contextual research.
<ul style="list-style-type: none"> <li>• The Current Stock of Employment Space (Section 4.0)</li> </ul>	A brief assessment of the current stock of employment space in High Peak and Staffordshire Moorlands, including levels and types of provision and recent changes in supply as well as major developments and employment land supply in nearby areas.
<ul style="list-style-type: none"> <li>• Stakeholder Consultation (Section 5.0)</li> </ul>	An overview of the consultation undertaken over the course of the study involving interviews and surveys.
<ul style="list-style-type: none"> <li>• Economic Potential and Growth Sectors (Section 6.0)</li> </ul>	Consideration of the potential future economic role of High Peak and Staffordshire Moorlands and specific sectors with growth potential.

- Future B-Class Employment Space Requirements (Section 7.0) This section translates estimates of net employment land requirements into gross requirements.
- Recommendations for Local Plan Policy Development (Section 8.0) Discusses the policy choices available to HPBC and SMDC alongside the needs of non-B uses and delivery mechanisms.
- Summary Conclusions (Section 9.0) Summarises the study's main findings and recommendations.

## 2.0 Economic Context

### Introduction

- 2.1 This section establishes the economic context of the study by reviewing recent economic conditions and trends within High Peak and Staffordshire Moorlands in the context of the economies of the East and West Midlands and Great Britain as a whole. This analysis is important in identifying the existing strengths and weaknesses of the economy in High Peak and Staffordshire Moorlands, as well as those factors likely to influence the nature and level of future demand for employment land.

### Geography and Connections

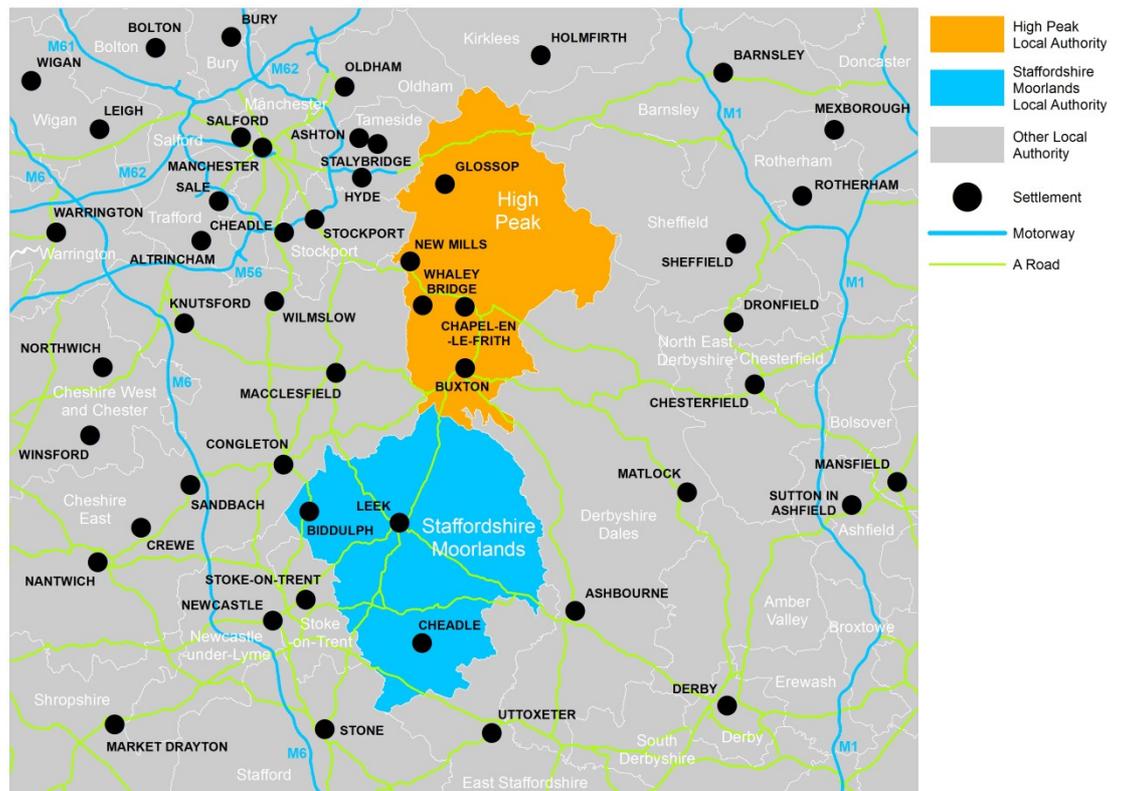
#### High Peak

- 2.2 High Peak is located within the East Midlands and shares boundaries with five counties. The Borough is bounded by:
- 1 The Manchester conurbation to the north west;
  - 2 West Yorkshire to the north;
  - 3 South Yorkshire to the east;
  - 4 Staffordshire to the south west;
  - 5 Cheshire to the west.
- 2.3 The main market towns in the Borough are Buxton, Glossop, New Mills, Whaley Bridge, and Chapel-en-le-Frith. High Peak sits between two important national transport corridors; the M1 and M6. The A6 forms the main route along which many of the settlements in the Buxton and Central Area have developed. To the north, the A57 provides connectivity from Glossopdale to Sheffield, with the A628(T) also providing connections to South Yorkshire and Manchester for the Glossop area. The A57 and A628 in Glossopdale are heavily used trans-Pennine routes.
- 2.4 The geographical position of High Peak and its close proximity to major cities such as Manchester and Sheffield put much of the area within easy commuting distance of these major conurbations. There are relatively frequent and reliable direct rail services that operate between High Peak and Manchester which are well used by residents commuting to work.
- 2.5 The University of Derby schools of Sport Performance & Outdoor Leadership and Hotel, Resort & Spa Management are located in Buxton in High Peak. Buxton also contains a campus serving Buxton and Leek College.

## Staffordshire Moorlands

- 2.6 Staffordshire Moorlands is bordered by: the local authority areas of Cheshire East to the north-west; High Peak to the north; Derbyshire Dales to the east; East Staffordshire to the south east; and, Stafford, Stoke-on-Trent and Newcastle-under-Lyme to the south-west. There are strong 'cross-border' workforce links with the Stoke conurbation. There are important road and public transport links with Stoke and Newcastle-under-Lyme, along the A53 and A52, and to Stafford along the A50.
- 2.7 The main settlements in Staffordshire Moorlands are Leek, Biddulph and Cheadle. The District has high car use and low public transport use. The main source of non-car access in the District is by bus. Many settlements are located close to main bus corridors and consequently have regular links to Leek and Hanley. There is one railway station in the District, at Blythe Bridge in the south-west of the District on the Crewe-Stoke-Derby line. There are problems of poor public transport connectivity between towns and with the national road network which limits movement across the District and places a heavy burden on the local road network.
- 2.8 In terms of further education provision, the town of Leek contains a campus serving Buxton and Leek College.

Figure 2.1 High Peak and Staffordshire Moorlands Sub-Regional Context



Source: NLP

## Regeneration Initiatives and Funding Streams

- 2.9 HPBC has prepared the Woods Mill Interim Planning Statement<sup>4</sup> [IPS] to support the regeneration of this 6.5ha site which is located in the centre of Glossop. The IPS aims to provide a viable mix of uses across the site and identifies B1 Business development as one of the appropriate uses.
- 2.10 The HPBC Federal Mogul IPS<sup>5</sup> seeks to assist the short term modernisation programme of the 18.6ha Federal-Mogul plant in Chapel-en-le-Frith and to grasp the longer term opportunity for comprehensive redevelopment of land that will become surplus to Federal-Mogul's requirement. The plant modernisation programme will potentially secure the retention of some 450 skilled workers at Federal-Mogul, the largest employer in Chapel-en-le-Frith, through the creation of a competitive and high quality production facility. The mix of potential new uses includes commercial, light industry and residential. This site now has planning permission for improvements to the retained manufacturing plant and 160 homes on surplus industrial land. The construction of these dwellings and the improvements to the retained manufacturing plant has begun.
- 2.11 SMDC has produced the Biddulph Town Centre Area Action Plan<sup>6</sup> which focusses on the delivery of regeneration in Biddulph Town Centre. This includes policy support for employment development in parts of the Action Plan area including purpose built industrial/warehouse units of 50 to 200 sq. m. and the redevelopment and improvement of old industrial premises for modern commercial needs, such as an enterprise centre or small starter units.
- 2.12 The Leek Town Centre Masterplan<sup>7</sup> seeks to reinforce Leek within the sub-region, in defining it as an interesting and distinctive place to visit, shop, live and work. This includes proposals for mixed use development including employment in the northern, eastern and western parts of the town centre.
- 2.13 The Cheadle Town Centre Masterplan<sup>8</sup> identifies several principle objectives which include identifying employment opportunities through the redevelopment of vacant and underutilised land and property. Proposals include modern office space on upper floors in the town centre core, office developments in the eastern part, and retained employment areas in the northern part.
- 2.14 The Churnet Valley Masterplan<sup>9</sup> identifies opportunities and measures to help regenerate and manage this important rural area based around sustainable tourism in a manner which is sensitive to and enhances its important heritage, landscape and ecology. Key principles include recognising and promoting the need for small modern business units and facilities for business start-up including live/ work units.

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<sup>4</sup> Woods Mill Interim Planning Statement, GVA and HPBC (January 2009)

<sup>5</sup> Federal Mogul Interim Planning Statement, HPBC (May 2011)

<sup>6</sup> Biddulph Town Centre Area Action Plan, SMDC (February 2007)

<sup>7</sup> Leek Town Centre Final Masterplan Report, SMDC (June 2013)

<sup>8</sup> Cheadle Town Centre Masterplan Final Masterplan Report, SMDC (January 2011)

<sup>9</sup> Churnet Valley Masterplan Supplementary Planning Document, SMDC (March 2014)

2.15

There are a number of financial incentives available at present for business expansion in High Peak and Staffordshire Moorlands. These include:

- 1 In both authority areas the 'Regional Growth Fund' is a national scheme which supports £1m+ projects to create jobs through investing in capital infrastructure or research and development.
- 2 The Regional Development Fund [RDF], in Staffordshire, has been extended until March 2017 with an additional £4m awarded. An application to extend the Derby, Derbyshire, Nottingham and Nottinghamshire Local Enterprise Partnership [D2N2 LEP] RDF was unsuccessful and therefore the scheme in the area covered by D2N2 will close in March 2015.
- 3 In High Peak 'Unlocking Investment for Growth'; has similar objectives but has a ring-fenced amount for the area and allocates smaller grants of between £50,000 to £500,000. There is an equivalent fund available in Staffordshire Moorlands called 'Jobs and Growth Fund'.
- 4 In High Peak, a new scheme entitled Global Derbyshire Small Business Support Programme has secured £3m of funding and now open for applications. This provides funds from 4k-75K across all sectors and includes start-ups.
- 5 In Staffordshire Moorlands there is a Business Enterprise Fund which funds between £1500 and £5000 for new and existing businesses - 50% of project costs - and there is also a small capital scheme for creative industries (£1000) under the Factory Project (ERDF).
- 6 In Staffordshire Moorlands there is the Green Bridge Supply Chain Programme which includes up to 35% grant for new premises/relocation (20K to 100k).
- 7 In High Peak, the 'Growing Places Fund' will have future rounds low interest loan (or combination of loan and grant) and is intended to kick start developments by awarding funds of between £500,000 and £2,500,000 to address infrastructure and site constraints.
- 8 In both authority areas there is a regional growth fund for small and medium enterprises [SMEs] accessed via 2 banks (company can access funding part as a loan and between 10-20% as a grant).
- 9 The LEADER programme is an EU 'bottom-up' approach to rural development, with the implementation of business plans and decisions on funding being made at a local level on projects. The bidding deadline for the new LEADER programme is the end of July 2014 with grants available from January 2015 for a 5 year period. Economic development officers are working with partners to put forward the case for a repeat of a previous scheme which focused on micro-business growth funds and the visitor economy (in rural areas and smaller market towns). There will be two separate schemes one covering High Peak & parts of Staffordshire within the National Park; and a second scheme covering probably most of Staffordshire Moorlands.

10 As it is a rural scheme, the LEADER programme does not normally cover urban conurbations in rural areas. However, Leek and Buxton have been designated as rural hubs and, as such, can be included in the application area. The possibility of 'gap filling' the areas not covered by LEADER is being explored so that people who would be eligible for one of the LEADER funding streams by nature of their project (e.g. micro business growth) but happen to fall outside of the LEADER area, could access funding from the Local Enterprise Partnership [LEP].

- 2.16 Four Wards in High Peak have been designated as Assisted Area Wards (Dinting, Hadfield North, Hadfield South, and Howard Town & Padfield). Four Wards in Staffordshire Moorlands have also been designated as Assisted Area Wards (Churnet, Checkley, Forsbrook and Cheadle West). This could result in some of the key sites in these wards becoming very attractive for relocations/expansions especially of large firms (over 500 employees) who are unable to access any other source of government funding (outside of these areas) due to state aid rules. A new round of bidding for this funding is anticipated to take place in the near future.

## Economic Trends

### High Peak

- 2.17 Nationally significant businesses in High Peak include Swizzles Matlow and Buxton Mineral Water (Owned by Nestle).
- 2.18 There are six key sectors that account for the majority of employment in High Peak: public administration, education and health, distribution, hotels and restaurants, manufacturing, and banking. Although the number of people employed in manufacturing has fallen in recent years it still employs more in the area than the national average. 40% of the working age population also commute to work outside the plan area, primarily to Manchester but also to Sheffield. Whilst many residents travel less than 2km to work, many of those that work locally are employed on low wages in sectors such as agriculture, and tourism.<sup>10</sup>
- 2.19 Approximately 17% of Peak District National Park residents live in the High Peak authority boundary<sup>11</sup>. The tourism industry offers major economic benefits to the area with over 22 million day visits to the Peak District National Park every year. This makes it the second most visited National Park in the world, although visitor spend in the area remains the lowest in England and Wales. The settlements in the Local Plan area play an important role in supporting Peak District tourism by providing a range of tourist facilities and services, while the main market towns in particular provide a gateway to the National Park for people travelling by train from the surrounding cities.<sup>12</sup>

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<sup>10</sup> High Peak Local Plan Preferred Options, HPBC (February 2013)

<sup>11</sup> Living in the Peak District National Park, Peak District National Park Authority

<sup>12</sup> Peak District Sustainable Tourism Strategy (2000)

- 2.20 There is a significant amount of employment land in High Peak much of which is dominated by factories and warehousing premises. Much of the existing supply is, however, not fit to meet the needs of modern businesses or the needs of the potential growth sectors in the area: creative industries, food and drink and tourism. In order to address this situation new employment sites may have to be identified and some of the existing sites redeveloped for other purposes.<sup>10</sup>
- 2.21 A key challenge for the Borough is to diversify the local economy and attract a range of businesses to the area, to improve the local job offer and reduce the level of out-commuting to the surrounding major cities. Although the population of the High Peak is set to grow, the size of the working age population is forecast to decrease and this could exacerbate future recruitment problems. Traffic congestion is a significant issue within the market towns and this has the potential to restrict the level of growth.<sup>10</sup>

### **Staffordshire Moorlands**

- 2.22 In Staffordshire Moorlands the economy is well represented in the public administration, education & health sectors, which represent a larger proportion than regional and national rates. Other key sectors of employment are distribution, hotels & restaurants and manufacturing. Manufacturing in particular is overrepresented in comparison with regional and national levels and has experienced a much slower rate of decline than the West Midlands average. Employment sites are almost at full capacity and there are a number of nationally significant businesses, including Britannia Building Society, JCB and Alton Towers.<sup>13</sup>
- 2.23 As with elsewhere across the country, Staffordshire Moorlands has been experiencing rapid economic change, moving away from the traditional industries of agriculture, textiles/manufacturing, and coal mining towards service sector businesses such as finance, retailing, tourism, leisure and the knowledge economy. The District's workforce is seeing a trend towards growth amongst managers and senior officials and increases in the professional class. Unemployment rates are below the national and Staffordshire average.<sup>13</sup>
- 2.24 In recent years Staffordshire Moorlands has benefited from a number of regeneration programmes and initiatives to the value of approximately £10m to help develop its business and tourism economy. A third of the District lies in the Peak District National Park.<sup>13</sup> Approximately 11% of Peak District National Park residents live in the Staffordshire Moorlands authority boundary.<sup>14</sup>
- 2.25 Whilst there is the continued presence of large nationally recognised employers, the business structure of Staffordshire Moorlands is dominated by micro and small businesses of between 1 and 10 employees which collectively accounted for over 92 per cent of all businesses in 2006.<sup>13</sup>

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<sup>13</sup> Staffordshire Moorlands Adopted Core Strategy (March 2014)

<sup>14</sup> Living in the Peak District National Park, Peak District National Park Authority

- 2.26 The District's economy is under-performing compared to its competitors. It provides low pay to a large proportion of its workforce when compared to the national and regional average and struggles to encourage the growth of new businesses and to attract new firms. The District has one of the lowest formation rates of new businesses in the area.<sup>13</sup>
- 2.27 Changes in the future economy will have significant implications for the need and type of employment land provided as well as the infrastructure to support growth. Most of Staffordshire Moorlands is unlikely to be a target for significant large-scale inward investment due to its relatively poor transport links and the absence of major centres of further education. However, the quality of the environment, community life and the workforce the District offers will attract new businesses and the District will continue to play a major role in the economy of the wider North Staffordshire area.<sup>13</sup>

## **Skills**

- 2.28 Following a tentative recovery from what was arguably the worst recession since WWII, there has been gradual economic growth and continuing economic uncertainty, especially in the Eurozone where the sovereign debt crisis has had a significant impact and affected global business confidence.
- 2.29 This, combined with austerity measures in the UK, hit the East Midlands and West Midlands economy hard. However, more recently there are signs that the economic picture is improving. For example, unemployment in High Peak and Staffordshire Moorlands has been falling, with JSA claimant levels reducing steadily since early 2012.
- 2.30 At the macro-economic level, the Chancellor announced in the 2014 Budget that Britain was growing at a faster rate than any other advanced economy - revising growth forecasts up to 2.7% in 2014. Plans to support economic recovery - including tax breaks to boost productivity, exports and manufacturing were also announced. This is likely to have positive knock-on effects for both the East and West Midlands economies.



(7.8%)<sup>17</sup> The same model indicates that unemployment in Staffordshire Moorlands at around 5.6%, which is well below the West Midlands (9.2%) and national averages (7.8%)<sup>18</sup>.

- 2.35 Over the period 2008-2010, the number of jobs based in High Peak and Staffordshire Moorlands followed the national trend and demonstrated modest decline of -2.6% and -4.6%, whilst over the same period, jobs in the East Midlands and West Midlands decreased by -2.5% and -4.8% respectively.<sup>19</sup>
- 2.36 Between 2001 and 2010 transport was the fastest growing sector in High Peak both in percentage and absolute terms (+485, +45.8%). Growth was also observed in the public administration (+40.1%), metal and mineral products (22.2%), and business services (+37.5%) sectors. For all these sectors, the rate of growth observed locally was significantly greater than the East Midlands average.<sup>19</sup>
- 2.37 However, the modest growth was not felt uniformly across all sectors, with a number experiencing a contraction in employment over the period. Textiles and clothing fell by -81.2% compared to a regional fall of -54.2%. Extraction and Mining employment fell by -75.2% which was more pronounced than the regional average (-47.0%). Health and social work also fell in High Peak (-7.4%) despite regional growth in the sector of +31.5% over the same period.<sup>19</sup>
- 2.38 In Staffordshire Moorlands, the fastest growing sector between 2001 and 2010, both in percentage and absolute terms, was other services (+128.3%), followed by other business activities (+82.4%) both of which were significantly higher than the West Midlands average. Job growth was also observed in transport equipment (+103.4%), construction (+15.4%) and retail (+9.71). For all these sectors, the rate of growth observed locally was significantly higher than the West Midlands average.<sup>19</sup>
- 2.39 In employment terms, as of 2012 High Peak's largest sectors comprise all manufacturing, at 19% of the total number of jobs in the Borough, followed by education (17%), health and social work (12%) and retail (10%). Manufacturing and education are above the East Midlands and national levels. Health and social work is slightly below the regional and national averages of 13%, whilst the figures for retail are the same as regional and national averages. As illustrated in Figure 2.3, in High Peak, professional, scientific and technical occupations account for 5.0% of the workforce compared to 6.0% regionally and 7.7% nationally. Financial and insurance occupations (0.9%) are also below the regional and national averages of 1.8% and 3.9%.<sup>20</sup>

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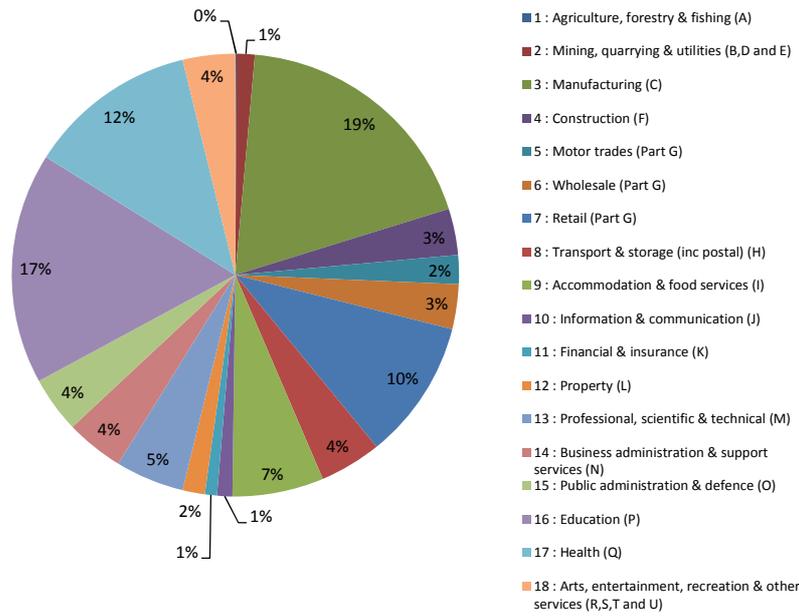
<sup>17</sup> ONS Annual Population Survey (July 2012 – June 2013)

<sup>18</sup> ONS Annual Population Survey (July 2012 – June 2013)

<sup>19</sup> Business Register and Employment Survey 2010

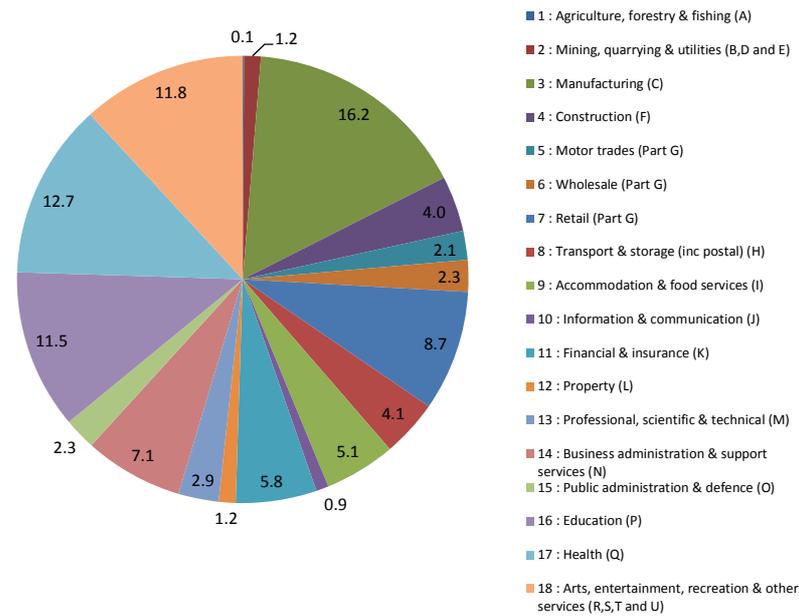
<sup>20</sup> Business Register and Employment Survey 2012

Figure 2.3 High Peak Key Industrial Sectors 2012



Source: Business Register and Employment Survey [BRES] 2012

Figure 2.4 Staffordshire Moorlands Key Industrial Sectors 2012



Source: Business Register and Employment Survey [BRES] 2012

2.40

The largest sectors in Staffordshire Moorlands in 2012 comprised manufacturing, at 16% of the total number of jobs in the District, followed by health and social work (13%), education (12%), and other services (12%). Manufacturing, education and other services are above the national and West Midlands levels. Health and social work is slightly below the regional and national averages. As illustrated in Figure 2.4, in Staffordshire Moorlands, professional, scientific and technical occupations account for 2.9% of the workforce compared to 5.5% regionally and 7.7% nationally. However, financial and insurance occupations (5.8%) are above the regional and

national averages of 2.9% and 3.9%.<sup>20</sup> This is likely to be partially due to the presence of the Britannia Building Society headquarters in Leek.

### **Business Start Ups**

- 2.41 Between 1994 and 2007, the number of VAT registered firms in High Peak increased from 235 to 300. This represents a growth rate of 27.7% which is higher than the rates observed in the East Midlands (23.9%) and Great Britain (23.5%) over the same period and indicates a high level of entrepreneurial activity within the District. Over the same period, the number of VAT registered firms in Staffordshire Moorlands increased from 245 to 280. This represents a growth rate of 14.3% which is lower than the rates observed in the West Midlands (15.8%) and significantly lower than the average for Great Britain (23.5%) over the same period and indicates a lower than average level of entrepreneurial activity within the District.<sup>21</sup>
- 2.42 An analysis of the most recent available data on business births and deaths shows that in 2012 there were 340 business deaths in High Peak compared to 370 business births. In Staffordshire Moorlands over the same period there were 265 business deaths against 255 business births.<sup>22</sup> In 2011, the business survival rate in High Peak for newly born enterprises was 93.0% and the rate for Staffordshire Moorlands was 93.2% which is broadly equivalent to East Midlands (93.3%), West Midlands (93.4%) rates and the national rate of 93.1%.<sup>23</sup>

### **Economic Activity**

- 2.43 High Peak has an estimated 48,400 economically active residents, which equates to an economic activity rate of 79.7%. This is slightly higher than the wider East Midlands (77.5% of working age population) and for Great Britain as a whole (77.3%). Staffordshire Moorlands has an estimated 47,800 economically active residents, which equates to an economic activity rate of 77.4%. This is slightly higher than the wider West Midlands (76.2% of working age population) and for Great Britain, but even so there remains scope to support some level of employment growth through the existing indigenous population in High Peak and Staffordshire Moorlands, through reducing unemployment and increasing economic activity.<sup>24</sup>
- 2.44 The profile of High Peak's labour force shows that the Borough has relatively more higher skilled occupations and a lower proportion of lower skilled manual jobs relative to the regional average, but similar to the national average. The profile of Staffordshire Moorland's labour force shows that the District has relatively more higher skilled occupations and a lower proportion of lower skilled manual jobs relative to the regional and national average.<sup>25</sup>

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<sup>21</sup> DTI Small Business Service – VAT registrations/deregistrations by industry

<sup>22</sup> ONS Business Demography Enterprise Births, Deaths and Survivals 2012

<sup>23</sup> A business is deemed to have survived if having been a birth in year t or having survived to year t; it is active in terms of employment and/or turnover in any part of t+1

<sup>24</sup> ONS Annual Population Survey (July 2012 – June 2013)

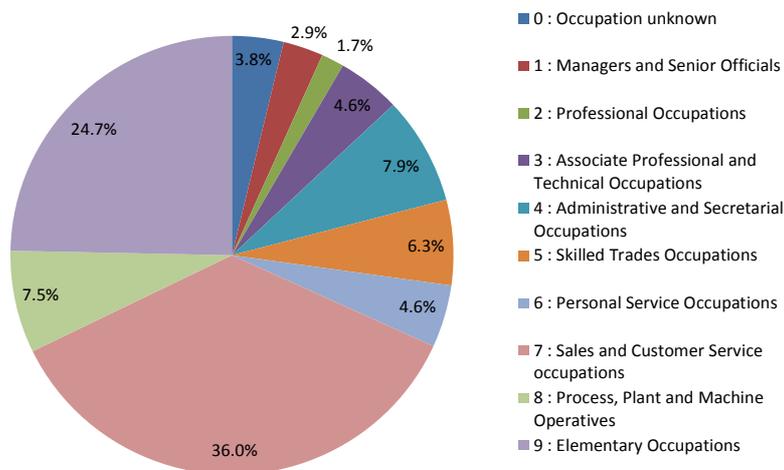
<sup>25</sup> ONS Annual Population Survey (Jan 2012 – Dec 2012)

2.45 The proportion of working age residents with no qualifications in High Peak is estimated at 9.4%, which is lower than the corresponding figure for the East Midlands (11.5%) and Great Britain (10.6%).<sup>26</sup> The proportion of the Borough's working age population qualified to degree level or above at 35.7% is above both the East Midlands (29.0%) and national (34.4%) level.<sup>25</sup>

2.46 The proportion of working age residents with no qualifications in Staffordshire Moorlands is estimated at 11.3%, which is lower than the corresponding figure for the West Midlands (13.6%) but higher than the national average.<sup>26</sup> The proportion of the District's working age population qualified to degree level or above at 29.2% is above the West Midlands average (27.8%) but below national level (34.4%).<sup>25</sup> There is therefore a need to improve the skills base of the population further to come in line with the national average if Staffordshire Moorlands is to attract more knowledge based businesses.

2.47 An analysis of the types of jobs sought by unemployed residents in High Peak demonstrates a significant proportion of total job seekers are looking for work in sales and customer service occupations (36.0%), which is above both the regional (31.4%) and national (33.2%) rates. Demand is also particularly high for elementary occupations (24.7%), but this is below national (27.2%) and regional (31.5%) trends.

Figure 2.5 High Peak Key Occupations Sought by Job Seekers

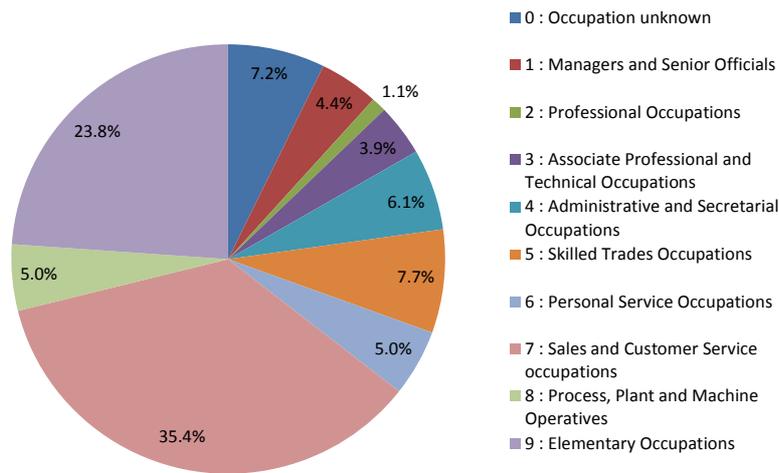


Source: Nomis February 2014

2.48 An analysis of the types of jobs sought by unemployed residents in Staffordshire Moorlands also demonstrates a significant proportion of total job seekers are looking for work in sales and customer service occupations (35.4%), which is above both the regional (34.1%) and national (33.2%) rate. Demand is also particularly high for elementary occupations (23.8%), but, as with High Peak this is below national (27.2%) and regional (29.3%) trends.

<sup>26</sup> ONS Annual Population Survey (Jan 2011 – Dec 2011)

Figure 2.6 Staffordshire Moorlands Key Occupations Sought by Job Seekers

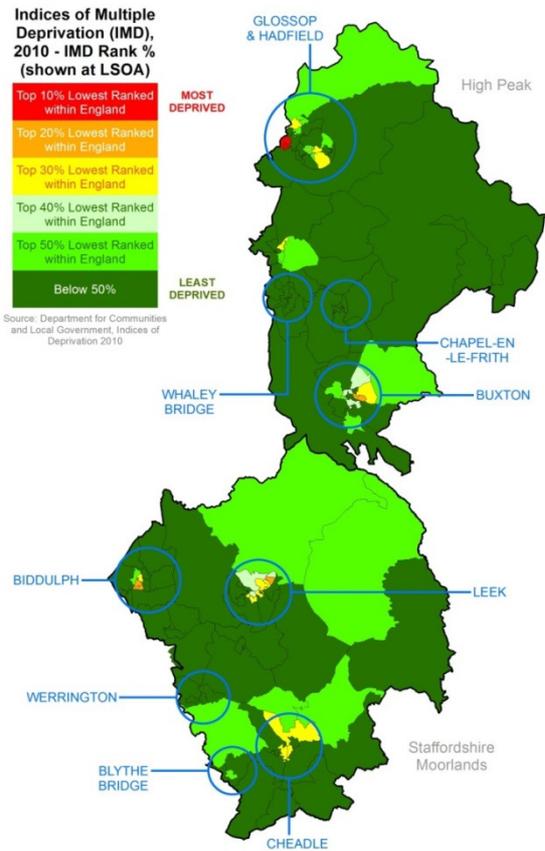


Source: Nomis February 2014

2.49

High Peak and Staffordshire Moorlands experience medium levels of deprivation; indeed, they fall in the mid-range of local authorities in England, ranking 189<sup>th</sup> and 185<sup>th</sup> out of 326 authorities in the English Index of Multiple Deprivation [IMD] (2010). However, as can be seen from Figure 2.7, there are pockets of higher deprivation in the inner urban areas of the High Peak and Staffordshire Moorlands around the settlements of Glossop and Hadfield, Buxton, Biddulph, Leek and Cheadle, whilst the surrounding (less populated) rural areas are less deprived.

Figure 2.7 IMD 2010 High Peak Borough and Staffordshire Moorlands District



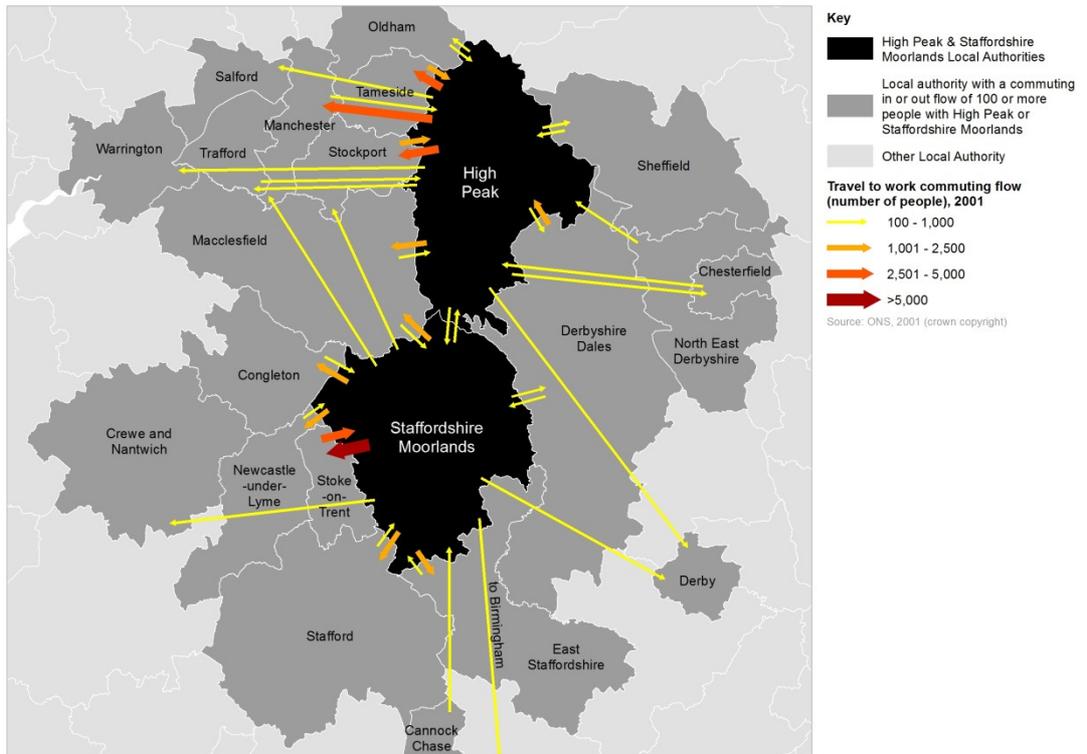
Source: CLG/ NLP analysis

## Functional Economic Area

- 2.50 Examining commuting flows can help in defining the functional economic area within which a District lies. An illustration of commuting flows for High Peak Borough and Staffordshire Moorlands District is shown in Figure 2.8.
- 2.51 At the time of the 2001 Census, 17,669 residents commuted out of High Peak Borough daily against 6,306 in-commuters, giving a net total of 11,363 out commuters. It demonstrates high levels of net out-commuting to Manchester, Tameside, Stockport and Macclesfield. The only significant level of net in-commuting from the surrounding area is from Derbyshire Dales. Around 26,083 people live and work in High Peak.
- 2.52 For Staffordshire Moorlands District, the 2001 Census shows that 22,101 residents commuted out of Staffordshire Moorlands District daily against 8,145 in-commuters, giving a net total of 13,956 out commuters. It demonstrates very high levels of net out-commuting to Stoke-on-Trent (6,152 people). The District also displays high levels of net out-commuting to Newcastle-under-Lyme, Congleton, Stafford, East Staffordshire and Macclesfield. There are 23,535 people who live in Staffordshire Moorlands and also work there.
- 2.53 Given that this information is more than ten years out of date, a more recent standard net commuting rate was derived using a 'Labour Force Ratio', taking account of the relationship between resident workers and workplace jobs.
- 2.54 This was calculated using the formula:
- $$\frac{\text{(A) Number of employed workers living in area}}{\text{(B) Number of workers who work in the area (number of jobs)}}$$
- 2.55 In High Peak and Staffordshire Moorlands, data from the 2012 Annual Population Survey [APS] and 2012 Business Register and Employment Survey [BRES] identifies LF ratios as follows:
- 1 **High Peak: 1.32** (42,300 residents employed ÷ 31,931 jobs)
  - 2 **Staffordshire Moorlands: 1.46** (41,800 residents employed ÷ 28,668 jobs);
- 2.56 This suggests that for High Peak Borough, effectively 30% more people commute out of the Borough on a daily basis, than commute into it for work and in Staffordshire Moorlands the figure is approximately 46%.
- 2.57 A commonly accepted approach to defining Functional Economic Market Areas is where at least 75% of a Travel to Work Area's economically active residents also work in that area. On this basis, High Peak would fall within a wider economic area of Stockport and Manchester, within which some 77% of the Borough's economically active residents work. Staffordshire Moorlands would fall within the wider economic area of Stoke-on-Trent, within which some 76% of the District's economically active residents work. In accordance with the Duty to Cooperate, it is recommended that HPBC and SMDC continue to partake in close discussions with these adjoining authorities to ensure that

their economic strategies and emerging development plan polices align.

Figure 2.8 High Peak Borough and Staffordshire Moorlands District Commuting Patterns



Source: ONS Census Data 2001

## 3.0 Policy Review

### Introduction

3.1 National planning policy places a particular emphasis on sustainable development through a process of:

- 1 reviewing employment and housing land allocations to ensure the supply meets identified needs;
- 2 proactively supporting sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs; and
- 3 encouraging the effective use of land by reusing land that has been previously developed (brownfield land), with a view to promoting regeneration.

3.2 This section of the report provides a summary of the relevant policy documents relating to employment land and economic development within High Peak and Staffordshire Moorlands.

3.3 The coalition Government's policy approach to planning has been focused on applying principles of 'localism' to give LPAs greater autonomy in planning for housing, and in particular setting local housing requirements in their development plans. The Localism Act (2011) has resulted in the Regional Strategies [RS] for the East and West Midlands being rescinded and they no longer form part of the statutory development plan.

3.4 The responsibility now falls on LPAs to set employment land requirement figures for their Local Plan. Local land targets will be tested through the Local Plan process and LPAs must collect and use reliable information to justify employment land supply policies.

### National Planning Policy Framework (March 2012)

3.5 The Framework sets out the Government's economic, environmental and social planning policies for England. The Framework [§14] states that the purpose of the planning system is to contribute to the achievement of sustainable development, which should be seen as a 'golden thread' running through both plan-making and decision taking.

3.6 The document states that there are three dimensions to sustainable development: economic, social and environmental. The economic role that the planning system must perform involves contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and co-ordinating development requirements, including the provision of infrastructure [§7].

3.7 Within the overarching 'presumption in favour' of sustainable development, the Framework [§17] identifies 12 core land use planning principles that should underpin both plan-making and decision taking. These 12 principles are that planning should (inter alia):

- Be genuinely plan-led; based on joint working and co-operation to address larger than local issues;
- Proactively drive and support sustainable economic development...identify and then meet the housing, business and other development needs of an area, and respond positively to wider opportunities for growth;
- promote the vitality of our main urban areas, protecting the Green Belts around them, recognising the intrinsic character and beauty of the countryside and supporting thriving rural communities within it;
- encourage the reuse of existing resources, including conversion of existing buildings;
- prefer development land of lesser environmental value;
- encourage the effective use of land by reusing previously developed land;
- promote mixed use developments; and
- actively manage patterns of growth to make the fullest possible use of public transport, walking and cycling, and focus significant development in locations which are or can be made sustainable.

3.8 The Framework states that 'significant weight' should be placed on the need to support economic growth through the planning system [§19]. To help achieve economic growth, Local Plans should [§21]:

- set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth;
- set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
- support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors likely to locate in their area. Policies should be flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances;
- plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
- identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and
- facilitate flexible working practices such as the integration of residential and commercial uses within the same unit.

3.9 The Framework [§22] also highlights that allocated employment sites for which there is no reasonable prospect of development should not be protected in the

long term. Proposals for alternative uses on such sites should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities.

- 3.10 The Framework [§23] confirms that offices are a ‘main town centre use’, and as such, LPAs must allocate a range of office sites that meet identified needs in full. LPAs should apply a sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan:
- ‘They should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge of centre and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale. [§24]’*
- 3.11 Planning policies to support economic growth in rural areas in order to create jobs and prosperity are required [§28].
- 3.12 The Framework [§157] identifies a number of issues which are crucial to plan making including (*inter alia*):
- planning positively for the development and infrastructure required in the area to meet the objectives, principles and policies of the Framework;
  - being drawn up over an appropriate time scale, preferably a 15 year time horizon, take account of longer term requirements, and be kept up to date; and,
  - being based on co-operation with neighbouring authorities, public, voluntary and private sector organisations.
- 3.13 Local authorities are required to ensure that the Local Plan is based on adequate, up-to date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. Local planning authorities should ensure that their assessment of strategies for housing, employment and other uses are integrated, and that they take full account of relevant market and economic signals [§158].
- 3.14 The Framework [§160] advises that local planning authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this, they should:
- 1 Work together with county and neighbouring authorities and with Local Enterprise Partnerships to prepare and maintain a robust evidence base to understand both existing business needs and likely changes in the market; and
  - 2 Work closely with the business community to understand their changing needs and identify and address barriers to investment, including a lack of housing, infrastructure or viability.

- 3.15 The Framework [§161] states that local planning authorities should use this evidence base to assess (*inter alia*):
- 1 The needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period;
  - 2 The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs. Reviews of land available for economic development should be undertaken at the same time as, or combined with, Strategic Housing Land Availability Assessments and should include a reappraisal of the suitability of previously allocated land; and,
  - 3 Deprived locations may benefit from planned remedial action.
- 3.16 Public bodies have a duty to cooperate on planning issues that cross administrative boundaries [§178]. The Framework requires local authorities to demonstrate evidence of having effectively cooperated to plan for issues with cross-boundary impacts when their local plans are submitted for examination [§181]. It sets out where co-operation might be appropriate and what form it might assume. It concludes that “*cooperation should be a continuous process of engagement from initial thinking through to implementation*”.

## Practice Guidance

### CLG Planning Practice Guidance (2014)

- 3.17 CLG has produced new on-line national planning practice guidance which includes guidance on the assessment of housing and economic development. This replaces the previous ODPM Employment Land Reviews: Guidance Note from 2004.
- 3.18 The Planning Practice Guidance contains a methodology for assessing economic development needs. It states [ID: 2a-030-20140306] that plan makers should liaise closely with the business community to understand their current and potential future requirements. Plan makers should also consider:
- The recent pattern of employment land supply and loss to other uses;
  - Market intelligence (from local data and discussions with developers and property agents, recent surveys of business needs or engagement with business and economic forums);
  - Market signals such as levels and changes in rental values, and differentials between land values in different uses;
  - Public information on employment land and premises required;
  - Information held by other public sector bodies and utilities in relation to infrastructure constraints;
  - The existing stock of employment land. This will indicate the demand for and supply of employment land and determine the likely business needs

- and future market requirements (though it is important to recognise that existing stock may not reflect the future needs of business);
  - The locational and premises requirements of particular types of business;
  - Identification of oversupply and evidence of market failure; and,
- 3.19 When examining the recent take-up of employment land, the guidance [Reference ID: 2a-031-20140306] advises that it is important to consider projections (based on past trends) and forecasts (based on future scenarios) and identify occurrences where sites have been developed for specialist economic uses.
- 3.20 In terms of forecasting future trends the guidance advises [Reference ID: 2a-032-20140306] that:
- Plan makers should consider forecasts of quantitative and qualitative need (i.e. the number of units and amount of floorspace for other uses needed) but also its particular characteristics (e.g. footprint of economic uses and proximity to infrastructure);
  - Local authorities should develop an idea of future needs based on a range of data which is current and robust;
  - Emerging sectors that are well suited to the area being covered by the analysis should be encouraged where possible; and,
  - The available stock of land should be compared with the particular requirements of the area so that 'gaps' in local employment land provision can be identified.
- 3.21 The guidance [ID: 2a-032-20140306] advises that plan makers should consider:
- Sectoral and employment forecasts and projections (labour demand);
  - Demographically derived assessments of future employment needs (labour supply techniques).
  - Analyses based on the past take-up of employment land and property and/or future property market requirements.
  - Consultation with relevant organisations, studies of business trends, and monitoring of business, economic and employment statistics.
- 3.22 In identifying the type of employment land needed the guidance [Reference ID: 2a-033-20140306] advises that:
- The need for rural employment should not be overlooked;
  - Underlying population projections can be purely demographic or tied to future housing stock which needs to be assessed separately; and,
  - Plan makers should be careful to consider that national economic trends may not automatically translate to particular areas with a distinct employment base.

- 3.23 In order to derive employment land requirements, the guidance states [ID: 2a-034-20140306] that when translating employment and output forecasts into land requirements there are four key relationships which need to be quantified:
- 1 Standard Industrial Classification sectors to use classes;
  - 2 Standard Industrial Classification sectors to type of property;
  - 3 Employment to floorspace (employment density); and,
  - 4 Floorspace to site area (plot ratio based on industry proxies).

## **High Peak Development Plan Policy**

### **The High Peak Local Plan (2005)**

- 3.24 The High Peak Local Plan was adopted in 2005 and remains part of the development plan for High Peak Borough. It sets a target of providing an additional 76ha of land developed for business, general industrial and distribution development between 1991 and 2011. In terms of progress towards this target of 76ha, the total gross amount of land developed up to 31<sup>st</sup> March 2012 was 41.68ha.<sup>27</sup>
- 3.25 Policies EMP1 to EMP3 allocate 12 sites for B1, B2 and B8 employment development across the Borough totalling 27.7ha in area. There are 4 sites in the Glossop Area (8.2ha), 5 sites in the Central Area (10.3ha) and 3 sites in the Buxton Area (9.2ha).
- 3.26 Policy EMP4 identifies 41 Primary Employment Zones [PEZ] across the Borough, with 15 sites in the Glossop Area, 21 sites in the Central Area and 5 sites in the Buxton Area. PEZs are defined as industrial areas which currently provide a significant number of local jobs, or have recently done so; or have planning permission for industrial or business development; and present no serious environmental problems, either at present, or which would result from redevelopment of the site for industrial or business use.
- 3.27 Policy EMP 8 identifies 12 Major Developed Sites in the Green Belt where limited infilling and/or redevelopment for B1, B2, B8 and other appropriate employment generating development will be allowed. There are 3 sites in the Glossop Area and 9 sites in the Central Area.
- 3.28 Policy EMP9 allows for the change of use of industrial or business premises subject to a number of criteria being satisfied.

### **Emerging High Peak Local Plan 2011 to 2031**

- 3.29 Once adopted the Local Plan will constitute the Development Plan for High Peak up to 2031.
- 3.30 The Local Plan Preferred Options Additional Consultation Document (December 2013) indicates that a total of 33.15ha of employment land will be

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<sup>27</sup> High Peak AMR 2011/12

required between 2013 and 2031 applying an annual average requirement of 1.95ha. This annual requirement is based on the 2008 Peak Sub Region ELR recommendation for the provision of 35ha of land over the period 2008 to 2026. The work being undertaken by NLP will update this requirement.

3.31 The emerging Local Plan divides the plan area into the following three sub areas that each have their own characteristics and features, including labour and housing market areas:

- Glossopdale
- Central Area
- Buxton

3.32 Preferred Option Policies S5 to S7 seek to encourage the growth of local employment opportunities and support the diversification and growth of local business by; identifying suitable land allocations for industrial and business use to meet the economic needs of the area; safeguarding existing employment sites for industrial and business use; and, supporting the mixed redevelopment of the industrial legacy sites (in Glossopdale and the Central Area) The following additional aims are also identified for each sub area:

**Glossopdale**

- Encouraging the growth of tourism.

**Central Area**

- Supporting the creation of higher technology businesses.
- Encouraging the growth of tourism including protecting and promoting the Peak Forest Canal and its associated infrastructure, the Buxworth Basin and the Peak Forest Tramway.

**Buxton**

- Supporting the needs of local businesses and employers.
- Encouraging the growth of tourism including the provision of additional visitor accommodation and facilities that reflect Buxton's status as a spa town at the heart of the Peak District.

3.33 Policy E2 allocates 7 employment sites for B1, B2 and B8 employment development across the Borough totalling 20.5ha in area. There are 2 sites in the Glossop Area (4.1ha), no sites in the Central Area (to be allocated by the Neighbourhood Plan for Chapel-en-le-Frith Parish) and 5 sites in the Buxton Area (16.4ha).

3.34 Policy E3 identifies 29 Primary Employment Zones [PEZ] across the Borough, with 13 sites in the Glossopdale Area, 11 sites in the Central Area and 5 sites in the Buxton Area.

3.35 Policy E4 allows for the change of use of industrial or business premises subject to a number of criteria being satisfied.

- 3.36 Policy E5 identifies 4 sites in the Central Area and 3 sites in the Glossopdale Area as Industrial Legacy Sites where infrastructure/premises are no longer suited to meeting the needs of modern business. The Policy seeks to maximise the potential of these sites by; encouraging proposals for redevelopment or re-use; stimulating investment; encouraging mixed use developments; and, ensuring that any buildings or features of acknowledged heritage value are retained or reused where viable and feasible.
- 3.37 Including land available within Proposed Allocations, land available within PEZs and land available within Industrial Legacy Sites, the emerging Local Plan identifies a net supply of 34.42ha of employment land.

## **High Peak Background Studies and Baseline Reports**

### **The Peak Sub Region Employment Land Review (2008)**

- 3.38 The Peak Sub Region Employment Land Review was commissioned by High Peak Borough Council and neighbouring authorities of Derbyshire Dales District Council and the Peak District National Park Authority in 2008. It advised that for the period 2008 to 2026 the future employment land requirements (within Use Class B) for High Peak Borough were in the order of 35ha. The majority of this identified requirement is for industrial land (26ha) with the remainder (9ha) providing for office and non-industrial developments.
- 3.39 The Employment Land Review advised that these estimates were not maximum requirements for employment land but represented that which is capable of being delivered over the plan period.
- 3.40 In terms of the current stock of employment land, the study found that much was heavily constrained and unsuitable for facilitating business growth. The study identified that this situation was most acute in the Glossopdale and the Central Area, and that generally there was a shortage of sites and premises suitable for modern business needs. It did however advise that there was a need to safeguard some sites that may appear to be poor quality and visually unattractive but that play a vital role in terms of meeting the demand for low rent business accommodation for small firms.

## **Staffordshire Moorlands Development Plan Policy**

### **Staffordshire Moorlands Local Plan (1998)**

- 3.41 The Staffordshire Moorlands Local Plan was adopted in 1998 and covered the period to 2001. It identified a requirement of 19.7ha of new industrial land over the plan period based on a Structure Plan requirement of 50ha for the period 1986 to 2001 (after having deducted industrial completions/commitments up to that point).
- 3.42 Policy E1 allocates a total of 19.7ha of land on 9 sites for general employment purposes.

- 3.43 Policy E2 identifies a 50ha strategic site at the junction of the A50 with the Blythe Bridge Bypass as a 'Premium Employment Site' for high quality B1 and B2 employment development.

### **Emerging Staffordshire Moorlands Local Plan**

- 3.44 In January 2014 the Council received the final report from the Inspector on the examination into the Staffordshire Moorlands Core Strategy. The Revised Submission Version Core Strategy was, with various modifications, adopted by the Council in March 2014. This document now formally supersedes the 1998 Local Plan. The Council will be identifying and progressing employment allocations as part of its emerging Site Allocations work from Summer 2014.
- 3.45 Policy SS2 states that provision will be made for at least 24 hectares of additional employment land in Staffordshire Moorlands (excluding the Peak District National Park) during the period 2006 – 2026. Sufficient deliverable land will be identified to provide at least 6 hectares of employment land at all times.
- 3.46 Policy SS3 seeks to distribute employment development on the following basis Leek (30%), Biddulph (20%), Cheadle (20%), and Rural Areas (30%)
- 3.47 Policy SS5 distributes the additional employment land requirement for the period 2006 to 2026 to the three Towns as follows:
- Leek 7.2ha
  - Biddulph 4.8ha
  - Cheadle 4.8ha
- 3.48 Policies SS5a to SS5c set out area strategies for the three Towns which seek to create employment growth and increase the diversity of employment opportunities. Policy E2 seeks to safeguard existing employment areas.
- 3.49 In order to ensure that the Core Strategy takes account of the longer term requirements of the District; the Council will undertake an early and comprehensive review of employment needs for the plan period 2016 to 2031. The employment requirement evidence base work being undertaken by NLP will feed into this review. This review will incorporate work currently underway on site allocations to provide a single Local Plan for the plan period.

### **Staffordshire Moorlands Employment Land Study 2026 Update (2008)**

- 3.50 The Atkins Employment Land Study Update provides advice in respect of the demand and supply for employment land and floorspace for the period 2008 to 2026.
- 3.51 The Atkins Study identifies a requirement for 22.2ha of land based on economic growth and a further 1.3ha to replace sites considered unsuitable for employment use. This equates to a total requirement of 23.8ha.

3.52 The Atkins Study identifies a shortage of suitable small scale premises under 100 square metres.

## **Peak District National Park Core Strategy (2011)**

3.53 The Peak District National Park Core Strategy was adopted in October 2011. Policy E1 allows for new business development within or on the edge of identified settlements and seeks to safeguard existing business land and buildings, particularly those which are of a high quality and in a sustainable location. The Core Strategy does not allocate and specific sites for employment development.

## **Economic Strategy Documents**

### **Growing the Rural Economy – Evidencing the Case for the Peak District (2013)**

3.54 High Peak, Staffordshire Moorlands and Derbyshire Dales commissioned Ekosgen to undertake an evidence based review of growth potential for the wider Peak District.

3.55 The report identifies the following sectors as presenting significant opportunity for economic growth in the wider Peak District:

- 1 Knowledge Economy: The wider Peak District's exceptional landscape and close proximity to conurbations are unique assets. These will be important for both growing existing knowledge based businesses, and encouraging knowledge based start-ups and professionals into the area.
- 2 Manufacturing: The area has a strong manufacturing base. There are also manufacturing sub-sectors which present significant future economic growth opportunities including food and drink (which has considerable potential to benefit from the development of a Peak District brand) and advanced manufacturing.
- 3 Cultural and Digital Industries: The area's attractive location and landscape offer are again key assets for growing these businesses, and attracting start-ups and talented professionals to the area.
- 4 Visitor Economy: There is an opportunity to build a higher value visitor offer to encourage increased visitor spend and more overnight stays. The wider Peak District's recreation offer has a strong link to the health and wellbeing agenda and there may be related opportunities for the wider Peak District which are worth exploring.
- 5 Ecosystem Services: This sector offers the opportunity to draw further value from the wider Peak District landscape and its ecosystems.

3.56 Ecosystem services include all the essential natural services provided by the land including food, timber and other crops, clean water, biodiversity, carbon storage, and landscape for enjoyment and leisure.

## Enterprise Peak District: Peak District Outline Economic Growth Package (2014)

3.57 High Peak, Staffordshire Moorlands and Derbyshire Dales have commissioned Mott MacDonald and JOHT to produce an outline growth package of interventions for the wider Peak District.

3.58 Eight interventions are identified as priorities. They are:

- 1 **Accessing finance to grow Peak District businesses:** Utilising LEP proposals for business grants and loans to support growth in Peak District businesses, ensuring these are at levels commensurate with Peak District needs.
- 2 **Growth Spokes - Building the reach of LEP Growth Hubs for Peak District businesses:** Extending LEP proposals for Business Advice and Information Growth Hubs as growth spokes into the Peak District.
- 3 **Physical Developments - business site(s):** Business premises supporting new businesses to set up and grow; and associated transport improvements
- 4 **'Inspired by the Peak District' brand:** Extending the reach of the Peak District Brand to support business marketing, inward investment and exporting aspirations of Peak businesses.
- 5 **Digital Connectivity:** Supporting County Councils/BDUK investment activity in digital infrastructure where gaps exist, and business advice to support growth.
- 6 **Pedal Peak Business Initiative:** Supporting growth of the visitor economy and its supply chains through the Pedal Peak sustainable cycling initiatives.
- 7 **Supply chain and exporting initiatives to grow Peak District businesses (linked to Growth Hubs):** Supporting existing business development and new business starts through business linking and supply chain development within the Peak District.
- 8 **Skills development to support business growth:** Supporting an employer-led approach to skills development to meet identified skills gaps for employers; niche skills development in sustainable construction and energy efficiency; development of youth entrepreneurship.

## Draft High Peak Growth Plan (2013)

3.59 This draft Growth Plan aims to draw together and build upon the various elements of existing strategies in so far as they help deliver growth. It identifies five strategic priorities that emerge from the existing strategies and the evidence base for High Peak. These are:

- 1 **Overtake the forecast long-term fall in jobs in High Peak**
- 2 **Maximise investment that supports a thriving private sector, supports affordable housing and helps sustain public services**

- 3 Make sure High Peak fulfils its potential in the County and Greater Manchester sub-region;
- 4 Maximise the economic opportunities open to High Peak residents;
- 5 Ensure High Peak's town centres successfully manage the transition to a new role in the future.

3.60 The Growth strategy states that these strategic priorities are interrelated and the drive for growth will be most successful if these linkages are clearly understood. For example, overturning the forecast decline in jobs in High Peak over the long-term will require investment by businesses in their own growth and investment in new sites and premises. This is in addition to wider investment in physical and digital infrastructure by the private and public sector, such as transport schemes and superfast broadband rollout.

## Summary

3.61 The key messages from this section can be summarised as follows:

- National planning policy requires LPAs to take a positive approach towards economic development, and makes it clear that applications seeking to secure sustainable economic growth should be treated favourably;
- LPAs should plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
- The adopted High Peak Local Plan set a target of providing an additional 76ha of land developed for business, general industrial and distribution development between 1991 and 2011.
- The 2008 Peak Sub Region Employment Land Review recommends the provision of 35ha of employment land in High Peak Borough over the period 2008 to 2026.
- The emerging High Peak Local Plan suggests that a total of 33.15ha of employment land will be required between 2013 and 2031 applying an annual average requirement of 1.95ha.
- The emerging Staffordshire Moorlands Local Plan (adopted Core Strategy) states that provision will be made for at least 24 hectares of additional employment land in Staffordshire Moorlands during the period 2006 – 2026. The Council will undertake an early and comprehensive review of employment needs for the plan period 2016 to 2031. This review will incorporate work currently underway on site allocations to provide a single Local Plan for the plan period.
- The Staffordshire Moorlands Employment Land Study Update (2008) identifies a requirement for 22.2ha of land based on economic growth and a further 1.3ha to replace sites considered unsuitable for employment use. This equates to a total requirement of 23.8ha.

- The evidence based review of growth for the wider Peak District identifies the Knowledge Economy, Manufacturing, Cultural and Digital Industries, the Visitor Economy, and Ecosystem Services sectors as presenting significant opportunity for economic growth in the wider Peak District.

## 4.0 The Current Stock of Employment Floorspace

### Introduction

4.1 This section provides an overview of the current stock of employment space in High Peak and Staffordshire Moorlands, as well as recent trends in, and changes to, supply. The future pipeline of development in High Peak and Staffordshire Moorlands and historic losses of employment land to alternate uses are also examined.

4.2 The analysis contained within this section draws upon the following data sources:

- 1 Commercial floorspace data from the Valuation Office Agency (VOA);
- 2 High Peak Borough and Staffordshire Moorlands District Councils' monitoring data on employment development; and
- 3 Commercial property databases including FOCUS and the websites of agents active in the local area.

4.3 An assessment of employment sites has also been undertaken separately by each LPA to help inform the study.

### Current Stock of Employment Floorspace

#### High Peak

4.4 In 2012, High Peak had over 720,000 sqm of industrial/commercial floorspace. As illustrated in Figure 4.1, the vast majority of this relates to industrial and warehousing floorspace<sup>28</sup> – 686,000 sqm, or 95% of the total. This bias was slightly less pronounced in 2000, with 94% of the total stock comprising industrial and warehousing floorspace. Floorspace has declined by 10% (79,000 sqm) over that period which has been the driving force behind an overall loss of 65,000 sqm (9%) of industrial floorspace or 5,000 sqm per annum. Office space has decreased more significantly, by 28% (14,000 sqm) over this period.<sup>29</sup>

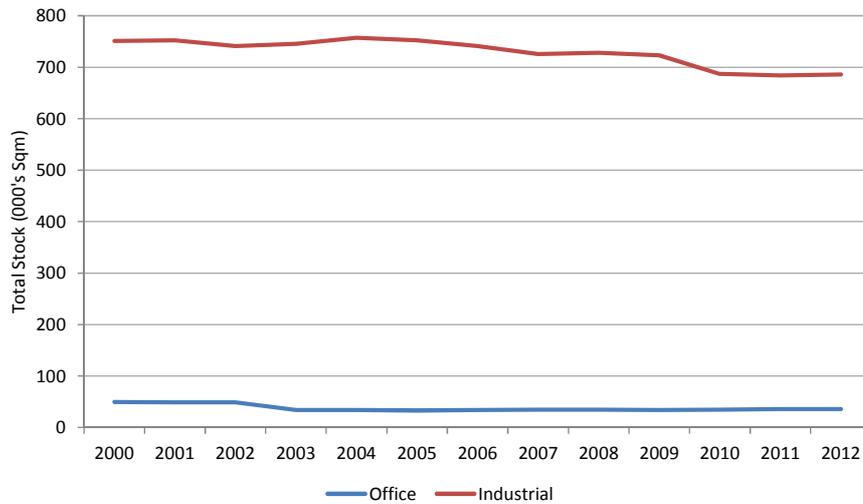
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<sup>28</sup> Note: the VOA includes a wide variety of uses in the 'industrial' floorspace categorisation. Whilst predominantly related to B2 (industrial) and B8 (warehousing), other categories are also included, such as scrap metal/breakers yards, waste transfer and recycling sites and vehicle testing centres, many of which would be classified as Sui Generis uses.

<sup>29</sup> VOA Floorspace Statistics. Note, according to VOA, the floorspace included under the broad heading of 'office', includes Business Units, Civic and Public Buildings, Computer Centres and 'offices' – it is not specified whether this could include an element of A2 office alongside B1a, hence the figures should be treated with a degree of caution.

[http://www.voa.gov.uk/corporate/statisticalReleases/120517\\_CRLFloorspaceReleaseNotes.html](http://www.voa.gov.uk/corporate/statisticalReleases/120517_CRLFloorspaceReleaseNotes.html)

Figure 4.1 Stock of Floorspace in High Peak Borough 2000-2012



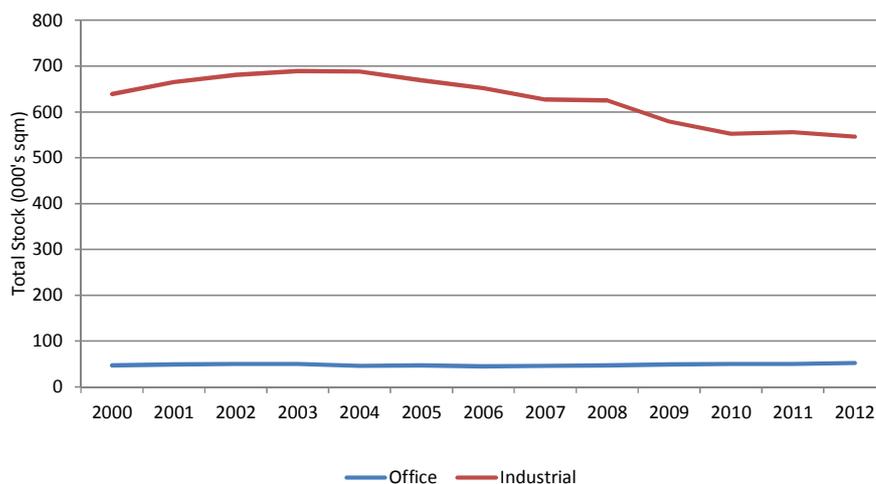
Source: VOA Business Floorspace Statistics / NLP Analysis

### Staffordshire Moorlands

4.5

In 2012, Staffordshire Moorlands had over 598,000 sqm of industrial/commercial floorspace. As illustrated in Figure 4.2, the vast majority of this relates to industrial floorspace – 546,000 sqm, or 91% of the total. This bias was slightly more pronounced in 2000, with 93% of the total stock comprising industrial and warehousing floorspace. Over this period floorspace has declined by 13% (88,000 sqm) which has been the driving force behind an overall loss of 93,000 sqm (15%) of industrial floorspace or 7,150 sqm per annum. In contrast, office space has actually increased by 11% (5,000 sqm) over this period.

Figure 4.2 Stock of Floorspace in Staffordshire Moorlands District 2000-2012



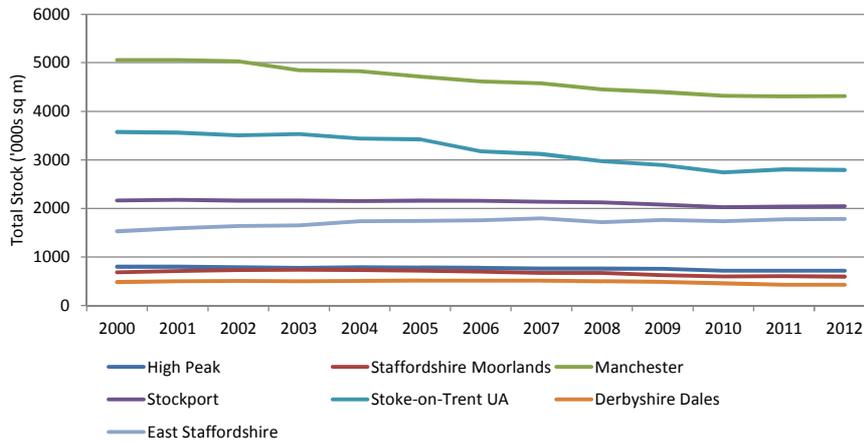
Source: VOA Floorspace Statistics / NLP Analysis

4.6

A comparison with employment space levels in nearby boroughs is presented in Figure 4.3. This suggests that High Peak and Staffordshire Moorlands have a slightly higher level of floorspace than the neighbouring rural authority of

Derbyshire Dales, with similar trends exhibited (i.e. rising during the early 2000s, followed by a continuous fall from around 2006 onwards). The surrounding urban areas such as Manchester, Stockport and Stoke-on-Trent exhibit much higher levels of floorspace but Manchester and Stoke-on-Trent have experienced proportionally higher levels of decline over this period.

Figure 4.3 Stock of Floorspace by Comparator Areas, 2000-2012



Source: VOA Business Floorspace Statistics / NLP Analysis

## Vacancy Levels

### High Peak

4.7 Based on commercial property being actively marketed via commercial property websites in January 2014, there was around 10,152 sqm of industrial floorspace available in High Peak, equivalent to around 1.5% of the total B2/B8 industrial stock. This is lower than might be expected and suggests that the variety and supply of premises in the Borough may be limited and therefore available properties are occupied quickly. It has been suggested by stakeholders that this low figure masks the issue that many premises are of poor quality and do not meet occupier requirements in terms of size, specification and location.

4.8 For offices in High Peak, the available stock was over 1,760 sqm, equivalent to around 5% of the total stock. Again, this is below the typical normal market level of 8-10% and this might be attributed to low levels of office space available in the Borough generally.

### Staffordshire Moorlands

4.9 For Staffordshire Moorlands there was around 6,367 sqm of industrial floorspace available and being actively marketed, equivalent to just over 1% of the total B2/B8 industrial stock. Again, this is lower than might be expected and suggests that the variety and supply of premises in the District may be limited and therefore available properties are occupied quickly.

- 4.10 For offices, the available stock was over 1,329 sqm, equivalent to almost 3% of the total stock. This is below the typical normal market level of 8-10% and this might be attributed to low levels of office space available in the District.

## Development Rates

- 4.11 The two authorities collate data on the development of employment land for Annual Monitoring purposes. Take-up of floorspace (i.e. completion of floorspace) for employment development has been provided from 2007 onwards in High Peak, and from 2006 onwards in Staffordshire Moorlands.
- 4.12 As Table 4.1 illustrates, take-up of employment sites in High Peak over the period 2007/08 to 2012/13 totalled **17.15ha, or 2.86ha per annum**, although this figure has been heavily influenced by the relocation of Nestlé Waters (who bottle and distribute Buxton Mineral Water) from a town centre site to a new purpose built bottling plant adjacent to Waterswallow Industrial Estate (7.42ha) in 2012/13. Their former 2.17ha site is expected to be largely lost to non B-use classes development, with just 0.217 ha of this site likely to be retained for B1<sup>30</sup> over the plan period.
- 4.13 Take up data from Staffordshire Moorlands has also been provided for the slightly longer period 2006 to 2013. As Table 4.2 illustrates, take-up of employment sites in Staffordshire Moorlands over the period 2006 to 2013 totalled **9.85ha, or 1.41ha per annum**. It should be noted that a significant portion of this figure is attributed to an unusually large amount of employment development in 2011/12 (4.2ha) including:
- 1 Around 1.87ha for a new Adams Food factory on undeveloped land at Sunnyhills Road, Leek (Application Ref: SMD/2010/0326).
  - 2 1.09ha involved development of the new Pointons Energy Centre at Felthouse Lane, Cheddleton, Leek (Application Ref: SMD/2010/0411).
  - 3 0.31ha was due to a new building expansion at the Esterchem premises, Brooklands Way, Leek (Application Ref: SMD/2008/0706).

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<sup>30</sup>As Nestlé's old site has yet to be redeveloped, it has not been counted as a loss at this stage

Table 4.1 Gross Employment Completions in High Peak (ha)

Year	B1	B2	B8	Total B-Class
2007/08	0	2.04	2.10	<b>4.14</b>
2008/09	0	0.28	0	<b>0.28</b>
2009/10	0.01	0.49	1.09	<b>1.59</b>
2010/11	0.22	1.20	0.06	<b>1.48</b>
2011/12	0	1.38	0.86	<b>2.24</b>
2012/13	0	7.42	0	<b>7.42</b>
<b>TOTAL</b>	<b>0.23</b>	<b>12.81</b>	<b>4.11</b>	<b>17.15</b>
<b>Annual Average</b>	<b>0.04</b>	<b>2.14</b>	<b>0.69</b>	<b>2.86</b>

Source: High Peak Borough Council 2013

4.14

In High Peak, completions in the period 2007 to 2013 have predominantly related to B2 development and to a lesser extent B8 development. Almost 99% of the gross employment completions over this period relate to industrial and warehousing space.

Table 4.2 Gross Employment Completions in Staffordshire Moorlands (ha)

Year	B1	B2	B8	Mixed B1, B2, B8	Total B-Class
2006/07	0	0	0	0	<b>0</b>
2007/08	0.22	0	0	0.02	<b>0.24</b>
2008/09	0.64	0	0.21	0	<b>0.85</b>
2009/10	0.02	0.10	0.32	0.52	<b>0.95</b>
2010/11	1.29	0.34	0	0.05	<b>1.67</b>
2011/12	0.16	0.64	0	3.40	<b>4.19</b>
2012/13	0.23	0.04	0.17	1.50	<b>1.95</b>
<b>TOTAL</b>	<b>2.55</b>	<b>1.12</b>	<b>0.70</b>	<b>5.48</b>	<b>9.85</b>
<b>Annual Average</b>	<b>0.36</b>	<b>0.16</b>	<b>0.1</b>	<b>0.78</b>	<b>1.40</b>

Source: Staffordshire Moorlands District Council 2013

4.15

In Staffordshire Moorlands over 55% of development in the period 2006 to 2013 has comprised mixed B1, B2 and B8 uses. Over 25% has comprised B1 development.

## Losses of Employment Land

4.16 Loss information provided by High Peak indicates that losses of employment land have not been significant<sup>31</sup>. In the period 2007/08 to 2012/13 losses have been as follows:

- B1a 0.00 ha
- B1b 0.00 ha
- B1c 0.11 ha
- B2 0.26 ha
- B8 0.90 ha
- Mixed B1/B2/B8 1.68 ha

4.17 These figures demonstrate that around **2.95ha** of employment land has been lost or redeveloped for non B-class uses over the past 6 years (the longest period for which Council records are available). This equates to an average loss of **0.49ha per annum**.

4.18 Loss information provided by Staffordshire Moorlands indicates that losses of employment land in the period 2007/08 to 2012/13 have been as follows:

- B1a 0.03 ha
- B1b 0.00 ha
- B1c 0.06 ha
- B2 0.98 ha
- B8 0.12 ha
- Mixed B1/B2/B8 7.15 ha

4.19 The rate of losses in Staffordshire Moorlands is much higher, at **8.35ha** over that period at a rate of **1.19ha per annum**. Much of this is attributable to the redevelopment of the Churnet Works site at Macclesfield Road, Leek, for a Sainsbury's foodstore, B1/B2/B8 industrial units and other retail units in 2012/13. In total, of the 9.514 ha site, 3ha comprised undeveloped land, 1.45ha will be redeveloped for new employment units, and the remaining 5.06ha being redeveloped for A1 retail.

## Anticipated Future Losses

4.20 HPBC and SMDC have provided details of anticipated future losses of allocated employment land and other employment sites.

4.21 The data collated by HPBC as part of the Local Plan evidence base suggests that 39.4ha of employment land in High Peak may be lost over the period 2011 to 2031. This includes a mixture of allocated sites, Primary Employment Zones [PEZ] and Major Developed sites in the Green Belt. Of the 39.4ha anticipated to be lost, 11.29ha is undeveloped land. 28.11ha is developed or

<sup>31</sup> Losses to an alternative use which has been developed or is under development.

previously developed. The overall amount of land anticipated to be lost equates to 1.97ha per annum. However, some of this land will simply be re-allocated rather than comprising the loss of a site in existing employment use. The amount of developed and previously developed land that is anticipated to be lost equates to 1.41ha per annum.

- 4.22 The data collated by SMDC for its SHLAA document suggests that around 30ha of employment land in Staffordshire Moorlands may be lost to residential and mixed use development over the period 2011 to 2031<sup>32</sup>. This includes the large site to be redeveloped for the mixed use regeneration scheme anchored by Sainsbury's at Leek, much of which has already been developed. It also includes a mixture of allocated sites and existing employment sites and equates to a loss of approximately 1.5ha per annum over the 20 year period.

## Available Employment Land

- 4.23 HPBC and SMDC have provided details of the allocated sites that have the potential for employment development within each authority area.
- 4.24 The data collated by HPBC suggests that there is currently around 71.29ha of 'available'<sup>33</sup> B-class employment land across High Peak. However, some of this land may no longer be suitable for B1, B2 or B8 developments. Additional potential employment sites have been identified through the Local Plan process..
- 4.25 Data collated by SMDC suggests that there is currently around 17.13ha of 'available' B-class employment land across Staffordshire Moorlands. It should be noted that this supply does not include the Regional Investment Site (RIS) at Blythe Bridge. This site was allocated in the Staffordshire Moorlands Local Plan under Policy E2 since it was identified as a special-case 'Premium Employment Site' in the Structure Plan to serve the aspirational needs of the North Staffordshire Sub-Region. It was retained in the RSS Revision (but rebadged as 'RIS'). It was subsequently granted outline planning permission in 1997 (recently renewed). To date there is only reserved matters approval pertaining to a single 1.44ha 'plot' of the wider site (uncommenced). Although it is a commitment of 50 hectares it does not count against the Core Strategy requirements, because it is considered to be a strategic provision for North Staffordshire rather than being specific to the Staffordshire Moorlands.
- 4.26 Feedback from stakeholders suggests that the quality of the supply in High Peak and Staffordshire Moorlands is generally low and investment is needed to improve the quality of key employment sites.

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<sup>32</sup> The area of land identified does not comprise all employment sites identified in the SHLAA, only those which the Council considers are likely to be lost in reality.

<sup>33</sup> Available is defined as land which is either undeveloped or has reached the end of its functional life and is a candidate for redevelopment.

## **Emerging Supply of Employment Floorspace**

- 4.27 An analysis of HPBC and SMDC's development pipeline also helps us to understand the projected supply of employment space. Information has been provided by the authorities detailing applications granted permission and separated out for industrial and office proposals where possible.
- 4.28 In High Peak, (excluding re-development land) there is permission for 1.86ha of industrial development plus a 0.65ha mixed use consent that includes an undefined amount of office space.
- 4.29 In Staffordshire Moorlands, applying the same criteria, there are no planning permissions for new industrial/commercial development on land currently allocated for B uses in the Local Plan.

## **Employment Space in Adjoining Areas**

- 4.30 It is also important to understand the extent of available employment land in adjoining authorities and any major new economic developments emerging in these locations which might compete with High Peak and Staffordshire Moorlands for future demand. A brief review has therefore been undertaken below of the current position in each area.

### **Peak District National Park**

- 4.31 The Peak Sub-Region ELR suggested a requirement for the provision of 5ha of employment land in the National Park Area for the period 2008-2026. The National Park Authority has confirmed that there is no need to allocate additional land within the National Park Area. There is existing space in Bakewell and Hope Valley which is proposed for safeguarding with scope for redevelopment of sites of low quality in less sustainable locations.

### **Stockport**

- 4.32 Stockport Council does not currently have an ELR, nor is one in the pipeline, although forecasting work was used to inform the Local Plan. In the period 2011 - 2026 the Core Strategy identifies a requirement of approximately 110,000 sq m of B1a/b floorspace.
- 4.33 There is forecast to be a significant fall in the overall level of B2 (Heavy Industry) uses. However with the net loss of B2 floorspace there will be a requirement for more B8 (Warehousing) floorspace. Given that there is significant overlap in the needs of such uses it is expected that warehousing uses will replace those B2 uses lost from employment areas, resulting in no net requirement for new employment land.
- 4.34 Major developments coming forward include office redevelopment in Stockport Town Centre at Stockport Exchange, a mixed use application at Woodford which includes approximately 8,400 sq m of Class B1c floorspace, and construction of the A6 to Manchester Airport Relief Road. These developments

could technically attract commuters from High Peak and also lead to the displacement of jobs but Stockport Council expects neither aspect to be significant.

- 4.35 HPBC is working with the Greater Manchester Combined Authority in relation to inward investment and economic development opportunities. There are currently no cross boundary sites between the Council and HPBC in relation to delivering employment land. The Council has confirmed that no land is required in the High Peak authority area to meet Stockport's needs.

### **Tameside**

- 4.36 A draft ELR is currently going through internal approval before publication. The current projected need is for 5.4ha per annum over the plan period, which equates to 92ha for the period 2012 to 2029. An analysis by the Council of current and potential employment land supply indicates that there would be a shortfall of 12.5ha.
- 4.37 It is anticipated that additional land will be identified through the site allocation process to make up for any shortfall. There are currently no major employment developments in the pipeline in Tameside.
- 4.38 HPBC is working with the Greater Manchester Combined Authority in relation to inward investment and economic development opportunities. There are currently no cross boundary sites between the Council and HPBC in relation to delivering employment land. However, Tameside Council has enquired whether High Peak could accommodate some of Tameside's employment land requirement. This issue will need to be the subject of further discussion between the Local Authorities.

### **Oldham**

- 4.39 Oldham Council's ELR (2010) identifies the need for 81.8ha of employment land in the period 2008 to 2026. The ELR notes that Oldham currently has 42.44ha of existing allocations (to be assessed through the Site Allocations DPD), giving Oldham a potential shortfall of up to 39.36ha of additional employment land to be identified for the plan period.
- 4.40 The three main employment sites identified in the Council's adopted Joint Core Strategy and Development Policies (2011) to help meet this requirement (Foxdenton, Hollinwood Business District and Chadderton Technology Park) are located in the western part of the Borough, a significant distance from the boundary with High Peak.

### **Kirklees**

- 4.41 Kirklees Council had originally planned for 240ha of employment land of which 137ha would be newly identified. The Core Strategy has since been withdrawn and a revised employment land requirement is now being considered based on the latest employment data available.

4.42 The focus of allocations in the emerging Local Plan will be towards Huddersfield and the north of the District. The Council does not consider that current and future proposals for employment will have an impact upon High Peak.

4.43 There are currently no cross boundary sites or on-going work between the Council and HPBC in relation to delivering employment land and inward investment initiatives. The Council has indicated that no land will need to be provided in the High Peak authority area to cater for Kirklees' employment land needs.

### **Barnsley**

4.44 The Council's adopted Core Strategy identifies a requirement to allocate 350ha of land to meet the needs of existing and future industry and business up to 2026. This is based on the requirements of RS, including an indicative figure of net change in industrial and warehousing land, and as recommended in the Council's ELR (2010).

4.45 The Core Strategy seeks to distribute the majority of this requirement to the eastern part of the Borough, away from its western boundary with High Peak.

### **Sheffield**

4.46 The Council's recent ELR (2013) suggested that Sheffield City could require in the order of 305ha gross 2013-31. This equates to an annual employment land requirement of 17ha over the 18 year plan period, or a five year requirement for 85 ha. It recommends that almost half of Sheffield's identified employment land requirement (150ha) should be for B1c/B2; 63ha for B1a/b, and a further 92ha for B8 warehousing.

4.47 In terms of major development projects, Sheffield Council has identified the expansion of advanced manufacturing in the lower Don Valley but considers that this should not have a significant impact upon need in High Peak.

4.48 There are currently no cross boundary sites or on-going work between the Council and HPBC in relation to delivering employment land and inward investment initiatives. The Council has indicated that no land will need to be provided in the High Peak authority area to cater for Sheffield's employment land needs.

### **Derbyshire Dales**

4.49 The Peak Sub-Region ELR recommended a requirement for the provision of 16ha of employment land in Derbyshire Dales for the period 2008-2026.

4.50 The Council has indicated that there are no major employment developments coming forward which would have any impact upon HPBC and SMDC.

4.51 HPBC, SMDC are working with Derbyshire Dales District Council on inward investment and wider economic development initiatives. As noted in previous

sections of this report, the Councils commissioned Ekosgen to undertake an evidence-based review of growth potential for the wider Peak District. The Council has indicated that no land will need to be provided in the High Peak or Staffordshire Moorlands authority areas to cater for the District's employment land demand. There are currently no cross boundary sites between the Council and HPBC/SMDC in relation to delivering employment land and inward investment initiatives.

### **Cheshire East**

- 4.52 The Cheshire East ELR (2012) identifies that between 278ha and 324ha of employment land (13.23ha - 15.41ha per year) could be required in Cheshire East in the period 2009 to 2030.
- 4.53 There are currently no cross boundary sites or on-going work between the Council and HPBC or SMDC in relation to delivering employment land and inward investment initiatives.

### **East Staffordshire**

- 4.54 The Borough's ELR Update (2013) identifies a requirement for the provision of just under 128ha of employment land in the plan period to 2031 broken down into 10ha of B1a/b, 34ha of B1c/B2, and 83ha of B8.
- 4.55 Two new employment sites totalling 20ha are planned in Uttoxeter, although the Council has not confirmed what impact they are likely to have on Staffordshire Moorlands.
- 4.56 There are currently no cross boundary sites or on-going work between the Council and SMDC in relation to delivering employment land and inward investment initiatives. The Council has indicated that no land will need to be provided in the Staffordshire Moorlands authority area to cater for East Staffordshire's employment land demand.

### **Stafford**

- 4.57 The Borough's 2012 ELR has formed the basis of evidence for the emerging Local Plan which sets out the provision of 8 hectares per year over the Plan period 2011 to 2031, totalling 160ha.
- 4.58 The Council has confirmed that the Plan for Stafford Borough does not require employment land within the Staffordshire Moorlands authority area to meet the needs of the Borough.
- 4.59 Currently there are no cross boundary sites or on-going work between Stafford Borough Council and Staffordshire Moorlands Council in terms of delivering employment land. However, it should be noted that the Plan for Stafford Borough identifies a Major Developed Site within the Green Belt at Hadleigh Park (Former Creda Works Limited), Blythe Bridge for future employment uses. This Major Developed Site is a short distance away from the Blythe Bridge

Regional Investment Site within Staffordshire Moorlands District Council's area.

### **Stoke-on-Trent**

- 4.60 The Council's ELR was completed jointly with Newcastle-Under-Lyme Borough Council in 2011. The ELR identifies a requirement for the provision of 230ha of employment land in the period up to 2026 broken down into 14ha of B1a/b, 15ha of B1c, 91ha of B2, and 110ha of B8.
- 4.61 The 50ha strategic site at Blythe Bridge identified in the adopted Staffordshire Moorlands Local Plan (which is located entirely within the Staffordshire Moorlands authority boundary) was designed to meet the inward investment needs of the Stoke/Newcastle conurbation in the early 1990's. It is understood that there are currently no other cross boundary sites or on-going work between the Council and SMDC in relation to delivering employment land and inward investment initiatives.

### **Newcastle-under-Lyme**

- 4.62 The Council's Joint 2011 ELR with Stoke-on-Trent identifies a requirement for the provision of 150ha of employment land in the period up to 2026, broken down into 17ha of B1a/b, 25ha of B1c, 58ha of B2, and 50ha of B8.
- 4.63 The 50ha strategic site at Blythe Bridge identified in the adopted Staffordshire Moorlands Local Plan was planned as one of 3 strategic sites designed to meet the inward investment needs of the Stoke/Newcastle conurbation in the early 1990's. There are currently no other cross boundary sites or on-going work between the Council and SMDC in relation to delivering employment land and inward investment initiatives.
- 4.64 The Council is currently considering the designation of a new major employment site in the A34/A500 area of the borough but this would be some distance from residents in Staffordshire Moorlands.

## **Conclusions**

- 4.65 The current position can be summarised, as follows:
- High Peak has over 720,000 sqm of B-class floorspace, the vast majority of which relates to industrial floorspace – 686,000 sqm, or 95% of the total.
  - Staffordshire Moorlands has over 598,000 sqm of B-class floorspace. As with High Peak the vast majority of this relates to industrial floorspace – 546,000 sqm, or 91% of the total.
  - Since 2000 floorspace in High Peak has declined by 10% (79,000 sqm), which has been the driving force behind an overall loss of 65,000 sqm (9%) of B Class floorspace or 5,000 sqm per annum. Office space has decreased more significantly, by 28% (14,000 sqm) over this period.

- In Staffordshire Moorlands, floorspace has declined by 13% (88,000 sqm) since 2000 with an overall loss of 93,000 sqm (15%) of B Class floorspace or 7,150 sqm per annum. In contrast, office space has increased by 11% (5,000 sqm) over this period.
- An average of 2.86ha gross (i.e. not including losses) of new B class space has been developed annually in High Peak since 2007. Virtually all of this relates to industrial and warehousing space.
- An average of 1.41ha gross (i.e. not including losses) of new B class space has been developed annually in Staffordshire Moorlands since 2006. Over 55% of this development has comprised mixed B1, B2 and B8 uses. Over 25% has comprised B1 development.
- In High Peak, (excluding re-development land) there is permission for 1.86ha of industrial development plus a 0.65ha mixed use consent that includes an undefined amount of office space. In Staffordshire Moorlands, applying the same criteria, there are no planning permissions for new industrial/commercial development on land currently allocated for B uses in the Local Plan.
- There are no known delivery issues in the adjoining districts and boroughs which would require additional land to be provided in Staffordshire Moorlands to meet their needs. As such, it is understood that none of the other areas are reliant upon Staffordshire Moorlands to meet any of their employment land requirements (or vice versa). Tameside Council has enquired whether High Peak could accommodate some of Tameside's employment land requirement. This issue will need to be the subject of further discussion between the Local Authorities.

## 5.0 Stakeholder Consultation

### Introduction

- 5.1 Stakeholder consultation is vital for commercially realistic and robust outputs, particularly when it must be defensible in EIPs and planning inquiries. In this situation, significant weight has been given to views of local businesses, local agents, economic development officers, surrounding local authorities and other key stakeholders.

### Employment Land Stakeholder Consultation

- 5.2 Early consultation with key stakeholders has helped the consultants to form a view on key economic issues, delivery assumptions, gaps in the market, constraints, market failure, and opportunities in the area. Market intelligence has been used to help understand the market in relation to economic uses, including close liaison with the business community to understand their current and potential future requirements. As part of this process, detailed questionnaires were sent to key local businesses and sought feedback on a number of issues including:
- future expansion plans;
  - the locational requirements of particular types of business;
  - the suitability of their existing sites and availability of land for future expansion; and,
  - the perceived strengths and weaknesses of the two local authority areas as business locations.
- 5.3 The stakeholder consultation process also involved discussions with local agents with regard to a number of issues including: sectors driving demand; the locational requirements of particular types of business, the key factors attracting/deterring business; the adequacy of existing sites to meet requirements; market signals such as rental levels; and, imbalances between available sites and where businesses would prefer to locate.
- 5.4 Discussions have also taken place with the Councils' economic development officers to help identify the sectors which present significant opportunities for economic growth. Officers have also provided property search information for employment land and premises required in High Peak and Staffordshire Moorlands to help inform likely future demand.
- 5.5 In accordance with the Duty to Co-operate, consultation has taken place with adjoining local authorities to identify cross boundary work being undertaken and understand the extent of available employment land in adjoining authorities and any major new economic developments which might compete with High Peak and Staffordshire Moorlands for future demand. Local Authorities consulted as part of this process include: Stockport; Tameside; Oldham; Kirklees; Barnsley; Sheffield; Derbyshire Dales; Cheshire East; East

Staffordshire; Stafford; Stoke-on-Trent; Newcastle-under Lyme; the Peak District National Park Authority; and, the relevant minerals and waste authorities.

5.6

This consultation has provided a wider view of economic potential and market demand than statistical data or employment forecasts, which are not always a reliable indicator of housing and employment land needs at local levels. The main findings of this consultation are set out in various sections of this study and have helped to inform the conclusions and recommendations set out in this report. Details of the stakeholder consultees contacted are attached at Appendix 4.

## 6.0 **Future Growth Sectors and Needs of Non B-Uses**

### **Introduction**

6.1 This section assesses the future economic growth potential of High Peak and Staffordshire Moorlands and seeks to identify those industrial sectors likely to drive this growth. Due to the lack of any distinction between different types of economic growth and development within The Framework, this section also considers the current level of provision and distribution of some non B Class uses in the two authority areas, the employment potential of these uses and, as far as possible, their future requirements for land. Reflecting the brief for this study, only non B class uses which are growing and likely to create pressures on employment land are examined.

### **Future Potential**

6.2 In order to identify the economic potential of High Peak and Staffordshire Moorlands, it is important to consider which industrial sectors are best placed to drive future growth. This is informed by an understanding of which sectors are under or over-represented in terms of local employment and their recent growth performance.

### **High Peak**

6.3 Figure 6.1 assesses the High Peak's current sectoral strengths through the use of location quotients, which measure the proportion of employment in an industry at the local authority level relative to the regional average. In the graph, the location quotients are shown using an orange bar. A value above 1.0 denotes a higher local representation of a sector compared to the East Midlands average, whilst anything below 1.0 signifies an under-representation. The further the orange bar is from 1.0, the greater the extent of any over or under-representation. In addition, the blue bars show the absolute level of employment within High Peak accounted for by each sector.

6.4 The graph indicates that the Borough has a strong employment representation in a number of manufacturing sub-sectors including: manufacturing of machinery and equipment, metal-based, transport equipment, rubber and plastic products, chemicals and pharmaceuticals; and, extraction and mining. It should be noted, however (with the exception of metal and minerals products), that these sectors account for relatively low levels of employment in absolute terms.

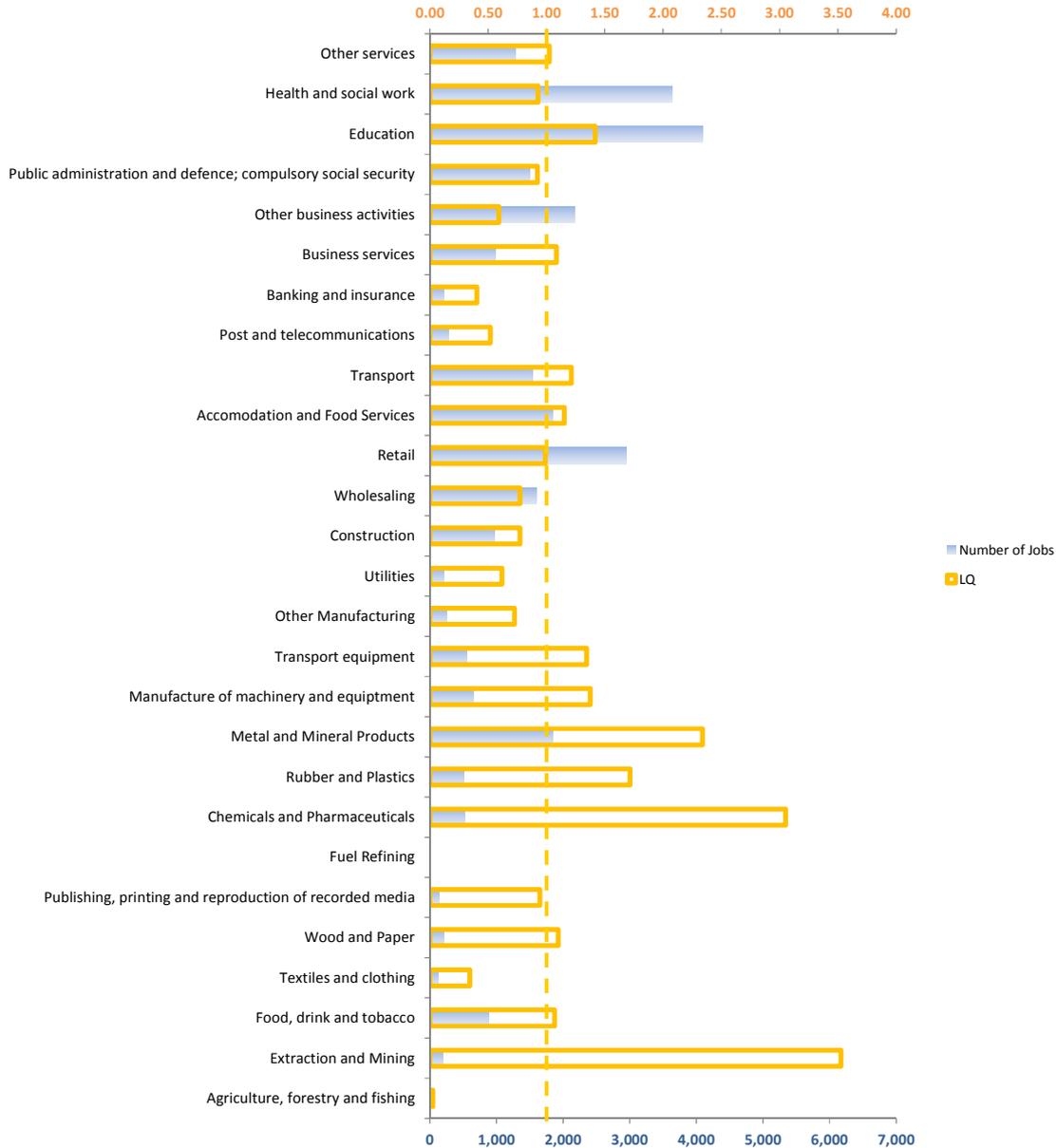
6.5 Perhaps more significantly, health & social work, education, other business activities and retail are strongly represented within High Peak, both in absolute and relative terms. It can be seen from the graph that these sectors support the largest number of jobs in the Borough, with health and social work, and

education in particular being represented at levels well above what might be expected given the size of the labour market in High Peak.

6.6

In relative terms, the Borough also has strong representation in the extraction and mining sector, with a location quotient of 3.5. However, in absolute terms, employment in this sector does not support a significant number of jobs.

Figure 6.1 Location Quotients of Economic Sectors in High Peak, 2012



Source: BRES/NLP Analysis

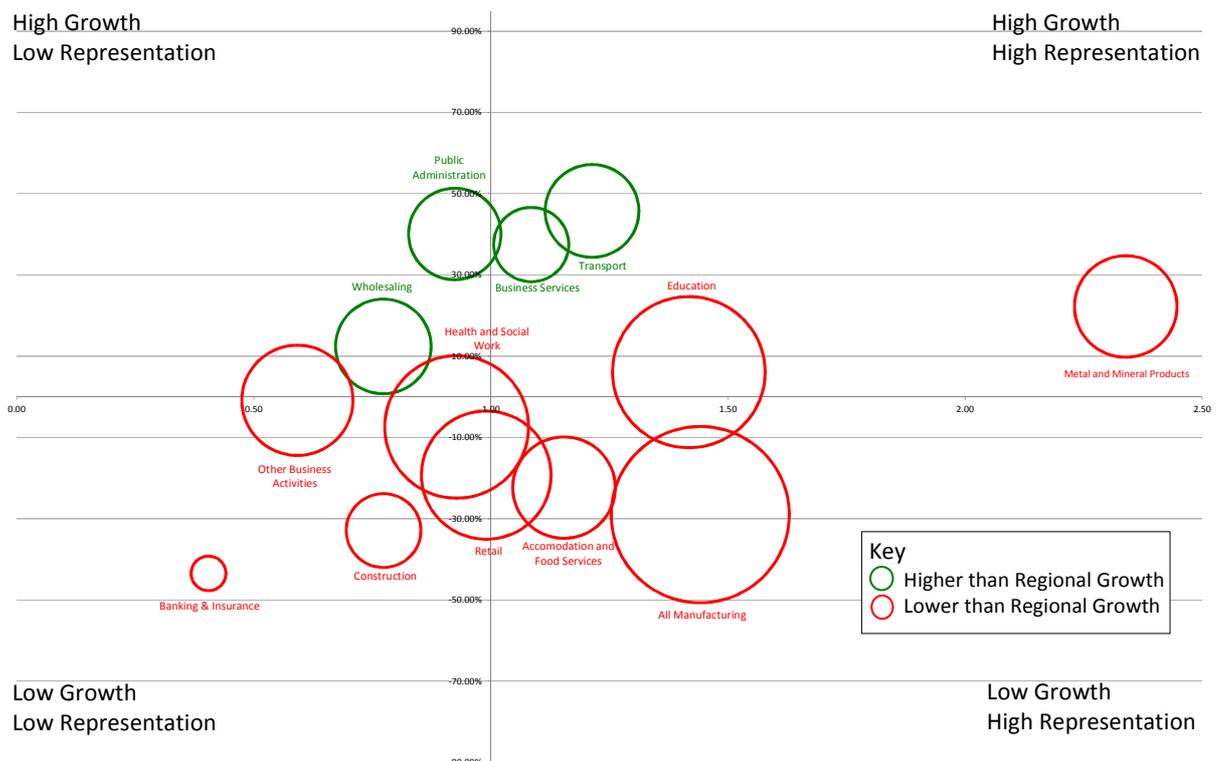
6.7

The over-representation of the education sector within the local economy is an indication that High Peak is reliant upon this sector for employment. The graph starkly illustrates the low level of employment in the more knowledge intensive business services such as banking & insurance, in both relative and absolute terms.

6.8 Figure 6.2 presents the relative representation of sectors in High Peak as well as levels of employment change over the period 2001 to 2010<sup>34</sup>. The relative size of the 'bubble' for each sector represents the level of absolute employment within High Peak.

6.9 It is also important to understand the direction of employment change. The chart indicates those sectors where there has been employment growth in the Borough; those which have out-performed the East Midlands regional average are highlighted in green; whilst those shown in red have under-performed relative to regional growth.

Figure 6.2 Growth, Representation and Size of Key Sectors in High Peak



Source: BRES/ABI/NLP Analysis

6.10 The top-right quadrant indicates sectors which are likely to drive future economic growth. These sectors have a high representation and have experienced growth above the East Midlands average, and notwithstanding the current economic climate, might be expected to enjoy continued strong growth within High Peak. The particularly high level of growth in the Transport (45.8%), Business Services (37.5%), and the Metals and Mineral products sector (22.2%) between 2001 and 2010, coupled with an above average representation in the sectors, indicates the existence of some competitive advantage for these sectors within High Peak.

6.11 The top-left quadrant contains those sectors that are under-represented relative to the regional average but have exhibited recent positive job growth.

<sup>34</sup> 2010 data from BRES has been used as this allows comparison with Annual Business Inquiry Employee Analysis (ABI) data which is available for earlier years. More recent data from BRES does not allow this direct comparison.

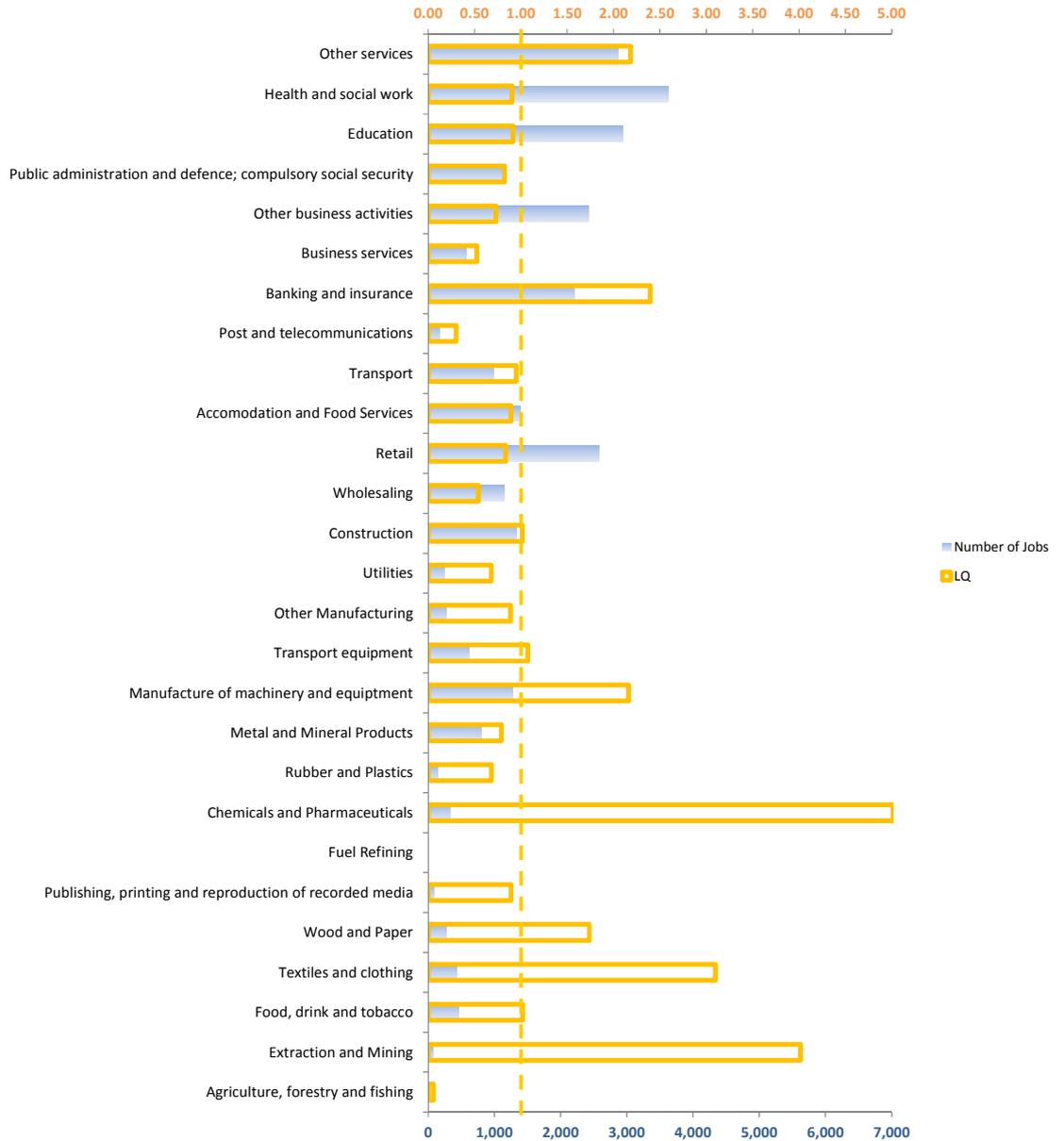
These sectors, which include Wholesaling and Public Administration. Given the high level of growth in the Transport and Wholesaling sectors, the potential for B8-based sectors to drive future growth in the Borough would appear to be reasonable.

- 6.12 The bottom right quadrant contains those sectors that are over represented relative to the regional average but have exhibited lower growth. As Figure 6.2 shows, representation in the 'All Manufacturing' sector is very high. However, employment in this sector has declined sharply over the period 2001-2010 (-29.0%). Of particular note is the decline in the manufacture of machinery and equipment sector which employed over 1,400 people as late as 2001, it has declined by 54% in the decade since, to the extent that it now provides just 2.2% of all jobs based in the Borough.
- 6.13 The potential for office-based development to drive future growth would appear to be modest. As noted above, whilst Other Business Activities shrunk by 0.9% between 2001 and 2010, this was well below the regional average which increased by 54.8%, whilst the number of people employed in Banking and Insurance Services also declined by 43.5% over the same time period. However, the number based in Business Services declined by 37.5% compared to modest growth regionally.

## **Staffordshire Moorlands**

- 6.14 An equivalent location quotient exercise has been undertaken for Staffordshire Moorlands. Figure 6.3 indicates that the District has a strong employment representation in a number of sectors including: manufacture of machinery and equipment and chemicals and pharmaceuticals, wood and paper, textiles and clothing, and extraction and mining. However, these sectors account for relatively low levels of employment in absolute terms.
- 6.15 Perhaps more significantly, other services and banking and insurance are strongly represented within Staffordshire Moorlands, both in absolute and relative terms. It can be seen from the graph that these sectors support a significant number of jobs in the District. Health and social work, education, other business activities and retail are also well represented at absolute levels. The over-representation of banking and insurance within the local economy is a reflection that Britannia Building Society is a key employer in the District.
- 6.16 The over-representation of the health & social work and education sectors within the local economy is an indication that Staffordshire Moorlands is heavily reliant upon public sector employment. However, the District is also well represented in the more knowledge intensive business services such as banking & insurance, in both relative and absolute terms.
- 6.17 As with High Peak, in relative terms, the District also has strong representation in the extraction and mining sector, with a location quotient of 4.1. However, in absolute terms, employment in this sector does not support a significant number of jobs.

Figure 6.3 Location Quotients of Economic Sectors in Staffordshire Moorlands

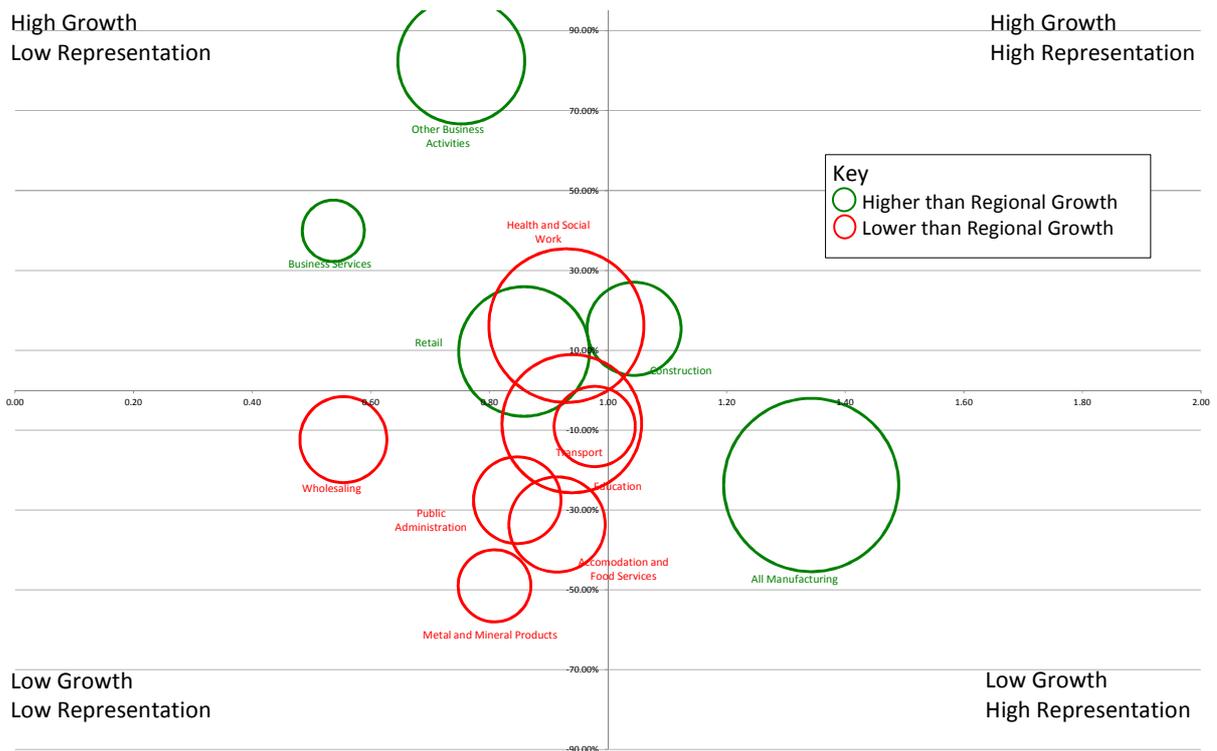


Source: BRES/NLP Analysis

6.18

Figure 6.4 presents the relative representation of sectors in Staffordshire Moorlands as well as levels of employment change over the period 2001 to 2010.

Figure 6.4 Growth, Representation and Size of Key Sectors in Staffordshire Moorlands



Source: BRES/ABI/NLP Analysis

- 6.19 There has been a particularly high level of growth in the Construction sector (15.4% between 2001 and 2010), coupled with an above average representation in this sector, which indicates the existence of some competitive advantage for this sector within Staffordshire Moorlands.
- 6.20 Given the high level of growth in the Business Services and other Business Activities sectors, the potential for office based sectors to drive future growth in the District would appear to be reasonable.
- 6.21 Representation in the ‘All Manufacturing’ sector is very high. However, employment in this sector has declined sharply over the period 2001-2010 (-23.7%), albeit this decline is lower than the Regional average (-38.3%). Of particular note is the decline in Textiles and Clothing sector which employed over 1,000 people as late as 2001; it has since declined by 56.9% in the period to 2010, to the extent that it now provides just 1.5% of all jobs based in the District.
- 6.22 The potential for distribution-based development to drive future growth would appear to be low. Wholesaling shrunk by -12.4% between 2001 and 2010, greater than the regional average which shrunk by 6.3%.

**Conclusions**

- 6.23 Clearly, there are limitations to predicting future growth based upon past performance, particularly given the uncertainty generated by current economic

conditions. However, there is a strong commitment in High Peak and Staffordshire Moorlands to support the growth of advanced manufacturing industries, knowledge based business, and cultural and digital industries, and their importance to future economic performance is acknowledged in a range of policy documents and strategies.

- 6.24 With respect to the future need for employment land and premises in High Peak, the analysis above suggests a continuation of the recent trends. Demand for commercial offices is likely to remain weak over the Local Plan period whilst there is likely to be a reduction in demand for (B2) factory units as the manufacturing industry continues to decline. This may, to an extent, be counteracted by growth in B8 wholesaling. However, as noted above, it should be recognised that there are limitations upon using past performance to predict future growth and other factors, such as anticipated future growth and the growth aspirations of local authorities, need to be considered.
- 6.25 With respect to the future need for employment land and premises in Staffordshire Moorlands, the analysis above suggests a continuation of the recent trends. Demand for commercial offices is likely to be significant over the Local Plan period whilst there is likely to be a reduction in demand for (B2) factory units as the manufacturing industry continues to decline. Again, the limitations of predicting future growth based upon past performance should be recognised and other factors need to be considered.

## **Needs of Non B-Uses**

- 6.26 Reflecting the lack of any distinction between different types of economic growth and development within The Framework, this section considers the current level of provision and distribution of some non B Class uses in the High Peak and Staffordshire Moorlands, the employment potential of these uses and, as far as possible, their future requirements for land. Reflecting the brief for this study, only non B class uses which are growing and likely to create pressures on employment land are examined in detail.

## **Context**

### **Growth Forecasts for High Peak**

- 6.27 Drawing on the Oxford Economics FTE employment forecasts for High Peak, non B-class jobs currently account for about 17,500 jobs in the Borough, some 55% of all employment. This sector is forecast to increase by about 67 jobs over the period 2011 to 2031, very slightly increasing its overall share.
- 6.28 Table 6.1 indicates that the fastest growing sectors in High Peak are forecast to be retail, followed by hotels and catering, residential and social care, and health. Conversely, job numbers in public administration and education are projected to fall. In some cases, components of these sectors are already included within the analysis of B-class sectors (as detailed in Appendix 2) so

the analysis here relates to other employment in the sector that is not assumed to create demand for B-class space.

Table 6.1 FTE Job Forecasts for Non B Class Uses in High Peak Borough, 2011-2031

Sector	2011 Job Level	Estimated Job Change 2011-31
Retail	2,463	+207
Hotels & Catering	1,498	+51
Residential & Social Care	2,092	+41
Health	1,173	+39
Public Administration	1,183	-134
Education	3,750	-212
<b>Total Non B Jobs*</b>	<b>12,159</b>	<b>-8</b>
<b>Total Jobs in High Peak</b>	<b>30,980</b>	<b>+114</b>

Source: Oxford Economics 2013 / NLP analysis

\*Table includes only significant Non B-Class sectors and jobs in High Peak

6.29

Table 6.2 indicates that the fastest growing sectors in Staffordshire Moorlands in future are sports activities and amusement, retail, residential and social care, and health. As with High Peak, job numbers in public administration and education are projected to fall.

Table 6.2 FTE Job Forecasts for Non B Class Uses in Staffordshire Moorlands District, 2011-2031

Sector	2011 Job Level	Estimated Job Change 2011-31
Sports Activities and Amusement	2,985	+1,342
Retail	1,842	+247
Residential & Social Care	1,571	+209
Health	1,466	+172
Hotels & Catering	1,111	-24
Public Administration	496	-48
Education	2,791	-163
<b>Total Non B Jobs*</b>	<b>12,262</b>	<b>+1,762</b>
<b>Total Jobs in Staffs Moorlands</b>	<b>30,354</b>	<b>+3,009</b>

Source: Oxford Economics 2013 / NLP Analysis

\*Table includes only significant Non B-Class sectors and jobs in Staffordshire Moorlands

## Development Pressure from Non B Classes

6.30

The land and space requirements of non B-class sectors can vary considerably and it is therefore important to consider the extent to which growth of these activities is having a direct impact through competition with B-class employment space.

## Sports Activities and Amusement

6.31

The number of FTE jobs in this sector in Staffordshire Moorlands is forecast to increase by approximately 1,350 in the period to 2031. In Staffordshire Moorlands a significant amount of jobs are generated by the Alton Towers Resort. It is likely that any future development will be concentrated within the

existing resort. Therefore, whilst significant job growth is forecast in this sector in Staffordshire Moorlands, this should not have a significant impact upon the supply of employment land.

- 6.32 Given the rural nature of both High Peak and Staffordshire Moorlands, other leisure and tourism activities are likely to be based in rural locations. Major leisure uses such as cinemas, are likely to be located in town centre locations in accordance with national planning policy. The land requirement generated by this sector is therefore unlikely to have a significant impact upon the provision of employment space.

## **Retail and Leisure**

- 6.33 Retail and leisure growth is related to population change and expenditure. The economic downturn has had, and is likely to continue to have, an impact on the retail sector. In addition, there has been a shift towards internet shopping in recent years which is reducing the need for retailers to provide a physical customer interface. However, the underlying trend over the medium and long term is expected to lead to a need for additional floorspace.
- 6.34 The retail sector currently accounts for about 2,500 FTE jobs in High Peak Borough and is forecast to grow to reach nearly 2,700 FTE jobs by 2031. Buxton is the largest town centre in the plan area and generally provides a good range of local and national retailer shopping opportunities and services to the local community. Glossop is the second largest town centre and there is also a network of smaller town and district centres which meet day-to-day shopping needs.
- 6.35 In Staffordshire Moorlands the retail sector currently accounts for about 1,900 FTE jobs and is forecast to reach nearly 2,100 FTE jobs by 2031. Leek is the principal town in the District with a large range of facilities and has become a recognised national centre for antiques and fine arts. Biddulph is the second largest town and serves a much more constrained area to the west of the District. Cheadle is the smallest town serving a more limited catchment area. Cheadle has suffered from under-investment and a poor infrastructure and its town centre has declined in recent years but a successful Heritage Economic Regeneration Scheme has led to some improvements.
- 6.36 The 2013 Quantitative Retail Study Update and the associated Addendum Report (February 2014) prepared by GVA for HPBC and SMDC concludes that:
- 1 In Buxton there are no real grounds for the Council to proactively plan for new convenience retail provision in the town over the early to mid-phase of the emerging Local Plan. A substantive capacity for comparison provision is identified beyond 2018 on the basis of forward population and expenditure growth.
  - 2 In Glossop there is no immediate and overriding quantitative or qualitative requirement for the Council to proactively plan for new convenience provision in the town. There is no immediate or overriding

requirement to plan for any future quantitative-based expansion of the comparison retail offer.

- 3 In High Peak Central there is a 'location specific' need for a new store in New Mills to address the existing spatial deficiency in provision. Given existing commitments, there is no need for additional non-food retail..
- 4 There is no need for the HPBC to proactively plan for new leisure development in the Borough over the emerging plan period.
- 5 In Leek and Cheadle there is no overriding requirement for the Council to proactively plan for new convenience retail provision during the emerging Local Plan process.
- 6 In Biddulph the Council should proactively identify an available and suitable sequentially compliant site through the emerging plan process to accommodate a deep discount foodstore to enhance choice and competition.
- 7 There is no need for SMDC to proactively plan for new comparison development in the early to mid-period of the emerging Local Plan.
- 8 There is no need for the SMDC to proactively plan for new leisure development in the District over the emerging plan period.

6.37 It is therefore considered that the retail and leisure sector provides moderate future potential for growth, with a focus on town centre regeneration that is unlikely to conflict with employment land provision on surrounding industrial estates and business parks.

## **Hotels and Catering**

6.38 The economic strategy document prepared for the wider Peak District by Ekosgen identifies the visitor economy as presenting significant opportunity for economic growth in the wider Peak District by building a higher value visitor offer to encouraging increased visitor spend and more overnight stays.

6.39 The accommodation and food and beverage sectors currently provide around 5% of the FTE jobs in High Peak and 4% of FTE jobs in Staffordshire Moorlands. FTE jobs in the period to 2031 in the accommodation and food and beverage sectors are forecast to increase slightly in High Peak and decrease slightly in Staffordshire Moorlands.

6.40 Any growth is likely to be accommodated through the change of use and conversion and expansion of existing agricultural and rural properties to tourist accommodation uses. Other hotel and restaurant uses are likely to be located in town centres to accord with national policy

## **Public Administration and Defence**

6.41 This sector includes local and central government activities, along with social services, job centres, police, courts, defence, fire and other emergency services. Although some of this activity occurs within buildings classified as

use class B1a, only a small proportion actually occurs in commercially available offices. It is only this generally-available and non-purpose built space which matters for estimating B-class future requirements and as a result the remainder (and vast majority) is considered here under non-B class uses.

- 6.42 With approximately 4% of High Peak total FTE jobs this sector is relatively strongly represented in High Peak in absolute job terms, although when compared with the regional average of 6%, it is apparent that it actually has a locational quotient of slightly less than 1.0.
- 6.43 Due to on-going Government public sector expenditure cuts, it appears unlikely that there will be any further significant job growth in this sector in the short/medium term, and probably some decline, as forecast in the latest Oxford Economics forecasts.
- 6.44 HPBC recently published its 2013/14 budget which outlines the challenges it faces as a result of the reduced level of funding introduced in the Government's Comprehensive Spending Review. This includes a review of the Council's Efficiency and Rationalisation Strategy up to and including 2015/16. The projected savings over this period are nearly £2.6m. Similarly, the Efficiency and Rationalisation Strategy for Staffordshire Moorlands for 2013/14 requires savings of £409,600.
- 6.45 Overall, no job growth can be expected in High Peak and Staffordshire Moorlands in this sector and no requirement for additional land, with the potential for some site and premises releases resulting from budget cuts and service rationalisation.

### **Healthcare and Residential Care**

- 6.46 The healthcare sector includes hospitals, medical centres, GP and dental surgeries, both public and privately run.
- 6.47 High Peak's current employment in the health sector totals about 1,200 jobs, and is forecast to grow by about 3% by 2031. The residential and social care sector, which includes care homes, currently supports about 2,100 jobs in the Borough and is expected to increase by about 2% by 2031.
- 6.48 Staffordshire Moorlands current employment in the health sector totals about 1,500 jobs, and is forecast to grow by about 12% by 2031. The residential and social care sector, which includes care homes, currently supports about 1,600 jobs in the District and is expected to increase by about 13% by 2031.
- 6.49 Whilst High Peak and Staffordshire Moorlands do not appear to have a particular competitive advantage with regards to the healthcare sector, the ageing population in each of the authority areas is likely to mean that it will remain a growth area in terms of employment going forward. However, fairly limited requirements for new space are expected from this sector overall.
- 6.50 It has been acknowledged for a number of years that the current supply and form of housing nationally does not adequately meet the needs of a rapidly

ageing society. It has been estimated that more than 3 million people over the age of 65 receive public funded services such as home care, home improvement and/or housing related support services, and community alarm/telecare services to help them live well in the home.

- 6.51 This issue is becoming more and more pressing over time due to Britain's ageing population, with substantial gains in life expectancy above the age of 65. According to the latest ONS (interim) 2011-based population forecasts, the number of people over the age of 65 in High Peak Borough is likely to grow by 34% (+5,413 residents) between 2011 and 2021, which is above the East Midlands growth rate of 27%. Furthermore, the proportion of 'very elderly' people in High Peak (i.e. over 85 years) is anticipated to increase by 68% by 2021 (+1,366 elderly residents), compared to a regional increase of 40%.
- 6.52 Using the same forecasts, the number of people over the age of 65 in Staffordshire Moorlands District is likely to grow by 28% (+5,724 residents) between 2011 and 2021, which is above the West Midlands growth rate of 21%. The proportion of 'very elderly' people in Staffordshire Moorlands (i.e. over 85 years) is anticipated to increase by 43% by 2021 (+1,093 elderly residents), compared to a regional increase of 40%.
- 6.53 These improvements in life expectancy are not being matched by commensurate gains in disability-free longevity, leading to a greater absolute number of older people who may need care. There is therefore a clear imperative for extra care facilities in High Peak and Staffordshire Moorlands over the coming years. Many facilities utilise former residential or institutional premises and it is possible that some future growth could be achieved by expanding capacity on existing sites without necessarily having a large additional land requirement.

## Education

- 6.54 High Peak and Staffordshire Moorlands contain a number of further and higher education facilities. The University of Derby schools of Sport Performance & Outdoor Leadership and Hotel, Resort & Spa Management are located in Buxton in High Peak. The towns of Buxton and Leek also contain campuses serving Buxton and Leek College.
- 6.55 In High Peak, the education sector currently accounts for approximately 3,750 FTE jobs and in Staffordshire Moorlands the sector accounts for about 2,800 jobs. However, FTE jobs in this sector are forecast to decline by 6% in both authority areas in the period to 2031. Limited expansion is seen in this sector generally due to increases in student fees and public sector spending cutbacks generally.
- 6.56 The Oxford Economics FTE job forecasts indicate a decline in the education sector. Details of future development proposals have not been provided by the education establishments. However, it is likely that any expansion in the sector will take place largely on existing sites in institutional use rather than creating pressure on employment land. Some conversion of small office

premises to educational or training uses could occur but this does not appear an inappropriate use of less attractive office space less likely to be occupied by B1 uses and again appears unlikely to occur on a large scale.

## Future Growth potential of Non-B Class Uses

6.57 This section considers the significance of non-B class uses on overall employment land requirements and the potential non-linear relationship between (net) job growth and land/floorspace requirements. A review of these non-B class uses is set out below.

## Future Growth Potential of A2 Sectors

6.58 This broad use classification, under the umbrella heading 'Financial and Professional Services', includes a range of town centre uses including banks, building societies, estate and employment agencies, professional services (excluding health and medical services) and betting shops.

6.59 Oxford Economics data suggests that the growth in the Finance, Insurance and Real Estate Activities in High Peak will be relatively low up to 2031, in the order of around 144 new FTE jobs. For Staffordshire Moorlands around 282 new FTE jobs will be provided in this sector over the same period.<sup>35</sup>

6.60 The 2007/08 global crisis in the banking sector, which has resulted in continued restrictions in lending practices and the part nationalisation of institutions such as Northern Rock, Royal Bank of Scotland and Lloyds Banking Group, has led to considerable uncertainty with regards future floorspace requirements. The recent spate of mergers and demergers of many of the larger banks and building societies, and the pressing need to cut costs and waste, has led to many of the High Street Banks embarking on widespread closures and consolidations. There has been more recent activity in the banking sector such as the demerger of Trustee Savings Bank (TSB) from Lloyds. However, early indications suggest that this is likely to involve the rebranding of existing branches and will not result in any significant expansion of the high street banking sector.

6.61 It is understood that the closures are disproportionately located in rural areas, rather than the larger towns and cities<sup>36</sup>. Other threats to banks and building societies retaining current levels of fascia on the High Street include:

- 1 **New entrants into the market:** The major supermarkets, notably Tesco, M&S, Sainsbury's and Asda, offer financial services including insurance, credit cards, loans, mortgages and savings accounts.
- 2 **Online Banking:** Two thirds of UK residents between the ages of 25 and 44 use internet banking services (increasingly via their smartphone), reducing the need for face-to-face interactions at a high street branch for most day-to-day transactions. However, this rate drops to around one in

<sup>35</sup> Oxford Economics Industries 64,65,66 and 68 (2011-2031)

<sup>36</sup> <http://conversation.which.co.uk/money/bank-branch-closure-high-street/>

three for the over 65s , whilst concerns over internet security and the desire for 'flagship' stores in key locations is likely to mean that there will remain an underlying demand for a physical presence in most towns and cities;

- 3 **Continued exposure to financial risk:** the five main UK High Street banks are thought to have £160 billion tied up in loans, mortgages and government debt in troubled Eurozone countries including Portugal, Italy, Ireland, Greece and Spain. Any further escalation of the economic crisis in the Eurozone could place further pressure on those High Street Banks most exposed to further cut back on the less profitable elements of their retail banking arm, which in practice could result in further bank closures on the High Street.

- 6.62 In terms of estate agents, clearly the property market has suffered greatly during the recession and consequent economic downturn. The number of house sales has fallen dramatically, with concurrent job losses for many employed in the sector. The market is showing signs of recovery, with Government fiscal initiatives such as 'Help-to-Buy' artificially boosting demand amid warnings of a speculative house price bubble, particularly in London and other hotspot areas.
- 6.63 However, the long term future for the UK property market remains uncertain and will continue to be highly susceptible to changes in economic conditions and several underlying factors. Particularly outside London, estate agents are increasingly involved in letting and management, property maintenance and repair. As a result, the prospects for additional office space servicing this sector in High Peak and Staffordshire Moorlands appear limited.
- 6.64 There may potentially be some limited demand for A2 office space arising from growth in the wider professional services sector dependent upon the nature of the specific businesses (i.e. legal services may be more likely to require A2 accommodation as opposed to scientific research and development operations).
- 6.65 It should also be noted that regarding accountancy and legal services, national trends suggest limited demand for new town centre office space moving forward. The major accountancy firms announced substantial layoffs in the aftermath of the 2007/08 recession and continue to face very challenging market conditions.
- 6.66 Similarly, the large legal firms particularly suffered from the meltdown in the financial sector, traditionally one of their major sources of income. Whilst the burgeoning growth of smaller, personal injury claims solicitors, has been a feature of the high street in recent years, the sector is set to face tougher rules and regulations as the Claims Management Regulator launches a consultation which proposes, amongst other things, enforcing a written contract before any fee can be taken. Such measures, if adopted, are likely to deter market entry for the more unscrupulous businesses and it is possible that a saturation point

has been reached in terms of the number of companies requiring town centre office space.

- 6.67 It seems likely that these macro-economic trends will be played out in miniature in the town centres of High Peak and Staffordshire Moorlands, with potentially limited demand for A2 uses going forward.

## **A2 Betting Offices**

- 6.68 In contrast with the challenges facing the high street banks and financial services, other A2 uses - notably betting shops – have remained more stable due to market changes and the use of new and more sophisticated technologies. The Portas Review, published in December 2011, proposed to change the planning use class of betting shops from “A2” to sui generis so that a planning application would need to be made to change use from any other establishment on the high street to become a betting shop. However, betting shops remain in the A2 use class at present, although local authorities do have the power to issue Article 4 directions to suspend permitted development rights in certain circumstances.
- 6.69 According to the Association of Bookmakers, the number of betting shops in the UK has remained at around 8,500 over the past decade, a reduction from over 10,000 a decade ago and 15,000 in the 1960s<sup>37</sup>. The perceived growth of betting shops on the high street may therefore be due to the fact that they have been less adversely affected by the recession and have therefore retained a presence on the high street.
- 6.70 With the increasing number of vacant units on the high street, there is an opportunity for betting shops to relocate in higher-footfall areas, but, as noted above, evidence suggests that the overall number of betting shops is not increasing significantly. The A2 office component of these uses would also be very limited.

## **Summary**

- 6.71 In summary, it is considered that the sector, particularly from observing potential trends in the financial services sectors, has relatively limited prospects for further expansion, both at a macro and at a more fine grained level, in the town centres of High Peak and Staffordshire Moorlands.
- 6.72 However, should the current economic recovery revert to one of strong growth, there may be some demand for A2 office space for those professional services directly related to the housing market. However, this appears unlikely for the foreseeable future and is wholly dependent on trends in the wider economy.

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<sup>37</sup> The Daily Telegraph (2012)

## Growth in Key Sui Generis Uses

### Extraction and Mining

- 6.73 This sector includes mining of coal, mining of metal ores, other mining and quarrying activities and mining support activities. In High Peak, this sector accounted for around 194 jobs in High Peak in 2010, down from 783 jobs in 2001. In Staffordshire Moorlands this sector declined from around 264 jobs in 2001 to 75 jobs in 2010.<sup>38</sup>
- 6.74 Preparation of the new Mineral Plan for Derbyshire and Derby for the period to 2030 is currently underway. As part of this process, a Local Aggregates Assessment has been prepared<sup>39</sup>. This document identifies a requirement which is equivalent to the recent 10 year average of 1.23 million tonnes of sand and gravel per annum plus 10% to account for anticipated growth in construction in the area over the plan period. The report notes [page 25] that discussions with operators have indicated they could increase capacity at existing sites to respond to increased demand. The same requirement calculation has also been applied to crushed rock. The County Council has not been able to confirm at this time the precise sites where this extraction will take place.
- 6.75 Preparation of the Staffordshire and Stoke-on-Trent Minerals Local Plan has recommenced following deferral of review to focus on the preparation and adoption of the Waste Local Plan. Consultation on the Draft Minerals Local Plan is timetabled for April 2014. At this stage, it has not been possible to confirm with the County Council details of the sites where future extraction is likely to take place.
- 6.76 The fall in jobs in this sector is a reflection of the closure of traditional mining sites in both authority areas and the overall decline of the mining industry over the past 30 years. It appears likely that there will be no growth in this sector in the short/medium term, according to the Oxford Economics forecasts. However, both local authorities should continue to monitor this situation to assess the potential impact of the respective Minerals Plans upon existing and potential employment sites in High Peak and Staffordshire Moorlands.

### Waste, Recycling and Environmental Technologies

- 6.77 This sector includes waste management and incorporates facilities for waste transfer, recycling and treatment. This sector accounted for around 160 jobs in High Peak Borough in 2010, up from 102 in 2008. In Staffordshire Moorlands, the sector accounted for 201 jobs in 2010, up from 150 jobs in 2008.<sup>38</sup> However, the Oxford Economics forecasts suggest that both authorities will experience a slight contraction in FTE jobs in this sector in the period to 2031.

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<sup>38</sup> Business Register and Employment Survey 2010

<sup>39</sup> Derbyshire County Council, Derby City Council and the Peak District National Park Local Aggregates Assessment Draft (March 2013)

- 6.78 For waste-related activities, key considerations with respect to location decisions include proximity to large population and manufacturing centres. Information provided by Derbyshire County Council in relation to the emerging Derby and Derbyshire Waste Core Strategy Development Plan Document indicates that there is a need to manage a range of waste streams across the County. However, whilst the broad level of need is identified, no site-specific allocations are identified and the County Council has been unable to confirm any specific sites at this stage. There may, therefore, be demand arising for land from waste activities but it is difficult to quantify at this stage and proposals will have to be dealt with on a case-by-case basis through the development management process. In overall terms, it appears that a low rate of jobs growth is likely with minimal land requirement implications.
- 6.79 Furthermore, a number of nearby authorities, including Rotherham are actively targeting the sector through the Dearne Valley Eco Vision and have much more land and more specific advantages or facilities.
- 6.80 The adopted Staffordshire and Stoke-on-Trent Joint Waste Core Strategy 2010-2026 does not identify specific sites for development. It states [§1.9] that the treatment capacity shortfall is not sufficient to warrant the identification of strategic sites and evidence concludes that there is no requirement to identify sites for non-strategic waste facilities. As such the document identifies broad locations for new and enhanced waste management facilities. In Staffordshire Moorlands, Leek, Biddulph and Cheadle are identified as broad locations.
- 6.81 On balance, the environmental technologies sector appears to have limited potential for future growth in High Peak and Staffordshire Moorlands and the demand for employment land for these uses does not therefore appear to be significant. However, both local authorities should continue to monitor this situation to assess the potential impact of operations upon existing and potential employment sites.

## **Car Showrooms**

- 6.82 Car dealerships have also suffered significantly from the economic downturn. The car scrappage scheme in 2009 helped to ameliorate the worst of the impacts, with new car dealerships benefitting significantly from the financial incentives provided by the UK government encouraging drivers to trade in their nine-year old plus car for a new vehicle. The incentive provided little benefit to second-hand car dealerships and very challenging trading conditions remain. However, rising GDP and growing car registrations are signalling increasing consumer confidence and the UK new car market achieved 24 consecutive months of growth in the period to February 2014, increasing 17.4% over this period.<sup>40</sup>
- 6.83 In terms of future prospects and land requirements, whilst the likes of Arnold Clark are continuing their expansion plans in the north of England, growth for

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<sup>40</sup> Society of Motor Manufacturers and Traders - <http://www.smmmt.co.uk/2014/03/consumer-confidence-drives-new-car-market-registrations-hit-two-year-growth-milestone/>

the sector as a whole remains highly volatile. Recent years have seen a trend away from numerous small dealerships scattered across industrial estates and road junctions towards a consolidation of fewer, larger, dealerships in highly visible and accessible locations. The huge car supermarkets off key Motorway junctions in the Midlands are the clearest example of this, although the agglomeration of main dealers on the frontage of modern industrial estates, and particularly prestige business parks on the edge of urban areas, are another example of the consolidating nature of the sector.

- 6.84 Whilst the over-concentration of car showrooms on individual business parks can result in the dilution of the B-class employment land offer and should be avoided, their presence is generally seen as a positive example of diversification and market confidence (particularly where this involves main dealers/prestige marques). This would also apply to certain hotel chains, health/leisure operators and also retail.
- 6.85 Future growth prospects for High Peak and Staffordshire Moorlands appear relatively limited given the current array of dealerships already in place, such as those in Buxton and Chapel-en-le-Frith in High Peak, and in Leek, Cheadle and Biddulph in Staffordshire Moorlands.

## **Summary and Conclusions**

- 6.86 Growth of selected Non B-Class uses is likely to make an important contribution to employment growth in High Peak and Staffordshire Moorlands by 2031. The growth needs of several Non B sectors have been considered where job growth is forecast and there is some limited potential for this to create pressures on employment land.
- 6.87 For retail, accommodation and leisure uses, the majority of the additional floorspace requirement identified is likely to be met within existing town centres or through the conversion of rural properties. Most of the future growth needs of the amusement, healthcare and education sectors are likely to be met within existing sites in such use and the scale for healthcare and education will be limited by the continued constraints on public sector spending. For residential care homes most future needs are likely to be met through expansion of existing facilities or re-use of other institutional premises rather than using land within employment areas in High Peak and Staffordshire Moorlands where the environment may not always be appropriate.
- 6.88 Both local authorities should continue to monitor this situation to assess the potential impact of the respective Minerals and Waste Plans upon existing and potential employment sites in High Peak and Staffordshire Moorlands.
- 6.89 Table 6.3 and Table 6.4 summarise the particular strengths, weaknesses, opportunities and threats in High Peak and Staffordshire Moorlands. Many of these issues will have a significant bearing on the future employment land requirement for each of the two authority areas.

Table 6.3 High Peak SWOT Analysis

High Peak Strengths	High Peak Weaknesses
<ul style="list-style-type: none"> <li>• High business density and entrepreneurialism with a demonstrable and successful record of business start-ups and strong business survival rates.</li> <li>• A high value manufacturing base which employs a higher proportion of people than the national average and can drive economic growth through innovation and export earnings.</li> <li>• The Borough contains nationally significant businesses including Swizzles Matlow and Buxton Mineral Water (Nestle).</li> <li>• A large, highly skilled workforce with High Peak residents exceeding regional and national averages for the percentage of the population educated to NVQ Level 4 and above.</li> <li>• A high value landscape which draws individuals and high value businesses into the area and provides a high quality of life and strong sense of place.</li> <li>• Unemployment levels are low in relation to the regional and national average.</li> <li>• A strong visitor economy and tourism industry which offers major economic benefits to the area. It is a gateway to the National Park and due to the proximity of several national trails attracts many visitors.</li> </ul>	<ul style="list-style-type: none"> <li>• Much of the existing supply of employment land is not fit to meet the needs of modern businesses or the needs of the potential growth sectors in the area; creative industries, food and drink and tourism.</li> <li>• The office market is limited and existing town centre stock is small scale and fails to meet modern needs.</li> <li>• Poor vehicular access to existing employment sites which may deter some businesses.</li> <li>• There is a high level of net out commuting to work outside of the Borough to surrounding major cities.</li> <li>• Over-reliance on the advanced manufacturing sector and public administration jobs.</li> <li>• Employment in traditional manufacturing jobs has witnessed a significant, and ongoing, loss of jobs.</li> <li>• Poor transport links outside of the larger towns.</li> <li>• Traffic congestion is a significant issue within the market towns and this has the potential to restrict the level of growth.</li> </ul>
High Peak Opportunities	High Peak Threats
<ul style="list-style-type: none"> <li>• There are a number of potential sources for growth and investment including The Regional Growth Fund, The Global Derbyshire Business Support Programme, The Growing Places Fund and Leader funding.</li> <li>• Four Wards in High Peak have been designated as Assisted Area Wards (Dinting, Hadfield North, Hadfield South, and Howard Town &amp; Padfield). This could result in some of the key sites in these wards becoming very attractive for relocations/expansions especially of large firms (over 500 employees) who are unable to access any other source of government funding (outside of these areas) due to state aid rules.</li> <li>• Opportunity to capture further value from the landscape.</li> <li>• Potential to improve existing public transport links such as the frequency and speed of services on the Buxton line which would be of benefit to the area by encouraging greater use of rail by local commuters travelling to and from Manchester and visitors coming into High Peak.</li> <li>• Potential to capitalise on the University of Derby site at Buxton and Buxton College as an educational facility.</li> <li>• Existing pool of skilled labour within the advanced manufacturing sector.</li> </ul>	<ul style="list-style-type: none"> <li>• Although the population of the High Peak is set to grow, the size of the working age population is forecast to decrease and this could exacerbate future recruitment problems.</li> <li>• The property market is relatively local. Values and demand for employment space in the Borough is generally low, impacting on viability and deliverability of schemes.</li> <li>• Wider regional priorities may limit the amount of funding directed to the Borough.</li> <li>• Fragile economic recovery and the decline of traditional manufacturing employment.</li> <li>• Competition for inward investment from neighbouring economic centres (Sheffield and Manchester)</li> <li>• The Borough has industrial sites which are likely to require public sector subsidy before they become viable for redevelopment</li> <li>• Further reduction in public spending could undermine growth and regeneration initiatives</li> </ul>

Table 6.4 Staffordshire Moorlands SWOT Analysis

Staffordshire Moorlands Strengths	Staffordshire Moorlands Weaknesses
<ul style="list-style-type: none"> <li>• Strong business survival rates.</li> <li>• A high value manufacturing base which employs a higher proportion of people than the national average and can drive economic growth through innovation and export earnings.</li> <li>• The District contains nationally significant businesses including Britannia Building Society, JCB and Alton Towers.</li> <li>• A high value landscape which provides a high quality of life and strong sense of place.</li> <li>• There is high employment with unemployment rates below the national and regional average.</li> <li>• A strong visitor economy and tourism industry which offers major economic benefits to the area.</li> </ul>	<ul style="list-style-type: none"> <li>• Employment sites are almost at full capacity. There is an identified lack of good quality modern premises and smaller sized units available for immediate take up and a significant under-representation of high quality office locations.</li> <li>• The District has a workforce characterised by low and medium skill levels and lower graduate level workers. Potential employees have the necessary qualifications but not the skills that employers need.</li> <li>• The local economy suffers from relatively low levels of productivity and new firm creation and a fall in the growth of manufacturing sector has not been fully compensated for by a rise in the services and distribution sectors.</li> <li>• Too much of the District's economy is based in relatively low productivity activities.</li> <li>• The District provides low pay to a large proportion of its workforce when compared to the national and regional average and struggles to encourage the growth of new businesses and to attract new firms.</li> <li>• The business structure of Staffordshire Moorlands is dominated by micro and small businesses of between 1 and 10 employees.</li> <li>• There is a high degree of out commuting to Stoke which undermines the local economy.</li> <li>• There are problems of poor public transport connectivity between towns and with the national road network which limits movement across the District and places a heavy burden on the local road network.</li> <li>• There are pockets of deprivation in Biddulph East, a former coal board housing estate that suffers from a range of socio-economic and environmental deprivation problems and to a lesser extent within Leek North and Cheadle North East areas.</li> </ul>
Staffordshire Moorlands Opportunities	Staffordshire Moorlands Threats
<ul style="list-style-type: none"> <li>• There are a number of potential sources for growth and investment including The Regional Growth Fund, The Business Enterprise Fund and Leader funding.</li> <li>• Four Wards in Staffordshire Moorlands have been designated as Assisted Area Wards (Churnet, Checkley, Forsbrook and Cheadle West). This could result in some of the key sites in these wards becoming very attractive for relocations/expansions especially of large firms (over 500 employees) who are unable to access any other source of government funding (outside of these areas) due to state aid rules.</li> <li>• The District's workforce is tending towards growth amongst managers and senior officials and increases in the professional class. There is the opportunity to capitalise on this by attracting the appropriate businesses.</li> <li>• Opportunity to capitalise on the growth of the 'experience economy' – tourism, leisure and retail – in particular developing the District's tourism role.</li> </ul>	<ul style="list-style-type: none"> <li>• Most of Staffordshire Moorlands is unlikely to be a target for significant large-scale inward investment due to its poor transport links and the absence of major centres of further education</li> <li>• Wider regional priorities may limit the amount of funding directed to the District.</li> <li>• Fragile economic recovery and the decline of traditional manufacturing employment.</li> <li>• Competition for inward investment from neighbouring economic centres (Stoke-on-Trent)</li> <li>• The loss of existing employment sites due to closures, restructuring and pressure for redevelopment for other uses, especially housing.</li> <li>• To support economic growth there is a continuing need to ensure the provision of relevant employment skills, training and support to retain and develop the local workforce.</li> </ul>

## 7.0 Future Employment Space Requirements

### Introduction

7.1 We have assessed B-class employment space requirements in High Peak and Staffordshire Moorlands for the period 2011 to 2031 using several different modelling approaches, namely:

- 1 Forecasts of employment growth in the main B class sectors (labour demand) derived from the latest available economic forecasts;
- 2 Consideration of past trends in completions of employment space based on monitoring data supplied by the Councils, and how these might change in future; and,
- 3 Estimating future growth of local labour supply related to the suggested top end housing target for High Peak and Staffordshire Moorlands in the emerging Local Plan housing evidence base (up to 470 dwellings per annum [dpa] for High Peak and 440 dpa for Staffordshire Moorlands)<sup>41</sup> and also the latest ONS 2011-based (interim) Sub-National Population Projections, and the amount of jobs and employment space that this could support, based on NLP PopGroup demographic model runs.

7.2 All of these approaches have some limitations and careful thought needs to be given as to how appropriate each is to circumstances in High Peak and Staffordshire Moorlands. Other factors that may influence future economic conditions in High Peak and Staffordshire Moorlands have also been considered including:

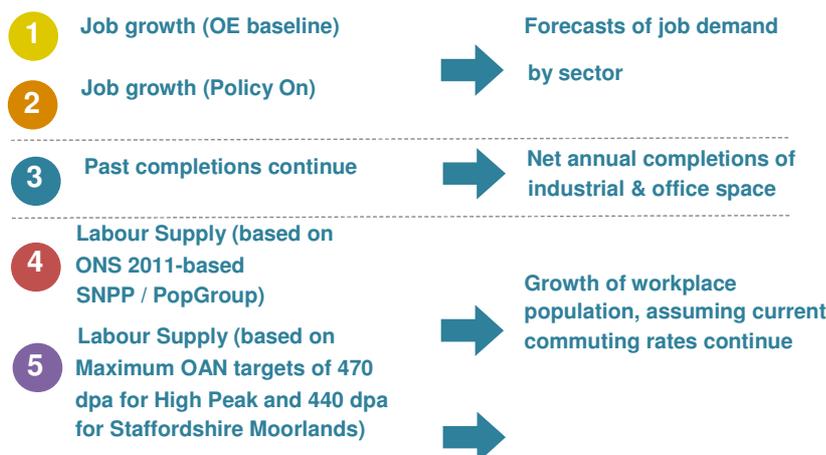
- 1 The pace of future national economic growth following severe recession;
- 2 The rate of formation of new businesses in High Peak and Staffordshire Moorlands;
- 3 The land needs of potential growth sectors in High Peak and Staffordshire Moorlands;
- 4 The need to replace employment space lost to other uses;
- 5 Wider trends that could reduce amounts of employment space needed per worker, such as denser occupation standards and hot-desking; and,
- 6 Competition for new investment from other parts of the Midlands, Sheffield and Greater Manchester.

7.3 Accordingly, this has framed the consideration of five scenarios to help understand the implications of different assumptions on future demand outlined in Figure 7.1.

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<sup>41</sup> It should be noted that the housing figures quoted above are indicative, based on the conclusions of an interim OAN report produced by NLP in February 2014. The figure may change as the plan progresses and in light of more up-to-date evidence.

Figure 7.1 Range of Growth Scenarios/Approaches



7.4 It should be noted that the Oxford Economics forecasts used in the production of this report cover those parts of the Peak District National Park which fall within High Peak and Staffordshire Moorlands local authority areas. The employment land take-up and loss information covers the areas of each local authority outside of the National Park. However, it is not considered that this anomaly has any discernible impact upon the findings of the OAN for employment because the majority of industrial centres in High Peak and Staffordshire Moorlands are located outwith the National Park. In addition, the vast majority of jobs in the National Park are related to non-B class uses, such as tourism, mining and quarrying, and leisure, which do not have a direct impact upon the requirement and supply of B class employment land.

## Growth Scenarios

### Econometric Job Forecasting

#### Scenario 1) Oxford Economics High Peak and Staffordshire Moorlands Economic Forecasts (August 2013)

7.5 The wider Peak District partners (Derbyshire Dales and Staffordshire Moorlands District Councils, High Peak Borough Council and the Peak District National Park Authority) commissioned Ekosgen to undertake an independent economic assessment of the wider Peak District area. Oxford Economics [OE] economic forecasts which were commissioned by Derbyshire County Council for all Derbyshire Authorities are being used to underpin this work. The OE forecasts project an FTE job growth in High Peak of 114 (net) and an FTE job growth in Staffordshire Moorlands of 3,009 (net) for the period 2011 to 2031 (the latter projections were commissioned by SMDC separately from the Peak District economic assessment work).

7.6 It should be emphasised that such forecasts tend to be most reliable at regional and national scales and consequently less so at the local economy level. However, they are widely recognised as a valuable input and can

indicate the broad scale and direction of economic growth in different sectors thereby helping to assess future employment space requirements.

- 7.7 Oxford Economics' sub-regional economic model takes account of the existing economic structure of each Local Authority (broken down by economic sector) and the historical relationship between the regional performance of an industry and the performance observed at the Local Authority level. The forecasts of job growth by sector used here reflect recent trends and economic growth projections at national and regional level, and how economic sectors in High Peak Borough and Staffordshire Moorlands District have fared relative to the East Midlands/UK growth in the past. These forecasts also reflect the current post-recession economic climate. They are not constrained by either labour supply or land availability.
- 7.8 Before presenting the job growth outcomes from the scenarios it is worth highlighting, in broad terms, limitations in how these were generated:
- 1 They are predominantly trend-based estimates projecting historic growth patterns into the future;
  - 2 The forecasts do not take into account policy influences and unforeseen impacts of individual business decisions; and,
  - 3 It is important to recognise that there is not always a clear cut relationship between employment change and employment land needs. Additional employment space can be needed even if employment itself is falling, for example if a manufacturing firm requires more space to enable greater automation and achieve job reductions through productivity gains.
- 7.9 For High Peak, the OE Baseline 2013 FTE employment projections (Appendix 3) suggest that, overall, there is likely to be a moderate increase in employment in the 96 defined sectors for the period 2011-2031 of just 114 (0.4%). This largely neutral level of growth masks substantive decline in a number of existing sectors, notably manufacturing (-1,097), but also Education (-212 or -6%) and Public Administration and Defence (-134 or -11%). However, these losses are outweighed by increases in sectors including Retail (+207, or +8%); Land, Transport (+190 or +18%), Computer Programming (+146 or +34%), and Architectural and Engineering Services (+199 or +29%).
- 7.10 Staffordshire Moorlands is expected to experience significantly stronger economic growth over the same time period, equating to a growth of 3,009 jobs (+10%) between 2011 and 2031. As set out in Appendix 3, strong performances are expected in Building Construction (+204 or +27%), Specialised Construction Activities (+455 or +29%), Services to buildings and landscape (+223 or +22%), Human Health (+172 or +12%), Residential Care (+175 or +21%) and most strikingly, Sports activities and amusement (+1,342, or +45%).
- 7.11 As illustrated in Table 7.1, GVA growth in High Peak is expected to increase by almost 50% over the period 2011 to 2031, and by 55% in Staffordshire Moorlands. These figures are below the East Midlands (+61%) and UK

(+63%) rates of growth over the same time period.

Table 7.1 High Peak and Staffordshire Moorlands Oxford Economics Indicators Summary

	2001	2006	2011	2021	2026	2031
<b>High Peak</b>						
Workforce Jobs (thousands)	38.75	36.13	37.64	38.42	38.15	37.92
Total FTE Employment (thousands)	31.82	30.33	30.98	31.78	31.44	31.09
High Peak GVA (£m 2009)	1,218	1,330	1,264	1,533	1,717	1,889
<i>East Midlands GVA (£m 2009)</i>	<i>68,222</i>	<i>79,656</i>	<i>79,467</i>	<i>99,836</i>	<i>113,961</i>	<i>127,772</i>
<b>Staffs Moorlands</b>						
Workforce Jobs (thousands)	34.10	35.88	35.68	37.63	38.03	38.45
Total FTE Employment (thousands)	28.88	30.83	30.35	32.47	32.96	33.36
Staffs Moorlands GVA (£m 2009)	1,049	1,134	1,174	1,450	1,640	1,822
<i>UK GVA (£m 2009)</i>	<i>1,079,985</i>	<i>1,252,703</i>	<i>1,277,867</i>	<i>1,628,231</i>	<i>1,858,656</i>	<i>2,083,392</i>

Source: Oxford Economics

- 7.12 The overall FTE employment change in High Peak and Staffordshire Moorlands resulting from these forecasts is shown in Table 7.2 along with expected growth in the main B-class sectors. This includes an allowance for jobs in other non B-class sectors that typically utilise industrial or office space, such as some construction uses, vehicle repair, courier services, road transport and cargo handling and some public administration activities. This is because a certain proportion of these jobs will occupy premises falling within the B-class sectors. The proportions we have applied are set out in Appendix 2.
- 7.13 These figures indicate a slight increase in the level of net job gains (47 jobs) in the B-use classes in High Peak over the period to 2031, with B1a/b sectors seeing a cumulative increase of 856 jobs and B8 seeing a cumulative increase of +223, moderated by a significant decline in B1c/B2 manufacturing (-1,032). This is within the context of overall job growth of just 114 jobs predicted for High Peak. The projected increase in B8 jobs would require lower density development and this would result in a requirement for additional employment land.
- 7.14 For Staffordshire Moorlands the figures indicate a larger increase in the level of net job gains (+667 jobs) in the B-use classes over the period to 2031, with B1a/b and B8 sectors seeing a cumulative increase of 898 jobs, moderated by a decline in B1c/B2 manufacturing (-231). This is within the context of overall job growth of 3,009 jobs predicted for the District, of which 2,342 would be in the Non-B Class sectors.

Table 7.2 Forecast FTE Employment Change in High Peak and Staffordshire Moorlands 2011-2031

	High Peak Workforce FTE Jobs		High Peak Change	Staffs Moorlands Workforce FTE Jobs		Staffs Moorlands Change
	2011	2031	2011-31	2011	2031	2011-31
Offices (B1a/b)*	3,593	4,449	+856	4,613	5,303	+690
Manufacturing (B1c/B2)**	7,821	6,789	-1,032	6,327	6,096	-231
Distribution (B8)***	2,165	2,389	+223	1,467	1,675	+208
<b>Total B-class Jobs</b>	<b>13,580</b>	<b>13,627</b>	<b>+47</b>	<b>12,408</b>	<b>13,075</b>	<b>+667</b>
Other Non B-Class Jobs	17,401	17,468	+67	17,947	20,288	+2,342
<b>Jobs in All Sectors</b>	<b>30,981</b>	<b>31,095</b>	<b>+114</b>	<b>30,354</b>	<b>33,364</b>	<b>+3,009</b>

Source: Oxford Economics/NLP Analysis 2013

\* includes a proportion of public sector employment and administration & support services

\*\* includes vehicle repair and some construction activities

\*\*\* includes elements of transport & communications sectors

7.15 In order to translate the resultant job forecasts into estimates of potential employment space, it was necessary to allocate the level of employment change forecast for office, industrial, and wholesale/distribution uses as follows (see Appendix 2 for a more detailed breakdown):

- 1 The office floorspace requirement is related to job growth/decline in the financial and business service sectors<sup>42</sup>;
- 2 The industrial floorspace requirement is related to job growth/decline in the manufacturing sectors<sup>43</sup>; and,
- 3 The wholesale/distribution floorspace requirement is related to job growth/decline in the Industrial sectors of wholesale and land transport, storage and post<sup>44</sup>.

7.16 In order to translate the resulting figures into employment land projections, employment densities (as recommended in the HCA Employment Densities Guide<sup>45</sup>, adjusted to translate jobs into FTEs) and plot ratios by use class were then applied to the FTE job change figures to translate these into employment land projections.

7.17 It was assumed that:

- 1 One B1a/b general office FTE job requires 14 sq. m. of employment floorspace [Gross External Area, or GEA];

<sup>42</sup> i.e. BRES Sectors 58-75, Office administration and support and 10% of Public Administration and Defence.

<sup>43</sup> Manufacturing sectors, plus car repair, some construction and waste and remediation activities.

<sup>44</sup> Wholesaling less car repairs retail car sales, plus post/couriers and land transport.

<sup>45</sup> HCA OffPAT (2010), Employment Densities Guide, 2<sup>nd</sup> Edition

- 2 One B1c light industrial FTE job requires 50 sq. m. of employment floorspace [GEA];
- 3 One B2 industrial workforce job requires 37 sq. m. of employment floorspace [GEA];
- 4 A combined B1c/B2 factor of one FTE job per 43.5 sq. m. was obtained by taking an average of the aforementioned B1c/B2 GEA equivalents;
- 5 One warehousing/distribution FTE job requires 70 sq. m. of employment space [GEA].<sup>46</sup>

7.18 This guidance takes account of recent trends in terms of the changing use of employment space, the main change being the more efficient utilisation of office space due to increased flexible working and hot-desking. This has resulted in a decrease in the amount of floorspace per office worker compared to previous guidance.

7.19 An adjustment has been made to reflect the fact that vacancy rates in High Peak are currently around 4.9% for commercial floorspace and around 1.5% for industrial/warehousing floorspace. The same adjustment has been made to reflect the fact that vacancy rates in Staffordshire Moorlands are currently around 2.6% for commercial floorspace and 1.2% for industrial/warehousing floorspace<sup>47</sup>.

7.20 On the basis that a figure of 10% better reflects 'normal' market conditions, the model has assumed that there is a need for higher levels of office and industrial floorspace to allow for an increase up to 10% by 2031.

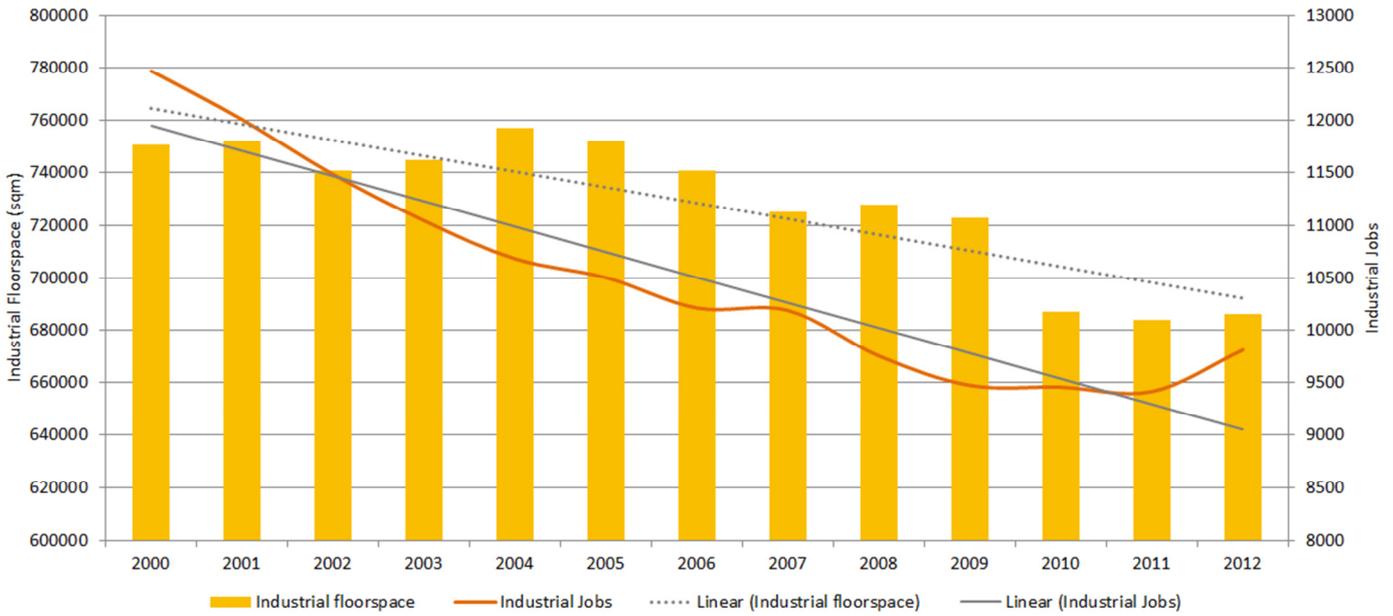
7.21 The relationship between job growth and floorspace is, however, not straightforward. As can be seen in Figure 7.2, whilst the number of industrial jobs in High Peak declined between 2000 and 2012 (by -21%), the amount of industrial floorspace in occupation declined by -9%. Similarly, office floorspace has grown at a slower rate than jobs: 72%, compared to 109%.

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<sup>46</sup> Given that the majority of B8 warehousing has been low bay warehousing in recent years, the 'small' warehousing jobs ratio of 1 FTE job per 70 sqm has been used from the HCA guidance as agreed with Council Officers.

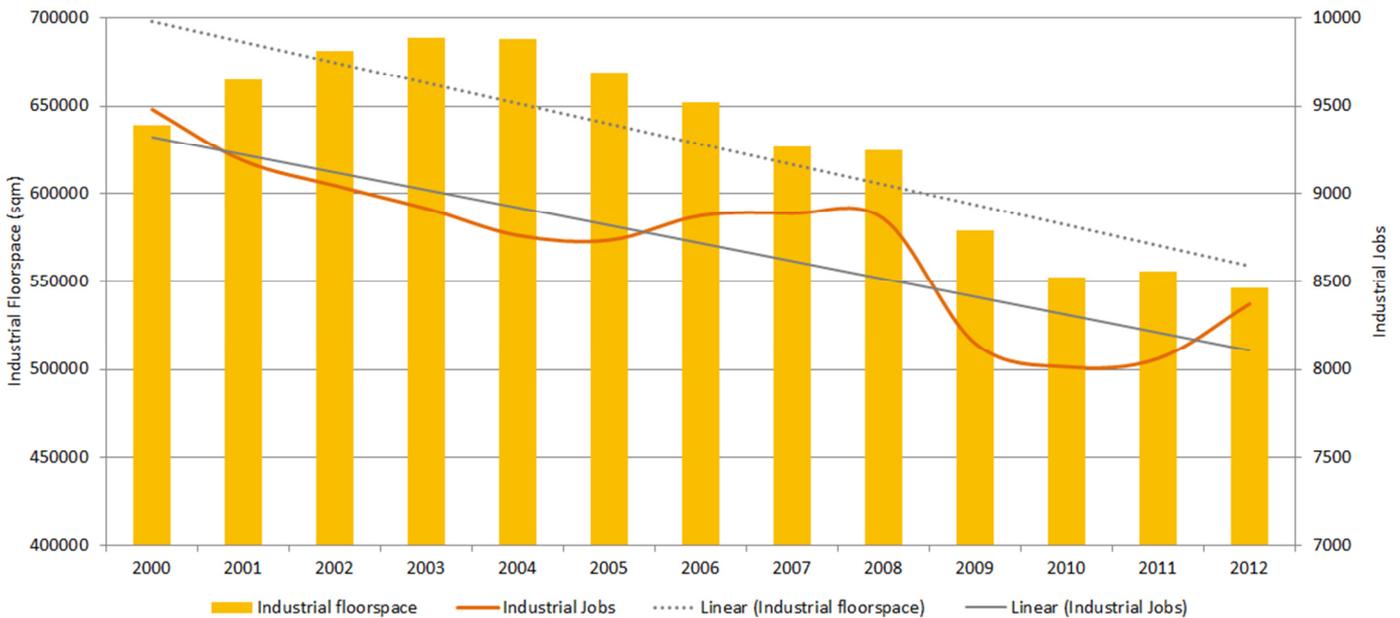
<sup>47</sup> On the basis of an assessment of commercial property websites in January 2014, set against the Business Floorspace (Experimental Statistics) published in May 2012 by the VOA. The realism of these figures has been tested with local agents, who broadly agreed with the figure for office and industrial uses.

Figure 7.2 Comparison of Historic Industrial FTE Jobs/Floorspace in High Peak



Source: NLP Analysis/Oxford Economics/Experimental Business Floorspace Statistics 2000-2012 (VOA)  
 Note: 'linear' refers to a line of best fit of average change

Figure 7.3 Comparison of Historic Industrial FTE Jobs/Floorspace in Staffordshire Moorlands



Source: NLP Analysis/Oxford Economics/Experimental Business Floorspace Statistics 2000-2012 (VOA)  
 Note: 'linear' refers to a line of best fit of average change

7.22

As can be seen in Figure 7.3, whilst the number of industrial FTE jobs in Staffordshire Moorlands declined between 2000 and 2012 (by -12%), the amount of industrial floorspace in occupation actually declined by a greater amount (-15%). However, this is due to an upsurge in jobs in the last couple of years of this period which has skewed the figures and the general trend over this period has been jobs falling at a faster rate than floorspace. Furthermore, office floorspace has grown at a slower rate than FTE jobs: 111%, compared

to 151%.

7.23 As such, where a reduction in industrial jobs is forecast, the associated negative floorspace was halved, to reflect the fact that not all of this employment space is likely to be lost.

7.24 The resultant floorspace estimates are provided in Table 7.3. They indicate a net floorspace requirement for B1a/b, B1c/B2 and B8 uses in High Peak of 23,373 sq. m., which is driven by B8 growth, and in Staffordshire Moorlands of 35,439 sq. m. over the 20-year assessment period. Future B2 Manufacturing land is estimated to be negative for both areas.

Table 7.3 OE FTE Job Growth based Net Employment Floorspace Requirements 2011-2031

	High Peak Floorspace (m <sup>2</sup> )	Staffordshire Moorlands Floorspace (m <sup>2</sup> )
Offices (B1a/b)	+15,744	+15,407
Manufacturing (B1c/B2)	-22,452	-5,016
Distribution (B8)	+30,081	+25,049
<b>Total</b>	<b>+23,373</b>	<b>+35,439</b>

Source: NLP Analysis/Oxford Economics

## Scenario 2) Job Growth: Regeneration / Policy On

7.25 An alternative job-based estimate of future needs has been compiled which was termed the Regeneration, or 'Policy-On', scenario. Following discussions with High Peak and Staffordshire Moorlands Planning and Economic Regeneration Officers, and making reference to the draft Ekosgen Report '*Growing the Rural Economy Evidencing the Case for the Peak District*' (January 2014), individual detailed classifications used in the OE FTE job projections were reassessed to test whether there were any concrete policy justifications for modifying any of the categories. It is recognised that limited conclusions can be drawn from the results of such an approach, as the OE forecasts for High Peak and Staffordshire Moorlands are complex and internally consistent with those of other authorities in the regions.

7.26 With this caveat in mind, Officers confirmed that work underpinning the Ekosgen report identified several core growth sectors that should be promoted and supported in the years ahead in High Peak and Staffordshire Moorlands:

- 1 Knowledge Economy;
- 2 Manufacturing;
- 3 Cultural and Digital Industries;
- 4 Visitor Economy; and,
- 5 Ecosystem Services.

7.27 As there is considerable overlap with some of the sectors and the standard industrial classifications used by OE, it was assumed that the five broad categories would broadly align as set out in Table 7.4.

Table 7.4 Comparison between High Peak and Staffordshire Moorlands Target Growth Sectors and SIC2 sectors

High Peak and Staffordshire Moorlands Target Growth Sectors	Approximate Comparable Standard Industrial Classifications
Knowledge Economy	Financial service activities Insurance, reinsurance and pension funds Activities auxiliary to financial services Real estate activities Legal and accounting activities Activities of head offices Architectural and engineering activities Scientific research and development Advertising and market research Other professional, scientific Veterinary activities Public administration and defence Education Human health activities Residential care activities Social work activities
Manufacturing	Manufacture of: Food products; beverages; tobacco products; textiles; wearing apparel; leather and related; wood and of products; paper and paper products; Printing and reproduction of recorded media; coke and refined petrol; chemicals and chemicals; basic pharmaceutical products; rubber and plastic products; other non-metallic minerals; basic metals; fabricated metal products; computer, electronic; electrical equipment; machinery and equipment; motor vehicles, trailers; other transport equipment; furniture; and Other manufacturing
Cultural and Digital Industries	Publishing activities Motion picture, video and television Programming and broadcasting activities Telecommunications Computer programming, consultancy Information service activities
Visitor Economy	Accommodation Food and beverage service activities Travel agency, tour operator and other Creative, arts and entertainment activities Libraries, archives, museums and other Sports activities and amusement
Ecosystem Services	N/A <sup>48</sup>

Source: NLP Analysis

7.28 Officers considered that growth in these sectors could be anticipated at rates close to the UK growth rates identified in the Scenario 1 OE job growth projections. As a consequence, if this was higher than High Peak Borough's or Staffordshire Moorlands District's forecast FTE growth between 2011 and 2031, then the UK rate was applied to the SIC sectors identified in Table 7.4.

<sup>48</sup> Ecosystem services include all the essential natural services provided by the land including: food, timber and other crops, clean water, biodiversity and carbon storage, and landscapes for enjoyment and leisure which are not easily captured by SIC codes and therefore do not show up in economic forecasts.

7.29 The adjustments to the OE forecasts outlined above increase the overall FTE job growth in High Peak by around 750. However, many of these job growth adjustments are in sectors not directly related to B-class employment. Nevertheless, the adjustments increase B-class job growth, to +288 from +47 previously. This is predominantly due to the growth in B1a/b office; B2 industrial-related jobs are still projected to decline despite the higher growth rates, used as the Borough's downward growth trajectory for many of the B2 sectors is mirrored at a regional and national level.

Table 7.5 Policy-On FTE Job Change in High Peak and Staffordshire Moorlands 2011-2031

	High Peak Workforce Jobs		High Peak Change	Staffs Moorlands Workforce Jobs		Staffs Moorlands Change
	2011	2031	2011-31	2011	2031	2011-31
Offices (B1 a/b)	3,593	4,656	+1,063	4,613	5,733	+1,120
Manufacturing (B1c/B2)	7,821	6,823	-998	6,327	6,107	-221
Distribution (B8)	2,165	2,389	+223	1,467	1,675	+208
<b>Total B-class Jobs</b>	<b>13,580</b>	<b>13,868</b>	<b>+288</b>	<b>12,408</b>	<b>13,515</b>	<b>+1,107</b>
Other Non B-Class Jobs	17,401	17,979	+578	17,947	20,585	+2,638
<b>Jobs in All Sectors</b>	<b>30,981</b>	<b>31,847</b>	<b>+866</b>	<b>30,354</b>	<b>34,100</b>	<b>+3,746</b>

Source: Oxford Economics/NLP Analysis

7.30 The similar adjustments to the OE forecasts outlined in Table 7.5 increase the overall FTE job growth in Staffordshire Moorlands by around 24%, to +3,746 (736 higher than the OE baseline). Some of these job growth adjustments are in sectors directly related to B-class employment. The adjustments increase B-class job growth, to +1,107 from +667 previously, predominantly due to the growth in B1a/b office. As with High Peak, B2 industrial-related jobs are still projected to decline despite the higher growth rates used as the District's downward growth trajectory for many of the B2 sectors is mirrored at a regional and national level.

7.31 These employment forecasts were then converted to floorspace requirements in a similar manner to the OE baseline forecasts. The resulting forecasts are more optimistic in terms of office job growth and less pessimistic regarding industrial decline. These are set out in Table 7.6.

7.32 Overall, they forecast B-Class job growth in High Peak by 2031 and a comparable increase in floorspace of around 27,310 sq. m., most of which is required for B8 warehousing due to the lower density of jobs to floorspace in the storage and distribution sector.

Table 7.6 FTE Jobs based Net Employment Space Requirements in High Peak and Staffordshire Moorlands 2011-2031

B Class sector	High Peak Workforce Job Change 2011-31	High Peak Net Floorspace (sq. m.)	Staffs Moorlands Workforce Job Change 2011-31	Staffs Moorlands Net Floorspace (sq. m.)
Offices (B1a/b)	+1,063	+18,928	+1,120	+22,029
Industrial (B1c/B2)	-998	-21,702	-221	-4,798
Warehousing (B8)	+223	+30,081	+208	+25,049
<b>Total</b>	<b>+288</b>	<b>+27,308</b>	<b>+1,107</b>	<b>+42,280</b>

Source: NLP Analysis

- 7.33 The forecasts also predict B-Class job growth in Staffordshire Moorlands by 2031 and a comparable increase in floorspace of around 42,280 sq. m., the majority of which is required for B8 warehousing due to the generally low density of jobs to floorspace in the storage and distribution sector.
- 7.34 The forecast for both authorities could be considered to form a scenario that reflects economic recovery generally, but does not result in a significant halt in the decline of manufacturing jobs in either High Peak or Staffordshire Moorlands.

### Estimating the Land Requirement

- 7.35 The next step involves translating floorspace into land requirements for both office and industrial uses. This has been calculated by applying appropriate plot ratio assumptions to the floorspace estimates. It has been assumed that a gross area of 1ha is required to develop 4,000sqm of out-of-centre office, industrial or warehousing/distribution space (equal to a plot ratio of 40%). This plot ratio is taken from the former ODPM Guidance on ELRs<sup>49</sup> and reflects typical development densities for these uses.
- 7.36 For town centre office space, previous studies elsewhere in the country (see Arup/Donaldsons' Demand for Employment Land in Greater Manchester, 2006) use 200% as an appropriate plot ratio when calculating employment land requirements in City Centres. This latter figure necessarily assumes an office building of four stories in height, with 50% plot coverage. However, given that there are few high density office developments in either High Peak Borough or Staffordshire Moorlands District generally, a standard plot ratio of 40% is considered appropriate for the B-class uses.
- 7.37 The resulting net land requirements for the two Labour Demand scenarios are set out in Table 7.7.<sup>50</sup>

<sup>49</sup> ODPM (December 2004): Employment Land Reviews: Guidance Note

<sup>50</sup> To take an example, the 18,929 sqm B1a net requirement for High Peak identified under the Policy On job growth projection was increased to reflect the 40% plot ratio, and divided by 10,000 to translate square metres (floorspace) into 4.73 ha (land).

Table 7.7 High Peak and Staffordshire Moorlands Net Land Requirement by Demand-Led Scenarios (ha)

Scenario Use	High Peak Labour Demand		Staffs Moorlands Labour Demand	
	1. OE Baseline Job Growth	2. 'Policy-On' Job Growth	1. OE Baseline Job Growth	2. 'Policy-On' Job Growth
Offices (B1a/b)	3.94	4.73	3.85	5.51
Industrial (B1c/B2)	-5.61	-5.43	-1.25	-1.20
Warehousing (B8)	7.52	7.52	6.26	6.26
<b>All B Uses</b>	<b>5.84</b>	<b>6.83</b>	<b>8.86</b>	<b>10.57</b>

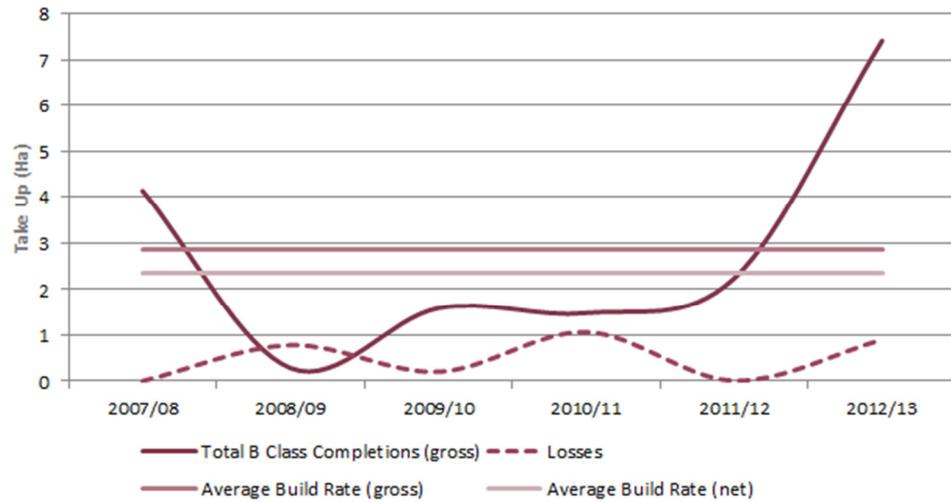
Source: NLP Analysis

### Scenario 3) Past Take Up Rates

- 7.38 Because they reflect market demand and actual development patterns on the ground, in some situations long term completion rates of employment floorspace can provide a reasonable basis for informing future land needs, particularly where land supply or demand has not been unduly constrained historically. However, the future demand picture may not reflect past trends and some adjustments may be needed.
- 7.39 Data on past completions and losses by B-class sector was provided by HPBC and SMDC. As Figure 7.4 illustrates, take-up of employment sites in High Peak over the period 2007 to 2013 totalled 17.15ha, or 2.86ha per annum, although this figure has been heavily influenced by the relocation of Nestlé Waters (who bottle and distribute Buxton Mineral Water) from a town centre site to a new purpose built bottling plant adjacent to Waterswallow Industrial Estate (7.42ha) in 2012/13. Their former 2.17ha site is expected to be largely lost to B-use classes development, with just 0.217 ha of this site likely to be retained for B1<sup>51</sup> over the plan period. In High Peak, almost 99% of the gross employment completions over the period 2007 to 2013 relate to industrial and warehousing space.
- 7.40 Losses totalled just 2.95ha over the same time period, at a rate of just under half a hectare annually.

<sup>51</sup>As Nestlé's old site has yet to be redeveloped, it has not been counted as a loss at this stage

Figure 7.4 Past Take Up of Employment Land in High Peak



Source: HPBC

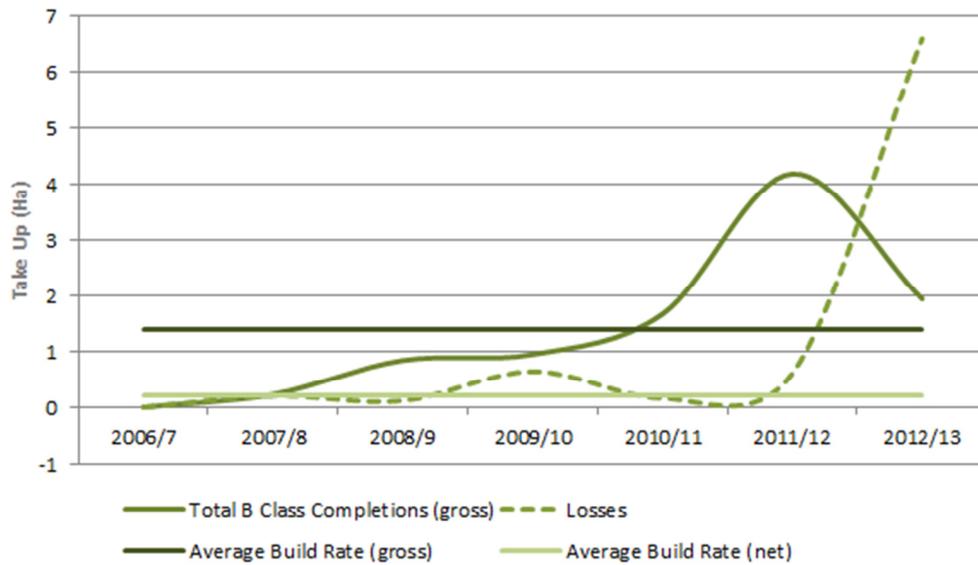
7.41 Take up data from Staffordshire Moorlands has also been provided for the slightly longer period 2006 to 2013. As Figure 7.5 illustrates, take-up of employment sites in Staffordshire Moorlands over the period 2006 to 2013 totalled 9.85ha, or 1.41ha per annum. Again, it should be noted that a significant portion of this figure is attributed to an unusually large amount of employment development in 2011/12 (4.2ha) including:

- 1 Around 1.87ha for a new Adams Food factory on undeveloped land at Sunnyhills Road, Leek (Application Ref: SMD/2010/0326).
- 2 1.09ha involved development of the new Pointons Energy Centre at Felthouse Lane, Cheddleton, Leek (Application Ref: SMD/2010/0411).
- 3 0.31ha was due to a new building expansion at the Esterchem premises, Boorklands Way, Leek (Application Ref: SMD/2008/0706).

7.42 Over 55% of development in the period 2006 to 2013 has comprised mixed B1, B2 and B8 uses. The remaining development has comprised 26% B1, 11.4% B2 and 7.1% B8.

7.43 The rate of losses in Staffordshire Moorlands is much higher, at 8.35ha over that period at a rate of 1.19ha per annum. Much of this is attributable to the redevelopment of the Churnet Works site at Macclesfield Road, Leek, for a Sainsbury's foodstore, B1/B2/B8 industrial units and other retail units in 2012/13. In total, of the 9.514 ha site, 3ha comprises open space, 1.45ha will be redeveloped for new employment units, and the remaining 5.06ha being redeveloped for A1 retail. As such, losses have averaged 1.19ha per annum.

Figure 7.5 Past Take Up of Employment Land in Staffordshire Moorlands



Source: SMDC

- 7.44 This scenario simply assumes that future development rates of employment space up to 2031 will be similar to those that have occurred in High Peak and Staffordshire Moorlands over previous years (the period for which take-up information is available for). However, it should be noted that the information provided by HPBC and SMDC covers a relatively short period which may not reflect longer term trends. In addition, as this period covered mainly recession, it may not provide an accurate basis for future planning and may be overly pessimistic.
- 7.45 The calculation of the net employment land figure set out below is also considered a pessimistic approach. However, it can be used in this instance due to the detailed information made available by the respective Councils regarding take up and losses of individual sites which allows a direct net comparison to be made.
- 7.46 This approach produces a gross requirement in High Peak for around 2.9ha per annum, or around 2.4ha per annum net. The latter figure is equal to 47.33ha over the 20-year plan period. The same approach produces a requirement in Staffordshire Moorlands for around 1.4ha per annum gross, 0.22ha net (due to the high level of losses), or 4.3ha over the 20-year plan period (Table 7.8). The High Peak figures in particular are in stark contrast with the much lower floorspace projections from the OE econometric projections (Table 7.3).

Table 7.8 Employment Land Requirement for High Peak and Staffordshire Moorlands based on Past Trends Continuing, 2011-31

Sector (Use Class)	Gross Average annual completion rate (ha)	Net Average annual completion rate (ha)	20 Year Net Requirement (ha)
High Peak General B-Class Space	2.86	2.37	47.33
Staffordshire Moorlands General B-Class Space	1.41	0.22	4.29

Source: Source: NLP analysis. Forecasts based on 6 (High Peak) and 7 (Staffs Moorlands)-years of average completion rates and losses 2007/08 and 2006/07 – 2012/13  
 Note; Figures in the Net Annual Completion Rate and 20 Year Net Requirement columns differ slightly due to decimal rounding

- 7.47 This approach assumes that past trends of development would continue unchanged, and may not fully reflect changes in the economy as it returns to growth. It may also underestimate future demand if the supply was constrained in the past, for example because of few sites becoming available or infrastructure/funding factors. Similarly, it may also underestimate future demand given that a number of wards in both High Peak and Staffordshire Moorlands have recently been designated as Assisted Areas. This could result in some of the key sites in these wards becoming very attractive for relocations/expansions especially of large firms (over 500 employees) who are unable to access any other source of government funding (outside of these areas) due to state aid rules.
- 7.48 On the other hand, future development rates for industrial space may be less than has been achieved historically as the sector rationalises and/or makes more efficient use of space.
- 7.49 Clearly the recession and prolonged economic downturn has had a significant effect on the viability of development schemes and in this regard High Peak and Staffordshire Moorlands are no different from the majority of other areas outside London and the Greater South East. Nevertheless, it is understood from speaking with the Economic Development Officer representing the authorities and commercial agents operating in the area that High Peak and Staffordshire Moorlands may have experienced relatively low levels of development relative to underlying demand. This is considered to be due, in part, to a lack of suitable, available and deliverable land particularly to accommodate small industrial units. It should also be borne in mind that there has been significant development in High Peak within the plan period 2011 to 2013 (past the 2011 base date) with the re-location of the Nestle Waters bottling plant.
- 7.50 Nevertheless, clearly the OE modelling work demonstrates limited (and indeed negative for B2) prospects for growth for the B-class employment sectors. In addition, as the employment markets change in the future and demand for B2 uses decline and demand for the less land hungry B1a uses increases, High Peak and Staffordshire Moorlands may be in a better position to compete and

meet the needs of this changing market. Furthermore, the practical physical constraints and relative inaccessibility of certain areas suggest that realistically, an upsurge in large developments in the authority areas is unlikely for the foreseeable future.

7.51 In addition, the following all suggest that the take up rates may not significantly increase in the future:

- 1 The move towards a more Business Services-orientated economy with significantly higher employment densities;
- 2 The future supply of land in both authorities is particularly constrained by topography and environmental constraints;
- 3 The restructuring of the traditional manufacturing economy with the potential for 'recycling' of older sites;
- 4 The Government's measures to facilitate the change of use from B1a office to residential without the need for planning permission;
- 5 The long term impacts of the economic downturn;
- 6 The significant reduction in public sector spending available to deliver difficult brownfield sites; and,
- 7 The need to consider alternative uses for existing B-class sites (i.e. for waste and recycling).

7.52 On balance, for High Peak, it is suggested that the 2.37ha net annual past take up rate figure represents a valid figure going forward over the remainder of the plan period, whilst for Staffordshire Moorlands, the equivalent net figure of 0.22ha (excluding any replacement of losses) is also considered appropriate.

### **Safety Margin**

7.53 To estimate the overall requirement of employment space that should be planned for in allocating sites, and to give some flexibility of provision, it is normal to add an allowance as a safety margin for factors such as delays in some sites coming forward for development. This margin is a contingency factor, providing a modest additional land buffer so that supply is not too tightly matched to estimated demand, and so that shortages of land do not arise if future demand turns out to be greater than the forecasts. Such flexibility is sensible given the uncertainties in the forecasting process and the scope for delays in developing employment space.<sup>52</sup>

7.54 The South East England Planning Partnership Board (SEEPB)<sup>53</sup> guidance on employment land assessments recommends an allowance that is equivalent to the average time for a site to gain planning permission and be developed, typically about two years. For High Peak and Staffordshire Moorlands, on the

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<sup>52</sup> This safety margin is separate from the consideration of vacancy rate which is dealt with in §7.20.

<sup>53</sup> SEEPB Economic and Employment Land Assessments Supplementary Guidance Consultation Document, 2009. Although the SEEPB no longer exists and the formal status of this guidance is not established, it is considered to be a source of good practice.

basis of the gross take up<sup>54</sup> analysis set out in the Past Take Up Scenario 3, the safety margins in Table 7.9 were added for B Class uses.

Table 7.9 High Peak and Staffordshire Moorlands Safety Margin Allowances

All B-Class Uses	Gross Average Annual Take-up (ha)	2-year Safety Margin Added 2011-2031
High Peak	2.86	5.72
Staffordshire Moorlands	1.41	2.81

Source: NLP Analysis

### Convert Net to Gross Floorspace Requirements

- 7.55 To convert the net requirement of employment space into a gross requirement (the amount of employment space or land to be allocated), an allowance is also typically made for some replacement of losses of existing employment space that may be developed for other, non B-Class uses in future. This is a widely accepted approach in planning for future employment land needs.
- 7.56 A judgement was therefore made on the suitability and degree of the allowance for future losses which it would be appropriate to apply here based on the consultants' understanding of supply-side deliverability factors in High Peak Borough and Staffordshire Moorlands District and current trends in the market. Not all losses need necessarily to be replaced as some will reflect restructuring in the local economy as less space may be needed in some sectors in future. However, some replacement is needed to refresh the quality of the stock and to avoid the employment land supply continually declining.
- 7.57 As set out above, from the data collated by HPBC for the period 2007/08 to 2012/13 it is estimated by Officers that around 2.95ha of employment land was lost to non-B class uses either through re-development or through a change of use (0.49ha per annum). This appears to be relatively low compared to the level of development for B-class uses in the recent past (2.86ha per annum) – effectively for every one hectare that has been lost in High Peak more than five times that was replaced.
- 7.58 From the data collated by SMDC for the period 2006/07 to 2012/13 it is estimated that around 8.35ha of employment land was lost to non-B class uses either through re-development or through a change of use (1.19ha per annum). This appears to be relatively high compared to the High Peak figures and to the level of development for B-class uses in the recent past (1.4ha per annum) – effectively for every one hectare that has been lost in Staffordshire Moorlands only 1.17ha was replaced.
- 7.59 There is an argument that not all such losses of employment land should necessarily be replaced or reflected in an increased gross land requirement. This would be on the basis that the stock of employment land in High Peak and

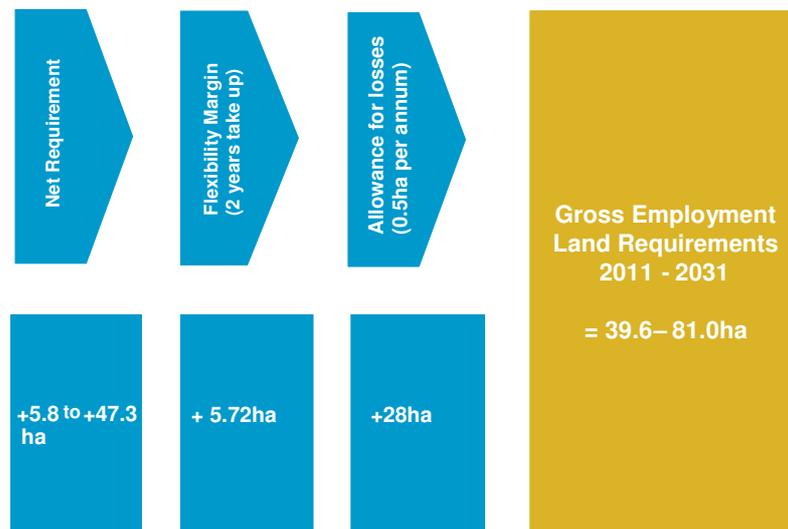
<sup>54</sup> The standard approach is to use gross take-up figures for this purpose.

Staffordshire Moorlands contains some older sites less likely to meet future needs and is of a scale that reflects past industrial patterns, rather than the amounts of land needed in future.

- 7.60 However, against this argument is the likelihood that other sites are also likely to be lost by 2031, and these will represent losses to the overall land portfolio, reducing choice within the market. HPBC and SMDC have provided details of anticipated future losses of allocated employment land and other employment sites to other uses such as residential development.
- 7.61 The data collated by HPBC as part of the Local Plan evidence base suggests that 39.4ha of employment land in High Peak may be lost over the period 2011 to 2031. This includes a mixture of allocated sites, Primary Employment Zones [PEZ] and Major Developed sites in the Green Belt and equates to a loss of approximately 1.97ha per annum over the 20 year period. However, much of this land will simply be re-allocated, rather than comprise the loss of a site in existing employment use. Of the 39.4ha anticipated to be lost, 11.29ha is undeveloped land. 28.11ha is developed or previously developed. In this regard losses on developed and previously developed sites equate to 1.41ha per annum. Whilst it is possible that not all of these identified developed and previously developed sites will be lost, it is likely that other windfall sites (which cannot be identified because their future use is unknown at present) will be lost over the plan period.
- 7.62 The data collated by SMDC for its SHLAA document suggests that around 30ha of employment land in Staffordshire Moorlands may be lost over the period 2011 to 2031. This includes the large site to be redeveloped for the mixed use regeneration scheme anchored by Sainsbury's at Leek, much of which has already been developed. It also includes a mixture of allocated sites and existing employment sites and equates to a loss of approximately 1.5ha per annum over the 20 year period.
- 7.63 It has also been suggested by commercial agents that some stock in the local authority areas is no longer fit for purpose and needs replenishing with better quality units better suited to meeting modern operator requirements. In this respect the consequences of changes to the Permitted Development regime need to be considered which will facilitate the change of use of office accommodation to residential uses.
- 7.64 Balancing these considerations, it is suggested that a replacement factor of **1.4ha per annum** for High Peak and **1.5ha per annum** for Staffordshire Moorlands provide a reasonable basis to go forward, although this should be monitored by the authorities over the next few years and adjusted as necessary to ensure that it is approximate to future losses.
- 7.65 Consequently, for High Peak by adding on an allowance for replacement of losses (1.4.ha per annum, or 28ha over 20 years) and factoring in two years of gross take up (5.72ha) to allow a margin for choice, this results in a gross total requirement of approximately 39.6ha – 81.0ha between 2011 and 2031.

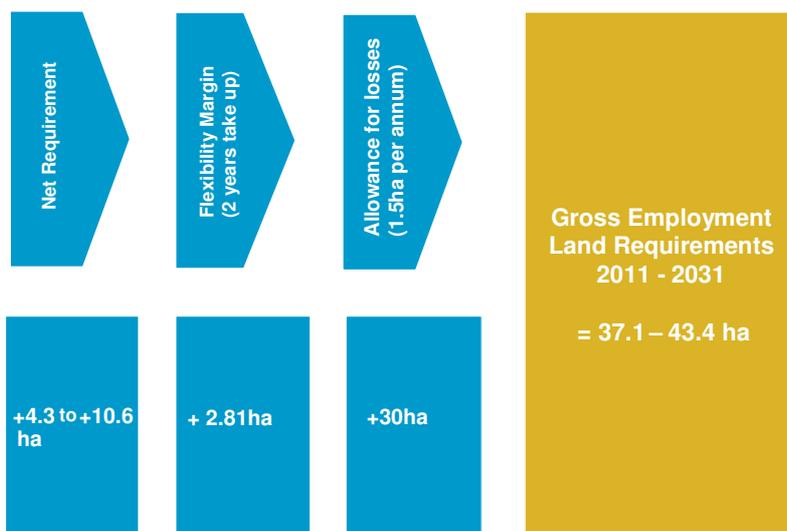
- 7.66 For Staffordshire Moorlands, by adding on an allowance for replacement of losses (1.5ha per annum, or 30ha over 20 years) and factoring in two years of gross take up (2.81ha) to allow a margin for choice, this results in a gross total requirement of approximately 37.1ha – 43.4ha between 2011 and 2031.
- 7.67 An alternative approach to calculating gross land requirements with a margin of choice is to apply a rate of ‘churn’ equivalent to 1% of the High Peak and Staffordshire Moorlands existing stock per annum (see other local employment land studies e.g. Lichfield District, Nuneaton and Bedworth). For High Peak, this could roughly equate to demand for around 1.80ha per annum (based upon 1% of 720,000 sq. m. of existing floorspace and multiplied by 40% plot ratio), a figure that is above the 1.4ha allowance for losses identified above which suggests the figure taken forward is quite conservative. For Staffordshire Moorlands (based upon 1% of 598,000 sq. m. of existing floorspace) this could roughly equate to demand for around 1.50ha per annum, an identical figure to the allowance for losses identified above.
- 7.68 The model steps are summarised in Figure 7.6 and Figure 7.7. The same steps described above to convert the net employment projections from net to gross (with a 2 year margin of choice) have been applied to the net historic take up figures described above for consistency.

Figure 7.6 Methodology for Defining Gross Requirement – High Peak



Source: NLP

Figure 7.7 Methodology for Defining Gross Requirement – Staffordshire Moorlands



Source: NLP

7.69

The full breakdowns for High Peak and Staffordshire Moorlands are illustrated in Table 7.10.

Table 7.10 High Peak and Staffordshire Moorlands Gross Employment Land Comparisons 2011-31

High Peak		B1a/b	B1c/B2	B8	TOTAL
1) OE Baseline	2011-2031 (net)	3.94	-5.61	7.52	5.84
	2011-2031 (gross)				33.84
	+ Flexibility factor				39.56
2) Regeneration / Policy On	2011-2031 (net)	4.73	-5.43	7.52	6.83
	2011-2031 (gross)				34.83
	+ Flexibility factor				40.54
3) Past Take Up	2011-2031 (net)				47.33
	2011-2031 (gross)				75.33
	+ Flexibility factor				81.04

Staffordshire Moorlands		B1a/b	B1c/B2	B8	TOTAL
1) OE Baseline	2011-2031 (net)	3.85	-1.25	6.26	8.86
	2011-2031 (gross)				38.86
	+ Flexibility factor				41.67
2) Regeneration / Policy On	2011-2031 (net)	5.51	-1.20	6.26	10.57
	2011-2031 (gross)				40.57
	+ Flexibility factor				43.38
3) Past Take Up	2011-2031 (net)				4.29
	2011-2031 (gross)				34.29
	+ Flexibility factor				37.10

Source: NLP

7.70 In summary, the demand-led range of indicative total gross land requirements to 2031, factoring in a 2-year margin of choice, results in the following range of demand projections for High Peak:

1	OE Baseline:	39.6ha
2	Regeneration / Policy On:	40.5ha
3	Past Take Up:	81.0ha

7.71 These total gross requirements result in the following range of demand projections for Staffordshire Moorlands:

1	OE Baseline:	41.7ha
2	Regeneration / Policy On:	43.4ha
3	Past Take Up:	37.1ha

## Labour Supply Growth

7.72 To provide a benchmark for comparison with these demand estimates, the employment space requirement that would result from anticipated housing and hence population growth in High Peak and Staffordshire Moorlands was estimated. This is because it could impact upon the ability of each authority area to attract businesses and future job growth.

7.73 For the employment land (labour supply) scenarios where demographic modelling is necessary, specialist demographic modelling and forecasting tool PopGroup was used to model future trends in demography, household and dwelling estimates. The PopGroup software uses a variety of inputs including ONS population projections and comparable CLG household forecasts.

### Scenario 4) Labour Supply Based on ONS 2011-based (interim) SNPP

7.74 For the purposes of the ELR Update, a baseline PopGroup model was run for each authority area. This produced a trajectory of demographic change over the Local Plans period to 2031, incorporating the latest CLG/ONS projections to provide population, households, economically active residents and job growth over time, which was then translated into a supply-led employment land requirement for the purposes of the scenario modelling.

7.75 The most up-to-date information available for the PopGroup model comprised the 2011-based (interim) ONS Sub-National Population Projections [SNPP] and the equivalent 2011-based (interim) CLG household projections.

7.76 For High Peak the baseline projection indicated population growth of 14,773 over the period of 2011-31; associated household growth of 8,731 and an equivalent housing requirement of 9,020 (451 dpa 2011-31). However, due to an ageing population, the number of economically active residents is actually projected to increase by only 1,595, and the number of jobs by 1,492 to 2031 (75 more jobs per annum).

7.77 For Staffordshire Moorlands, the baseline projection indicated population growth of 6,436 over the period of 2011-31; associated household growth of 4,534 and an equivalent housing requirement of 4,752 (238 dpa 2011-31). However, due to an ageing population, the number of economically active residents is actually projected to decline by around -3,745, and the number of jobs by -2,011 to 2031 (101 fewer jobs per annum).

### **Scenario 5) OAN Housing Need for High Peak and Staffordshire Moorlands (470 dpa and 440 dpa)**

7.78 NLP has provided HPBC and SMDC with an analysis of their Objectively Assessed Need [OAN] for housing covering the period 2011 – 2031. The figures provided represent an indication of the OAN for High Peak and Staffordshire Moorlands and is included in the Strategic Housing Market Assessment [SHMA] documents prepared by NLP for the two authorities. The OAN suggests provision for up to 470 dpa in High Peak and up to 440 dpa in Staffordshire Moorlands over this period. Whilst the LPAs may go for a different housing requirement in their Local Plans, the OAN ranges identified are considered to be robust and have therefore been used as the basis for assessment in this context.

7.79 The OAN for High Peak is somewhat higher than the 451 dpa required to purely meet demographic needs (i.e. the projected change in population/households due to the interaction of natural change and migration) as demonstrated above, which could address a number of policy imperatives. However, this scenario was modelled on the basis of accelerating household formation rates post 2021 as the economy returns to strong economic growth, so the actual population level, and hence economic activity rates and job growth, is unchanged from the baseline scenario referred to above. This is the case even if the number of households generated, and hence dwellings, does increase slightly as a result. Therefore for High Peak the job growth figure is the same for both Scenarios 4 and 5.

7.80 In contrast, NLP's modelling work indicates that Staffordshire Moorlands should aim to deliver up to 440 dpa. This could address a number of policy imperatives including the Council's economic agenda. Using the PopGroup model, but this time constraining it to a housing output of 440 dpa, suggests a population growth of 16,564 between 2011 and 2031; household growth of 8,363, and a higher level of job growth, of 1,997 in total over the 20-year period, or 104 per annum.

7.81 By applying the HCA's employment densities (adjusted from before to reflect the fact that these are total jobs, rather than FTEs), and using a standard plot ratio of 40%, the labour supply scenarios could result in gross requirements for High Peak of 43.7ha for both scenarios. The labour supply scenarios could also result in gross requirements for Staffordshire Moorlands ranging from 26.2ha to 38.4ha (Table 7.11).

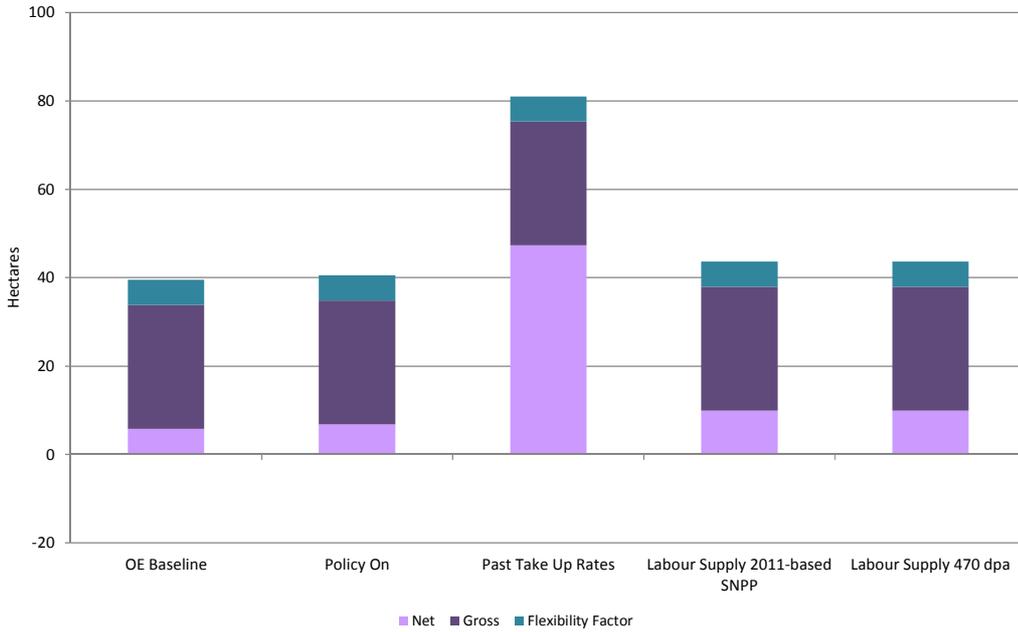
Table 7.11 High Peak and Staffordshire Moorlands Labour Supply Assessments 2011-31 (ha)

	Net Job Growth 2011-31	Floorspace Requirements	Land requirements (net)	Employment land lost	Margin of choice	Land requirements (gross)
<b>High Peak</b>						
<b>2011-based (interim) ONS SNPP</b>	+1,492	39,735	<b>9.93</b>	28.00	5.72	<b>43.65</b>
<b>Housing Needs Requirement – 470 dpa</b>						
<b>Staffordshire Moorlands</b>						
<b>2011-based (interim) ONS SNPP</b>	-1,312	-26,664	<b>-6.67</b>	30.00	2.81	<b>26.15</b>
<b>Housing Needs Requirement – 440 dpa</b>	+1,997	22,461	<b>5.62</b>	30.00	2.81	<b>38.43</b>

Source: NLP Analysis, PopGroup

- 7.82 It should be noted that by their nature, labour supply approaches are more conservative given that they relate to a declining working age population. Furthermore, whilst housing growth and employment requirements are clearly related, it is questionable whether there is a direct causal relationship between the two, particularly once considerations relating to changing commuting practices, fluctuating unemployment rates and economic activity rates are taken into account. These local labour supply based estimates therefore provide a benchmark for comparison with other approaches rather than a sound basis for future planning in isolation.
- 7.83 Nevertheless, the labour supply forecasts are reasonably close to the OE Baseline and Policy on Scenarios, hence this approach could support the need for a broad range of employment land requirements. However, the reality checks set out below also need to be taken into consideration.
- 7.84 The labour supply projections for High Peak are illustrated alongside the aforementioned econometric and past take up projections in Figure 7.8. They indicate that the two labour supply projections, at 43.65ha (gross) broadly align with broader range based on the demand-led projections of 39.56ha (OE baseline) and 40.54ha (Policy On), but are well below Past Take Up (81.04ha).

Figure 7.8 High Peak Gross Employment Land Projections 2011-31 (ha)

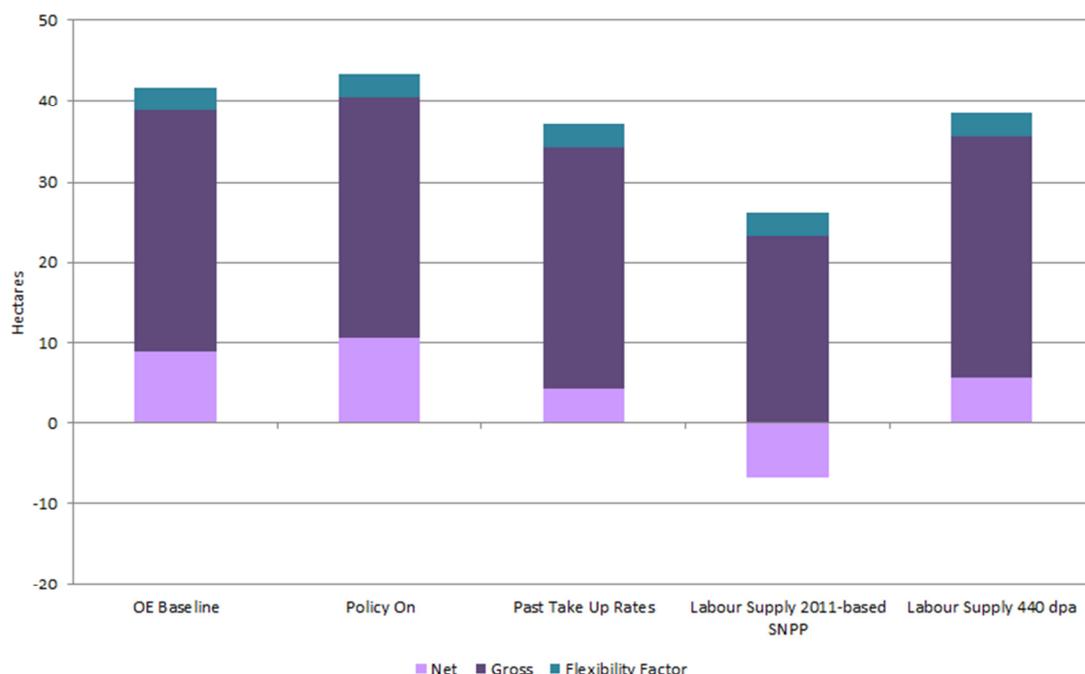


Source: NLP

7.85

The labour supply projections for Staffordshire Moorlands are illustrated alongside the aforementioned econometric and past take up projections in Figure 7.9. They indicate that the two labour supply projections, at 26.2ha to 38.4ha (gross) sit below, or at the very bottom end, of the broader range based on the demand-led projections of 41.67ha (OE baseline) and 43.38ha (Policy On) to 37.10ha (Past Take Up).

Figure 7.9 Staffordshire Moorlands Gross Employment Land Projections 2011-31 (ha)



Source: NLP

7.86

Gross employment land comparison in High Peak and Staffordshire Moorlands for each of the five scenarios are set out in Table 7.12 and Table 7.13.

Table 7.12 High Peak Gross Employment Land Comparisons 2011-31 (ha)

		B1a/b	B1c/B2	B8	TOTAL
<b>1) OE Baseline</b>	2011-2031 (net)	3.94	-5.61	7.52	<b>5.84</b>
	2011-2031 (gross)				<b>33.84</b>
	<b>+ Flexibility factor</b>				<b>39.56</b>
<b>2) Regeneration / Policy On</b>	2011-2031 (net)	4.73	-5.43	7.52	<b>6.83</b>
	2011-2031 (gross)				<b>34.83</b>
	<b>+ Flexibility factor</b>				<b>40.54</b>
<b>3) Past Take Up</b>	2011-2031 (net)				<b>47.33</b>
	2011-2031 (gross)				<b>75.33</b>
	<b>+ Flexibility factor</b>				<b>81.04</b>
<b>4) Labour Supply (ONS 2011-based SNPP)</b>	2011-2031 (net)				<b>9.93</b>
	2011-2031 (gross)				<b>37.93</b>
	<b>+ Flexibility factor</b>				<b>43.65</b>
<b>5) Labour Supply (470 dpa)</b>	2011-2031 (net)				<b>9.93</b>
	2011-2031 (gross)				<b>37.93</b>
	<b>+ Flexibility factor</b>				<b>43.65</b>

Source: NLP

Table 7.13 Staffordshire Moorlands Gross Employment Land Comparisons 2011-31 (ha)

		B1a/b	B1c/B2	B8	TOTAL
<b>1) OE Baseline</b>	2011-2031 (net)	3.85	-1.25	6.26	<b>8.86</b>
	2011-2031 (gross)				<b>38.86</b>
	<b>+ Flexibility factor</b>				<b>41.67</b>
<b>2) Regeneration / Policy On</b>	2011-2031 (net)	5.51	-1.20	6.26	<b>10.57</b>
	2011-2031 (gross)				<b>40.57</b>
	<b>+ Flexibility factor</b>				<b>43.38</b>
<b>3) Past Take Up</b>	2011-2031 (net)				<b>4.29</b>
	2011-2031 (gross)				<b>34.29</b>
	<b>+ Flexibility factor</b>				<b>37.10</b>
<b>4) Labour Supply (ONS 2011-based SNPP)</b>	2011-2031 (net)				<b>-6.67</b>
	2011-2031 (gross)				<b>23.33</b>
	<b>+ Flexibility factor</b>				<b>26.15</b>
<b>5) Labour Supply (440 dpa)</b>	2011-2031 (net)				<b>5.62</b>
	2011-2031 (gross)				<b>35.62</b>
	<b>+ Flexibility factor</b>				<b>38.43</b>

Source: NLP

## Reality Check

- 7.87 Clearly the levels of future demand for B-use class land projected by the various employment-based projections differ significantly. The projections are largely trend-based; in particular, the OE/Policy-On scenarios reflect the position at the 'bottom' of the market. The past take up has been at least partly recorded during an unprecedented recession in the commercial market nationally. It is likely that the actual performance of the High Peak and the Staffordshire Moorlands economies and commercial property markets will lie somewhere between the econometric and past trends projections.
- 7.88 In order to provide a clearer steer as to what level of growth High Peak Borough and Staffordshire Moorlands District should be planning for, it is important to apply a series of reality checks.

## Adjustments to Plot Ratios

- 7.89 The estimates of land requirements are clearly highly sensitive to the various assumptions used. The job/floorspace ratios and plot ratios adopted here reflected those in the ODPM guidance<sup>55</sup>. At present, it is assumed that the plot ratio<sup>56</sup> of 40% is generally applied to out-of-centre office space, industrial space and warehousing.

<sup>55</sup> Employment Land Reviews Guidance Note, ODPM (2004)

<sup>56</sup> A plot ratio is the total building square footage (building area) divided by the site size square meterage (area of the plot). Therefore, a plot ratio of 150% would indicate that the total floor area of a building is 1.5 times the gross area of the plot on which it is constructed. For practical purposes, this would equate to a 3 storey building with fifty percent plot coverage, the remaining plot area being occupied, for example, by access roads, parking and landscaping.

- 7.90 If a lower level were applied to all types of employment land of, say, 30%, this would make a modest difference to the overall net requirement, of around 1-2ha for the OE/Policy-On scenarios. Given that HPBC and SMDC are keen to encourage higher quality manufacturing industry (much of which will be B1c rather than B2) into their local authority areas, alongside diversification of the employment base towards the knowledge economy and creative and digital business services (which tend to have higher plot densities), and The Framework requirement for office space to be located in town centres rather than out of centre, this could point to plot densities increasing, rather than decreasing in future. On this basis, it is considered reasonable to assume that the majority of future development in the authority areas will be at plot ratios closer to 40% than 30%.

## **Adjustments to the Margin of Choice**

- 7.91 A more significant assumption in terms of sensitivity is the 2-year safety margin added. A 2-year margin of choice may ordinarily be seen as being reasonable, particularly in the light of the on-going economic uncertainties and the need to provide market ready sites to prevent occupiers from moving beyond the authority areas when searching for appropriate sites. Hence an increased margin of choice would help to provide a balanced portfolio. A number of agents have commented that an overall lack of supply, combined with the lack of appropriately sized units and poor infrastructure/access serve as a deterrent to companies wishing to locate in the local authority areas.
- 7.92 It should also be noted that the UK as a whole is likely to experience a period of economic recovery in the coming years which may result in increased demand for employment land beyond that projected by the various scenarios.
- 7.93 In summary, it is recommended that the approach taken in defining a two-year margin of choice remains valid.

## **Commercial Perspective**

- 7.94 In terms of sectors driving demand in High Peak and Staffordshire Moorlands, feedback from local agents suggests that engineering and manufacturing, (including smaller supply chain companies that serve major industries in the area such as JCB) are the main sectors driving demand, and to a lesser extent, warehousing.
- 7.95 Records of business space enquiries provided by the local authorities indicate that the majority of enquiries are for engineering/manufacturing/and scientific laboratory units with floorspace requirements typically ranging between 250 sq. m. and 2,000 sq. m. Enquiries also suggest a lesser requirement for engineering and manufacturing units of up to 6,500 sq. m. in size.
- 7.96 Demand for office space in both authority areas was generally considered by local agents to be low given the availability of such space in the surrounding urban centres such as Stoke-on-Trent, Manchester and Sheffield. The two areas lose out due to better amenities being more readily available in larger

centres of population. It was suggested by one agent that office demand may increase if superfast broadband was available.

- 7.97 It was suggested by stakeholders that there remains an issue regarding the lack of good quality industrial land. A shortage of quality industrial premises and poor location/accessibility, due to issues such as narrow road widths, were identified by local agents as factors which deter businesses from locating in the authority areas. Infrastructure provision, such as superfast broadband, public transport connectivity and the perception of a lack of a suitably skilled workforce, were also considered to be issues in the authority areas.
- 7.98 A local agent commented that the towns in Staffordshire Moorlands are fragmented and need to be considered separately on this basis. A lack of good quality industrial land in Leek was identified by the agent, although the office market was considered to be small in this area. What little office demand there is was considered to be for small units of approximately 100 sq. m. in size. Cheadle was identified as an area where industrial property is difficult to let.
- 7.99 The suitability of the existing stock's size was also highlighted by stakeholders as a barrier to potential occupants. Agents noted that available industrial units are too large for many of the businesses operating or wishing to locate in the authority areas and in some cases landlords are unwilling to subdivide them. One agent commented that in Glossop there is little industrial space for sale and it was considered that smaller units under 300 sq. m. would receive demand. In Biddulph it was noted that there was a past trend of affluent business owners moving their businesses over to Congleton. It was suggested that this trend is now reversing and these businesses are looking for space because prices in Congleton have increased significantly.
- 7.100 In terms of business start-up units, stakeholders commented that there is a demand for small industrial units for small businesses and business start-ups/incubator units in High Peak. It was also suggested that there is demand from companies wishing to relocate from incubator units outside of the authority areas to slightly larger units to enable business growth.
- 7.101 It was suggested by local agents that the bulk of the demand in both High Peak and Staffordshire Moorlands is generated by indigenous companies wishing to relocate or expand, with relatively less interest from companies wishing to relocate. Feedback from local businesses indicates that many intend to expand in the next few years and additional space would be required for this purpose. Most local businesses indicated a desire to stay within the local authority area in which they were already located either by expanding their existing premises or re-locating elsewhere within the local authority area.
- 7.102 With regard to rental levels stakeholders commented that:
- 1 In High Peak rental levels are generally slight lower than Greater Manchester.

- 2 Rental levels in Glossop and the vicinity (Hadfield) are lower than in neighbouring areas in East Manchester.
- 3 Rental levels in Buxton are more expensive as a result of limited space compared to demand in this area.
- 4 Rental demand for office and industrial space in Glossop is low but improving in the industrial sector.
- 5 Rental levels in Staffordshire Moorlands are higher than Stoke-on-Trent and Newcastle-under-Lyme.

7.103 Agents commented that the viability of commercial/industrial development was an issue in High Peak as a result of low sales and rental values and it was suggested that subsidies may be required to meet demand for industrial units.

## Conclusions

7.104 This report has appraised a range of employment land projections for High Peak and Staffordshire Moorlands using a variety of methodologies in accordance with Government guidance.

7.105 It should be noted that the OE forecasts used in the production of this report cover the areas of the Peak District National Park which fall within High Peak and Staffordshire Moorlands local authority areas. The employment land take-up and loss information covers the areas of each local authority outside of the National Park. However, it is not considered that this anomaly has any discernible impact upon the findings because the majority of industrial centres in High Peak and Staffordshire Moorlands are located outwith the National Park. In addition, the majority of jobs in the National Park are related to non B class uses such as tourism and leisure which do not have a direct impact upon the requirement and supply of B class employment land.

7.106 It is important to identify an appropriate level of need that achieves a balance between market realism and economic and planning policy objectives. A range of qualitative and quantitative factors have been considered within this report that can help to inform a judgment on the appropriate level of need, with the key issues set out below:

- 1 Both High Peak and Staffordshire Moorlands benefit from a relatively high value manufacturing base with linkages to sector expertise and clusters of businesses. There are a high number of small businesses and entrepreneurialism, combined with strong business survival rates. A highly skilled workforce, combined with the Peak District landscape and quality of life offer make the authority areas ideal locations for knowledge and creative businesses. The visitor economy is a key sector and the local authority areas provide a market for Peak District businesses and branded products. This may result in a requirement for B-class uses such as offices for tourism-related business and manufacturing premises for niche food products.

- 2 There is a lack of good quality small to medium-sized industrial premises, which is suppressing demand. In particular, the limited level of development in recent years has restricted the availability of sites for local businesses to expand.
- 3 Future realisable demand may be further restricted by the current poor and ageing existing stock, lack of public investment in infrastructure, poor access to many industrial estates/business parks, and weak inward investment offering relative to adjoining areas (such as Sheffield, Manchester and Stoke).
- 4 Agents suggested that there is reasonably strong underlying demand for B1c and B2 manufacturing and to a lesser extent B8 warehousing, although this is not reflected in the OE econometric projections (as the latter are, to an extent, trend based and neither B1 nor B2 industrial land have been developed in substantial quantities in High Peak and Staffordshire Moorlands recently). HPBC and SMDC have an opportunity to diversify the portfolio to allow for further development in creative and digital services.
- 5 Out-commuting into neighbouring authorities for work remains a major issue for High Peak, with a net loss of around 11,360 employed residents daily. There are high levels of net out-commuting to Tameside, Manchester and Stockport.
- 6 A high level of net out-commuting is also an issue in Staffordshire Moorlands where 13,956 more people commute out to work than commute in. There is significant net out-commuting to Stoke-on-Trent and Newcastle-under-Lyme.
- 7 High Peak has a low job density ratio of around 0.65 compared to the East Midlands average of 0.75. The job density ratio of 0.55 in Staffordshire Moorlands is also very low compared to the West Midlands average of 0.74. Rebalancing the land uses of High Peak and Staffordshire Moorlands to ensure that more, and better quality, jobs are provided could help to reverse this trend and 'claw-back' out-commuters, reducing net out-commuting rates (although this would need to be a choice made by the authorities and supported by corporate decisions and policies in their economic strategy and emerging Local Plan).
- 8 Labour supply analyses for High Peak based on the delivery of up to 470 dpa and the latest ONS 2011-based SNPP, indicate that the number of economically active residents is forecast to increase slightly over the coming years. On this basis, around 44ha (gross) could be required to 2031.
- 9 Labour supply analyses for Staffordshire Moorlands, based on the delivery of up to 440 dpa and the latest ONS 2011-based SNPP, suggest that the number of economically active residents is forecast to decline slightly over the coming years due to an ageing population (despite overall population growth over the same period). Consequently job growth, if related to labour supply, will either be neutral or negative over

the Plan period. On this basis, between 26ha and 38ha could be required (gross) to 2031.

- 7.107 Consequently, on the basis of these considerations, for High Peak, a range of between **40ha and 80ha** (gross) of employment land may be considered appropriate to 2031. This is approximate to the Labour Supply Scenarios at the lower end, and the Past Take Up Rate projection at the top end.
- 7.108 For Staffordshire Moorlands a range of between **25ha and 45ha** (gross) of employment land may be considered appropriate to 2031. This is approximate to the Labour Supply Scenarios at the lower end, and the OE Baseline/Policy On projections at the top end.
- 7.109 The range accommodates High Peak's and Staffordshire Moorland's housing strategy; the need to revitalise current poor quality stock; the imbalance of the portfolio in terms of the size of properties available, continued demand for B2 floorspace (particularly from indigenous companies) and the emerging digital and creative, and knowledge economy business service sectors, whilst factoring in the continued economic uncertainty and the practicalities of the physical constraints of the authority areas which would preclude a step-change in delivery. If the authorities seek to accommodate new developments of large-scale warehousing schemes (which has not been the case in the past), then this could necessitate higher levels of provision well above the current portfolio.
- 7.110 Furthermore, it is recognised that the labour supply projections which link to the Objectively Assessed Housing Need are towards the lower end of this range. Whilst it has been acknowledged that there is not a direct causal link between housing and employment land requirements, there is nevertheless a need to ensure that the two dovetail together to avoid any unsustainable outcomes.
- 7.111 As such, if the Councils were to consider going for the top end of the employment land range, they would need to be mindful of the housing implications by either considering a higher level of housing delivery, or reviewing other policy interventions to minimise any adverse labour force and economic implications. This could include the need to 'claw back' out-commuters and planning for a mix of housing which encourages the retention of residents of an economically active age or encourages younger economically active people to move into High Peak and Staffordshire Moorlands.
- 7.112 It is recognised that this may be difficult to achieve and would therefore require strong policy interventions by the Local Authorities, set out in their Local Plans. This could include an aspiration to increase the job density in High Peak to, say, 0.7 (up from 0.65 currently and closer to the East Midlands average of 0.75) and increasing job density in Staffordshire Moorlands to, say, 0.65 (up from 0.55 currently and closer to the West Midlands average of 0.74), followed up by suitable policy measures such as the provision of better quality employment opportunities, and monitored on a regular basis by the Councils to

test whether the aspirations and policy measures remain appropriate.

- 7.113 In terms of how the 40-80ha range for High Peak could be split between the B1a/ B1b, B1c/B2 and B8 uses, it is not possible to directly translate the net split in Table 7.12 into gross requirements, as the data is not sufficiently robust to enable a precise breakdown of land lost/margin of choice by use type. Furthermore, there are a number of conflicting considerations:
- 1 Based on the current ‘stock’ of floorspace in High Peak Borough, there is a considerable supply of B2 industrial units, comprising 68% of all floorspace in the Borough, compared to 26% for B8 and just 6% for B1a office<sup>57</sup>
  - 2 The OE growth forecasts indicate stronger growth in B1a/b offices; a more modest growth in B8 warehousing land requirements; and a decline in demand for B2 industrial. The policy on forecasts suggest slightly higher growth in B1a/b office floorspace, the same growth in B8 floorspace and a lower decline in B2 land requirements;
  - 3 The target growth sectors have a reasonable split between the knowledge economy, manufacturing, cultural and digital sectors and the visitor economy;
  - 4 Based on the current land use of B-class sites identified as having the potential for redevelopment for non-employment uses in future, the great majority relate to industrial sites.
- 7.114 On the basis of the points above, it is considered that an indicative split of 25% for B1a/B1b office, 50% for B1c/B2 industrial and 25% for B8 land could be appropriate.
- 7.115 This seeks to balance the replacement of some existing industrial stock with aspirations for heightened demand in this sector going forward; the positive growth in office requirements alongside economic aspirations for this sector; the reduction in the decline of the industrial sector and the demand for B8 warehousing (recognising that this land hungry sector requires a disproportionate amount of land relative to employment generated).

#### Policy Advice for High Peak

This report does not seek to make a planning or policy judgement; this is a matter for HPBC when taking account of the information before them. The report therefore represents a first stage for further consideration of all relevant factors through the Local Plan process.

On this basis, the recommended employment land requirement range for HPBC is as follows:

**40ha – 80ha 2011-2031.**

The selection of the final figure will depend upon the preferred level of

<sup>57</sup> VOA: Commercial and industrial rateable value statistics (2008)

employment growth for High Peak. The identification of the number of new jobs that are to be sought will be based upon the identification of policy aspirations relating to the promotion of key sectors in accordance with the economic and spatial vision for the area.

- 7.116 In terms of how the 25-45ha range for Staffordshire Moorlands could be split between the B1a/ B1b, B1c/B2 and B8 uses, it is not possible to directly translate the net split in Table 7.13 into gross requirements, as the data is not sufficiently robust to enable a precise breakdown of land lost/margin of choice by use type. As with High Peak, there are a number of conflicting considerations:
- 1 Based on the current 'stock' of floorspace in Staffordshire Moorlands District, there is a considerable supply of B2 industrial units, comprising 70% of all floorspace in the District, compared to 22% for B8 and just 8% for B1a office;
  - 2 The OE growth forecasts indicate stronger growth in B1a/b office floorspace requirements; a more modest growth in in B8 land requirements; and a decline in demand for B2 industrial. The regeneration / policy on forecasts suggest higher growth in B1a/b office floorspace and the same growth in B8 floorspace and a lower decline in B2 land requirements;
  - 3 The target growth sectors have a reasonable split between the knowledge economy, manufacturing, cultural and digital sectors and the visitor economy;
  - 4 Based on the current land use of B-class sites identified as having the potential for redevelopment for non-employment uses in future, the great majority relate to industrial sites.
- 7.117 On the basis of the points above, it is considered that an indicative split of 35% for B1a/B1b office, 40% for B1c/B2 industrial and 25% for B8 land could be appropriate.
- 7.118 This seeks to balance the replacement of some existing industrial stock with aspirations for heightened demand in this sector going forward; the higher growth in B1/b office requirements, the reduction in the decline of the industrial sector and the continuing relatively limited demand of B8 warehousing (albeit recognising that this land hungry sector requires a disproportionate amount of land relative to employment generated).

### Policy Advice for Staffordshire Moorlands

This report does not seek to make a planning or policy judgement; this is a matter for SMDC when taking account of the information before them. The report therefore represents a first stage for further consideration of all relevant factors through the Local Plan process.

On this basis, the recommended employment land requirement range for SMDC is as follows:

**25ha – 45ha 2011-2031.**

The selection of the final figure will depend upon the preferred level of employment growth for Staffordshire Moorlands. The identification of the number of new jobs that are to be sought will be based upon the identification of policy aspirations relating to the promotion of key sectors in accordance with the economic and spatial vision for the area.

### Peak District National Park

7.119

The Peak Sub-Region ELR suggested a requirement for the provision of 5ha of employment land in the National Park Area for the period 2008-2026. The National Park Authority has confirmed that there is no need to allocate additional land within the National Park Area. There is existing space in Bakewell and Hope Valley which is proposed for safeguarding with scope for redevelopment of sites of low quality in less sustainable locations.

## 8.0 Recommendations for Local Plan Policy Development

- 8.1 This section considers other policy measures which may be required to support the economic growth objectives for HPBC and SMDC. These relate to qualitative employment land issues such as how to renew and upgrade existing sites or how to encourage modern employment development within the constraints of a limited supply of potential new sites.

### Policy Choices

#### Non B Uses

- 8.2 The development needs of economic sectors other than the B use classes were also considered. The growth of non B-class uses is likely to make an important contribution to employment growth in High Peak and Staffordshire Moorlands to 2031. The growth needs of a number of these sectors have been considered where job growth is forecast and there is potential for this to create some pressures on employment land. These sectors include retail, healthcare, and residential and social care, and sports activities and amusement.
- 8.3 These other sectors will compete for employment land up to a point, although the extent and nature does not appear likely to cause particular pressures on land supply. Retail and leisure development is likely to be focussed in and around existing town centres, for which the Local Plans will identify land already (beyond that identified for B Class use). Development in the accommodation and food and beverage sectors is likely to be accommodated through the change of use and conversion and expansion of existing agricultural and rural properties to tourist accommodation uses. Other hotel and restaurant uses are likely to be located in town centres to accord with national policy. Sports activities and amusement development is likely to be located in existing areas such as the Alton Towers Resort site in Staffordshire Moorlands.
- 8.4 There will be a need for a degree of flexibility in provision to cater for any B-class land being taken up by other uses so that B Class uses still retain a choice of good quality sites and land over the plan period (and so that HPBC and SMDC can respond to any rapid change in circumstances). Whilst adopted and emerging Local Plan policies may seek to safeguard against the loss of employment land to other uses it is likely that, over the course of the plan period, some land will be lost to alternative use (for example where they are no longer suitable for employment use). In accordance with the Practice Guidance, market signals should be used by the LPAs as a guide to whether losses in certain areas will be appropriate or not.
- 8.5 Most of the future growth needs of the healthcare and social care sectors are

likely to be met within existing sites in such use and the scale will be limited by the continued constraints on public sector spending. For residential care homes, although there may be proposals for new facilities on employment land, most future needs are likely to be met through expansion of existing facilities or re-use of other institutional premises rather than using land within employment areas in High Peak and Staffordshire Moorlands where the environment may not always be appropriate.

- 8.6 Consideration should also be given as to whether the growth of some sectors could be accommodated in existing employment areas in a way that improves sustainability and enhances the attractiveness of the site as an employment location. This may have some scope, subject to strict controls, to avoid adverse pressures on landowners from higher value uses thereby reducing the potential for lower-value B Class development.

## **Policy Delivery Mechanisms**

- 8.7 There are a number of other policy delivery mechanisms which have the potential to contribute to the delivery of more and better quality employment land which could be investigated further by the Councils.
- 8.8 Firstly, Section 106 agreements could potentially be used, either directly or indirectly, to deliver workspace. This particularly applies to schemes which involve a mixed-use redevelopment of existing employment land. Provision could be either on-site or in some cases, at an alternative location. It should be noted that the ability for projects to generate sufficient profit to enable such levies may be limited in all but the most buoyant markets. Any requirement to use S106 to cross fund employment development from residential or retail uses will need to be underpinned by strong evidence justifying the need and viability of such an approach. The authorities may also wish to explore the potential for using CIL to deliver infrastructure, such as highways and communications infrastructure, to support the delivery of employment sites. This would be subject to such provision according with the legislation and regulations governing CIL.
- 8.9 Whilst this approach offers the prospect of new office space in High Peak and Staffordshire Moorlands, there are some potential problems in ensuring such provision is attractive to the market. The layout of the site and uses, particularly for mixed-use schemes, can make a significant difference to their commercial appeal, with most office occupiers wanting a relatively high profile location towards the front of a site and without any potential for amenity conflicts. In addition, there may be issues about matching the type of space delivered to demand in that area.
- 8.10 Where the development lies within an area of low industrial and office demand (i.e. areas with high vacancy rates at present), subject to the legal provisions governing such approaches, funding from sources such as CIL/s.106 contributions could be pooled and used to develop workspace space on other sites, perhaps including those in Council ownership, and loans or grants to firms to support upgrading of premises. This could also potentially be used to

fund further enterprise or incubation workspace.

- 8.11 If there are areas where large-scale change may be required in order to deliver workspace, an Area Action Plan, Supplementary Planning Document, Planning Brief or Development Brief could be considered as a tool for identifying how new development should come forward.
- 8.12 Local Development Orders [LDO] is another potential mechanism that could be considered in some appropriate situations. These allow Councils to identify specific areas/sites where express planning permission is not required for certain types of development. Examples applying to industrial estates, for example, could include alterations or certain levels of extensions to premises, construction of new employment premises within specified limits, and some types of change of use. In some situations, this approach could provide benefits to occupiers/developers through greater flexibility, speed, certainty of outcome and reduced cost.
- 8.13 Mixed use schemes can also be a way forward in delivering some new office or industrial space. This is more likely to be effective on larger schemes.
- 8.14 The market alone is unlikely to deliver these improvements. Encouragement for owners/developers may be necessary, and could be aided by a range of planning and economic development interventions including:
- 1 A Local Plan policy encouraging such forms of upgrading, although this will only work in combination with other actions;
  - 2 Continued and stronger Local Plan policy protection for certain industrial sites (reducing the potential for residential 'hope value' pricing out development);
  - 3 Local initiatives to publicise to local firms case studies of successful upgrading of business premises, including costs, local contractors involved and rental or other benefits achieved;
  - 4 Encouragement of mixed use developments to help facilitate and cross-subsidise the creation of B-class premises; and
  - 5 HPBC and SMDC economic development officers engaging with owners on upgrading of premises.
- 8.15 There may also be some potential to explore different funding sources (e.g. Tax Increment Financing) and potential sources of grant aid to enable small/medium firms to upgrade premises or develop new premises if the market does not deliver these improvements. This could include a number of forms of direct Council financial support such as a Business Improvement Grant, direct lending to small firms and/or mortgage support, as well as grants to install renewable energy equipment. It is recognised that such measures will be harder to fund in the current economic climate and rolling back of public expenditure but appear worthwhile as future actions.

## Conclusions

- 8.16 Previous sections of this report have highlighted the need for a quantitative increase in the office and industrial stock of between 40ha to 80ha (gross) for High Peak and 25ha to 45ha (gross) for Staffordshire Moorlands to 2031.
- 8.17 However, barriers to the redevelopment / improvement of industrial sites in particular remain, primarily as a result of low commercial values and viability issues in many urban parts of High Peak and Staffordshire Moorlands. A number of planning and economic development interventions could significantly improve the level of development and premises renewal activity including continued policy protection for B-class land, use of BID<sup>58</sup> schemes, and engaging with land owners. In certain locations cross subsidy of new employment facilities from residential development may offer a solution.
- 8.18 A number of mechanisms can be used to facilitate the delivery of workspace. These include using mixed use developments, s.106 agreements and/or Community Infrastructure Levy to pay for workspace either on-site or off-site. However, any new provision should ensure that the layout, location and type of space is attractive to the market rather than purely focusing on the quantum of space delivered.

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<sup>58</sup> A Business Improvement District (BID) is a business led and business funded scheme to improve a defined commercial area, such as a town centre or industrial estate through additional services or new initiatives. Government legislation enabling the formation of BIDs, was introduced into England and Wales in 2003, empowering businesses to 'raise funds locally to be spent locally' on improving their trading environment. BIDs are funded through a nominal levy calculated on the rateable value of all businesses within a defined area. Although the percentage can be set higher or lower, most BIDs apply 1% or 2% levies and exempt very small ratepayers. Business Improvement Districts meet two of the government's key priorities: Promoting economic growth and Localism.

## 9.0 Overall Conclusions

- 9.1 The following conclusions can be drawn from this study on the future requirements for employment space in High Peak and Staffordshire Moorlands over the period 2011-2031.

### High Peak

**1: High Peak's economy has experienced a decline in manufacturing in recent years and remains over-reliant on manufacturing and public sector employment. However, as the economy continues to recover from the downturn there remains opportunities in established sectors and opportunities in emerging sectors.**

- 9.2 A key challenge for High Peak is to diversify the local economy and attract a range of businesses to the area, to improve the local job offer and reduce the level of out-commuting to the surrounding major cities. Although the number of people employed in manufacturing has fallen in recent years it is still more reliant on the sector than the country as a whole.
- 9.3 Much of the Borough's recent growth was related to transport, metal and mineral products and business service sectors coupled with an above average representation in the sectors, this indicates the existence of a level of competitive advantage for these sectors within High Peak. The number of jobs in wholesaling and public administration is also relatively high. Given the high level of growth in the transport and wholesaling sectors, the potential for B8-based sectors to drive future growth in the Borough would appear to be reasonable.
- 9.4 High Peak has low levels of unemployment, at around at around 6.4%, which is below the East Midlands (7.9%) and national averages (7.8%). However there are pockets of deprivation in the settlements of Glossop and Hadfield.
- 9.5 The profile of High Peak's labour force shows that the Borough has relatively more highly skilled occupations and a lower proportion of lower skilled manual jobs relative to the regional average.
- 9.6 The legacy of the recession(s) and public sector cuts will undoubtedly place significant strains on the local economy over the short to medium term, with High Peak likely to be vulnerable to any further public sector job cuts. There are, however, a number of opportunity sectors that will dictate the need for employment land in the Borough, specifically continued opportunities for manufacturing, as well as knowledge based industries and digital and creative technologies.

**2: High Peak has a low supply of available employment land, and potential losses may require the re-provision of employment land elsewhere in the Borough to cater for retained and future job growth.**

- 9.7 In basic quantitative terms, the Borough appears to have a low level of employment land, comprising around 17ha of allocated sites. This figure is below the bottom end of the employment land requirement range identified.
- 9.8 The Borough has a relatively low proportion of vacant existing office floorspace, equal to around 5% of all office floorspace across the Borough as a whole. This is below the typical normal market level of 8-10% and this might be attributed to low levels of office space available in the Borough.
- 9.9 Vacant industrial floorspace is also low at around 1.5% of all stock. This figure is below the level that could be considered the 'ideal' level of vacancy necessary to enable a properly functioning property market and suggests that the variety and supply of premises in the Borough may be limited and therefore available properties are occupied quickly. It has been suggested by stakeholders that this low figure masks the issue that many premises are of poor quality.
- 9.10 Set against this available supply over the plan period is the potential for around 39.4ha of existing employment land to be lost to non-B class uses, whilst 0.91ha has already been lost in the plan period to date (2011-13).

**3: Past take up of land has been moderate, influenced by a number of B2 developments and to a lesser extent B8 development within the Borough in recent years.**

- 9.11 Past take up of employment land in Borough has been moderate and predominantly related to B2 development and to a lesser extent B8 development. In High Peak, almost 99% of the gross employment completions over the period 2007 to 2013 relate to industrial and warehousing space.
- 9.12 Take-up of employment sites in High Peak over the period 2007/08 to 2012/13 totalled 17.15ha, or 2.86ha per annum, although this figure has been heavily influenced by the relocation of Nestlé Waters (who bottle and distribute Buxton Mineral Water) from a town centre site to a new purpose built bottling plant adjacent to Waterswallow Industrial Estate (7.42ha) in 2012/13.
- 9.13 Losses of employment land have not been significant. Around 2.95ha of employment land has been lost or redeveloped for non B-class uses over the past 6 years. This equates to an average loss of 0.49ha per annum.
- 9.14 The nature of developments going forward therefore will influence the level of employment land into the future (e.g. if HPBC moves away from significant, large scale B2/B8 developments, take up rates can be expected to be lower).

**4: High Peak's future growth is likely to be driven by growing demand for office space and continued demand for B2 industrial uses; whilst B8 warehousing will still have a role to play in meeting demand in parts of the Borough.**

- 9.15 High Peak's future growth is likely to be driven by continued underlying demand for B2 industrial premises and growing demand for office space and warehousing. The potential for office-based sectors to drive future growth would depend on the provision of good quality units in areas of stronger demand.
- 9.16 The OE Baseline job growth projections suggest that there will be a slight increase in the level of net job gains (47 jobs) in the B-use classes in High Peak over the period to 2031, with B1a/b and B8 sectors seeing a cumulative increase of 1,079 FTE jobs, moderated by a significant decline in B1c/B2 manufacturing (-1,032). This is within the context of overall job growth of 114 FTE jobs predicted for the Borough, of which 67 would be in the Non-B Class sectors. However, at a local level there are aspirations for heightened demand in the B1c/B2 sector going forward.
- 9.17 The success of economic development strategies looking to diversify the local economy to include more professional office based employment such as knowledge and creative industries and those looking to diversify the manufacturing base into more high-tech sectors, will also impact upon future land demands.

**5: High Peak requires between 40ha and 80ha (gross) to meet employment land needs up to 2031**

- 9.18 Based on projecting forward past take up and allowing for the re-provision of likely losses to non-B-class uses, it is suggested that High Peak could require around 81ha between 2011-31. However, this projection is well in excess of the demand forecasts based on the OE Baseline econometric model. This would indicate a requirement for 39.6ha gross over the same time period, with a bias towards B1a/b office and particularly B8 warehousing. A scenario incorporating the policy aspirations of HPBC could suggest a slightly higher figure of 40.5ha gross to 2031, with a slightly greater representation of B2 manufacturing and B1a/b office.
- 9.19 The analysis has not identified a particular qualitative need for any additional A2 space given macro-economic trends, although clearly the Council should take a flexible approach in this regard going forward.
- 9.20 Two labour supply sensitivity tests indicate a slightly higher level of need than the job-based econometric projections due to the forecast increase in economically active residents over the plan period, with commensurate implications for the number of jobs required. These figures are both 43.65ha over the plan period as illustrated in Table 9.1.

Table 9.1 High Peak Summary Employment Land Scenarios

	Scenario	Net (ha)	Gross (ha)
<b>Econometric Demand Forecasting</b>	<b>1) OE Baseline</b>	5.84	<b>39.56</b>
	<b>2) Regeneration / Policy On</b>	6.83	<b>40.54</b>
<b>Past Take Up</b>	<b>3) Past Delivery Rates Continue</b>	47.33	<b>81.04</b>
<b>Labour Supply</b>	<b>4) Labour Supply (ONS 2011-based SNPP)</b>	9.93	<b>43.65</b>
	<b>5) Labour Supply (470 dpa)</b>	9.93	<b>43.65</b>

9.21 Consequently, a range of between 40ha and 80ha (gross) of employment land may be considered appropriate to 2031.

9.22 This is approximate to the OE Baseline / Policy On / Labour Supply Scenarios at the lower end, and above the Past Take Up Rate projection at the top end.

9.23 The range accommodates High Peak’s housing strategy; the need to revitalise current poor quality stock and the imbalance of the portfolio in terms of the size of properties available. It allows for the continued demand for B2 floorspace (particularly from indigenous companies) whilst factoring in the continued economic uncertainty and the practicalities of the physical constraints of the authority area which would preclude a step-change in delivery. The range also accommodates the potential need for emerging digital and creative, and knowledge economy business service sectors. If the authority seeks to accommodate new developments of large-scale warehousing schemes (which has not been the case in the past), then this could necessitate higher levels of provision well above the current portfolio.

9.24 Furthermore, it is recognised that the labour supply projections which link to the Objectively Assessed Housing Need are towards the lower end of this range. Whilst it is acknowledged that there is not a direct causal link between housing and employment land requirements, there is nevertheless a need to ensure that the two dovetail together to avoid any unsustainable outcomes.

9.25 As such, if the Council was to consider going for the top end of the employment land range, it would need to be mindful of the housing implications by either considering a higher level of housing delivery, or reviewing other policy interventions to minimise any adverse labour force and economic implications. This could include the need to ‘claw back’ out-commuters and planning for a mix of housing which encourages the retention of residents of an economically active age or encourages younger economically active people to move into High Peak.

9.26 Ultimately, HPBC will be required to make a decision on a suitable level of employment land to be provided in the Borough based on the evidence before it, balancing the social, economic and environmental dimensions to sustainable development in line with The Framework.

9.27 In this regard, if HPBC were to have a defined policy response to decrease net out commuting this could align with the Government’s sustainability agenda in

The Framework, which states that:

*'Planning policies should aim for a balance of land uses within their area so that people can be encouraged to minimise journey lengths for employment, shopping, leisure, education and other activities' [§37]*

- 9.28 In terms of how the 40-80ha range for High Peak could be split between the B1a/ B1b, B1c/B2 and B8 uses, it is not possible to directly translate the net split into gross requirements as the available data is not sufficiently robust to enable a precise breakdown of land lost/margin of choice by use type. Furthermore, there are a number of conflicting considerations:
- 1 Based on the current 'stock' of floorspace in High Peak Borough, there is a considerable supply of B2 industrial units, comprising 68% of all floorspace in the Borough, compared to 26% for B8 and just 6% for B1a office<sup>59</sup>
  - 2 The OE growth forecasts indicate stronger growth in B1a/b offices; a more modest growth in B8 warehousing land requirements; and a decline in demand for B2 industrial. The policy on forecasts suggest slightly higher growth in B1a/b office floorspace, the same growth in B8 floorspace and a lower decline in B2 land requirements;
  - 3 The target growth sectors have a reasonable split between the knowledge economy, manufacturing, cultural and digital sectors and the visitor economy;
  - 4 Based on the current land use of B-class sites identified as having the potential for redevelopment for non-employment uses in future, the great majority relate to industrial sites.
- 9.29 On the basis of the points above, it is considered that an indicative split of 25% for B1a/B1b office, 50% for B1c/B2 industrial and 25% for B8 land could be appropriate.
- 9.30 This would to balance the replacement of some existing industrial stock with aspirations for heightened demand in this sector going forward; the positive growth in office requirements alongside economic aspirations for this sector; the reduction in the decline of the industrial sector and the demand for B8 warehousing (recognising that this land hungry sector requires a disproportionate amount of land relative to employment generated).
- 9.31 A policy decision will need to be made within this broad range to ensure that if a specific (and, as yet, unforeseen) inward investment opportunity were to arise, a suitably sized prestige site could be made available within the overall portfolio in an accessible location attractive to the market. This may require Officers to adopt a flexible approach responding to the release/reservation of such a site, particularly if this could be linked to the Council's strategic aim of diversifying the employment base by attracting more highly skilled manufacturing jobs to High Peak.

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<sup>59</sup> VOA: Commercial and industrial rateable value statistics (2008)

9.32 Tameside Council has enquired whether High Peak could accommodate some of Tameside's employment land requirement. This issue will need to be the subject of further discussion between the Local Authorities. Should High Peak choose to accommodate some of Tameside's requirement additional land may need to be identified to accommodate this requirement.

**6: The Council should adopt a proactive approach to managing and improving the existing portfolio of employment sites to facilitate future growth.**

9.33 Alongside making new allocations, HPBC should adopt a pro-active approach to managing and improving the existing portfolio of employment sites to facilitate future growth. Renewal and intensification on older sites with available land should be encouraged to ensure that they contribute positively to meeting some of the employment land requirements, taking account of the particular constraints that apply on individual sites. This could include releasing some of HPBC's poorer quality employment sites to housing or other higher value uses in order to cross subsidise improvements to other, more viable, estates.

9.34 However, in assembling a new portfolio of sites, a cautious approach would be required to manage the competing pressures on potential employment sites within High Peak, balancing the aspirations for mixed-use development on some sites with the need to encourage renewal and intensification of the older industrial estates. Where mixed-use development or potential release of an employment site to other uses is contemplated, this should have regard to the availability of alternative sites to accommodate the relocation of firms.

9.35 On appropriate sites and where a clear need is demonstrated, in marginal areas of High Peak officers may be advised to allow a limited amount of higher value 'enabling development' to help fund infrastructure and support provision of speculative employment premises. Mixed-use development may provide one way of enabling the private sector to provide such enabling investment. As well as seeking to retain employment land in any redevelopments of redundant employment sites (where appropriate, depending upon the nature of the employment site itself), there may also be some scope for developers to provide small business units in mainly residential schemes, perhaps secured through s.106 agreements and with delivery linked to the timing of other development. The precise location and layout of such space should be carefully assessed to ensure that it will be attractive to the market; for example, office space and Sui Generis uses such as car showrooms should typically be located at the front of sites to ensure market visibility.

## Staffordshire Moorlands

9.36 The following conclusions can be drawn from this study on the future requirements for employment space in Staffordshire Moorlands over the period 2011-2031.

**1: The Staffordshire Moorlands economy has experienced a decline in manufacturing in recent years and remains over-reliant on manufacturing and public sector employment. However, as the economy begins to recover from the downturn there remains opportunities in established sectors and opportunities in emerging sectors.**

9.37 Staffordshire Moorlands has been experiencing rapid economic change moving away from the traditional industries of agriculture, textiles/manufacturing, and coal mining to service sector businesses such as finance, retailing, tourism, leisure and the knowledge economy.

9.38 In Staffordshire Moorlands the structure of the economy is highest in the public administration, education & health sector, which represents a larger proportion than regionally and nationally. The other key sectors of employment are distribution, hotels & restaurants and manufacturing. The fastest growing sector in recent years, both in percentage and absolute terms, was other services, followed by other business activities, which indicates the existence of some competitive advantage for these sectors within Staffordshire Moorlands. FTE job growth was also observed in transport equipment, construction and retail.

9.39 Unemployment in Staffordshire Moorlands is currently around 5.6%, which is well below the West Midlands (9.2%) and national averages (7.8%). However there are pockets of higher deprivation in the urban areas of Biddulph, Leek and Cheadle.

9.40 The profile of Staffordshire Moorland's labour force shows that the District has relatively more highly skilled occupations and a lower proportion of lower skilled manual jobs relative to the regional and national average. The District's workforce is tending towards growth amongst managers and senior officials and increases in the professional class.

9.41 The legacy of the recession(s) and public sector cuts will undoubtedly place significant strains on the local economy over the short to medium term, with Staffordshire Moorlands likely to be vulnerable to any further public sector job cuts. There are, however, a number of opportunity sectors that will dictate the need for employment land in the District, specifically continued opportunities for manufacturing, as well as Council aspirations for the development of highly skilled creative industries and knowledge driven sectors.

**2: Staffordshire Moorlands has a low supply of available employment land, and potential losses may require the re-provision of employment land elsewhere in the District to cater for retained and future job growth.**

9.42 In basic quantitative terms, the District appears to have a low level of employment land, comprising around 17.3ha of 'available' B-class employment land. This figure is below the bottom end of the employment land requirement range identified.

9.43 The District has a low proportion of vacant industrial floorspace, equivalent to around 1.2% of the total B2/B8 industrial stock. This figure is below the level that could be considered the 'ideal' level of vacancy necessary to enable a properly functioning property market and suggests that the variety and supply of premises in the District may be limited and therefore available properties are occupied quickly.

9.44 For offices in Staffordshire Moorlands, the available stock is equivalent to 2.6% of the total stock. This is below the typical normal market level of 8-10% and this might be attributed to low levels of office stock in the District.

9.45 Set against this available supply over the plan period is the potential for around 30.0ha of existing employment land to be lost to non-B class uses, whilst 7.2ha has already been lost in the plan period to date (2011-13).

**3: Past take up of land has been low, influenced by a number of mixed B1, B2 and B8 developments within the District in recent years.**

9.46 Take-up of employment sites in Staffordshire Moorlands over the period 2006 to 2013 totalled 9.85ha, or 1.41ha per annum. It should be noted that a significant portion of this figure is attributed to an unusually large amount of employment development in 2011/12 (4.2ha). Over 55% of development in the period 2006 to 2013 has comprised mixed B1, B2 and B8 uses. The remaining development has comprised 26% B1, 11.4% B2 and 7.1% B8.

9.47 Losses of employment land in the period 2006/07 to 2012/13 have been significant at 8.35ha over that period at a rate of 1.19ha per annum. Much of this is attributable to the redevelopment of the Churnet Works site at Macclesfield Road, Leek for a Sainsbury's foodstore, B1/B2/B8 industrial units and other retail units in 2012/13.

9.48 The nature of developments going forward therefore will influence the level of employment land into the future (e.g. if SMDC moves towards significant, large scale B8 developments, take up rates can be expected to increase).

**4: Future growth in Staffordshire Moorlands is likely to be driven by growing demand for office space, continued demand for B2 industrial uses and; whilst B8 warehousing will still have an on-going role to play in meeting demand in parts of the District.**

9.49 Future growth in Staffordshire Moorlands is likely to be driven by continued

underlying demand for B2 industrial premises; growing demand for office space and on-going demand for warehousing. The potential for office-based sectors to drive future growth would depend on the provision of good quality units in areas of stronger demand.

- 9.50 The OE Baseline job growth projections suggest that there will be an increase in the level of net job gains (+667 jobs) in the B-use classes in Staffordshire Moorlands over the period to 2031, with B1a/b and B8 sectors seeing a cumulative increase of 898 FTE jobs, moderated by a slight decline in B1c/B2 manufacturing (-231). This is within the context of overall job growth of 3,009 FTE jobs predicted for the District.
- 9.51 The success of economic development strategies looking to diversify the local economy to include more professional office based employment such as knowledge and creative industries and looking to diversify the manufacturing base towards more high-tech sectors, will also impact upon future land demands.

**5: The District requires between 25ha and 45ha (gross) to meet employment land needs up to 2031**

- 9.52 Based on projecting forward past take up and allowing for the re-provision of likely losses to non-B-class uses, it is suggested that Staffordshire Moorlands could require around 37.1ha between 2011-31. However, this projection is below the demand forecasts based on the OE Baseline econometric model. This would indicate a requirement for 41.7ha gross over the same time period, with a bias towards B1a/b office and particularly B8 warehousing. A scenario incorporating the policy aspirations of SMDC could suggest a slightly higher figure of 43.4ha gross to 2031, with a slightly greater representation of B1a/b office.
- 9.53 The analysis has not identified a particular qualitative need for any additional A2 space given macro-economic trends, although clearly the Council should take a flexible approach in this regard going forward.
- 9.54 Two labour supply sensitivity tests indicate a lower level of need than the job-based econometric projections due to the forecast decline in economically active residents over the plan period, with commensurate implications for the number of jobs required. These figures are 26.2ha and 38.4ha over the plan period as illustrated in Table 9.2.

Table 9.2 Staffordshire Moorlands Summary Employment Land Scenarios

	Scenario	Net (ha)	Gross (ha)
<b>Econometric Demand Forecasting</b>	<b>1) OE Baseline</b>	8.86	<b>41.67</b>
	<b>2) Regeneration / Policy On</b>	10.57	<b>43.38</b>
<b>Past Take Up</b>	<b>3) Past Delivery Rates Continue</b>	4.29	<b>37.10</b>
<b>Labour Supply</b>	<b>4) Labour Supply (ONS 2011-based SNPP)</b>	-6.67	<b>26.15</b>
	<b>5) Labour Supply (440 dpa)</b>	5.62	<b>38.43</b>

- 9.55 Consequently, a range of between 25ha and 45ha (gross) of employment land may be considered appropriate to 2031.
- 9.56 This is approximate to the Labour Supply Scenarios and Past Take Up Rate at the lower end, and slightly above the OE Baseline / Policy On / projections at the top end to reflect the clustering of scenarios at the lower end of the range.
- 9.57 The range accommodates the housing strategy in Staffordshire Moorlands ; the need to revitalise current poor quality stock; the imbalance of the portfolio in terms of the size of properties available, continued demand for B2 floorspace (particularly from indigenous companies) and the emerging digital and creative, and knowledge economy business service sectors, whilst factoring in the continued economic uncertainty and the practicalities of the physical constraints of the authority area which would preclude a step-change in delivery. If the authority seeks to accommodate new developments of large-scale warehousing schemes (which has not been the case in the past), then this could necessitate higher levels of provision well above the current portfolio.
- 9.58 Furthermore, it is recognised that the labour supply projections in Scenario 5 which link to the Objectively Assessed Housing Need are towards the lower/middle end of this range. Whilst it has been acknowledged that there is not a direct causal link between housing and employment land requirements, there is nevertheless a need to ensure that the two dovetail together to avoid any unsustainable outcomes.
- 9.59 As such, if the Council was to consider going for the top end of the employment land range, it would need to be mindful of the housing implications by either considering a higher level of housing delivery, or reviewing other policy interventions to minimise any adverse labour force and economic implications. This could include the need to 'claw back' out-commuters and planning for a mix of housing which encourages the retention of residents of an economically active age or encourages younger economically active people to move into Staffordshire Moorlands.
- 9.60 Ultimately, SMDC will be required to make a decision on a suitable level of employment land to be provided in the District based on the evidence before it, balancing the social, economic and environmental dimensions to sustainable development in line with The Framework.

9.61 In this regard, if SMDC were to have a defined policy response to decrease net out commuting this could align with the Government’s sustainability agenda in The Framework, which states that:

*‘Planning policies should aim for a balance of land uses within their area so that people can be encouraged to minimise journey lengths for employment, shopping, leisure, education and other activities’ [§37]*

9.62 In terms of how the 25-45ha range for Staffordshire Moorlands could be split between the B1a/ B1b, B1c/B2 and B8 uses, it is not possible to directly translate the net split into gross requirements, as the data is not sufficiently robust to enable a precise breakdown of land lost/margin of choice by use type. As with High Peak, there are a number of conflicting considerations:

- 1 Based on the current ‘stock’ of floorspace in Staffordshire Moorlands District, there is a considerable supply of B2 industrial units, comprising 70% of all floorspace in the District, compared to 22% for B8 and just 8% for B1a office;
- 2 The OE growth forecasts indicate stronger growth in B1a/b office floorspace requirements; a more modest growth in in B8 land requirements; and a decline in demand for B2 industrial. The regeneration / policy on forecasts suggest higher growth in B1a/b office floorspace and the same growth in B8 floorspace and a lower decline in B2 land requirements;
- 3 The target growth sectors have a reasonable split between the knowledge economy, manufacturing, cultural and digital sectors and the visitor economy;
- 4 Based on the current land use of B-class sites identified as having the potential for redevelopment for non-employment uses in future, the great majority relate to B2 industrial sites.

9.63 On the basis of the points above, it is considered that an indicative split of 35% for B1a/B1b office, 40% for B1c/B2 industrial and 25% for B8 land could be appropriate.

9.64 This seeks to balance the replacement of some existing B2 stock with aspirations for heightened demand in this sector going forward; the higher growth in B1/b office requirements, the slower decline of the industrial sector and the continuing relatively limited demand of B8 warehousing (albeit recognising that this land hungry sector requires a disproportionate amount of land relative to employment generated).

9.65 A policy decision will need to be made within this broad range to ensure that if a specific (and, as yet, unforeseen) inward investment opportunity were to arise, a suitably sized prestige site could be made available within the overall portfolio in an accessible location attractive to the market. This may require Officers to adopt a flexible approach responding to the release/reservation of such a site, particularly if this could be linked to the Council’s strategic aim of diversifying the employment base by attracting more highly skilled manufacturing jobs to Staffordshire Moorlands.

**6: The Council should adopt a proactive approach to managing and improving the existing portfolio of employment sites to facilitate future growth.**

- 9.66 As with High Peak, SMDC should adopt a pro-active approach to managing and improving the existing portfolio of employment sites to facilitate future growth such as:
- Encouraging renewal and intensification on older sites with available land taking account of the particular constraints of individual sites.
  - Releasing some of SMDC's poorer quality employment sites to housing or other high value uses in order to cross subsidise improvements to other, more viable estates.
- 9.67 In assembling a new portfolio of sites, the Council would be required to manage the competing pressures on potential employment sites within Staffordshire Moorlands, balancing the aspirations for mixed-use development on some sites with the need to encourage renewal and intensification of the older industrial estates. Where mixed-use development or potential release of an employment site to other uses is contemplated, this should have regard to the availability of alternative sites to accommodate the relocation of firms.
- 9.68 On appropriate sites and where a clear need is demonstrated, marginal areas of the District may require allowing a limited amount of higher value 'enabling development' to help fund infrastructure and support provision of speculative employment premises. Mixed-use development may provide one way of enabling the private sector to provide such enabling investment. As well as seeking to retain employment land in any redevelopments of redundant employment sites (where appropriate, depending upon the nature of the employment site itself), there may also be some scope for developers to provide small business units in mainly residential schemes, perhaps secured through s.106 agreements and with delivery linked to the timing of other development. The precise location and layout of such space should be carefully assessed to ensure that it will be attractive to the market; for example, office space and Sui Generis uses such as car showrooms should typically be located at the front of sites to ensure market visibility. This approach is supported by Policy E2 of the adopted Staffordshire Moorlands Core strategy.

# Appendix 1 Glossary



ABI	Annual Business Inquiry, now replaced by BRES
APS	Annual Population Survey
B-Class employment	All office, industrial and warehousing/storage employment (in use classes B1a, B1b, B1c, B2 and B8).
Base Year	Starting year for assessment. Currently 2011 due to data availability.
BRES	The Business Register and Employment Survey (BRES) is the official source of employee and employment estimates by detailed geography and industry
Economic Activity Rate	The % of population (both employed and unemployed) that constitutes the manpower supply of the labour market.
Employee Jobs	Excludes self-employed jobs, HM Forces and Government Supported Trainees. The estimates also exclude employee jobs in farm agriculture
Employment Densities	Employment density refers to the average floorspace per person in an occupied building, and is therefore a measure of how much space each person occupies within the workplace.
Full Time Equivalent [FTEs]	A unit of measurement whereby an FTE of 1.0 means that the person employed is equivalent to a full-time worker, while an FTE of 0.5 signals that the worker is employed on a part-time basis
Gross External Area	Broadly speaking the whole area of a building taking each floor into account and including the perimeter wall thickness and external projections
Gross Internal Area	In general terms the whole enclosed area of a building within the external walls, taking each floor into account but excluding the thickness of the external walls
GVA	Gross value added (GVA) is a measure in economics of the value of goods and services produced in an area, industry or sector of an economy.
HEaDROOM	NLP housing requirement framework which takes account of demographic, housing and economic factors as well as policy and delivery matters to set out future housing requirements.
IMD 2010	The English Indices of Deprivation 2010, focussing on the national and sub-national patterns of multiple deprivation
Job Density	Jobs density is defined as the number of jobs in an area divided by the resident population aged 16-64 in that area.
Knowledge-based industries	Those industries which are relatively intensive in their inputs of technology and/or human capital
Location Quotients	Location Quotients measure the proportion of employment in an industry at the local authority level relative to the regional average.
National Planning Policy Framework [The	Published in March 2012, The National Planning Policy Framework sets out the Government's planning policies for England and how these are expected to be

Framework]	applied.
Net Internal Area	The usable area within a building measured to the face of the internal finish of perimeter or party walls ignoring skirting boards and taking each floor into account. This excludes toilets, lobbies, cleaners' cupboards, lifts, stairwells, corridors, circulation areas and internal structures such as walls and pillars.
NOMIS	National Online Manpower Information System which provides national statistics on the labour market
Plot Ratios	Plot ratios measure the total area of each floor (gross) of the building(s) (including plant), and relate this to the area of the site, excluding roads, pavements, access roads to backland sites and any land included in the site. For example, a two storey building covering half the site would have a plot ratio of 1:1, as would a 5-storey building covering one fifth of the site.
PopGroup	Forecasting model to project future population levels, based upon assumptions regarding fertility, mortality and migration.

## Appendix 2 Definitions of B-Class sector



The method used for re-categorising the employment forecasts by sector into B-Class uses is summarised below.

High Peak Apportionment of B Class Sectors to Land Uses

Oxford Economics Sector	Proportion of Jobs by Use Class		
	B1 office	B2 industrial	B8 warehousing
Crop and animal production, hunting		Non B-Class	
Forestry and logging		Non B-Class	
Fishing and aquaculture		Non B-Class	
Mining of coal and lignite		Non B-Class	
Extraction of crude petroleum		Non B-Class	
Mining of metal ores		Non B-Class	
Other mining and quarrying		Non B-Class	
Mining support service activities		Non B-Class	
Manufacture of food products	0%	100%	0%
Manufacture of beverages	0%	100%	0%
Manufacture of tobacco products	0%	100%	0%
Manufacture of textiles	0%	100%	0%
Manufacture of wearing apparel	0%	100%	0%
Manufacture of leather and related	0%	100%	0%
Manufacture of wood and of products	0%	100%	0%
Manufacture of paper and paper products	0%	100%	0%
Printing and reproduction of recorded media	0%	100%	0%
Manufacture of coke and refined petrol	0%	100%	0%
Manufacture of chemicals and chemicals	0%	100%	0%
Manufacture of basic pharmaceutical products	0%	100%	0%
Manufacture of rubber and plastic products	0%	100%	0%
Manufacture of other non-metallic minerals	0%	100%	0%
Manufacture of basic metals	0%	100%	0%
Manufacture of fabricated metal products	0%	100%	0%
Manufacture of computer, electronic	0%	100%	0%
Manufacture of electrical equipment	0%	100%	0%
Manufacture of machinery and equipment	0%	100%	0%
Manufacture of motor vehicles, trailers	0%	100%	0%
Manufacture of other transport equipment	0%	100%	0%
Manufacture of furniture	0%	100%	0%
Other manufacturing	0%	100%	0%
Repair and installation of machinery	0%	100%	0%
Electricity, gas, steam and air conditioning		Non B-Class	
Water collection, treatment and supply		Non B-Class	
Sewerage		Non B-Class	
Waste collection, treatment a	0%	100%	0%
Remediation activities and other waste activities	0%	100%	0%
Construction of buildings		Non B-Class	
Civil engineering		Non B-Class	
Specialised construction activities	0%	52%	0%
Wholesale and retail trade and repairs	0%	73%	0%
Wholesale trade, except of motor vehicles	0%	0%	100%

Oxford Economics Sector	Proportion of Jobs by Use Class		
	B1 office	B2 industrial	B8 warehousing
Retail trade, except of motor vehicles	Non B-Class		
Land transport and transport via pipe	0%	0%	69%
Water transport	Non B-Class		
Air transport	Non B-Class		
Warehousing and support activities	0%	0%	70%
Postal and courier activities	0%	0%	100%
Accommodation	Non B-Class		
Food and beverage service activities	Non B-Class		
Publishing activities	100%	0%	0%
Motion picture, video and television	100%	0%	0%
Programming and broadcasting activities	100%	0%	0%
Telecommunications	100%	0%	0%
Computer programming, consultancy	100%	0%	0%
Information service activities	100%	0%	0%
Financial service activities	100%	0%	0%
Insurance, reinsurance and pension funds	100%	0%	0%
Activities auxiliary to financial services	100%	0%	0%
Real estate activities	100%	0%	0%
Legal and accounting activities	100%	0%	0%
Activities of head offices	100%	0%	0%
Architectural and engineering activities	100%	0%	0%
Scientific research and development	100%	0%	0%
Advertising and market research	100%	0%	0%
Other professional, scientific	100%	0%	0%
Veterinary activities	100%	0%	0%
Rental and leasing activities	Non B-Class		
Employment activities	Non B-Class		
Travel agency, tour operator and other	Non B-Class		
Security and investigation activities	Non B-Class		
Services to buildings and landscape	Non B-Class		
Office administrative, office support	100%	0%	0%
Public administration and defence	10%	0%	0%
Education	Non B-Class		
Human health activities	Non B-Class		
Residential care activities	Non B-Class		
Social work activities	Non B-Class		
Creative, arts and entertainment activities	Non B-Class		
Libraries, archives, museums and other	Non B-Class		
Gambling and betting activities	Non B-Class		
Sports activities and amusement	Non B-Class		
Activities of membership organisation	Non B-Class		
Repair of computers and personal	Non B-Class		
Other personal service activities	Non B-Class		
Residential Care & Social Work	Non B-Class		

Source: Oxford Economics / NLP analysis

Staffordshire Moorlands Apportionment of B Class Sectors to Land Uses

Oxford Economics Sector	Proportion of Jobs by Use Class		
	B1 office	B2 industrial	B8 warehousing
Crop and animal production, hunting		Non B-Class	
Forestry and logging		Non B-Class	
Fishing and aquaculture		Non B-Class	
Mining of coal and lignite		Non B-Class	
Extraction of crude petroleum		Non B-Class	
Mining of metal ores		Non B-Class	
Other mining and quarrying		Non B-Class	
Mining support service activities		Non B-Class	
Manufacture of food products	0%	100%	0%
Manufacture of beverages	0%	100%	0%
Manufacture of tobacco products	0%	100%	0%
Manufacture of textiles	0%	100%	0%
Manufacture of wearing apparel	0%	100%	0%
Manufacture of leather and related	0%	100%	0%
Manufacture of wood and of products	0%	100%	0%
Manufacture of paper and paper products	0%	100%	0%
Printing and reproduction of recorded media	0%	100%	0%
Manufacture of coke and refined petrol	0%	100%	0%
Manufacture of chemicals and chemicals	0%	100%	0%
Manufacture of basic pharmaceutical products	0%	100%	0%
Manufacture of rubber and plastic products	0%	100%	0%
Manufacture of other non-metallic minerals	0%	100%	0%
Manufacture of basic metals	0%	100%	0%
Manufacture of fabricated metal products	0%	100%	0%
Manufacture of computer, electronic	0%	100%	0%
Manufacture of electrical equipment	0%	100%	0%
Manufacture of machinery and equipment	0%	100%	0%
Manufacture of motor vehicles, trailers	0%	100%	0%
Manufacture of other transport equipment	0%	100%	0%
Manufacture of furniture	0%	100%	0%
Other manufacturing	0%	100%	0%
Repair and installation of machinery	0%	100%	0%
Electricity, gas, steam and air conditioning		Non B-Class	
Water collection, treatment and supply		Non B-Class	
Sewerage		Non B-Class	
Waste collection, treatment a	0%	100%	0%
Remediation activities and other waste activities	0%	100%	0%
Construction of buildings		Non B-Class	
Civil engineering		Non B-Class	
Specialised construction activities	0%	58%	0%
Wholesale and retail trade and repairs	0%	75%	0%
Wholesale trade, except of motor vehicles	0%	0%	100%
Retail trade, except of motor vehicles		Non B-Class	
Land transport and transport via pipe	0%	0%	68%

Oxford Economics Sector	Proportion of Jobs by Use Class		
	B1 office	B2 industrial	B8 warehousing
Water transport	Non B-Class		
Air transport	Non B-Class		
Warehousing and support activities	0%	0%	88%
Postal and courier activities	0%	0%	100%
Accommodation	Non B-Class		
Food and beverage service activities	Non B-Class		
Publishing activities	100%	0%	0%
Motion picture, video and television	100%	0%	0%
Programming and broadcasting activities	100%	0%	0%
Telecommunications	100%	0%	0%
Computer programming, consultancy	100%	0%	0%
Information service activities	100%	0%	0%
Financial service activities	100%	0%	0%
Insurance, reinsurance and pension funds	100%	0%	0%
Activities auxiliary to financial services	100%	0%	0%
Real estate activities	100%	0%	0%
Legal and accounting activities	100%	0%	0%
Activities of head offices	100%	0%	0%
Architectural and engineering activities	100%	0%	0%
Scientific research and development	100%	0%	0%
Advertising and market research	100%	0%	0%
Other professional, scientific	100%	0%	0%
Veterinary activities	100%	0%	0%
Rental and leasing activities	Non B-Class		
Employment activities	Non B-Class		
Travel agency, tour operator and other	Non B-Class		
Security and investigation activities	Non B-Class		
Services to buildings and landscape	Non B-Class		
Office administrative, office support	100%	0%	0%
Public administration and defence	10%	0%	0%
Education	Non B-Class		
Human health activities	Non B-Class		
Residential care activities	Non B-Class		
Social work activities	Non B-Class		
Creative, arts and entertainment activities	Non B-Class		
Libraries, archives, museums and other	Non B-Class		
Gambling and betting activities	Non B-Class		
Sports activities and amusement	Non B-Class		
Activities of membership organisation	Non B-Class		
Repair of computers and personal	Non B-Class		
Other personal service activities	Non B-Class		
Residential Care & Social Work	Non B-Class		

Source: Oxford Economics / NLP analysis

## Appendix 3 Projected Employment Changes in High Peak and Staffordshire Moorlands 2011-2031



Projected FTE Job Growth in High Peak, Staffordshire Moorlands and Comparator Areas 2011-2031

Industrial Sector	% FTE Job Growth High Peak	% Growth Staffs Moorlands	% Growth East Midlands	% Growth UK
Crop and animal production, hunting	-19%	-25%	-19%	-23%
Forestry and logging	-42%	-38%	-34%	-29%
Fishing and aquaculture	-35%	0%	-35%	-31%
Mining of coal and lignite	0%	0%	-48%	-39%
Extraction of crude petroleum	0%	0%	-37%	-42%
Mining of metal ores	0%	0%	0%	0%
Other mining and quarrying	-43%	-70%	-47%	-47%
Mining support service activities	0%	0%	6%	-29%
Manufacture of food products	-5%	2%	-5%	-9%
Manufacture of beverages	-27%	-28%	-16%	-21%
Manufacture of tobacco products	0%	0%	-14%	-18%
Manufacture of textiles	-42%	-30%	-35%	-32%
Manufacture of wearing apparel	-41%	-32%	-33%	-36%
Manufacture of leather and related	-23%	0%	-15%	-20%
Manufacture of wood and of products	-26%	0%	-14%	-18%
Manufacture of paper and paper products	-21%	-22%	-23%	-28%
Printing and reproduction of recorded media	-23%	-16%	-26%	-30%
Manufacture of coke and refined petrol	0%	0%	0%	-8%
Manufacture of chemicals and chemicals	-18%	-7%	-19%	-22%
Manufacture of basic pharmaceutical products	-26%	-6%	-19%	-12%
Manufacture of rubber and plastic products	-11%	-15%	-13%	-19%
Manufacture of other non-metallic minerals	-19%	-13%	-19%	-21%
Manufacture of basic metals	-26%	-24%	-29%	-29%
Manufacture of fabricated metal products	-9%	-7%	-12%	-16%
Manufacture of computer, electronic	-39%	-41%	-31%	-34%
Manufacture of electrical equipment	-13%	-25%	-18%	-22%
Manufacture of machinery and equipment	-13%	-9%	-15%	-18%
Manufacture of motor vehicles, trailers	-22%	-17%	-22%	-25%
Manufacture of other transport equipment	-21%	-16%	-11%	-14%
Manufacture of furniture	-16%	-2%	-23%	-19%
Other manufacturing	-3%	-24%	-10%	-16%
Repair and installation of machinery	-18%	-18%	-9%	-12%
Electricity, gas, steam and air	-26%	0%	-24%	-26%

Industrial Sector	% FTE Job Growth High Peak	% Growth Staffs Moorlands	% Growth East Midlands	% Growth UK
conditioning				
Water collection, treatment and supply	-7%	-3%	-8%	-15%
Sewerage	-30%	-15%	-15%	-22%
Waste collection, treatment a	-13%	-5%	-10%	-15%
Remediation activities and other waste activities	0%	0%	-7%	-10%
Construction of buildings	21%	27%	27%	19%
Civil engineering	6%	13%	15%	8%
Specialised construction activities	12%	29%	17%	14%
Wholesale and retail trade and repairs	-1%	4%	7%	6%
Wholesale trade, except of motor vehicles	5%	10%	16%	13%
Retail trade, except of motor vehicles	8%	13%	17%	13%
Land transport and transport via pipe	18%	23%	21%	16%
Water transport	0%	122%	0%	6%
Air transport	0%	0%	10%	8%
Warehousing and support activities	22%	29%	27%	28%
Postal and courier activities	3%	2%	5%	0%
Accommodation	-3%	-9%	16%	12%
Food and beverage service activities	6%	-1%	26%	22%
Publishing activities	5%	13%	1%	0%
Motion picture, video and television	24%	61%	14%	20%
Programming and broadcasting activities	68%	30%	49%	26%
Telecommunications	3%	21%	2%	3%
Computer programming, consultancy	34%	65%	28%	33%
Information service activities	26%	53%	16%	15%
Financial service activities	-21%	7%	-6%	-7%
Insurance, reinsurance and pension funds	-32%	0%	-7%	2%
Activities auxiliary to financial services	6%	53%	18%	20%
Real estate activities	37%	34%	35%	38%
Legal and accounting activities	34%	6%	32%	46%
Activities of head offices	30%	9%	30%	41%
Architectural and engineering activities	29%	0%	26%	37%
Scientific research and development	31%	17%	23%	28%
Advertising and market research	33%	5%	31%	47%
Other professional, scientific	38%	2%	34%	52%
Veterinary activities	46%	20%	39%	50%
Rental and leasing activities	-11%	27%	25%	26%
Employment activities	-21%	-2%	30%	29%
Travel agency, tour operator and other	-13%	1%	21%	20%

Industrial Sector	% FTE Job Growth High Peak	% Growth Staffs Moorlands	% Growth East Midlands	% Growth UK
Security and investigation activities	-14%	1%	36%	35%
Services to buildings and landscape	-9%	22%	33%	30%
Office administrative, office support	-11%	27%	37%	38%
Public administration and defence	-11%	-10%	-16%	-17%
Education	-6%	-6%	-3%	-4%
Human health activities	3%	12%	12%	9%
Residential care activities	9%	21%	17%	15%
Social work activities	-5%	5%	2%	1%
Creative, arts and entertainment activities	26%	18%	30%	27%
Libraries, archives, museums and other	27%	36%	28%	21%
Gambling and betting activities	21%	35%	23%	17%
Sports activities and amusement	32%	45%	36%	29%
Activities of membership organisation	3%	22%	12%	19%
Repair of computers and personal	12%	20%	21%	21%
Other personal service activities	3%	10%	11%	12%
<b>TOTAL</b>	<b>0%</b>	<b>10%</b>	<b>10%</b>	<b>11%</b>
Key:	>10% Decline	>10% Growth		

Source: Oxford Economics (December 2013)



## Appendix 4 Stakeholder Consultee Details

## Local Authority Consultees

<b>Date</b>	<b>Local Authority</b>	<b>Consultee</b>	<b>Method of Consultation</b>
21/01/2014	Peak District National Park Authority	Ian Fullilove Policy Planner	Questionnaire Completed by Council
22/01/2014	Stockport MBC	David Johnston Policy Officer (Employment)	Questionnaire Completed by Council
23/01/2014	Tameside Council	Simon Pateman Senior Planning Officer	Questionnaire Completed by Council
28/01/2014	Kirklees Council	James Barker Policy Planner	Questionnaire Completed by Council
13/01/2014	Sheffield City Council	Richard Holmes Principal Planning Officer Forward and Area Planning	Questionnaire Completed by Council
07/01/2014	Oldham	Clare Davison Planning Officer	Questionnaire Completed by Council
N/A	Barnsley	N/A	Questionnaire sent to the local authority by email. Information taken from the Council's Local Plan documents/website as no response was received from the local authority.
N/A	Cheshire East	N/A	Questionnaire sent to the local authority by email. Information taken from the Council's Local Plan documents/website as no response was received from the local authority.
22/01/2014	Derbyshire Dales	Mike Hase Policy Manager	Questionnaire Completed by Council
24/01/2014	Stoke-on-Trent	Mathieu Evans	Questionnaire Completed by Council
23/01/2014	Newcastle-under-Lyme BC	Simon Smith Economic Regeneration Manager	Questionnaire Completed by Council

21/01/2014	East Staffordshire	Dean Piper Enterprise and Partnerships Manager	Questionnaire Completed by Council
20/01/2014	Stafford BC	Robert Gatensbury/Alex Yendole Regeneration Manager/Planning Policy Manager	Questionnaire Completed by Council
21/01/2014	Derbyshire County Council	Michelle Spence Minerals and Waste	Email sent to the County Council on 16/01/14 requesting information. Telephone conversation with the officer on 21/01/2014.
N/A	Staffordshire County Council	Julie Castree-Denton Mat Griffin Minerals and Waste	Email sent to the County Council on 16/01/14 requesting information. Information taken from the County Council's Mineral and Waste Plan documents/website as no response was received from the authority.

## Responses received from Local Agents

<b>Date</b>	<b>Agent</b>	<b>Area Covered</b>	<b>Method of Consultation</b>
20/01/2014	Ryder & Dutton Ltd Richard Byers	High Peak - Glossop Town Centre	Email response
22/01/2014	GVA Andrew Pexton	High Peak - Glossop	Questionnaire Completed by Agent
21/01/2014	High Peak Agent	High Peak - Buxton	Questionnaire Completed by Agent
13/01/2014	Waltons Martin Walton	High Peak	Questionnaire Completed by Agent
15/01/2014	Daniel & Hulme Richard Day	Staffordshire Moorlands	Questionnaire Completed by Agent

## Responses received from Local Businesses

<b>Date</b>	<b>Business</b>	<b>Location of Business</b>	<b>Method of Consultation</b>
21/01/2014	Boss Bellows	High Peak	Questionnaire Completed by Business
17/01/2014	Otter Controls	High Peak	Questionnaire Completed by Business
17/01/2014	Clover Chemicals Limited	High Peak	Questionnaire Completed by Business
16/01/2014	Flowflex Components Ltd	High Peak	Questionnaire Completed by Business
13/01/2014	Carpenter Ltd	High Peak	Questionnaire Completed by Business
13/01/2014	Street Cranes	High Peak	Questionnaire Completed by Business
13/01/2014	Glossop Cartons	High Peak	Questionnaire Completed by Business
10/01/2014	Gap Plastics	High Peak	Questionnaire Completed by Business
21/01/2014	F Ball and Co. Ltd	Staffordshire Moorlands	Questionnaire Completed by Business
17/01/2014	Adams Foods Ltd	Staffordshire Moorlands	Questionnaire Completed by Business

## Other Consultees

<b>Date</b>	<b>Organisation</b>	<b>Location of Organisation</b>	<b>Method of Consultation</b>
15/01/2014	University of Derby Peter Dewhurst Strategic Director and Dean	High Peak	Email sent requesting information. Information taken from details available online as no response was received.

15/01/2014

Buxton & Leek College  
Mary Blauciak  
Head of FE/Assistant Dean

High Peak/Staffordshire Moorlands

Email sent requesting information.  
Information taken from details available  
online as no response was received.



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