Harrogate Borough Council Employment Land Review

Harrogate Borough Council

June 2015

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Executive summary

Scope and purpose of Study

Atkins Ltd were commissioned to undertake an Employment Land Review Study on behalf of Harrogate Borough Council in order to analyse the future demand for employment land in the District to 2035.

The Employment Land Review provides a robust evidence base and associated policy recommendations to assist in the development of policies in the Council's Local Plan.

The study assesses the current provision for employment in the District. It provides an assessment of future demand and market demands and evaluates current policies and research in neighbouring authorities.

Methodology

The study has involved a comprehensive assessment of the future demand for employment land that complies with the National Planning Policy Framework (NPPF) and the National Planning Practice Guidance (NPPG), including the need to be more flexible and responsive to market signals and the need to demonstrate greater co-operation with neighbouring authorities.

A review of existing policies and strategies has been prepared along with a summary of the prevailing socio-economic conditions in Harrogate District to set out the socio-economic context which shapes employment land demand and supply factors in the study area.

An examination of the future employment needs in Harrogate District was undertaken which draws upon property data provided by Harrogate Borough Council, discussions with local agents and a series of site visits.

The functional economic market area (FEMA) of the District was defined, analysed and shared with adjoining local authorities. An assessment of the future employment needs for the period to 2035 were completed and based on projecting employment growth within the study area. These projections used the latest employment forecasts for Harrogate Borough Council generated by Experian Model, Regional Econometric Model (REM) and trend based employment growth.

Harrogate Borough Council provided a list of 40 sites within the administrative area, of which 25 were existing employment areas and 15 identified as potential future employment allocations. The sites were assessed by carrying out site visits, which collected a mixture of qualitative and quantitative data. The sites were assessed against criteria (including access; sustainable development criteria; quality of site environment and surroundings; market requirements and perceptions; and policy considerations) to assess their suitability for employment uses and ability to meet future business accommodation requirements to 2035.

The study concluded with policy recommendations for achieving a demand – supply balance and meeting employment demands for the period to 2035.

Key findings

Economic context

The Harrogate district is located within the county of North Yorkshire. The business register employment survey (BRES) results show total employment in the District is 73,327 jobs (2012) with an annual average rate of growth of 1.8% over the period 1998-2012. Employment was dominated pre-2008 by three broad sectors: wholesale and retail trade, repair of motor vehicles and motorcycles (20%); real estate and business activities (16%) and health & social work (14%). As per the revised SIC2007 classifications for 2012, the order has changed with health (14%), education (10%) and retail (10%), information & communication (10%) and accommodation & food services (9%) now identified as the major employment sectors. The change in classification does not allow for easy comparison with past surveys.

The majority of businesses in the district employ less than 10 workers, which is consistent with regional and national trends. Harrogate has a marginally smaller proportion of large businesses employing over 250 workers, although this is not significant.

Between 2001 and 2011, the District experienced population growth of 4% which was lower than the regional (6%) and national averages (8%). At 72%, Harrogate's working age population is slightly lower than that of the two LEPs and national averages (which range from 73-74%). The District has a relatively large proportion of its population with high level qualifications (Level 4 and above) when compared to regional and national averages. This reflects the high quality nature of the resident workforce in the District.

Commercial property market

Analysis of Valuation Office Agency (VOA) data and consultations with local property agents indicate that the market in Harrogate is performing well. The District has approximately 760,000 sq. ft. of employment floorspace being marketed, of which 60% is industrial and 40% office (VOA).

The office market is dominated by small companies and most demand for office space is for premises less than 5,000 sq. ft. in size, with good quality, modern and well-connected offices a necessity for most occupiers. It is reported by agents that many businesses choosing to locate in or seeking relocation within the District are keen to stay within or near Harrogate Town. Enquiries for property in the town are consistently high, and agents have identified a shortfall in office B1a premises within close proximity to the town centre.

VOA data shows that growth in available office floorspace has been significantly lower than the national level, and that experienced by adjacent local authorities (shown in Chapter 4). Combined with the high level of enquiries reported by agents, this suggests that demand may outweigh~~s~~ supply within the district. This poses a risk, as businesses may choose to move to new premises outside of the district. Good quality vacant floorspace in suitable locations within the district is therefore crucial in helping businesses meet their needs.

Future requirements

Employment projections identify potential B-class Full Time Equivalent (FTE) jobs growth of between 3,070 and 10,860 between 2014 and 2035, depending on which of the three growth scenarios is considered. Forecast jobs growth to 2035 would require between 65,000 and 294,000 sqm of floorspace.

A common pattern across all three scenarios is continued employment growth (and therefore increasing floorspace and land requirements) in the B1 and B8 sectors, and decline in B2 employment. This supports the evidence gathered in conversation with local businesses, property representatives and the council (Chapter 6).

A key objective should therefore relate to testing any surplus B2 floorspace and land for its ability to be re-used for B1 and/or B8 purposes. If the assessment indicates that surplus B2 sites are unfit for B1/B8 uses they should be considered for release to other uses, while appropriate land is allocated to meet the growing B1 and B8 needs. Furthermore, as it is unlikely that all surplus B2 land will be reused for B1 and B8 purposes it will be important to safeguard and intensify suitable B1 and B8 locations and protect vacant / undeveloped employment land, so that Harrogate district's economy can continue to grow over the plan period.

A preferred scenario was identified (the REM scenario, set out in Chapter 6). This forecasts higher land requirements than the Experian scenario but lower than those of the trend based scenario. Given the uncertainties surrounding long term forecasting however, and the many externalities that could affect Harrogate's economy over the period to 2035, it is recommended that the Council adopts a flexible approach to employment land planning.

However based on the REM Scenario, **Harrogate should plan for a minimum requirement of 18 hectares of employment land across the district over the period to 2035** but aspire to deliver potentially more good quality employment land in order to offer the local and inward investment markets sufficient choice and flexibility. Overall, we recommend that the Council allocates an additional 20-25ha of developable employment land for the period up to 2035 in order to meet the projected levels of additional B1 and B8 need, replace existing employment sites that may be lost to other uses (e.g. as a result of permitted development rights) and to allow flexibility and choice in the market.

Assessment of existing employment areas

The existing 25 employment areas identified by the Council were assessed to determine their suitability for existing B class uses and future development opportunities based on a range of criteria. This assessment was summarised using a suitability score which indicates the majority of existing sites in the District as ‘fair’ or ‘good’ in terms of quality.

Supply of employment floorspace

To consider the implications associated with employment land requirements to 2035, Atkins assessed the potential for additional floorspace from a variety of sources, including:

Vacant Floorspace – As identified in section 8, there is approximately 70,922 sqm of actively marketed B-class employment space in the District (based on Q3 2014/15 PAF data). This presents a vacancy rate of 6% which provides a source of supply for the market to function efficiently. There will always need to be flexibility and a range of choices in premises to allow for movement of business and to allow businesses to expand and start up. Consequently, this was excluded from our analysis of future supply.

Commercial Development Pipeline – There is currently a predicted net gain of 60,326sqm of unimplemented B use class planning permissions within Harrogate District, some of which are on sites identified as vacant land (e.g. Pannal , near Harrogate) and on longer term opportunity sites (e.g. Manse Farm, Knaresborough).

Vacant Land – Existing employment sites were assessed to have a total of approximately 11 ha of vacant land that theoretically could provide potential B-class employment space. This presents a source of supply that could potentially deliver up to 47,500sqm of B-class floorspace. However, the majority of this land is suitable mainly for general industrial B2/B1c use and the realisation of this latent supply would be subject to more detailed feasibility and viability analysis

Demand-supply balance

Chapter 9 has quantified the potential from each of the above sources to assess what the theoretical supply - demand balance might be, in terms of meeting the projected employment land requirements of the preferred scenario. This has shown that there is a shortfall of B1a/b and B8 land (a total of 5ha) and a theoretical oversupply (16ha) of land for B1c/B2, as summarised in the table below.

B-class land use	Change 2014-2035 Preferred REM scenario (ha)	Potential identified supply (ha)	Supply / demand balance (ha)
B1a/b	+4	3	-1
B1c/B2	-1	15	+16
B8	+9	5	-4
Total	**+12**	**23**	**+11**

Based on the above, Harrogate will need to provide additional B1 and B8 land to meet business needs over the period to 2035. Some of this need could be met by re-using surplus industrial land, although it is likely that not all industrial sites will be suitable for B1 or B8 re-development. Furthermore, both B1 and B8 sites are subject to permitted development rights that grant prior approval for residential re-development, and therefore it will be important to replace any loss of existing B1 or B8 stock.

It should be noted that the quantitative assessment reflects a level of uncertainty inherent in the job forecasts, while the supply of sites needs to provide for a choice of size, quality, type and location of premises. Providing a precise match of sites and premises is not realistic, accounting for the functioning of the market, and is not the purpose of this exercise. However, comparing the supply with demand does allow the Council to consider what policy approaches they will need to take forward to meet the future employment needs of the District and to promote growth.

It will be important that the Council seeks to promote enough land to meet employment demands over the plan period. Without sufficient employment land, projected job growth will be very difficult to achieve, as existing businesses within the district may find it difficult to meet their aspirations to expand and inward investment to the District may be hindered due to a lack of suitable sites. This could ultimately mean that existing businesses and those looking to locate or invest in the District may choose to look elsewhere for suitable sites.

Housing growth projections need to be supported by new jobs. Failure to provide sufficient land to meet the projected growth in jobs would impact on the local employment opportunities available to existing and future residents of the Borough, and hence more residents would need to look outside the District for employment.

The key finding from this review was that existing employment areas do provide a potential reservoir of land for future needs. However, this will not adequately meet all demand during the period up to 2035 in terms of both quantity and quality. It is therefore important that the Council should continue to retain policy protection for existing employment areas to prevent a decrease in supply, Atkins recommend that any release of employment land should only take place at a limited number of existing employment areas that are currently under-used and considered suitable for mixed use development.

Policy recommendations, implementation and monitoring

Section 10 sets out our recommendations for informing the employment land policies which will be developed and refined as part of the Harrogate district Local Plan process:

Employment Protection Policy – The evidence from the review shows the majority of existing employment sites are operating effectively and perform well as viable employment sites. The future supply-demand analysis shows that there is sound justification for the continued protection of the majority of existing employment areas. However, a small number of sites are considered as being more suitable for mixed use development.

Future Allocations – The demand-supply analysis clearly demonstrates that the Harrogate District has an undersupply of employment land up until 2035. The council therefore has scope for bringing forward new unallocated employment sites to address this shortfall and to allow for sufficient flexibility and choice in order to:

- Facilitate expansion of existing business demand.
- Offer a high quality site (or sites) to capture inward investment in key business sectors which will assist in diversifying the District's economy and maintaining balanced economic prosperity in the period up to 2035.
- Consolidate Harrogate's unique economic identify and ensure its economic role is distinguished from, but related to, the main employment centres of the two LEP areas.

A shortlist of good quality sites for further evaluation and consideration by the Council has been identified by Atkins. These should be considered strong contenders as potential new allocations in the Local Plan. The sites have been ranked and the best scoring have been identified as representing the best opportunities to be allocated in part or whole for B-class uses.

Overall, we recommend that the Council allocates an additional 20-25ha of developable employment land for the period up to 2035 in order to meet the projected levels of additional B1 and B8 need, replace existing employment sites that may be lost to other uses (e.g. as a result of permitted development rights) and to allow flexibility and choice in the market.

Assessing Market Signals – In order to respond to market signals the Council should undertake regular reviews of employment land trends every 3–5 years which would include the following:

- Engage with and undertake surveys of local businesses to understand their needs and aspirations, which will require an appropriate sample size to be statistically representative of the local economy (approximately 500 businesses). The business survey would gather empirical evidence of need including the suitability of the location, type, size and quality of the premises available in the area.
- Continue to carry out and monitor existing employment areas through surveys, assessing quantity of occupied and vacant floorspace, but also assessing the quality of the premises and wider site environment.
- Consult with local property agents to gain perspectives of local market conditions.

1. Introduction

1.1 Background and objectives

1.1.1 Atkins Ltd was commissioned in July 2014 to undertake an Employment Land Review on behalf of Harrogate Borough Council. The purpose of the study was to provide a robust evidence base and associated recommendations to assist in the development of policies in the Council's Emerging Local Plan. The core objectives of the study were to:

- Define Harrogate's Functional Economic Market Area (FEMA);
- Provide an overview of economic trends
- Analyse the structure and performance of the District's existing economic base;
- Assess the supply of, and demand for, labour and skills over the period to 2035;
- Consider effects of changes to permitted development rights;
- Make recommendations for the future nature and scale of employment provision in the District and FEMA; and
- Make recommendations as to the future number of jobs that could be provided within the FEMA.

1.2 Scope of study

1.2.1 The study is concerned specifically with employment land and premises that fall within the "B-class" of the Town and County Planning (Use Classes) Order 1987 (as amended) (the "UCO"). Specifically the UCO identifies the following categories for employment land within the "B-class":

Class B1 – Business

- Use for all or any of the following purposes:
  - as an office other than a use within Class A2 (financial and professional services);
  - for research and development of products and processes; or
  - for any industrial process, being a use which can be carried out in any residential area without detriment to the amenity of that area by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit.

Class B2 – General Industrial

- Use for carrying on of an industrial process other than one falling within Class B1 above.

Class B8 – Storage or Distribution

- Use for storage or as a distribution centre.

1.2.2 The employment forecasts in chapter 6 also cover all sectors of the economy. The report also considers the role which mixed use development can play in meeting the demand for B-class activities in the District.

1.3 Methodology overview

1.3.1 Summarised below is the methodology applied for the Employment Land Review. More details regarding the methodology and associated tasks are provided in relevant chapters of the report.

- **Task 1:** Review of Existing Policies, Strategies and Evidence – Analysis of current policies and strategies at the national, regional and local levels and assessment of the economic characteristics of the District. The review included an assessment of relevant studies and plans adopted by neighbouring districts.

- **Task 2:** Identifying the Functional Economic Area – A FEMA helps understand the nature, extend and distribution of economic activity, the Department for Communities and Local Government (DCLG) defined FEMAs as 'the area over which the local economy and its key markets operate', There is no universally agreed approach to defining a FEMA, however the most widely accepted approach to identifying FEMAs is by reference to Travel to Work Areas (TTWAs), which are relatively self-contained, internally contiguous labour market areas. As part of this study, the travel to work and employment data were reviewed enabling recommendations to be made as to the most appropriate FEMA definition for Harrogate. We also consulted with neighbouring authorities on our recommended FEMA area given that functional areas are not necessarily constrained by administrative boundaries.
- **Task 3:** Property Market Appraisal – Review of property market trends and demand-supply factors based on discussions with local property agents and analysis of Valuation Office Agency (VOA) data. Key stakeholders such as the Chamber of Commerce, local property agents, and attendees of the Property Agent's Forum were also consulted. Data was gathered from these sources to enable analysis of the total available floorspace, analysis of the change of supply, identify past trends in the district since 2002 and comparison of supply to other Local Authorities, in addition to more qualitative analysis of local market patterns as per discussions with local agent.
- **Task 4:** Economic Profiling and Review of Past Trends - Review of key socio-economic characteristics and conditions to inform our forecasts for the demand for employment land. The socio economic conditions provide the context to what ultimately shapes Harrogate Borough Council's employment land supply and demand. The Annual Business Survey (ABI) and Business Register Employment Survey (BRES) are used as the main data for analysis, and in addition to Harrogate Borough Council, comparisons are made to regional, sub regional and national trends.
- **Task 5:** Scenario Building of Demand for Employment Land – Preparation of employment and employment growth scenarios. Future employment floorspace and land requirements are identified through consideration of three growth scenarios; Regional Econometric Model (REM), Experian Forecast and a Trend-based scenario based on Harrogate District's historic growth needs. This range of scenarios allows for conclusions and patterns to be identified to select a preferred employment floorspace and land requirement to be identified.
- **Task 6:** Taking Stock of the Existing Situation & Identifying a New Portfolio of Sites - Appraisal of individual existing and potential sites having regard to factors including vacancy, location, premises, site quality, infrastructure and accessibility issues and any constraints on future development.
- **Task 7:** Relationship between Supply Demand Balance – Combining the findings of Tasks 6 and 7, we assess the theoretical demand-supply balance in the District. This takes the forecasted needs combined with the appraised supply, identified in Task 6, to conclude whether there is a need for additional provision or any surplus employment land across different use classes. Any identified need for additional provision will then use the portfolio of new sites, identified in Task 6, to identify which sites could broadly accommodate these needs.
- **Task 8:** Conclusions and Policy Recommendations – Drawing together the findings of the research, particularly the findings from the supply demand analysis. Conclusions and policy recommendations are made to ensure sufficient and appropriate employment land is available over the plan period. Include the recommendation and ranking of certain sites available within the district in addition to providing overall key recommendations for the Local Plan.

1.4 Structure of document

1.4.1 The remainder of this document is structured as follows:

- Section 2 summarises the relevant policy and strategy context for the study;
- Section 3 presents our analysis of Harrogate's function and relationship to other areas defined as the Functional Economic Area;
- Section 4 provides a review of property market conditions and performance in the District;
- Section 5 sets out the socio-economic profile of the area;

- Section 6 contains our estimates of future potential employment land demand;
- Section 7 assesses existing employment land supply;
- Section 8 provides an analysis of the future potential supply of employment land;
- Section 9 describes how future employment land needs can be met; and
- Section 10 sets out our conclusions and recommendations for employment land policy.

2. Planning policy and strategic context

2.1 Introduction

2.1.1 This section summarises the policy context for the study and identifies the key implications for employment land policy in the District.

2.1.2 The review has included an assessment of the relevant local, regional and national policy context including the NPPF and emerging guidance. The Council's existing policy approach has also been reviewed.

2.2 National planning policy

The National Planning Policy Framework

2.2.1 The National Planning Policy Framework (NPPF) was published in March 2012. The NPPF is a key component of the Government's planning reforms which aim to make the planning system less complex and more accessible while at the same time promoting sustainable growth. The NPPF consolidates all policy statements, circulars and guidance documents into a single, simple Framework.

Using a proportionate evidence base

2.2.2 The NPPF encourages local planning authorities to ensure their Local Plans are based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics of a given area. This aspect of the NPPF requires local authorities to 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.

Business needs

2.2.3 The NPPF makes it clear that local planning authorities should have a clear understanding of business needs within economic markets operating in and across their area (paragraph 160). Local authorities are also encouraged to work together with other bodies including county and neighbouring authorities, Local Enterprise Partnerships (LEPs) and the local business community when preparing and maintaining a robust evidence base.

Duty-to-cooperate and neighbouring Local Authorities

2.2.4 The NPPF asks local authorities to use this evidence base to primarily assess: the needs for land or floorspace for economic development and the existing and future supply of land available for economic development and its sufficiency and suitability to meet identified needs (paragraph 161). This study will ensure that the Council has a clear understanding of business needs within economic markets operating across the District.

2.2.5 Harrogate District's adjoining districts are Richmondshire, Craven, Bradford, Leeds, Selby, York and Hambleton. These local authorities fall within the Functional Economic Market Area (discussed below in Chapter 3). As such these authorities should be involved in duty to co-operate matters. Section 110 of the Localism Act sets out a 'duty to co-operate'. This applies to all local planning authorities, national park authorities and county councils in England and to a number of other public bodies. The new duty:

- relates to sustainable development or use of land that would have a significant impact on at least two local planning areas or in a planning matter that falls within the remit of a county council and requires that councils set out planning policies to address such spatial issues;
- requires that councils and public bodies 'engage constructively, actively and on an ongoing basis' to develop strategic policies; and
- requires councils to consider joint approaches to plan making.

2.2.6 The NPPF identifies the strategic issues where co-operation might be appropriate, including the provision of major retail, leisure, industrial and other economic development across a travel to work area (paragraph 156). Paragraphs 178-181 of the NPPF give further guidance on 'planning strategically across local boundaries', highlighting the importance of joint working to meet development requirements that cannot be wholly met within a single local planning area through either joint planning policies or informal strategies such as infrastructure and investment plans.

2.2.7 This study provides part of the evidence base which will allow Harrogate Borough Council to demonstrate how its approach to economic development meets the requirements set out in the NPPF.

National Planning Practice Guidance

2.2.8 National Planning Practice Guidance 2014 (NPPG) provides guidance on how local authorities should approach both housing and employment land reviews. Two online guides have been produced – Housing and Economic Land Availability Assessment which provides a methodology of reviewing suitable land, and Housing and Economic Development Needs Assessments, which provides guidance on how future needs can be determined.

2.2.9 The assessment is formed of a 5 stage methodology as follows:

- **Stage 1:** Identification of sites and broad locations to provide an audit of available land. The outcome of this stage is to understand key employment land supply issues and generate a portfolio of potential employment sites to take forward for more detailed review.
- **Stage 2:** Site/broad location assessment to estimate the development potential. This will include a re-appraisal of the suitability of previously allocated land and the potential to designate allocated land for different or a wider range of uses. This stage entails a qualitative review of all significant sites and premises for their 'suitability', 'availability' and 'achievability.'
- **Stage 3:** Windfall assessment not applicable to employment land reviews as this relates to housing sites only.
- **Stage 4:** Assessment Review ascertaining the need for economic development uses. To understand the future quantity of land required across the main business sectors; to provide a breakdown of that analysis in terms of quality and location and provide an indication of 'gaps' in supply through economic forecasting, consideration of recent trends and/or assessment of local property market circumstances. The outcome of this stage is to provide broad quantitative employment land requirements across the principal market segments covering the Local Plan period and an analysis of the likely 'gaps' in supply that need to be filled.
- **Stage 5:** Final evidence base, the outcome of which will be the completion of the employment land review, to be taken forward in the Local Plan.

2.2.10 This Review is prepared in line with the advice described above.

2.3 Assessment of economic development needs

The primary objective of assessing need

2.3.1 Guidance for assessing economic development needs has been targeted at supporting local planning authorities to objectively assess and provide evidence for the development needs for economic development. The stated primary objectives for assessing economic development needs is to identify the future quantity of land or floorspace required for economic development uses including both the quantitative and qualitative needs for new development, to provide a breakdown of that analysis in terms of quality and location, and to provide an indication of gaps in current land supply.

Defining need

2.3.2 The guidance defines 'need' for economic development. It is outlined that 'need' should address the total quantity of economic floorspace required, based on quantitative assessments and a consideration of the qualitative requirements for each market segment. Additionally the guidance recommends that any assessment of need should be realistic in taking account of the particular nature of that area (for example geographic constraints and the nature of the market area).

Economic development needs and the duty to cooperate

2.3.3 In accordance with Section 110 of the Localism Act and the NPPF (see above), guidance advises local planning authorities to assess their development needs by working with other local authorities within the functional economic market area (FEMA – see below and chapter 3).

2.3.4 The planning practice guidance recognises that economic development needs are rarely constrained precisely by local authority administrative boundaries. Local authorities such as Harrogate Borough Council are encouraged to work collaboratively with other bodies to ensure strategic priorities across local boundaries are properly co-ordinated and clearly reflected in individual Local Plans. This study recognises that joint working enables local planning authorities to work together to meet economic development requirements which cannot be wholly met within their own administrative boundaries. This study seeks to ensure Harrogate Borough Council can demonstrate how they have planned for issues relating to cross-boundary impacts.

Assessment areas

2.3.5 The NPPG identifies that economic needs should be assessed in relation to the relevant functional area, in this case that of a functional economic market area. Establishing suitable assessment areas may identify smaller sub-markets with specific features, and it may be appropriate to investigate these specifically to create a detailed picture of local need.

2.3.6 The NPPG recognises no single source of information on needs will be comprehensive in identifying the appropriate assessment area and that careful consideration should be given to the appropriateness of each source of information and how they relate to one another. Chapter 3 of this study considers the methodological approach to defining the functional economic area of Harrogate District.

Permitted development rights

2.3.7 Permitted development (PD) rights are a national grant of planning permission by Parliament, not the local authority, allowing certain changes of use without the need for a planning application. In May 2013 the Government introduced PD rights allowing the change of use from B1a offices to C3 residential for a period of three years (with CLG proposing a further 3 year extension to May 2019).

2.3.8 As of April 2014, prior approval also applies to the conversion of A1/A2 retail units to residential use and CLG is proposing new PD rights for change of use from light industrial (B1c) and storage/ distribution (B8) to residential.

2.3.9 The Government's rationale for the introduction of PD rights is to bring underused and outdated employment premises back to life and create much needed new homes. However, many local authorities have expressed concerns about the impacts of PD rights as they restrict their control over development and potentially risk the integrity of the plan-led system and local decision-making.

2.3.10 The difference between office and residential value poses a risk to the large scale loss of office stock, and therefore jobs. The loss of smaller, affordable offices units in particular, could have an adverse impact on smaller businesses, as well as business start-ups.

Article 4 Directions

2.3.11 Article 4 of the Town and Country Planning (General Permitted Development) Order 1995 gives local planning authorities the power to remove permitted development rights in some circumstances. The Secretary of State maintains the power to modify or cancel most article 4 directions, and local authorities need to provide clear justification that an Article 4 direction is necessary to protect local amenity or the wellbeing of an area.

2.3.12 An Article 4 direction does not mean that planning consent would not be granted but that an application needs to be submitted so that it can be properly examined by the local planning authority. Many London Boroughs have used Article 4 directions as a means to control the change of use from office to residential.

Starter Home Initiative

2.3.13 In March 2015 the Government introduced The Starter Homes Initiative, a new National Policy which seeks to introduce 100,000 new high quality, low cost starter homes for first time buyers. The policy states that sites 'should look for opportunities to create exception sites on commercial and industrial land that is either under-used or unviable in its current or former use'. This new policy therefore poses further risk, in addition to PD rights, to Harrogate district for losing B-class employment space within the district.

2.4 Sub regional policy

York, North Yorkshire and East Riding Strategic Economic Plan 2014

2.4.1 The Strategic Economic Plan (SEP), published in January 2014, sets out the long term vision of the York, North Yorkshire and East Riding Enterprise Partnership for the sub-regional economy. It also provides the basis for Local Growth Deal negotiations with central Government (a deal was agreed in July 2014 for £110 million).

2.4.2 The LEP's vision is to make York, North Yorkshire & East Riding the place in England to grow a small business, combining a vibrant business location with an enviable quality of life. The SEP sets out five priorities:

- Profitable and ambitious small and micro businesses;
- A global leader in food manufacturing, agri-tech and bio-renewables;
- Inspired People;
- Successful and distinctive places; and
- A well connected economy.

2.4.3 These priorities are a response to the characteristics of the sub-region. For example, there is a rich diversity of small & micro-businesses but few medium and large businesses, the report contains data that shows that there were 7,950 businesses in Harrogate District in 2012 of which 90% were businesses of less than 10 employees).

2.4.4 The Plan remarks that Harrogate stands out as having had the best performance within the sub-region on business formation, with start-up rates holding up much better over time than elsewhere, and well above the average in England.

2.4.5 The Plan notes that Harrogate and Knaresborough suffer from localised congestion issues and capacity constraints on both the strategic highway network and on the rail route between York, Harrogate and Leeds. Arterial routes in Harrogate are described as frequently blocked with high levels of vehicles and peak time delays of around 20 minutes travelling into the town centre. Consequently it is felt that there is a need for a package of essential junction improvements in Harrogate and Knaresborough in order to bring forward the housing and employment sites identified in the Harrogate District Local Plan. Improvement of the York-Harrogate-Leeds rail line is one of the SEP's priorities for investment.

Leeds City Region Enterprise Partnership Strategic Economic Plan 2014

2.4.6 The Strategic Economic Plan (SEP), published in March 2014, sets out the long term vision of the Leeds City Region Enterprise Partnership for the City Region economy. It also provides the basis for Local Growth Deal negotiations with Central Government (a deal was agreed in July 2014 for £1 billion).

2.4.7 The Plan is based on four strategic pillars:

- Supporting growing businesses;
- Developing a skilled and flexible workforce;
- Building a resource smart City Region; and
- Delivering the infrastructure for growth.

2.4.8 In relation to the delivery of infrastructure for growth, three categories of spatial priorities are identified where either the growth opportunities or the level of market failure is of City Region significance: strategic growth centres; strategic housing growth areas; and strategic employment and mixed use sites. None of these spatial priorities relate to areas within Harrogate District. With the exception of a site near the M1 to the west of Barnsley, all strategic employment and mixed use sites are located in the M62 corridor.

2.4.9 The SEP identifies six business sectors where it is considered that the Leeds City Region has distinctive and world-leading capabilities and where there are real opportunities for rapid and sustained growth. These are

- Innovative manufacturing;
- Financial & professional services;
- Health & life sciences;
- Low carbon & environmental industries;
- Digital & creative industries; and
- Food & drink.

Surrounding local authorities

2.4.10 In 2011 the Localism Act removed the legal framework for the review of Regional Spatial Strategies (RSS) or the adoption of new or revised regional strategies, providing the Secretary of State with the power to revoke in full or in part existing strategies by order. The government laid an Order in Parliament to revoke the Yorkshire and Humber Plan. This Order came into force at the beginning of 2013, thereby abolishing the RSS.

2.4.11 Since the regional tier of strategic planning was abolished, emphasis is now placed on the duty to cooperate outlined in the Localism Act, NPPF and NPPG. The following review of economic evidence studies represents the latest assessment of economic needs for Harrogate and each of the surrounding local authorities. Richmondshire District Council prepared the Employment Land Review Update (2012); Craven District Council prepared the Employment Land Review Update (2008); City of Bradford prepared the Employment Land Review Update (October 2011); Leeds City Council prepared the Leeds Employment Land Review (2006); Selby District Council Employment Land Refresh (2010); City of York Council prepared the Employment Land Study (2007) and Hambleton District Council prepared the Employment Land Review (2014).

Richmondshire District Council

2.4.12 The Richmondshire Employment Land Review Update (2012) provides the most up to date thinking regarding employment supply and demand within Richmondshire. The district has a low job growth forecast, of only 2200 jobs between 2011 and 2026, which is one of the lowest rates of growth in North Yorkshire. A heavy military presence within Richmondshire, which represents 44% of the workforce skews the districts occupational profile.

2.4.13 In terms of future employment land requirements within Richmondshire, there is a decline in traditional employment land use consuming B1, B2 and B8 industries and there is a relatively low level of employment within the district. The need for land is likely to come from financial and business services, transport and construction and wholesaling. Retail and non B-class uses account for the majority of projected employment within Richmondshire.

Craven District Council

2.4.14 The Craven District Council Employment Land Review Update was commissioned by Craven District Council in 2007, as part of the evidence base for the Council's Local Development Framework. This study updates and strengthen the Draft ELR of June 2006.

2.4.15 The document concludes a projection of employment land requirement from 2006 – 2021 for around 52-61 ha, largely to be met in the Skipton and South Craven area. There is an identified demand for smaller B1 office and workshop spaces, with a perceived demand for business parks in Skipton and South Craven, which could accommodate larger foot print buildings for B1/B2 and B8 uses.

2.4.16 The Craven 'Shaping a Strategy for Employment Land in Craven' Draft Discussion Paper (2013) suggests a lower requirement based on six scenarios, including that in the June 2006 ELR figure, and suggests a requirement of 27ha between three sub-areas (North, Mid & South) with the largest concentration of employment in the Southern sub area, in the vicinity of Skipton, Glusburn / Cross Hills, Gargrave and Sutton.

City of Bradford

2.4.17 The city of Bradford Metropolitan District Council Employment Land Review was commissioned in 2010, with an update following in 2011. The study provides an overview to the local market and economic overview of Bradford, then takes a look at supply and demand of employment with a summarising chapter with a strategy to meet future employment land demand.

2.4.18 Bradford plays an active role in the Leeds city region, and is the second largest economy in the functional economic area. However, Bradford's level of economic activity is significantly below that of Yorkshire and the Humber as a whole, with high levels of worklessness. The largest employers are currently concentrated in the Bradford Urban Area. Bradford's district provides an important location for financial and business services within the Leeds City Region and also plays an important role in supporting the City Region's manufacturing and distribution sectors.

2.4.19 This study identified the need for between 145 and 214 ha of employment land, which reflects unconstrained and constrained growth scenarios for Bradford district.

Leeds City Council

2.4.20 Leeds City Council commissioned an Employment Land Review in 2006, an update of which was provided in 2010. The study represents the most recent economic evidence base prepared for the authority.

2.4.21 The Employment Background Paper (2013) reveals that the Leeds GVA was £18.0bn in 2011 and is around 44% of West Yorkshire's, 20% of Yorkshire and Humber's and 1.4% of Great Britain's GVA. It is by far the largest economic centre in the Yorkshire and Humber region

2.4.22 Within the Leeds City Region, Leeds is the principle office centre due to its good accessibility to the sub region, with a good access to large and skilled labour supply and wide customer and client base. Leeds City Region also benefits from critical mass and agglomeration effects within Leeds city. The report suggests that Leeds region is the principal area for business parks with good access to the strategic road Network and the motorways.

2.4.23 The 2010 employment land review update report indicates a requirement for 645,000 sqm of office space to 2026. The requirement for industrial and warehousing uses in the 2010 update suggest between 420 and 480 hectares of land by 2026.

Selby District Council

2.4.24 Selby District Council commissioned an Employment Land Study in 2007 to provide an evidence based analysis of the district and recommendations on future employment planning policies. An employment land refresh was then commissioned in 2010, providing a partial update.

2.4.25 The Selby Economic Development Strategy (2008-2013) states that Selby District is inextricably linked to the Leeds City Region and the York sub area however there is considerable out-commuting to Leeds and York, with nearly half the population travelling outside the District as residents travel to work in neighbouring areas of Leeds.

2.4.26 The identified future need within the ELR shows Selby District requires small start-up units, large sites for large users which would provide some B1 office within B8, future expansion land, and flexibility to offer opportunities for future investment in certain areas within the district. A total of 37 – 52 hectares of land is the identified requirement following the analyses of employment land supply and future demand requirements and opportunities for growth; rolled forward to 2026.

City of York Council

2.4.27 Despite its size, the City of York provides a key role in the Yorkshire and Humber Region, as an important centre for business, higher education, visitor economy and public services. The

Science City York (SCY) initiative is perceived in the region and nationally as a driver for a new knowledge-based economy, shifting away from manufacturing industries.

2.4.28 York is seen as a key driver of the Leeds City Region economy, and it is intended to grow and diversify by encouraging the businesses and financial services sector, knowledge based industries, leisure and retail services and evening economy in addition to further developing its tourism sector.

Hambleton

2.4.29 The Hambleton District Council Employment Land Review was published in February 2014. It identifies that Hambleton's Key Functional Economic Areas (FEA) as Easingwoldrem , Thirsk, Bedale, Northallerton and Stokesley. The analysis suggests that all FEAs have relationships with areas outside of the Hambleton authority boundary, however the spread has not been determined definitively.

2.4.30 For each FEA an indicative demand for land requirement has been identified as follows; Bedale 7.11ha-8.54ha; Easingwold 3.94ha-5.43 ha; Northallerton 7.14 ha-10.77 ha; Stokesley 6.6 ha – 10.74 ha and Thirsk 9.28 ha – 11.89 ha, detailed information on individual sites within each FEA is then described to discuss demand / supply balance.

2.5 Local policy context

The Harrogate District Local Plan 2001

2.5.1 The Harrogate District Local Plan was adopted in February 2001 with a Selective Alteration adopted in 2004. Whilst a number of policies have been superseded by policies in the Core Strategy which was adopted in 2009 other policies currently remain in force and form part of the Development Plan for the District.

2.5.2 The Local Plan notes the then recent loss of major employers such as ICI Fibres Division, National Power, and the RAF Support Management Group.

2.5.3 Relevant policies include Policy E2 (Retention of Industrial/Business Land and Premises) which is still extant and seeks to resist the loss of employment land to other uses unless certain criteria are met. Other policies include Policy E6 which allows the redevelopment or expansion of existing industrial or business sites for industrial and business uses providing no unacceptable planning problems would arise, and Policy E8 which sets out the criteria for new industrial and business development in the countryside.

Harrogate District Employment Land Review 2006

2.5.4 This Review Report was the result of a commission awarded to Drivers Jonas in June 2005 by Harrogate Borough Council. The Review was solely concerned with the provision of employment land for manufacturing, warehouse and distribution and office uses.

2.5.5 The Review considered the quantitative requirements of the District and concluded that overall an additional 7 hectares of employment land would be required between 2005 and 2021. This minimum requirement was based on expectations that manufacturing floor space needs would decline whilst office, warehousing and distribution needs would increase. The Review noted that this figure did not allow for 'churn' (i.e. losses of, or changes in the mix of existing employment land) or the need for there to be a selection of vacant sites and premises.

2.5.6 The Employment Land Review divided the District into six sub-areas based on the identification of discrete property market areas. These sub-areas were:

- Boroughbridge;
- Harrogate Town;
- Knaresborough;
- Ripon;
- Rural East (representing the electoral wards of Claro, Marston Moor, Newby, Ouseburn, Ribston, Rural East Wathvale); and

- Rural West (representing the electoral wards of Bishop Monkton, Killinghall, Kirkby Malzeard, Lower Rural West Nidderdale, Mashamshire (3), Nidd Valley, Pateley Bridge (4), Spofforth with Lower Wharfdale, Washburn).

2.5.7 Boroughbridge is situated just east of the A1(M) near Junction 48. Despite the proximity of the town to the A1, the Review did not find a strong market for warehousing and distribution. Harrogate Town had few large employers and the vast majority of properties on the market were under 1,000 sq. metres. Available property in Knaresborough was also small scale and the Review considered that new offices were more likely to locate in Harrogate town. The employment land market in Ripon was more dominated by industrial development than in Harrogate, but still on a relatively small scale.

2.5.8 The Rural East sub-area mainly comprises more sparsely populated wards with a number of villages spread throughout the area. The Review found that commercial property here is dominated by the industrial sector and there was no real office market. In addition there was no demand for large-scale manufacturing or warehouse and distribution.

2.5.9 The Rural West is comprised of open countryside and small villages mainly interconnected by local roads. The Review considered that available employment properties were small-scale, rather sporadic, and in some cases related to local agricultural activity. Consequently, the area was not suggested as a key focus for future employment development.

2.5.10 The Review details the findings of a survey of local businesses. The major concerns of businesses were identified as the affordability of housing, the availability of new sites, the level of business rates, and access by public transport. The need for more sites and premises for small/micro businesses was supported by the high proportion of businesses surveyed that were operating from residential premises. The District was seen as a good location for the office sector.

2.5.11 At the time of the Review, approximately 70% of all existing office space and almost 90% of identified vacant office stock was within Harrogate town. Harrogate town also included over half of the District’s vacant industrial / warehouse supply. The Review considered that the supply of available employment land was limited for a town of Harrogate’s size and the role it plays in the District’s economy. The ELR did not make a recommendation as to the scale of the requirement, however, it suggested that any new sites for Harrogate town should be “suitable to accommodate a range of user requirements,” and to, “deliver opportunities for SMEs given the lack of currently available employment allocations which cater for smaller requirement.”

2.5.12 The Review felt that consideration should also be given to increasing the employment land supply in Boroughbridge. At the time of the Review the town’s employment land supply amounted to less than 1 hectare, and vacant premises were small in both scale and number.

2.5.13 Ripon was the most significant sub-area in overall quantitative employment land supply terms, providing around a third of Harrogate District’s total provision. However, whilst vacant land supply equated to about 15 hectares, about 9 hectares were not considered to be immediately available. Vacant premises in Ripon were extremely limited in number, with only one office and one industrial / warehousing opportunity identified.

2.5.14 The Review contains considerable information on employment sites in existing employment use in 2005 and makes a number of comments on their characteristics and future prospects.

2.5.15 The ELR classified sites according to their importance and function in the employment hierarchy. The following categories were identified:

- Best Urban – good quality sites suitable for local or incoming clients with a national /regional choice of locations;
- Good urban – good quality sites mainly suitable for locally based clients;
- Other urban – sites which could perform a role for local clients; and
- Other local – moderate to poor quality sites which may have potential for release to other forms of development subject to monitoring.

Core Strategy 2009

2.5.16 The Harrogate District Core Strategy was adopted by Harrogate Borough Council on 11th February 2009. The Core Strategy provides the strategic policy framework for the development and conservation of the District. It sets out the proposed distribution of new homes and jobs in the District up to 2023.

2.5.17 The Core Strategy includes a housing target of 390 new homes per annum (net annual average) in Harrogate District during the period 2004 to 2023. Policy SG1 proposes that around 48% of new homes are accommodated in Harrogate town, 14% in Knaresborough and 8% in Ripon. Policy SG2 identifies these three settlements as Category A settlements – main urban areas which are to be the focus of future growth.

2.5.18 Chapter 2 of the Strategy, defines the Council's main objectives for employment as:

- To promote a robust and varied economy for the benefit of local people;
- To significantly improve the prospects of the rural and market town economy including the diversification of the agricultural industry;
- To provide an adequate supply of readily available employment land to meet identified employment needs; and
- To protect and enhance the District's town centre, conference, business and holiday tourism, and the digital and food cluster industries.

2.5.19 Paragraph 5.3 of the Strategy summarises the approach taken to jobs and business as follows:

2.5.20 "The focus for economic growth is essentially one of meeting the expansion and relocation needs of local businesses and providing support for small business start-ups to ensure sufficient jobs for the resident population. The approach does not place significant emphasis on the need to secure large amounts of inward investment."

2.5.21 Four policies JB1, JB2, JB3 and JB4 set out the main planning policy principles for economic development. Policy JB1 (Supporting the Harrogate District Economy) identifies key objectives to maintain and enhance the economic role of the District, including developing mutually beneficial cross-boundary links within the Leeds City Region. Policy JB2 addresses conference and business tourism, particularly in Harrogate town whilst JB4 addresses retail and town centre development in the District's main urban settlements. Policy JB3 (Land for Jobs and Business) sets out quantitative needs for employment land. It states that provision will be made between 2005 and 2021 for 45 hectares of employment land. This includes land already committed since 2005 and adopted in the 2009 Core Strategy, land already committed for employment use, as well as 5 hectares of new employment land in Harrogate and 3 hectares in Boroughbridge. It pledges to protect employment uses on most sites but indicates that sites will be classified in a future development plan document, linked with criteria based policies for their protection.

Visitor Accommodation Study 2011

2.5.22 This Study was carried out 'in-house' by Council staff and published in May 2011. The Study aimed to provide information to support detailed criteria based planning policy for the retention and protection of existing hotels, and also to determine whether there is the need to allocate land for new hotel development in the then emerging Sites and Policies DPD.

2.5.23 The study recommended that hotels with 25 or more bedrooms should have planning policy protection against changes of use. A review of planning applications demonstrated that since May 2004 planning permissions had been granted to develop a further 161 bedrooms in Harrogate Town and 241 bedrooms elsewhere in the District. Consequently, it was not considered necessary to identify land within the Sites & Policies DPD for the development of new visitor accommodation.

2.5.24 The Council is in the process of updating this evidence base and preparing a review of the Visitor Accommodation Study.

Review of Best and Good Employment Sites 2011

2.5.25 This Review was carried out 'in-house' by Council staff and published in May 2011. The aim of the Review was to carry out a qualitative assessment of existing employment sites which were not assessed as part of the Employment Land Review in 2006 and any additional sites subsequently identified by the Council. The Review assessed each site against a set of criteria grouped under the headings of market attractiveness, sustainability and strategic planning considerations.

2.5.26 In total the Review assessed eight sites which were classified as follows:

- Best Urban - Hornbeam Park, Harrogate;
- Good Urban – Claro Park and Plumpton Park, Harrogate; Manse Lane, Knaresborough; Dallamires Lane, Ripon; Marston Business Park, Tockwith;
- Other Urban – Tockwith Business Park; and
- Other Local – Killinghall Stone Quarry.

2.5.27 This classification is important because Policy JB3 of the Adopted Core Strategy policy requires the protection and improvement of the District's 'Best' and 'Good' quality employment sites.

Harrogate Office Study 2011

2.5.28 This study was carried out 'in-house' by Council staff and published in June 2011. The study aims to explore the opportunities for intensifying office accommodation within Harrogate Town Centre, thereby reducing pressure for new office accommodation in out-of-centre locations. The study focuses first and foremost on the potential to modernise existing sub-standard office space and provide more space in underused buildings by means of conversion and change of use (e.g. above shops). The second aim is to identify potential sites for new office development within the town centre and edge-of-centre locations.

2.5.29 The study notes that the Employment Land Review in 2006 looked at the minimum floorspace requirements to accommodate economic activity within the District and indicated that between 2005 and 2021, there would be a need for 60,700 sqm of additional office space. It also concluded that there was a net additional supply of 49,785 sqm of offices within Harrogate District. However, this supply figure did not take account of the vacant premises figure of 25,952 sqm and therefore what first appeared as a deficiency actually equated to an oversupply of 15,037 sqm based on a total of 75,737 sqm.

2.5.30 The study provided an update of the market situation in Harrogate town as of 2010. It concluded that there was enough office supply through planning commitments and empty premises to provide 49,832 sqm of floor space in Harrogate Town thereby meeting the target figure of 42,490 sqm (which equates to 70% of the forecast for the District). However, the supply would fall below the target figure if all the pending losses (e.g. offices with permission for changes of use) of 8,711 sqm were developed. It was concluded that short term needs were adequately catered for. Nevertheless, site allocations needed to be made in the local plan for longer term supply.

2.5.31 In terms of the size of premises, almost 52% of available premises were within the 0 – 999 sq. ft. range with only 7% being premises over 5,000 sq. ft. This is considered to reflect the reduced capacity of the town centre to accommodate larger premises.

2.5.32 The Study identifies two sites as possible sites for office development. Firstly, a town centre site at Station Parade which is bounded by the York – Leeds railway line to the east and the town centre's retail core to the west. A development brief for the site indicates that office uses could be acceptable as part of a mixed use development. Secondly, a site off Station Avenue in use as a car park behind the Odeon Cinema which has good access to the town centre and could be developed for office development with ancillary car parking.

2.5.33 More generally, it is noted that floors above ground floor retail premises in the town centre present an opportunity to increase the amount of smaller town centre office accommodation. Whilst there are a number of office locations in the town centre, the main concentration is along Victoria Avenue. Within this area, offices are the main land use and form an important part of the town centre supply and therefore the report advocates resistance to any changes to other uses in this area.

2.5.34 On the 25 March 2014, the Planning Committee of Harrogate Borough Council confirmed an Article 4 Direction affecting properties used as Offices (Use Class B1(a) on Victoria Avenue, Harrogate. The Article 4 Direction has removed the right of owners of properties currently falling within the B1(a) Use Class and used as offices to convert these properties to residential use. The Article 4 Direction means that planning permission is required to change the use of the property from offices to residential.

2.5.35 The study reports the results of responses to questionnaires sent to local agents and to occupiers of offices. Harrogate town is seen as an attractive location for office space and there is a desire for modern town centre accommodation rather than out of centre locations. There also seems to be a growth in small businesses which require smaller premises which the town centre is well suited to provide.

Draft Sites and Policies Development Plan Document Submission 2013

2.5.36 An Examination into the Sites and Policies DPD started in April 2014 but was adjourned after two days as the Inspector expressed significant concerns that the employment land evidence base could not be considered up to date and therefore compliant with the NPPF. The Inspector also expressed concern that the DPD fell short of meeting objectively assessed housing need. The Council made a decision on the 17th June 2014 to withdraw the Plan.

2.5.37 The Council is now preparing a new Local Plan that will set out the District's growth strategy to 2035 supported by allocations of land and policies to manage development. This will be underpinned by the Harrogate Borough Council Strategic Housing Market Assessment (February 2015), which revealed an overall need for 621 homes between 2014 – 2035 within Harrogate district, and also by new work on the employment land supply.

Economy Action Plan

2.5.38 A 'Strong Local Economy' is Harrogate Borough Council's number one corporate priority, with the aims of securing:

- a resilient, diverse and expanding economy;
- a vibrant tourism experience;
- excellent travel, transport and broadband connectivity; and
- A world class conference centre.

2.5.39 The 'Strong Local Economy Action Plan 2015 – 2020' identifies the council's priorities for supporting the district's economy over the next five years. Economic data identifies Harrogate as an entrepreneurial district, with the highest business start-up rate in the region. Businesses need suitable premises and sites to start-up, move to and grow, which highlights the importance of providing a range of business premises, by location and size, including: small units in rural areas, high-tech business parks, industrial units, serviced sites and Grade A office accommodation.

2.5.40 The council's Economy Action Plan places importance on supporting the sustainable growth of new and existing businesses, and encouraging appropriate inward investment into the district, to increase the diversity of sectors and number of high-level skilled jobs available. The Discretionary Business Rate Relief scheme has recently been extended by the Council, to include businesses within the following growth sectors: finance, professional services, wholesale, media/digital activities, scientific activities and low carbon. These sectors are sympathetic to the strong labour market conditions within the district (with a low unemployment rate and well qualified resident working-age population) and will deliver the most gross added value and higher value jobs

2.6 Key messages

2.6.1 The key issues arising from the policy review set out in this section are as follows:

- The district has few large employers but has a strong existing business base with latent capacity for expansion.
- There is a strong policy focus on meeting expansion needs of local businesses and providing support for small business start-ups.
- Harrogate town is a valued office location well attuned to the needs of viable small businesses.
- Key sectors with potential for growth include financial and business services and the digital industry (particularly in Harrogate town).
- There is a clear need to ensure that suitable premises are made available for small and growing businesses.

3. The functional economic market area

3.1 Introduction

3.1.1 This section considers the functional economic market area (FEMA) of which Harrogate District forms a part. It sets out the approach to defining the FEMA and then proposes a definition of FEMA for use in planning for economic development in the area.

3.2 Guidance on defining functional economic market areas

Functional Economic Market Areas – An economic note

3.2.1 In 2010 the Department of Communities and Local Government (DCLG) prepared a note which explores the concept of a FEMA and its usefulness for economic policy analysis. It should be highlighted that with the publication of the NPPG this note is now cancelled, although the guidance in the note is still considered relevant. The note considers the range of alternative ways to measure FEMA boundaries, including: labour markets; housing markets; supply chains in industry and commerce; service markets for consumers; administrative areas; and transport networks.

3.2.2 The note reveals that there are no universal approaches to defining FEMAs. The note states that there is a range of relevant information available to define a FEMA, with the most appropriate depending on what features of the economy are being considered:

- Labour markets: using Travel to Work data from the Census;
- Housing markets: using data on house prices and migration;
- Supply chains in industry and commerce: using data on the flow of goods, services and information across the local economy;
- Service market for consumers: using data on the spatial area from which users of goods and services are drawn;
- Administrative areas: It is within administrative boundaries that services and strategies are applied and developed, based on analyses using FEMAs. The importance of administrative boundaries therefore also needs to be recognised; and
- Transport networks: Whereas most major transport networks are determined by national requirements, local transport policy is best considered at the scale of FEMAs. However, in practice, the key role of transport will be reflected using other FEMA definitions, such as TTWAs, as these flows are partly shaped by transport availability.

3.2.3 The note identifies that there is a strong argument for analysing labour market data using the Census travel to work data, as this is the most reliable flow data (for identifying a FEMA). This data should be supplemented with other key data from other key markets as set out above.

3.2.4 The note states that economic flows often overlap local authority boundaries. This means that the functional area over which the local economy and its key markets operate will not necessarily adhere to administrative boundaries, although it is possible that they can do. Where strong economic links are identified the note recommends that local authorities should consider the benefits of collaborating with neighbouring areas.

National Planning Policy Guidance

3.2.5 The NPPG recommends that economic needs should be assessed in relation to the relevant functional economic area. The NPPG states that there is no universal approach to defining a FEMA. Instead, it puts forward the suggestion that a range of information should be considered depending on the basis which best reflect the drivers of the local economy.

3.2.6 The suggested range of information is entirely consistent with the information set out in the 2010 DCLG note (see above) with the exception that the extent of any Local Enterprise Partnership should also be considered.

3.3 Approach to defining the FEMA

Labour market

3.3.1 As set out above, functional labour markets should be defined using Travel to Work data from the Census. Table 3-1 shows the workplace destination of Harrogate's resident labour force. It demonstrates that 71% of the District's resident labour force also works within the District. There are strong linkages with Leeds, with 13% of the labour force commuting to the city, and less strong, but still significant, linkages with York and Hambleton.

Table 3-1 Destination of workplace for Harrogate residents

Workplace	No.	%
Harrogate	45,408	71.1%
Leeds	8,481	13.3%
Hambleton	1,920	3.0%
York	1,837	2.9%
Bradford	1,202	1.9%
Wakefield	467	0.7%
Richmondshire	399	0.6%
Selby	303	0.5%
Craven	297	0.5%
Kirklees	213	0.3%
Westminster, City of London	179	0.3%
Ryedale	171	0.3%
County Durham	145	0.2%
East Riding of Yorkshire	129	0.2%
Calderdale	114	0.2%
Darlington	98	0.2%
Sheffield	94	0.1%
Stockton-on-Tees	89	0.1%
Manchester	89	0.1%
Scarborough	78	0.1%

3.3.2 The strong functional linkages with Leeds are a key reason why Harrogate is one of ten local authorities that form the Leeds City Region Local Economic Partnership (LEP). The Leeds City Council area has by far the largest economy of these ten authorities and attracts a relatively high level of net in-commuting from each of the surrounding nine districts. There is also a relatively high degree of poly-centricity between the main urban centres that make up the LEP area[1].

3.3.3 However, this does not mean that Harrogate is simply part of the Leeds City Region labour market. Whilst 13% of its labour force does travel to Leeds for work, the self-containment ratio of 71% is the highest in the Leeds City Region LEP after Leeds itself (Table 3-2). The ONS states that Travel to Work Areas must have a self-containment ratio above 66.7%2, a threshold which Harrogate clearly meets.

Table 3-2 Self-containment ratio - Leeds City Region LEP authorities 2011

Leeds LEP authorities	Self-Containment	2011 working population
Leeds	78%	613,992
Harrogate	71%	129,036

[1] City Relationships: Economic linkages in Northern city regions, Northern Way
[2] As long as they have a working population in excess of 25,000 people. See: http://www.ons.gov.uk/ons/guide-method/geography/beginner-s-guide/other/travel-to-work-areas/index.html

Leeds LEP authorities	Self-Containment	2011 working population
Bradford	70%	400,121
Wakefield	65%	265,797
Calderdale	64%	163,645
Kirklees	63%	336,309
Barnsley	57%	188,335
Craven	56%	46,161
Selby	41%	68,135

3.3.4 Given its functional connections to York and Hambleton, Harrogate is also part of the York, North Yorkshire and East Riding LEP. Self-containment ratios are higher in the two main cities of York and Hull, as well as in Scarborough, but Harrogate still has a higher proportion of its labour force working in the District than most other authorities in the LEP (Table 3-3).

Table 3-3 Self-containment ratio – York, North Yorkshire and East Riding LEP authorities 2011

York and East Riding LEP	Self -Containment	2011 working population
Scarborough	82%	91,402
Kingston upon Hull, City of	75%	208,040
York	75%	166,275
Harrogate	71%	129,036
Richmondshire	66%	42,698
Ryedale	65%	43,200
Hambleton	60%	74,039
East Riding of Yorkshire	58%	278,333
Craven	56%	46,161
Selby	41%	68,135

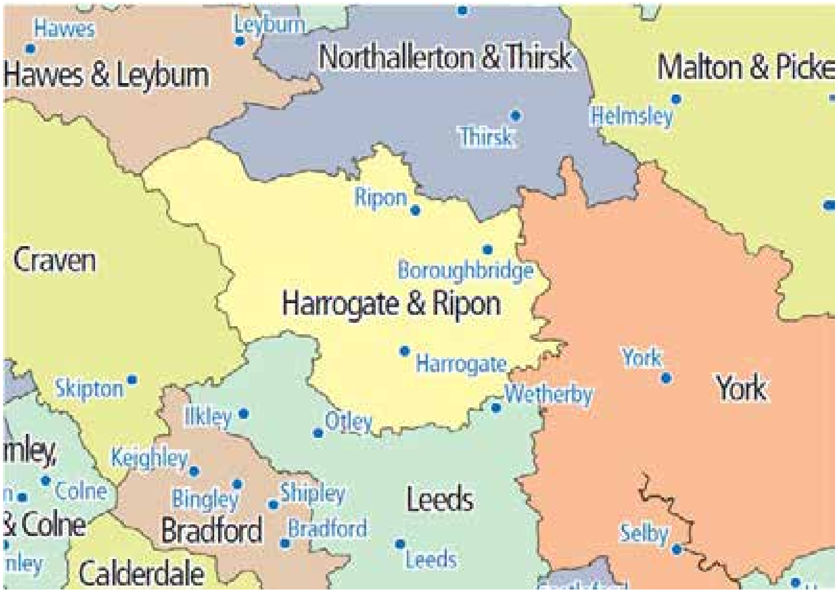
3.3.5 The Harrogate District can therefore be considered to be self-contained enough to represent a discrete labour market, both in relative terms and by meeting the requirements of the ONS's Travel to Work criteria. However, there is a need to consider the definition of the labour market area to a greater degree of granularity than the administrative district level.

3.3.6 Using 2001 travel to work data at a Lower Layer Super Output Area (LSOA), the ONS concluded that Harrogate did indeed form its own labour market area, distinct from those at Leeds and York (see Figure 3-1). However, the boundary of this labour market area does not conform neatly to the administrative area.

3.3.7 Figure 3-2 shows the Harrogate travel to work area in black, against the local authority area in green. Whilst the Harrogate and Ripon travel to work area falls entirely within the Harrogate District boundary, the following parts of the District fall within different travel to work areas:

- Parts of the north east and north west of the District both fall within the Northallerton and Thirsk travel to work area;
- The far south west of the District falls within the Leeds travel to work area; and
- The far south east of the District falls within the York travel to work area.

Figure 3-1 2001 Travel to work area definitions



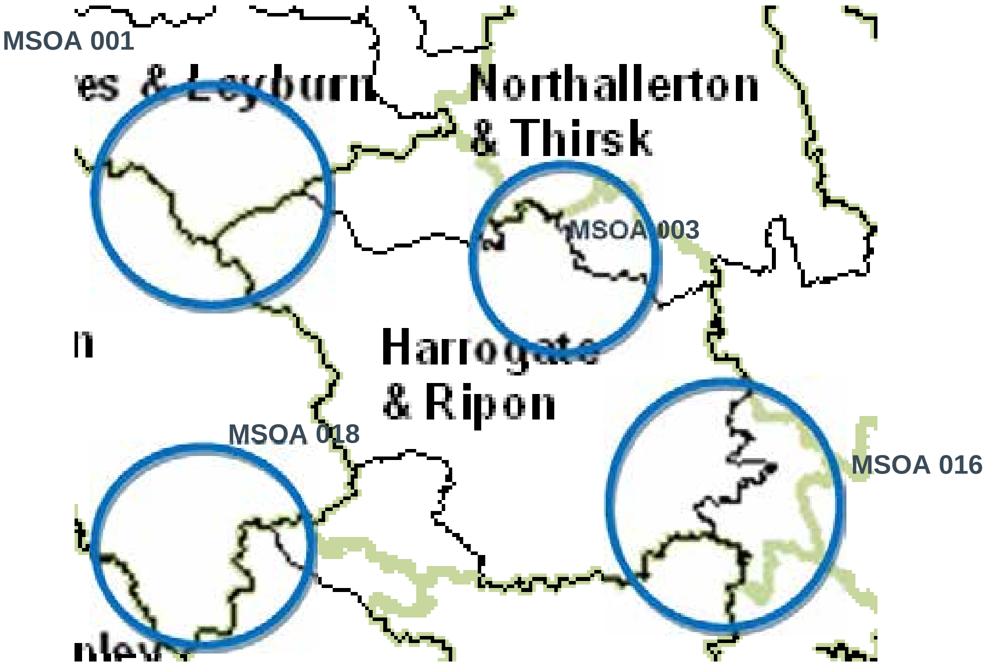
Source: ONS Map of 2001 Travel to Work Areas

Figure 3-2 2001 Travel to work area definition compared to Local Authority boundaries

Source: ONS: Map of 2001 Travel to Work Areas

3.3.8 Travel to work data for 2011 is not available at LSOA level at the time of writing, with the most granular data available at the MSOA level instead. This has been used to test the functional relationship between these areas and the core Harrogate and Ripon travel to work area. Figure 3-3 shows the closest fit MSOAs for those areas of the District that are outside the Harrogate & Ripon travel to work area as defined by the ONS using 2001 Census data.

Figure 3-3 Definition of closest fit MSOA area for area of District outside 2001 Harrogate and Ripon travel to work area



3.3.9 Table 3-4 shows the destination of travel to work movements for residents who live in the four MSOAs identified above. The table shows that:

- Both the northern areas (MSOA 001 and MSOA 003) have much stronger commuting flows to the Harrogate and Ripon travel to work area than to other local authorities. It would appear that these areas are actually better suited to forming part of the Harrogate and Ripon labour market area rather than the Northallerton & Thirsk area.
- The south east area (MSOA 016) has strong flows to the Harrogate & Ripon, Leeds and York travel to work areas. Whilst the MSOA has overlapping economic relationships with York, Leeds and Harrogate, we consider it should be excluded from the Harrogate FEMA given that the majority of residents work outside Harrogate District (particularly York and Leeds).
- The south west area (MSOA 018) has strong commuting flows to Leeds, but connections to the Harrogate and Ripon labour market area are stronger. It would therefore appear that this area is actually better suited to being placed in the Harrogate and Ripon labour market area rather than the Leeds area.

Table 3-4 Commuting movements of residents of MSOAs outside 2001 Harrogate & Ripon travel to work area

Destination	MSOA 001 (North West)		MSOA 003 (North East)		MSOA 016 (South East)		MSOA 018 (South West)	
	No	%	No	%	No	%	No	%
Own MSOA	472	26%	555	23%	502	17%	414	19%
Harrogate and Ripon TTWA	656	36%	943	39%	712	24%	755	34%
Leeds	111	6%	151	6%	708	24%	543	25%
York	32	2%	67	3%	416	14%	30	1%
Hambleton	183	10%	278	12%	108	4%	27	1%
Craven	3	0%	1	0%	9	0%	26	1%
Richmond	59	3%	52	2%	9	0%	19	1%
Bradford	29	2%	28	1%	49	2%	164	7%
Calderdale	3	0%	7	0%	12	0%	6	0%
Kirklees	6	0%	7	0%	16	1%	15	1%
Selby	7	0%	8	0%	65	2%	7	0%
Wakefield	15	1%	18	1%	62	2%	16	1%
Other	249	14%	300	12%	326	11%	171	8%
Total	1,825	100%	2,415	100%	2,994	100%	2,193	100%

Source: 2011 Census

3.3.10 Atkins have tested the most suitable combination of MSOAs as a single labour market by calculating the self-containment ratio of each shows that the MSOAs that make up the Harrogate & Ripon TTWA as defined in 2001 have a self-containment ratio of 65.6%, just below the 66.7% ONS threshold. If we add in the two northern MSOAs (001 and 003), the self-containment rises to 68.6%. Once MSOA 018 is included, leaving only MSOA 016 out, self-containment rises to 71.7%.

3.3.11 It is therefore concluded that the best definition of the functional labour market area is well reflected by District boundaries with the exclusion of MSOA 16.

Service market for consumers

3.3.12 The retail catchment area for Harrogate is considered in the 2014 Retail Study. This indicates that the retail catchment area broadly corresponds with the District boundary, and that Harrogate Town Centre attracts a significant proportion of expenditure from a number of areas within the District. Consequently, policies should aim to retain rather than expand the current level of comparison expenditure given competition from higher order centres including York and Leeds.

Transport network

3.3.13 As stated above, the transport network should not be used as a primary measure to identify a Functional Economic Market Area, but is a facilitator of labour market and service catchments.

3.3.14 The main transport corridors are:

- The A1M runs north-south through the east of the District and provides connections to Wetherby and Leeds;
- The A61 connects Harrogate to Leeds in the south, Ripon and Thirsk in the north;
- The A59 runs east-west and connects Harrogate and Knaresborough with York in the east and Skipton and Preston in the west; and
- Northern Rail services run from Leeds direct to Harrogate and then onto York via Knaresborough.

3.3.15 These connections do show through in the analysis of commuting patterns, with strong connections to Leeds and York.

3.4 Bringing the analysis together to define the FEMA

3.4.1 As stated above, there is no universally agreed approach to defining FEMAs. The most appropriate method will depend on what features of the local economy are being considered. As this work is concerned with the analysis of B class employment needs, we consider that it is the functional labour market which will provide the most appropriate basis for defining the FEMA in this instance.

3.4.2 We consider that FEMAs are likely to reflect the geography of higher order economic centres and their hinterlands. Harrogate, Knaresborough and Ripon are the key centres in the District. Whilst none of these meet the criteria for a self-contained labour market by themselves, together they do form a functioning labour market. Our analysis shows that the majority of the rural parts of the District also access jobs in this combined labour market area, rather than other areas outside of the District. The only exception is the far south east of the District, where a majority of workers travel out to York and Leeds (MSOA 16). We therefore recommend that the FEMA for this study is best defined as being consistent with the District boundary, with the exclusion of MSOA 016. This is consistent with the analysis and views of York City Council who considers that MSOA 016 should be included in the York FEMA. Travel to work patterns in this area will have changed between the 2001 and 2011 censuses as a consequence of the completion of the M1 A1 link road east of Leeds and the upgrade to the A1 to the north of the link road.

3.4.3 As part of this study, adjacent local authorities were consulted[3] on the FEMA analysis presented in this chapter. This did not raise significant observations other than the view of City of York Council that MSOA 16 should be included in the York FEMA and consensus in the need to review the analysis once more detailed travel to work data becomes available.

[3] Bradford Metropolitan District Council, Craven District Council, Hambleton District Council, Leeds City Council, North Yorkshire County Council, Richmondshire District Council, Ryedale District Council,
.Scarborough District Council, Selby District Council, City of York Council, Yorkshire Dales National Park Authority and York, North Yorkshire and East Riding Local Enterprise Partnership

4. The local property market

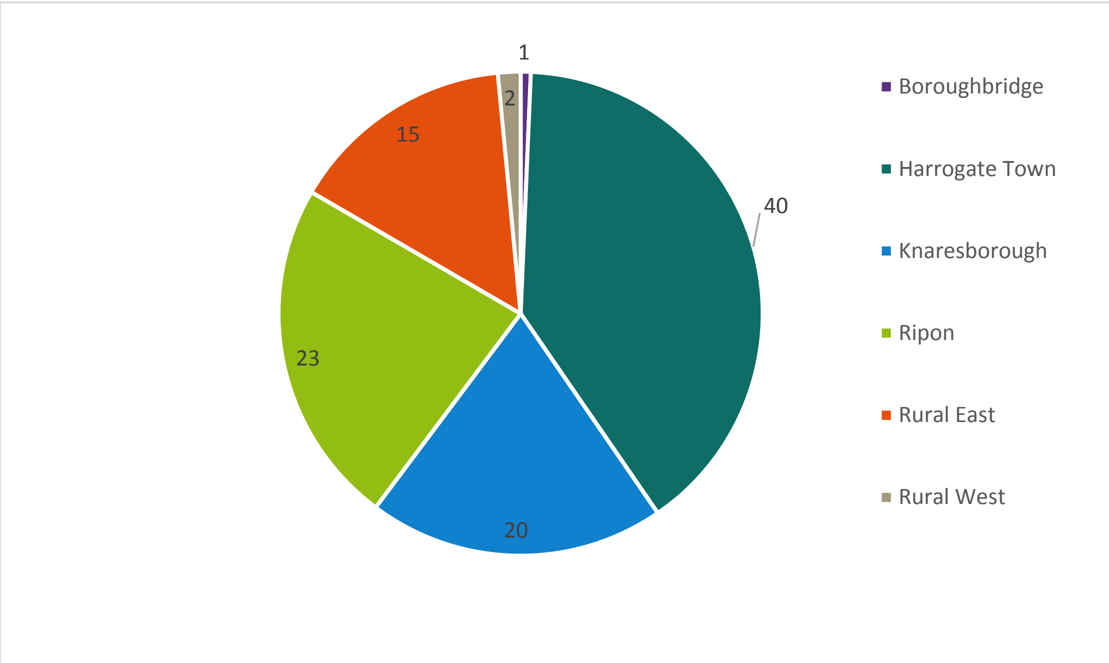
4.1 Introduction

4.1.1 This section provides a review of the District's office and industrial property markets. It draws on information sourced from the Property Agents Forum Quarter 3 Data (1st October – 31st December 2014), Valuations Office Agency (VOA) data and discussions with local commercial agents[4].

4.2 Current supply

4.2.1 There are currently 192 available / actively marketed industrial and office premises within the District, with a total available floor space of 763,399sq ft. In addition, 16.23ha of land is identified as being available and marketed for office, industrial and retail development. As seen in Figure 4-1, much of the available employment floorspace (40%) is currently located within Harrogate Town. The remaining available floorspace is distributed as follows: 23% in Ripon, 20% in Knaresborough, 1% in Boroughbridge and the remaining 17% located in the rural east and west areas.

Figure 4-1 Distribution of available floor space for industrial and office space in Harrogate District October 1st – December 31st 2014



Source: Property Agents Forum Report Q3 (PAF)

Industrial and warehousing

4.2.2 Table 4-1 shows there are currently 32 available industrial premises in the District, with a total floor space of 472,064 sq. ft. No industrial floorspace is available within Boroughbridge or the Rural West, and in the remaining areas there is a fairly even distribution. However, Ripon has a slightly larger availability with 32% of all available floorspace being located there.

4.2.3 As can be seen in Table 4-1 the majority of available properties (65%) are less than 5,000 sq. ft. in size, with few larger premises being available. This matches discussions with local agents which suggest the greatest demand for industrial space comes from occupiers seeking premises in the size of 2,000 – 5,000 sq. ft.

[4] Discussions with Harrogate Chamber of Trade and Commerce, Carter Jonas, Gent Visick, Feather Smailes Scales and Lister Haigh

4.2.4 Discussions with local agents suggest that, in general terms, the supply of industrial properties is steady across the District, with a good level of turnover. Businesses generally look for good quality, modern, well landscaped premises which are often on the market for short periods of time given the high demand across the District.

4.2.5 In line with the figures shown in Table 4-1, Ripon is identified as having the most surplus industrial floorspace compared to the other sub-areas in the District, with Boroughbridge and the Rural West having the least.

4.2.6 For warehousing development in particular, locations close to the strategic road network are important. Generally occupiers are looking for higher quality more modern industrial premises, with good quality landscaping and supporting facilities on or close to their facilities. Melmerby, Bar Lane, St James, Knaresborough and Boroughbridge were all identified by agents as being successful and near full occupation.

4.2.7 Agents commented that for many businesses it is important to be located in Harrogate town given their well established customer, supplier and labour force relationships. Consequently, there is a need to ensure that Local Plan policies are flexible to ensure such businesses are retained in the area.

Table 4-1 Amount of vacant industrial property in Harrogate October 1st – December 31st 2014

% of total floorspace	Number of units								Total floorspace (sq. ft.)	% of total floorspace
	0- 999 sq. ft.	**1,000 - 2,499 sq. ft.**	**2,500 - 4,999 sq. ft.**	**5,000 - 9,999 sq. ft.**	**10,000 - 19,999 sq. ft.**	**20,000 - 39,999 sq. ft.**	**40,000 + sq. ft.**	**Total units**		
Boroughbridge	0	0	0	0	0	0	0	0	0	0
Harrogate Town	2	2	3	0	2	0	1	10	92,790	20
Knaresborough	0	0	1	0	0	0	2	3	116,370	25
Ripon	2	1	0	0	1	0	1	5	151,947	32
Rural East	5	5	0	2	0	1	1	14	110,957	24
Rural West	0	0	0	0	0	0	0	0	0	0
Total								**32**	**472,064**	**100**

Source: PAF Report Q3

Offices

4.2.8 As shown in Table 4-2, there are currently 160 available office premises in the District, with a total floor space of 291,335sq ft. Approximately 72% of the total office space is located within Harrogate Town, forming the overwhelming majority within the District. Within Harrogate Town, 50% of the available office units are under 1,000 sq. ft., with 90% being under 5,000sq ft. Knaresborough represents 12% of total available floorspace whilst the other sub areas represent less than 10% each.

4.2.9 Consultation with local agents reinforced the above and suggest the local market is dominated by smaller companies with 86% of businesses employing between 1-10 employees (footnote 5). Demand within the District and particularly Harrogate Town is for smaller office units of less than 5,000 sq. ft. and there is a fairly reasonable turnover for this market, but a lack of high quality new office space available on the market.

4.2.10 Local agents suggest there is a real desire for high quality, well landscaped modern facilities, with good access to local facilities. Car parking is an important feature and a desirable requirement is 4 car parking spaces per 1000 sq. ft. of office space. However, car parking is not always an essential requirement, particularly in areas such as Harrogate town where there is good public transport accessibility. Broadband internet has also been noted as important to businesses, and can prevent businesses locating in areas which experience slower speeds.

4.2.11 As discussed above, and particularly relevant to the office market, many businesses are looking for offices in or near Harrogate town. Harrogate is desirable because of its pleasant surroundings and the perceived high quality labour market available. For this reason, sites such as Hornbeam Park and Cardale Park are very desirable amongst businesses. Against the high levels of demand, agents noted an undersupply of office space within Harrogate Town.

4.2.12 The average rent for office space across the District is estimated at £13-£14 per sq. ft., which is significantly lower than in neighbouring Leeds. High quality sites however can command higher rental values (such as some buildings within Cardale Park).

[5] Carter Jonas Commercial Edge Leeds and North Yorkshire Report (2014)

Table 4-2 Amount of vacant office property in Harrogate October 1st – December 31st 2014

% of total floorspace	Number of units								Total floorspace (sq. ft.)	% of total floorspace
	- 999 sq. ft.	**1,000 - 2,499 sq. ft.**	**2,500 - 4,999 sq. ft.**	**5,000 - 9,999 sq. ft.**	**10,000 - 19,999 sq. ft.**	**20,000 - 39,999 sq. ft.**	**40,000 + sq. ft.**	**Total units**		
Boroughbridge	1	0	1	0	0	0	0	2	5,135	2
Harrogate Town	52	25	16	7	0	2	0	102	210,566	72
Knaresborough	30	3	1	2	0	0	0	36	34,918	12
Ripon	4	4	1	0	1	0	0	10	24,821	9
Rural East	3	0	1	0	0	0	0	4	4,372	2
Rural West	2	3	0	1	0	0	0	6	11,523	4
Total				**160**					**291,335**	**100**

Source: PAF Report Q3

4.3 Change in supply

4.3.1 Based on monitoring data provided to the Property Agents Forum, there was a reduction in available floorspace of 197,000 sq. ft between Q3 in 2013 and the same period in 2014. In terms of sub areas, all areas experienced a decrease in office and industrial floorspace availability, except for Knaresborough which experienced a 28% increase in office floorspace

Figure 4-2 % change in floorspace availability by sub area 2013-2014

Source: PAF Report Q3 2013/14 and PAF Report Q3 2014/15

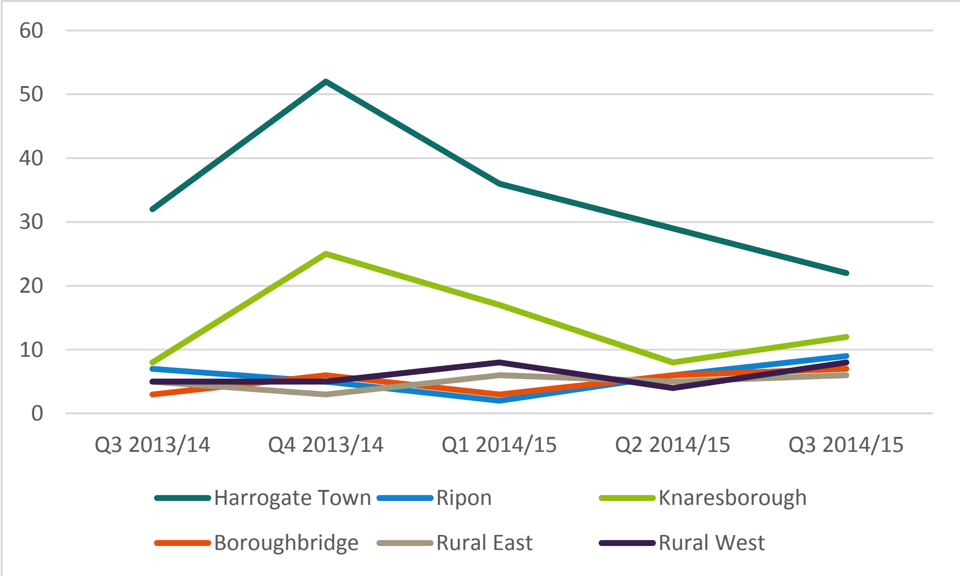
4.3.2 Discussions with local agents suggest the market is fairly robust and steady, however there are concerns regarding a perceived lack of suitable office space in Harrogate Town. There are indications that because of the limited availability of floorspace in popular business parks, businesses may consider relocating to other areas outside of the District. This poses an obvious risk to the local economy. In terms of good quality industrial floorspace, there is a risk that if sufficient floorspace is not available, then businesses could be more attracted to other well connected towns with good access to the A1, such as Darlington where access to the A1 is still good, but the cost of floorspace is cheaper

4.3.3 Site and premises enquiries Figure 4-3 shows the total number of new enquiries across all sub-areas from Q3 in 2013/14 until Q3 in 2014/15. It can be seen that Harrogate Town and Knaresborough received the most enquiries. These were confirmed by local agents as being the most popular business locations within the District.

4.3.4 The total number of enquiries across the District has stayed fairly constant over the previous 12 months, with a 7% increase from Q3 2013/14 to Q3 2014/15. Ripon, Boroughbridge, Rural East and Rural West have stayed fairly constant, whereas there has been more variation within Harrogate Town and Knaresborough, where a 31% decrease and a 50% increase have been experienced respectively.

4.3.5 Discussions with local agents suggest that some major inward investment enquiries have been lost due to the lack of available suitable sites. Examples include Latex Innovations and Lindam which both located away from the District to Wetherby.

Figure 4-3 Number of enquiries for office and industrial floorspace across sub areas Q3 2013/14 – Q3 2014/15

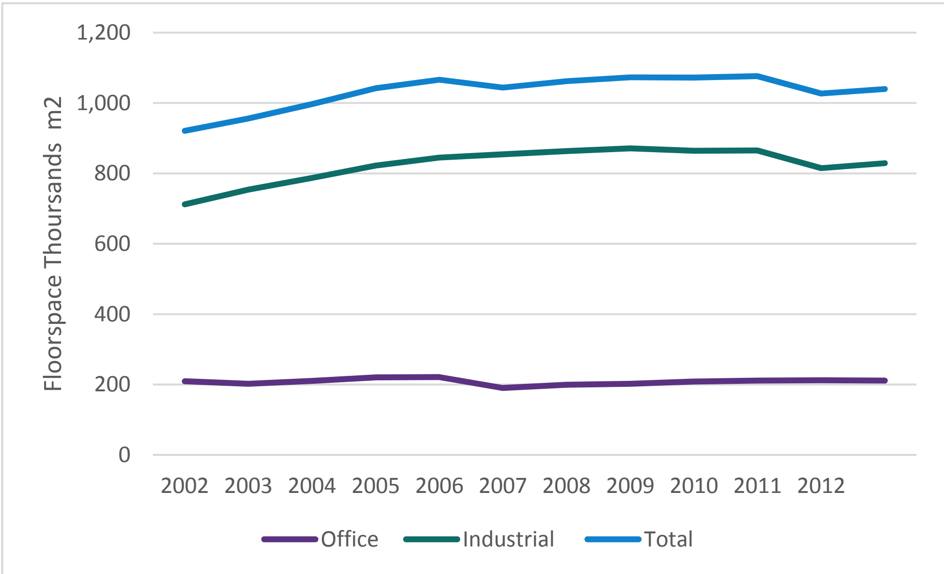


Source: PAF Reports, 2013 & 2014

4.4 Valuation office agency data

4.4.1 Figure 4-4 presents estimates of total B-class use floorspace in the Harrogate district for the period 2002-2012, using the latest available Valuation Office Agency (VOA) data. It can be seen that office floorspace has stayed fairly steady throughout the period, with a small increase of 6%.

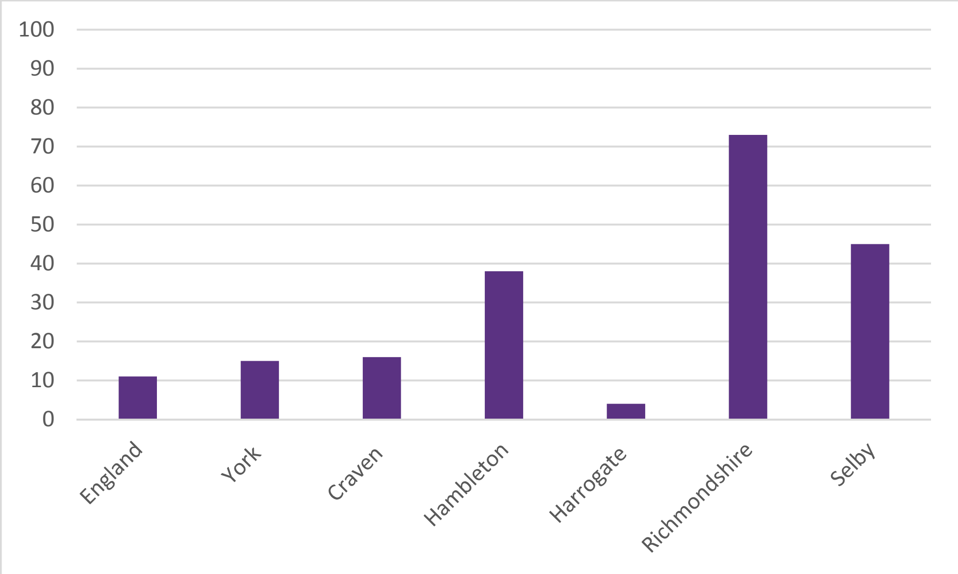
Figure 4-4 B-class floorspace in Harrogate District 2002 to 2012



Source: VOA Data (2012)

4.4.2 As shown in Figure 4-5 over the same period, office growth within the District was considerably lower than the national average of 11%, and significantly lower than the 18% growth experienced across the Yorkshire and Humber region. In addition, all neighbouring authorities experienced larger growth in office space over the same period, with Richmondshire to the north, experiencing the largest growth at 73%. In contrast, industrial growth between 2002 and 2012 within Harrogate saw a 7.1% increase, which was higher than the national average of 5% over the same period.

Figure 4-5 Percentage change in office floorspace between 2002 and 2012



Source: VOA Data (2012)

4.5 Conclusions

4.5.1 The key messages from the property market analysis described above are as follows:

- The District currently has approximately 760,000 sq. ft of office and industrial floorspace marketed and available, of which 60% is industrial and 40% office space.
- The vast majority (70%) of all available office floorspace is located within Harrogate Town which reflects the town's predominant role as a service centre. Available industrial floorspace is more evenly spread across Harrogate Town, Knaresborough, Ripon and the Rural East sub-areas.
- Office market demand is dominated by small companies and most demand for office space is for properties less than 5,000 sq. ft. in size, with good quality, modern and well-connected premises a necessity for many businesses.
- The office market across the District has been identified as 'Harrogate Centric'. It is important for many businesses to be located within or very close to the town itself, which is reflected in the significant number of enquiries received for floorspace within Harrogate Town.
- VOA data shows that growth in available office floorspace has been significantly lower than the national level and that experienced by adjacent local authorities. Discussions with local agents support this and many have suggested that demand often outweighs supply, which is highlighted by multiple businesses locating outside of the district as they are unable to find suitable premises. It is therefore concluded that B-class demand is constrained by supply within the District.

5. Socio-economic profile

5.1 Introduction

5.1.1 This section sets out a summary profile of the prevailing socio-economic conditions in Harrogate District. It aims to provide the socio-economic context which shapes employment land demand and supply factors in the study area. It provides an important context for understanding economic demand and needs, having regard to the wider regional and national economies. Further detail is provided in Appendix A.

5.1.2 Harrogate has been benchmarked against the wider sub-region, region and the two LEP areas. The Leeds City Region LEP and York, North Yorkshire and East Riding LEP have different economic priorities and Harrogate is seen to share common economic characteristics with both. Although abolished in 2011, The Yorkshire and Humber regional context is still relevant and has been considered for the purposes of this analysis.

5.2 Harrogate socio-economic profile

5.2.1 This analysis has been derived from the Annual Business Survey Inquiry (ABI) covering the period 1998 to 2008 and the Business Register and Employment Survey (BRES) covering the period 2009 – 2012 (produced by the Office of National Statistics) which presents employment information about the UK economy.

5.2.2 BRES is the official source of employee and employment estimates by detailed geography and industry. It is also used to update the Inter-Departmental Business Register (IDBR), the main sampling frame for business surveys conducted by the Office for National Statistics (ONS), with information on the structure of businesses in the UK.

5.2.3 It should be noted that the ABI is based on a sampled survey, estimating the number of employees which can give rise to sampling errors and should be viewed in this light. A standard error can be applied to the estimates to provide an upper and lower boundary, within which ABI are 95% confident of the true value.

5.2.4 In relation to the BRES, NOMIS[6] recommend caution should be applied when comparing estimates at or below the local authority level, particularly when further disaggregated by industry. In this circumstance the coefficient of variation is likely to increase, meaning that the 95% confidence interval becomes wider. It should also be noted that the Standard Industrial Classifications (SICs), used to classify different industries, vary between the ABI and BRES datasets.

5.2.5 This study has combined the use of the 2011 and 2012-based SNPP (Sub-National Population Projections). Whilst the 2012-based projections are available, the data at the time of writing, was published at local authority and regional levels only at 5 year intervals. However, for the 2011-based projections, annual data is available for the period up to 2021 which enables a more accurate assessment of annualised growth rates to be provided. The SNPP 2012-based projections were only used to provide an up-to-date comparison of economic activity rates between Harrogate and the wider region. In terms of a headline comparison between the two data-sets, there is only a marginal (2%) variation in Harrogate's projected population count.

5.3 Employment

5.3.1 BRES survey results show that total employment in the District is 73,327 jobs with an annual rate of growth of 1.8% over the period 1998–2012. During the tough economic period of 2009-2012, number of jobs declined by 0.4%

5.3.2 Harrogate has a high job density of 0.97, where 1.0 represents 1 job for every active resident between the ages of 16-64. This is the highest when compared to North Yorkshire County (0.85), the England average (0.79) and the two LEP's (0.73-0.79). However, this may be explained by

[6] Nomis is a service provided by the Office for National Statistics, showing the most detailed and up-to-date UK labour market statistics from official sources.

the District having the highest proportion of part time jobs (42% of total jobs) which is substantially higher than the two LEP's, County, Regional and England range of 33%-38%.

5.3.3 Employment was dominated pre-2008 by three sectors: wholesale and retail trade; repair of motor vehicles and motorcycles (20%); real estate and business activities (16%) and Health & social work (14%). As per the revised SIC2007 classifications for 2012, the order has changed with health (14%), education (10%) and retail (10%), information & communication (10%) and accommodation & food services (9%) forming the major employment sectors.

5.3.4 As seen in Appendix A, growth in employment pre-2008 was focused on five sectors: manufacturing (8% pa), real estate, business activities (4% pa), transport, storage, communication (4% pa), and hotels and restaurants (3% pa) and education (2.4% pa). Agriculture, forestry was growing at 6% pa, however this has been disregarded due to its low starting base. During the heart of the recession (2009-2012) business administration & support services (8% pa), education (4% pa), manufacturing (3% pa), construction and transportation & storage (2% pa each) have continued to grow. During the same period real estate declined by -10% pa, finance & insurance declined by -7% pa, public administration by -5% pa and retail by -4% pa.

5.3.5 Consistent growth sectors have included business administration, education, manufacturing and transportation & storage. However, they continue to be relatively under-represented when compared to the wider region.

5.3.6 At sub–sector level, the retail trade sub-sector represents the largest proportion of employment (11%) and is the sub-sector that has seen the largest absolute decline in employment (net loss of 1,006 jobs) during 2009-2012. The education sub-sector forms the fasting growing employment sub-sector (net gain of 805 jobs) in the District.

5.3.7 B use-class employment accounts for approximately 49% of total employment in the District. The largest B use-class employment sectors are information & communication (20% of which the Publishing activities sub-sector is 15%) and wholesale and retail trade (16%), followed by professional scientific and technical activities (14%), manufacturing (13%), and administrative and support services (11%).

5.3.8 A comparison between the Harrogate District and the two LEP areas shows opportunities for the District in under-represented growth sectors as discussed below:

- Leeds City Region LEP: Key under-represented growth sectors within the District include Business administration & support services, manufacturing, education and construction. Key knowledge sectors that are underrepresented are financial & insurance. Professional scientific & technical are declining within the District.
- York, North Yorkshire and East Riding LEP: The key under-represented growth sectors within the District remain somewhat consistent with the Leeds City Region LEP (exception of Business administration & support services). Harrogate is consistently in-line with the LEP's proportion of accommodation & food services, health, retail and arts entertainment, recreation and other services.

5.3.9 Business structure is dominated (90% of all businesses) by micro businesses of 0 – 9 employees, which reflects the County, region and national trends as a whole. Harrogate has a smaller proportion of large businesses over 250 employees (0.3%) when compared to the County, region and national average of 0.4%.

5.3.10 Professional, scientific and technical business units constitutes 20% of the total units in the District which is in line with England but is a substantially higher proportion when compared to the County and region. This trend is seen in the information and communication sector as well, while major employment sectors such as retail have a small proportion of business units when compared to the wider region.

5.3.11 Major employers in employment sectors including retail, public administration and education tend to be heavily skewed toward larger businesses. This reflects the nature of the sectors in question. In the case of the public sector organisations these are typically major employers in the UK's major towns and cities. For retail, the presence of many national and international operators will increase the average level of employment by business unit in this sector.

5.3.12 Micro firm employment tends to be dominated by professional, scientific and technical and information and communication employment sectors. This reflects the specialist, highly skilled labour characteristics of these sectors.

5.4 Population and labour market

5.4.1 Population growth (4%) in Harrogate District 2001-2011 (Census) has been lower than the regional (6%) and national (8%) averages. The ONS population projections to 2021 show an annualised growth rate of 0.8% compared to a Regional and National average of 0.9%.

5.4.2 The population profile and projections for the Harrogate District differ from the trends seen at the two LEP's, County, Region and National level. Working age population is currently 72% of total population (Census, 2011) and is already lower when compared to the wider area range of (73-74%). The older age structure of the District suggests the working age population will decline faster in 2022 and 2032 (2012-based projection) when compared to the wider region which is a serious concern on the long-term competitiveness of the District.

5.4.3 The average weekly resident wages in the District are higher than the County and Regional averages, but almost in-line with the National average. However, the average weekly workplace wages in the District are lower that the Regional and National average which is expected to result in a struggle to attract employees into the District (see Appendix A).

5.4.4 Median weekly workplace wages in 2013 (£460) is the highest it has been (Although this is substantially lower than the median weekly resident wages in the District which is £504 (National median is £521 – Appendix A).

5.4.5 The District has a relatively high proportion of people employed as managers and high professional occupations, constituting 43% of the workforce, and is substantially higher than the wider region range of 33%-37%.

5.4.6 A third of the working age population within the District has the highest level qualifications (Level 4 and above), which is higher than regional levels, and has the lowest proportion of non-qualified working age residents.

5.5 SWOT

5.5.1 Table 5-1 sets out a SWOT (strengths, weaknesses, opportunities and threats) analysis for the study area in terms of its economic conditions and future prospects. This summarises the implications of the social and economic characteristics of the study area for future economic development prospects.

5.5.2 Implications of the SWOT analysis include the loss of employment amongst B1a/b floorspace occupiers during the recession and the aging workforce, contrasting with the national picture.

Table 5-1 SWOT analysis for Harrogate District

Strengths	Weaknesses
Harrogate is strong in Health, Education, Information & Communication, Accommodation & food service and Retail. The key sub-sector is publishing activities representing 15% of the jobs. The District has a strong skilled workforce and a relatively higher resident earning when compared to the average in the County, Region and Country as a whole.	The District's projected aging population will result in a weakened workforce and significantly affect competitiveness of the District. High value employment sectors such as professional, scientific and technical activities and financial / insurance services have been vulnerable to employment loss during the recession 2009-2012. The District has an aging workforce and lower workplace earning makes it a challenge to attract and retain new workforce.
Opportunities	**Threats**
The high proportion of economically active population and relatively higher proportion of part-time working offers a flexible workforce. This could be perceived as an opportunity as a strong work culture within the District. Harrogate has access to the investments from the two LEP's with a potential to grow in business	Of the top 5 employment sectors, only education has seen positive growth (2009-2012) and information & communication is extremely overrepresented in the region. The District currently has less than half the workforce in B use class employment and given the key employment sectors, is

Strengths	Weaknesses
administration, manufacturing, transportation & storage, and construction (based on recent trends and a review of the District's competitive position).	expected not to have strong demand on B-use space.

Source: Atkins

6. Future demand for employment land

6.1 Introduction

6.1.1 This section assesses Harrogate's future employment floorspace and land requirements by use class (B1a/b, B1c, B2 and B8) up to 2035. It should be noted that forecasts of future economic growth and resulting employment land requirements should be treated as indicative rather than definitive. It is difficult to predict future economic trends at any time but particularly so in the current context of prolonged economic uncertainty. It is therefore recommended that a cautious approach be taken, especially when considering longer-term projections.

6.1.2 To mitigate the uncertainties associated with forecasting future employment land requirements we have considered a range of possible growth scenarios including:

- A scenario based on the latest (December 2014) employment forecasts of the Regional Econometric Model (REM);
- A scenario based on the employment forecasts produced by Experian in August 2014; and
- A trend-based scenario based on Harrogate's historic employment growth levels.

6.1.3 Table 6-1 provides a description of the three selected scenarios, identifying the key differences between them as well as the underlying methodological approach in each case.

Table 6-1 Employment growth scenarios

Scenario	Description	Source
Scenario 1 – REM based scenario (December 2014).	The Yorkshire and Humber Regional Economic Model (REM) is operated by the Regional Economic Intelligence Unit which forms part of Leeds City Council. The REM is an interactive database of economic, demographic and environmental data available across the region. Based on Experian's economic model, the REM model incorporates historical data and forecasts for 38 industry sectors between the years 1997 and 2031. It can produce forecasts of output, productivity, employment, occupations and skills. The REM has been used as an important tool for supporting decision making in the region for a number of years. Of particular interest to local authorities in the region, is the model's capability to produce employment forecast at a local level. Whilst the REM is based on Experian's baseline regional and local economic forecasting model (Scenario 2), the key difference between the two is that the REM enables users to build in a range of scenarios for local areas. In the case of Yorkshire and Humber, the user is the Regional Economic Intelligence Unit at Leeds City Council. The advantage of this scenario-based tool, is that nationally and regionally driven forecasts can be refined to incorporate specific local factors or indeed the perceived effect of policy interventions.	REM - Regional Economic Intelligence Unit / Experian.
Scenario 2 – Experian forecasts (August 2014)	In essence, there is very little difference between Scenarios 1 and 2 as they both are based on the same baseline historical and forecast economic data produced by Experian. As highlighted above, the main factor that differentiates the two 'models' is that the REM enables the user to adopt the Experian model to reflect local circumstances and potential policy effects. The Experian forecasts for local authority areas are derived directly from national and regional forecasts. A number of steps are taken to produce the local area forecasts which can be summarised as follows:	Experian

Scenario	Description	Source
	• Monthly UK forecasts are produced by Experian and the variables contained within these forecasts are assumed exogenous when translated to the regional level (so cannot be altered). The UK level inputs draw heavily on National Institute of Social & Economic Research (NISER) model. The UK model is expressed as input-output model which captures intra-industry demand. • UK forecasts are then disaggregated into regional forecasts which are heavily influenced by historical trends and the representation of industry sectors relative to the national average. • Local authority area forecasts are prepared once national and regional forecasts are finalised using a shift-share methodology. In broad terms, the historical performance of local authority economies is interpreted in terms of their share of the regional economy of which they are a part. For each sector of the economy, equations are produced for output and employment that explain the observable relationship between these variables at the local and regional level. All local authority totals must sum to regional totals. Outputs forecast are translated to employment using regional productivity trends.	
Scenario 3 – Trend based employment growth (February 2015).	Scenario 3 is a simple linear trend-based scenario which reflects Harrogate's historic patterns of job change between 1997 and 2013. Linear trend based forecasts are produced on a sector by sector basis which are aggregated annually to produce estimates of total forecast employment change. It should be highlighted that the pure-trend based model is a simple tool which is produced primarily for comparative, benchmarking purposes. The simplicity of the scenario is explained by the fact that future employment change in each sector of the local economy will replicate average trends which have been observed since 1997. Moreover, by their nature, the trend-based forecast do not include any allowance for exogenous factors occurring internationally, nationally or regionally. Consequently, we consider that this Scenario is unlikely to be considered robust or sufficiently realistic to be used as the basis for development planning. However, it does provide a useful benchmark for comparing the outputs of other more sophisticated forecasting models (Scenarios 1 and 2).	Atkins based on secondary data issued by ONS & Experian.

6.1.4 Employment sectors have been mapped to the core B1a/b (offices and research and development), B1c (light industrial), B2 (general industrial) and B8 (storage and distribution) "employment" uses and job numbers have been converted to floorspace and land demand by applying appropriate employment density and plot ratio assumptions.

6.1.5 As is standard practice in Employment Land Reviews, the employment densities used are in line with the Homes and Communities Agency's (HCA) Employment Densities Guide 2nd Edition (2010) and the plot ratios are in line with the ODPM's Employment Land Reviews: Guidance Note (2004). This is the most recent available guidance. The employment density and plot ratio assumptions are summarised in Table 6-2 below.

Table 6-2 Employment density and plot ratio assumptions

Use class	Employment density	Plot ratio
B1a/b	12 sqm per FTE	75% of site area
B1c	47 sqm per FTE	40% of site area
B2	36 sqm per FTE	40% of site area
B8	70 sqm per FTE	50% of site area

Scenario 1 REM based scenario

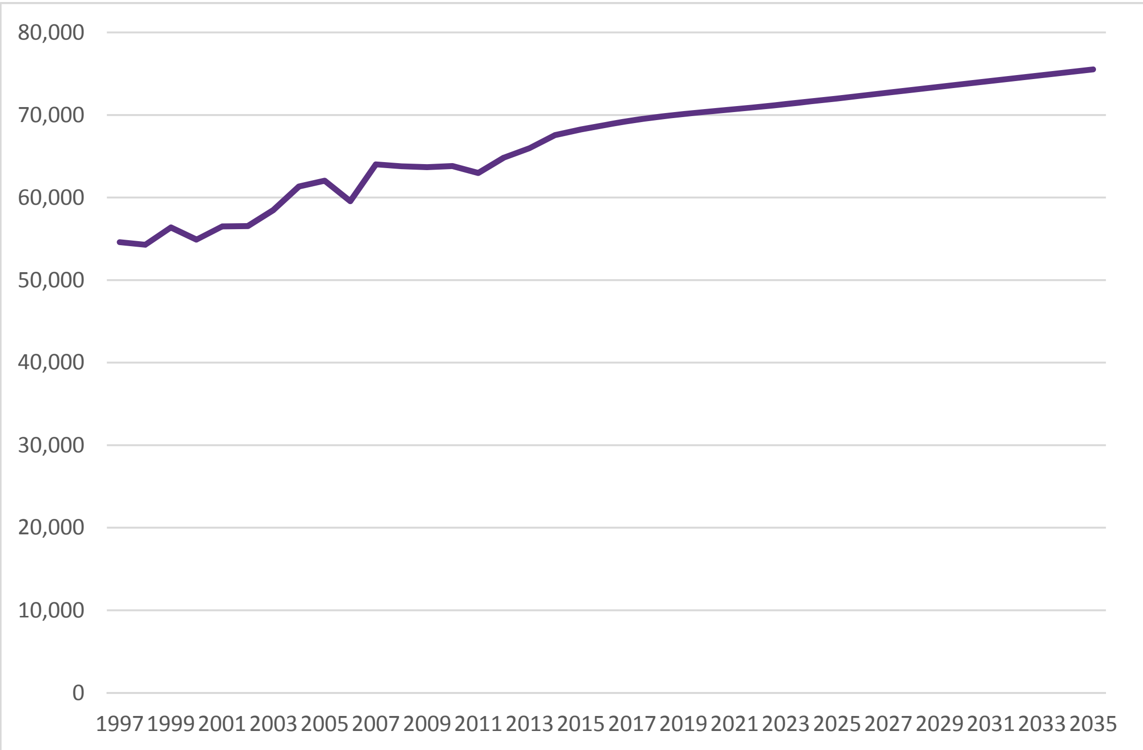
6.1.6 All figures presented in the following analysis have been rounded and as a result may not completely add up.

6.2 Scenario 1: REM based scenario (December 2014)

6.2.1 Scenario 1 is based on the Regional Economic Model (REM) held by Leeds City Council's Regional Economic Intelligence Unit. The forecasts for local authorities are prepared once national and regional forecasts are finalised using a shift-share methodology. In broad terms, the historical performance of county economies is interpreted in terms of their share of the regional economy of which they are a part. In turn, the performance of the local authority area is based on their share of their encompassing county.

6.2.2 The REM forecasts cover the period to 2031 but have been extrapolated to 2035 in order to align with the emerging Local Plan period. Future employment levels were estimated using a linear trend extrapolation, using Microsoft Excel's "Forecast" function (Figure 6-1). The linear extrapolation was undertaken on a sector by sector basis with Figure 6-1 illustrating the outcome for total employment up to 2035.

Figure 6-1 Linear trend extrapolation of REM employment figures for 1997-2031 to 2035



Source: REM, Atkins

6.2.3 According to the REM forecasts, the number of FTE jobs across all sectors will increase by 12% between 2014 and 2035, rising from 67,600 to 75,500 (an increase of approximately 7,900 FTE jobs[7]). In absolute terms, key growth sectors include Wholesale; Media activities;

[7] These FTE figures are consistent with the total jobs figures presented in the Harrogate Strategic Housing Market Assessment, February 2015.

Accommodation & food services; and Computing & information services (Table 6-3). The greatest decline is projected to take place in Agriculture; Land transport, storage & post; Public administration & defence; and various manufacturing sub-sectors.

Table 6-3 REM forecasts: FTE job changes in selected sectors, 2014-2035

Sector	FTE jobs change 2014-2035	% FTE jobs change 2014-2035
Wholesale	+2,150	+34%
Media Activities	+1,800	+40%
Accommodation & Food Services	+1,610	+33%
Computing & Information Services	+810	+52%
Specialised Construction Activities	+770	+48%
Finance	+730	+30%
Retail	+670	+12%
Health	+520	+12%
Printing and Reproduction of Recorded Media	-230	-49%
Manufacturing of Computer & Electronic Products	-240	-35%
Manufacturing of Machinery & Equipment	-260	-48%
Public Administration & Defence	-290	-16%
Land Transport, Storage & Post	-340	-11%
Agriculture, Forestry & Fishing	-360	-16%
All sectors	**+7,930**	**+12%**

Source: REM, Atkins

6.2.4 FTE employment in B-use class sectors is forecast to increase by approximately 9% between 2014 and 2035, resulting in 3,070 additional B-use class FTE jobs by 2035. Employment growth is forecast to come from B1a/b, B1c and B8 sectors while B2 employment is forecast to continue to decline (Table 6-4).

Table 6-4 Scenario 1: B-use class FTE jobs, 2014-2035

Use class	2014	2016	2021	2026	2031	2035	Change 2014-2035	% change 2014-2035
B1a/b	21,570	22,090	22,790	23,280	23,810	24,300	2,730	13%
B1c	2,910	2,980	3,050	3,150	3,280	3,330	420	14%
B2	2,330	2,280	2,050	1,900	1,780	1,610	-720	-31%
B8	5,990	6,100	6,230	6,370	6,540	6,630	640	11%
Total B class	**32,800**	**33,450**	**34,120**	**34,700**	**35,410**	**35,870**	**3,070**	**9%**

Source: REM, Atkins

6.2.5 Based on the above employment forecasts and the employment density and plot ratio assumptions summarised in Table 6-2, Harrogate's employment floorspace and land requirements over the period 2014-2035 are presented in Table 6-5 and Table 6-6 below.

Table 6-5 Scenario 1: B-use class floorspace requirements (sqm), 2014-2035

Use class	2014	2016	2021	2026	2031	2035	Change 2014-2035
B1a/b	259,000	265,000	273,000	279,000	286,000	292,000	+33,000
B1c	137,000	140,000	143,000	148,000	154,000	157,000	+20,000
B2	84,000	82,000	74,000	68,000	64,000	58,000	-26,000
B8	419,000	427,000	436,000	446,000	458,000	464,000	+45,000
Total B class	**899,000**	**914,000**	**926,000**	**941,000**	**962,000**	**971,000**	**+72,000**

Source: REM, Atkins

Table 6-6 Scenario 1: B-use class land requirements (ha), 2014-2035

Use class	2014	2016	2021	2026	2031	2035	Change 2014-2035
B1a/b	35	35	36	37	38	39	+4
B1c	34	35	36	37	39	39	+5
B2	21	21	18	17	16	14	-6
B8	84	85	87	89	92	93	+9
Total B class	**173**	**176**	**178**	**181**	**184**	**185**	**+12**

Source: REM, Atkins

6.2.6 According to the REM based scenario, B1a/b floorspace demand will rise by approximately 33,000 sqm over the period 2014-2035, translating into an indicative need for 4 additional hectares of B1a/b land.

6.2.7 Demand for B1c floorspace is forecast to grow by 20,000 sqm over the same period, translating to additional indicative demand for 5 ha of B1c land. B8 floorspace requirements are projected to increase by 45,000 square metres (indicatively 9 hectares of land).

6.2.8 Demand for B2 floorspace is projected to decline however, decreasing by 26,000 square metres (-6 hectares in terms of land) over the period 2014-2035.

6.2.9 As a consequence, the overall B class floorspace need in the District is forecast to increase by approximately 72,000 sqm over the period 2014-2035, translating to an indicative requirement of 12 hectares of additional B class land. This assumes that all surplus B2 land will be re-used for other B class uses. It is possible however that not all surplus B2 land will be suitable for B1 or B8 re-use (because of factors such as site location, size, layout, quality and accessibility), and as a result the additional land requirements could range from 12 to 18 hectares.

6.3 Scenario 2: Experian August 2014 Scenario

6.3.1 Scenario 2 uses Experian's August 2014 detailed local level employment forecasts. As with the REM forecasts, the Experian forecasts cover the period to 2031 but have been extrapolated to 2035 to align with the emerging Local Plan period using the same linear extrapolation technique. As explained in the introduction to this section, Scenario 2 shares the same baseline forecasting database provided by Experian with the only difference between them being that Scenario 1 (REM) incorporates a locally informed scenario element.

6.3.2 The main differences between the Experian and REM forecasts are summarised in Table 6-7 below.

Table 6-7 Summary of key REM and Experian model facts

REM forecasts	Experian forecasts
The REM is an interactive database of economic, demographic and environmental data available across the region. Based on Experian's base output, productivity and employment forecasts, the model has been developed and upgraded over a number of years to help forecast industry growth and decline over the coming years across the region. Produced in December 2014 Use ONS 2012-based population projections Include some adjustments to employment in agriculture, forestry and fishing for districts in Yorkshire and the Humber based on feedback from REM users. Incorporates locally defined scenarios.	Experian is one of the UK's most respected forecasting houses. Produced in late August 2014 Use ONS 2013 mid-year estimates and ONS 2012-based sub-national population projections

6.3.3 According to the Experian forecasts, the number of FTE jobs across all sectors will increase by approximately 7,400 between 2014 and 2035, representing an increase of 11%. This projection is similar to the forecasts of the REM model.

6.3.4 Key growth sectors are projected to include Wholesale; Media activities; Accommodation & food services; Finance; and Computing & information services. The greatest decline in absolute terms is projected to take place in Agriculture, Public administration & defence; land transport storage & post; and various manufacturing sectors.

6.3.5 For some sectors such as food and drink, a small projected decline is projected in the District whilst demand for these activities in surrounding conurbations such as Leeds and York is likely to increase. Consequently, employment land allocation policies in Harrogate should be sufficiently flexible in order to take advantage of potential downstream opportunities which arise in the form of spill-over or supply-chain demand.

Table 6-8 Experian forecasts: FTE job changes in selected sectors, 2014-2035

Sector	FTE jobs change 2014-2035	% FTE jobs change 2014-2035
Wholesale	2,010	32%
Media Activities	1,720	39%
Accomodation & Food Services	1,340	28%
Finance	910	38%
Computing & Information Services	730	47%
Retail	700	12%
Printing and Reproduction of Recorded Media	-250	-53%
Manufacturing of Computer & Electronic Products	-250	-37%
Manufacturing of Machinery & Equipment	-260	-48%
Land Transport, Storage & Post	-310	-10%
Public Administration & Defence	-340	-18%
Agriculture, Forestry & Fishing	-450	-20%
All sectors	**7,400**	**11%**

Source: Experian

6.3.6 Under Scenario 2, FTE employment in B-use class sectors is forecast to increase by 10% between 2014 and 2035, resulting in 3,300 additional B-use class FTE jobs by 2035 (Table 6-9). As with Scenario 1, employment growth is forecast to come primarily from B1a/b sectors (+3,220 FTE jobs). Employment in B1c and B8 sectors is also forecast to increase, while employment in B2 sectors is projected to decline.

6.3.1 For some sectors such as food and drink, a small projected decline is projected in the District whilst demand for these activities in surrounding conurbations such as Leeds and York is likely to increase. Consequently, employment land allocation policies in Harrogate should be sufficiently flexible in order to take advantage of potential downstream opportunities which arise in the form of spill-over or supply-chain demand.

Table 6-9 Scenario 2: B-use class FTE jobs, 2013-2035

Use class	2014	2016	2021	2026	2031	2035	Change 2014-2035	% change 2014-2035
B1a/b	21,610	22,170	22,990	23,600	24,250	24,830	3,220	+15%
B1c	2,900	2,970	3,010	3,090	3,200	3,240	340	+12%
B2	2,320	2,260	2,010	1,840	1,710	1,520	-800	-34%
B8	5,980	6,090	6,190	6,300	6,440	6,520	540	+9%
Total B class	**32,810**	**33,490**	**34,200**	**34,830**	**35,600**	**36,110**	**3,300**	**+10%**

Source: Experian, Atkins

6.3.2 The above employment forecasts translate into indicative additional demand for 65,000 sqm of employment floorspace between 2014 and 2035. Most of the additional demand is projected to be for B1a/b and B8 floorspace (39,000 and 38,000 square metres respectively), with B1c need also increasing (by approximately 16,000 square metres of floorspace). However, B2 floorspace requirements are projected to decline by 28,000 square metres (Table 6-10).

Table 6-10 Scenario 2: B-use class floorspace requirements (sqm), 2013-2035

Use class	2014	2016	2021	2026	2031	2035	Change 2014-2035
B1a/b	259,000	266,000	276,000	283,000	291,000	298,000	+39,000
B1c	136,000	139,000	141,000	145,000	150,000	152,000	+16,000
B2	83,000	81,000	72,000	66,000	62,000	55,000	-28,000
B8	418,000	426,000	433,000	441,000	451,000	456,000	+38,000
Total B class	**896,000**	**912,000**	**922,000**	**935,000**	**954,000**	**961,000**	**+65,000**

Source: Experian, Atkins

6.3.3 The above floorspace projections translate into indicative need for 5 additional hectares of B1a/b land, 4 hectares of B1c land, and 8 hectares of B8 land. B2 land requirements are projected to decrease by approximately 7 hectares, creating the opportunity to re-use some of the surplus industrial land to meet the needs of other sectors.

Table 6-11 Scenario 2: B-use class land requirements (ha), 2013-2035

Use class	2014	2016	2021	2026	2031	2035	Change 2014-2035
B1a/b	35	35	37	38	39	40	+5
B1c	34	35	35	36	38	38	+4
B2	21	20	18	17	15	14	-7
B8	84	85	87	88	90	91	+8
Total B class	**173**	**176**	**177**	**179**	**182**	**183**	**+9**

Source: Experian, Atkins

6.3.4 The indicative need for 9 hectares of additional employment land over the period 2014-2035 assumes all surplus B2 land will be reused for B1 or B8 purposes. Since it is possible that not all surplus B2 land will be suitable for B1 or B8 re-use, the range of indicative employment land requirements to 2035 under Scenario 2 is between 9 and 17 hectares.

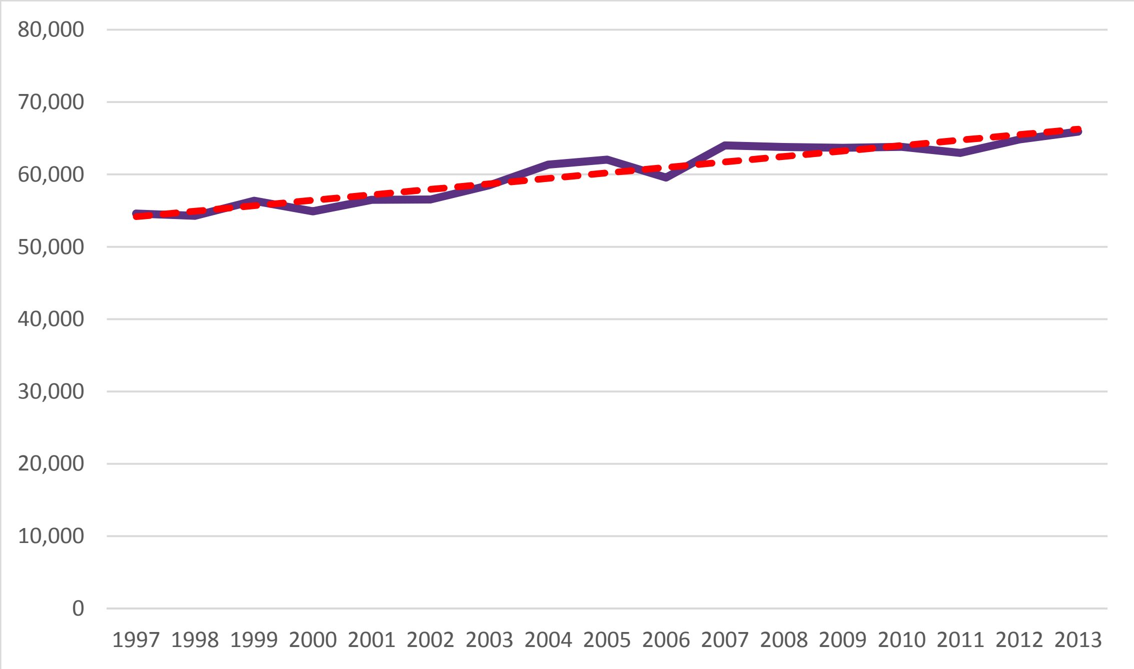
6.3.5 The employment land projections of Scenario 2 are very similar to those of Scenario 1 in terms of the overall employment land need to 2035. The two scenarios also align in their projection that all B use classes (with the exception of B2) will generate additional floorspace and land requirements.

6.4 Scenario 3: Trend based

6.4.1 Scenario 3 uses past employment trends as the basis for forecasting future employment levels. A simple linear extrapolation is undertaken on a sector by sector basis. This technique effectively repeats past, average sectoral trends. Given that past trends are unlikely to be replicated, this scenario should not be considered especially realistic. However, it provides a useful benchmark by which to compare and sense check more sophisticated forecasts.

6.4.2 As Figure 6-2 illustrates, despite some fluctuations, Harrogate job numbers grew steadily over the period 1997-2013, increasing by 11,340 (approximately 21%) over that period. The biggest growth sectors (in terms of absolute increases in numbers of jobs) were media activities (+3,920 FTE jobs), health (+3,170 FTE jobs) and professional services (+1,970 FTE jobs).

Figure 6-2 Harrogate FTE jobs 1997-2013



Source: Experian, ONS

6.4.3 Extrapolating these employment trends to 2035, Harrogate FTE job numbers would increase by approximately 15,900 over the period 2014-2035, an increase of approximately 24%. FTE employment in B class sectors is projected to grow by 10,860, an increase of 33% (Table 6-12).

Table 6-12 Scenario 3: B-use class FTE jobs, 2014-2035

Use class	2014	2016	2021	2026	2031	2035	Change 2014-2035	% change 2014-2035
B1a/b	21,590	22,280	24,020	25,760	27,500	28,890	7,300	34%
B1c	2,860	3,050	3,520	3,990	4,460	4,840	1,980	69%
B2	2,250	2,240	2,220	2,190	2,170	2,150	-100	-4%
B8	6,080	6,240	6,640	7,040	7,440	7,760	1,680	28%
Total B class	**32,780**	**33,810**	**36,400**	**38,980**	**41,570**	**43,640**	**10,860**	**33%**

Source: Experian, ONS, Atkins

Table 6-13 Scenario 3: B-use class floorspace requirements (sqm), 2014-2035

Use class	2014	2016	2021	2026	2031	2035	Change 2014-2035
B1a/b	259,000	267,000	288,000	309,000	330,000	347,000	88,000
B1c	135,000	143,000	166,000	188,000	210,000	227,000	92,000
B2	81,000	81,000	80,000	79,000	78,000	78,000	-3,000
B8	426,000	437,000	465,000	493,000	521,000	543,000	117,000
Total B class	**901,000**	**928,000**	**999,000**	**1,069,000**	**1,139,000**	**1,195,000**	**294,000**

Source: Experian, Atkins

6.4.4 The above employment projections translate into indicative additional need for 12 hectares of B1a/b land over the period 2014-2035, 23 hectares of B1c land and 23 hectares of B8 land. B2 land requirements are projected to remain largely the same over the period 2014-2035 (Table 6-14).

Table 6-14 Scenario 3: B-use class land requirements (ha), 2014-2035

Use class	2014	2016	2021	2026	2031	2035	Change 2014-2035
B1a/b	35	36	38	41	44	46	12
B1c	34	36	41	47	52	57	23
B2	20	20	20	20	20	19	-1
B8	85	87	93	99	104	109	23
Total B class	**174**	**179**	**193**	**206**	**220**	**231**	**57**

Source: Experian, Atkins

6.4.5 According to the projections of Scenario 3, Harrogate would need some 57 hectares of additional employment land over the period to 2035. This is a much higher projection than those of Scenarios 1 and 2.

6.5 Preferred scenario

6.5.1 Scenarios 1 and 2 forecast similar levels of employment growth and resulting floorspace and land requirements. This is unsurprising given that they are both based on Experian's forecasting model. Scenario 3 forecasts significantly higher levels of employment growth and B use class land requirements.

6.5.2 However, as explained earlier, Scenario 3 replicates past trends which cannot be considered a reliable basis on which to plan for future economic change. The primary purpose for considering this scenario is to use it as a benchmark for comparing other more sophisticated forecasts and to indicate what would happen in the economy if past trends continued in the long term.

6.5.3 A common pattern across all scenarios is continued employment growth (and therefore increasing floorspace and land requirements) in the B1a/b, B1c and B8 sectors and decline in B2 employment. This supports the evidence gathered in conversation with local businesses, developers and the Council. A key objective should therefore relate to testing any surplus B2 floorspace and land for its ability to be re-used for B1 and/or B8 purposes. If the assessment shows surplus B2 sites to be unfit for B1/B8 uses then they should be considered for release for other uses while appropriate land is allocated to meet the growing B1 and B8 needs. Furthermore, as it is unlikely that all surplus B2 land will be reused for B1 and B8 purposes it will be important to safeguard and intensify suitable B1 and B8 locations and protect vacant / undeveloped employment land so that Harrogate's economy can continue to grow over the plan period.

6.5.4 In choosing a preferred scenario, it is also worth considering data from Harrogate Council on B-Class completions suggesting that over the last 7 years there have been approximately 0.5ha of B-class land completions per annum. This aligns well with both Scenarios 1 and 2.

6.5.5 On balance, it is recommended that the REM scenario is used as the preferred scenario. The REM is a very detailed, bespoke economic forecasting tool that has been continually developed and upgraded over many years and is best placed to reflect the characteristics and trends of the local and regional economies. It has been an important tool for supporting decision making in the region for many years. Moreover, the REM model builds in national and regional variables which are combined with locally informed scenarios. These enable alterations to be made to the top-down forecasts allowing key local factors such as the unique effects of one or two large employers entering or leaving the local economy to be taken into consideration.

6.5.6 Scenario 3 forecasts higher land requirements than Scenarios 1 and 2, but this simply reflects past sectoral trends in Harrogate and does not provide a realistic and robust approach to planning for future changes in the local economy. Whereas Scenarios 1 and 2 show similar trends across all use classes and similar levels of total employment growth, Scenario 3 projects much higher levels of growth. In particular, it projects significant growth in B8 employment which would have significant implications for B8 land requirements (as a result of the employment densities and plot ratios associated with B8 uses).

6.5.7 Whilst this section has sought to provide an estimate for future employment land needs in Harrogate broken down by use class, these should be considered as guidelines and used as one of many factors to inform the preparation of robust employment policies in the forthcoming Local

Plan. The quantitative estimates should not be applied in a rigid or prescriptive manner as the market and wider economic forces will dictate actual demand as it materialises over the plan period. However, the estimates provide a reasonable basis and order of magnitude for planning for an efficient and productive economy.

6.5.8 Given the uncertainties surrounding long term forecasting however, and the many externalities that could affect Harrogate's economy over the period to 2035, it is recommended that the Council adopts a flexible approach to employment land planning, providing a range of sites that meet the needs of businesses of different type and size. It is important that the supply and demand for employment land and premises is regularly monitored and updated, and the Council monitors levels of employment and housing growth to ensure a balance is maintained. Although the forecasts set out in this section are disaggregated into B1, B2 and B8 uses, these, in particular, should be treated as indicative. We recommend that the overall quantum of land for allocation provides the main focus of planning policy along with the identification of sites that are suitable for a variety of B use. The exception to this will be for sites with specific locational qualities which restrict their use in accordance with other planning objectives (for example, town centre employment sites would, in most cases, be restricted to B1a uses).

6.5.9 In conclusion, Harrogate should plan for a minimum requirement of 18 hectares of employment land but aspire to deliver potentially more good quality employment land in order to offer the local and inward investment market sufficient choice and flexibility. Overall delivery should be carefully monitored and planned for across a variety of sites and locations, in order to provide choice and flexibility to expand for local businesses, and a diverse range of employment opportunities for local people.

7. Assessment of existing employment areas

7.1 Introduction

7.1.1 The following section sets out the site appraisal methodology of all sites reviewed. It then provides an overview of the existing 25 employment areas considered as part of this assessment. Although the council provided a total list of 40 sites only 25 of these are existing employment areas and this Chapter considers these 25 only. The assessment of the remaining 15 sites are discussed in Chapter 8. The findings of the individual appraisals can be found in Appendix B of this report

7.2 Site appraisal methodology

7.2.1 Harrogate Borough Council Planning Officers identified the employment areas considered for review. In total 40 areas were reviewed consisting of a mix of existing employment areas, brownfield and greenfield sites. The employment areas have been considered as part of an overall assessment focussed on the existing quality of B-class premises and level of vacancy, along with potential for redevelopment opportunities.

7.2.2 Employment land assessments have been undertaken for each employment area. Each assessment considered the following attributes:

- Site specific policy context;
- Location and site type;
- Total number of premises, number of vacant premises and vacant floorspace;
- The site typology including the balance and type of premises at each site;
- The condition of premises and percentage of premises developed within the last five years;
- Appraisal of access and transport issues including external and internal access and parking arrangements;
- Environmental condition and quality including the provision of amenities; and
- Other issues affecting the marketing and management of the site.

7.2.3 A breakdown of the appraisal findings can be found in Appendix B and E. Appendix C provides an overview map of all the employment areas. Maps of each individual site are included in Appendix D

7.3 Existing employment areas

7.3.1 As discussed above, 25 sites have been identified as existing employment areas, these are listed below. The remaining 15 sites were identified by Harrogate Borough Council as having potential for future development for employment use. All sites are identified on the overview map in Appendix C, an on individual area plans provided in Appendix D.

7.3.2 The 25 existing areas are listed below:

Table 7-1 Existing employment sites

Site number	Site name	Sub area
8	Ash Grove Industrial Estate	Ripon
9	Riffa Park, Huby	Rural West
10	Jubilee Mills, Copgrove	Rural East
11	Glasshouses Mills, Glasshouses	Rural West
12	Haggs Farm, Spofforth	Rural East
13	Concept Kitchens, Hunsingore	Rural East
14	Mantons, A59	Rural East
15	The Maltings, Ure Bank Top	Ripon
17	Former Cattle Market	Knaresborough
18	Station Parade and Copthall Bridge House	Harrogate
19	Coal Yard and Highways Depot, Pateley Bridge	Rural East
25	Bondgate Regeneration Area	Ripon
27	Cardale Park	Harrogate
28	Hornbeam Park	Harrogate
29	St James Park	Knaresborough
30	Melmerby Business Park	Rural East
31	Claro Park	Harrogate
32	Plumpton Park	Harrogate
33	Manse Lane	Knaresborough
34	Boroughbride Road	Ripon
36	Dallamire Lane	Ripon
37	Bar Lane	Boroughbridge
38	Fearby Road, Masham	Rural West
39	Marston Business Park, Tockwith	Rural East
40	Dunlopillo, Pannal	Rural East

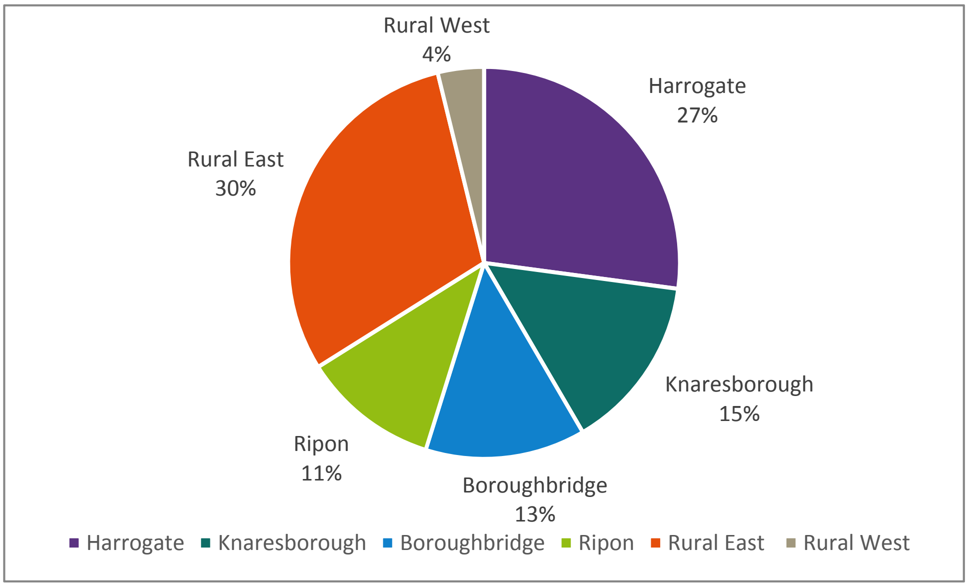
7.4 Location of premises

7.4.1 The employment land appraisal focused on employment areas located within the following sub areas:

- Harrogate – sites located within the urban area of Harrogate;
- Knaresborough – sites located within urban area of Knaresborough;
- Ripon – sites located within the urban area of Ripon;
- Boroughbridge – sites located within the urban area of Boroughbridge;
- Rural East – sites located in or near minor settlements in the east of the District; and
- Rural West – sites located in or near minor settlements in the west of the District.

7.4.2 Figure 7-1 illustrates the distribution of the existing 25 employment areas by sub area. The majority of the employment land assessed is located within Harrogate and Rural East, with approximately 30% of land within each area. Rural West has the least amount of employment land, given its more rural nature and further distance from the strategic network of the A1. Ripon, which represents approximately 25% of employment land acts as a key employment area for the north of the District.

Figure 7-1 Distribution of existing employment areas assessed (ha)



Source: Atkins

7.5 Premises by type

7.5.1 It is important to understand the nature of the local property market in terms of location and market segment. In order to understand the market areas within Harrogate, each existing employment site was classified using a site typology which is based on the characteristics of the employment area assessed from a market perspective. The classification of employment property segments was carried out by planning consultants during the employment land appraisal process. The classification system is consistent with advice in the Employment Land Reviews Guidance Note (2004), although this guidance has now been superseded by the NPPG it does provide a sound basis for identifying employment premises typologies, and continues to be used in a large number of employment land reviews.

7.5.2 Table 7-1 sets out the quantity of development land used for each of the nine premises types identified, on the existing employment sites reviewed. The total of 227ha of land for employment purposes does not include all land for employment purposes, and some of this is not in B-class use, this study has focused on larger employment sites assigned by Harrogate Borough Council. Across the district it can be seen that General Industrial Areas has the largest land take (81.3ha), followed by Warehouse / Distribution (56.5ha) and High Quality Business Park and Established Office Locations representing a total of 43.7ha.

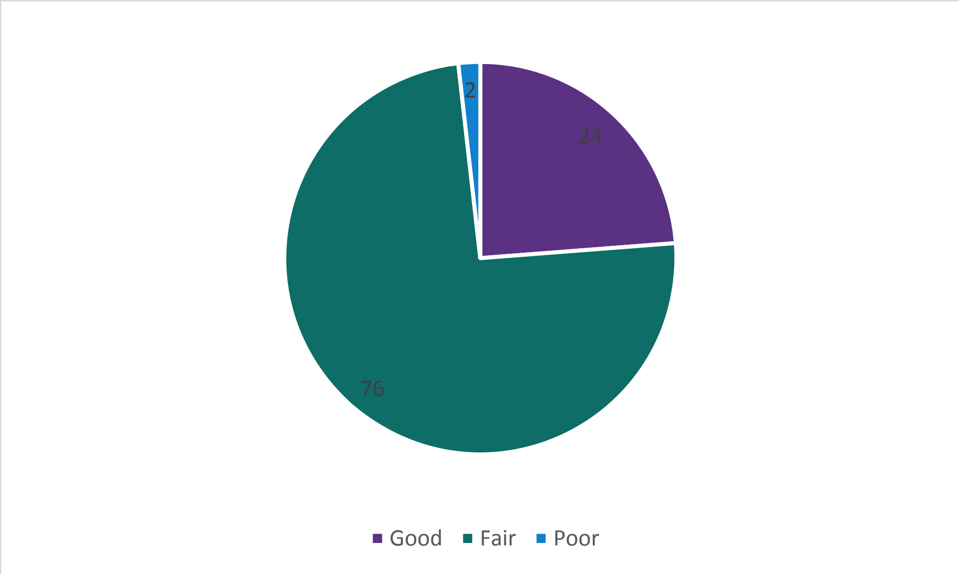
Table 7-2 Assessed sites: types of employment premises 2014

Types of premises		
	(ha)	%
Established Office Locations	21.2	9.6
High Quality Business Park	22.5	10.2
Warehouse / Distribution Park	56.5	25.6
General Industrial Areas	81.3	36.9
Incubator / SME Cluster	3.3	1.5
Sites for Specific Occupiers	9.8	4.4
Recycling / Environmental Industrial Sites	7	3.2
Retail	19	8.6
Farm Based Employment Locations	0	0.0
TOTAL	**220.6**	**100.0**

7.6 Quality of stock

7.6.1 Figure 7-2 illustrates the quality of existing employment premises which were identified during site visits. Each site was categorised as having good, fair or poor quality buildings. As can be seen the majority of the buildings fall into the 'fair' category with very few poor quality buildings used for B-class within the district. Ash Grove Industrial Estate, Ripon (Site 8) was identified as poor quality, whereas more modern business parks such as St James Park, Knaresborough (Site 29) were identified as largely good quality.

Figure 7-2 Quality of employment premises



Source: Atkins

7.6.2 The good quality premises tended to be located in Harrogate and Knaresborough due to the larger proportion of development which appears to have occurred more recently. The large majority of fair quality development relates to the majority of general industrial and warehousing / distribution sites given the older nature of a lot of these premises which generally fall in quality over time. However, newer good quality premises do exist for these use types such as Mantons distribution (Site 14).

7.7 Public transport accessibility

7.7.1 The proportion of existing employment premises with access to public transport was identified by noting the proximity of the site to a bus stop or a train station as shown in Table 7-2.

7.7.2 With reference to railway connections, the majority of sites were located further than 800m from a train station. Ripon does not offer a railway station and the closest rail facilities to Ripon are at Thirsk, over 10 miles away. As for Harrogate and Knaresborough some of the employment areas are located on the periphery of town and therefore not located close to any railway station.

7.7.3 However employment sites at Former Cattle Market (Site 17), Station Parade (Site 18), Hornbeam Park (Site 28) and Dunlopillo (Site 40) all had a station either on site or within 400m. These stations all are located on main routes (Leeds - Harrogate – York) with good frequency of services.

7.7.4 Although the majority of sites do not have access to a train station, over 75% of the sites are located within 800m of a bus stop and the District's bus network. Five sites had no access to bus or train station within 800m, all of which were located in the Rural East or Rural West areas of the District; Riffa Park (Site 9), Jubilee Mills (Site 10), Glasshouses (Site 11), Haggs Farm (Site 12), Bar Lane Industrial Estate (Site 37).

Table 7-3 Proximity to public transport

Proximity to public transport		Number of sites	%
Bus Stop	On site	5	20
	Within 400m	11	44
	Within 800m	4	16
	Further than 800m	5	20
Train Station	On site	2	8
	Within 400m	3	12
	Within 800m	1	4
	Further than 800m	19	76

7.8 Potential B-class development land

7.8.1 Within the employment areas that were reviewed as part of the site appraisal, some key vacant pieces of land within the existing site have been identified and are set out in Table 7-4. It is important to identify these opportunities as they are a potential supply of employment land. Some 11.34 ha of vacant land in the existing employment areas was identified as a result of site visits.

7.8.2 This 11.34 ha total includes vacant areas within existing employment sites and some derelict former employment sites (Site 17: Former Cattle Market, Knaresborough and Site 19 Coal Yard and Highways Depot Pateley Bridge) which have been identified as being more suitable for residential led mixed use schemes. If a mixed use scheme has been deemed more appropriate as a result of the site appraisal, then it is assumed a 25% B-Class usage on the site. Table 7-4 provides the maximum amount of land available for employment use on suitable existing employment sites.

Table 7-4 Vacant parcels of land within existing employment sites

Site No.	Site name	Sub area	Vacant / derelict employment land (ha)	Opportunity
15	The Maltings, Ure Bank Top, Ripon	Ripon	0.3	Vacant Site – Part of site is underutilised and occupied with a building (Grade II listed) which could limit potential for any development on site
17	Former Cattle Market, Knaresborough	Knaresborough	0.12 (25% of 0.46)	Vacant Site - The northern part of the site is underutilised but location within town centre may mean site is more appropriate for mixed use development
19	Coal Yard and Highways Depot, Pateley Bridge	Rural West	0.17 (25% of 0.66)	Vacant Site – Western part of the site is underutilised and provides opportunity for mixed use development
30	Melmerby Business Park	Rural East	5.95	Vacant Site– this is a single underutilised grassed area to the north west corner of the site
38	Fearby Road, Masham	Rural West	0.46	Vacant Site – this is a single underutilised hard surfaced area in the grassed area to the west of the site, to rear of existing buildings

Site No.	Site name	Sub area	Vacant / derelict employment land (ha)	Opportunity
39	Marston Business Park	Rural East	4.34	Vacant Site– single underutilised brownfield land to the south east of the site Vacant Site– single underutilised area of existing very poor quality buildings to north of the site
		TOTAL	**11.34**	

7.9 Key messages

7.9.1 A total of 25 of existing employment areas were assessed. Nearly 60% of the employment land assessed is located within Harrogate or Rural East of the District. In general, employment areas are focused around the main settlements of Harrogate, Knaresborough, Ripon and close to the A1 / A59 with very few sites being located within Rural West of the District given the poorer access to the strategic road network and public transport.

7.9.2 The majority of the employment premises are identified as fair or good quality, with a majority of sites having good access to some form of public transport, although it is recognised there are some more rural areas with poor connectivity.

7.9.3 The employment land appraisals identified vacant land within six of the existing employment areas. This land has the potential to be developed for employment use and represents an important source of potential employment land supply. A total of 11.34 of vacant land has been identified within existing employment areas which represents only a modest amount of theoretical capacity for expansion and investment.

8. Supply of employment land

8.1 Introduction

8.1.1 This chapter provides an overview of the total stock of existing B-class employment land and provides the headline results of the comprehensive review of employment areas and premises within Harrogate District. It then details all sources of supply from vacant floorspace, commercial development pipeline and opportunities for future development sites.

8.2 Total stock

8.2.1 Valuation Office Agency (VOA) data provides the most recently available details of business units in Harrogate District that are subject to business rates. The VOA assesses the 1.8 million non-domestic properties in England and Wales that are liable for business rates and collects information on these properties, together with property data from HBC, the two sources allow the identification of the total stock of B-class employment land within Harrogate.

8.2.2 As shown in Table 8-1 there is an approximate total of 1,124,922 sqm of B-class use employment floorspace. The majority of this floorspace consists of industrial floorspace (B1c, B2, B8) with a 79% share, and office floorspace (B1a/b) makes up the remaining 21% of total B-class employment floorspace. It should be noted that the VOA data does not classify by use class, only office and industrial, and the data is rounded to the nearest 1000 sqm. Also, data availability requires that 2012 data is being compared with 2014/15 PAF data, which has been rounded, and therefore only provides an approximate guide to vacancy rates.

8.2.3 Table 8-1 shows there is a total B-class floorspace vacancy rate across all the district of approximately 6.3%.

Table 8-1 Total stock of B-class employment land

	Office - B1a/b (sqm)	Industrial - B1c, B2, B8 (sqm)	Total
Occupied Stock	211,000	843,000	1,054,000
Vacant Floorspace	27,066	43,856	70,922
Total (sqm)	238,066	886,856	1,124,922
Vacant Floorspace (%)	11	5	6.3
Total (%)	21	79	100

Source: Atkins based on VOA (2012) and HBC PAF data (Q3 2014/15)

8.2.4 Table 8-2 provides an indication of the average size of different B-class premises within Harrogate District. Average industrial properties are largest at approximately 505 sqm and office smallest at approximately 146 sqm. The overall average for premises is 338 sqm.

Table 8-2 Average size of premises in Harrogate District (sqm)

	Number of hereditaments[8]	Total area, (sqm)	Average property size (sqm)	Average property size (sq. ft.)
Office	1450	211000	146	1566
Industrial	1670	843000	505	5434

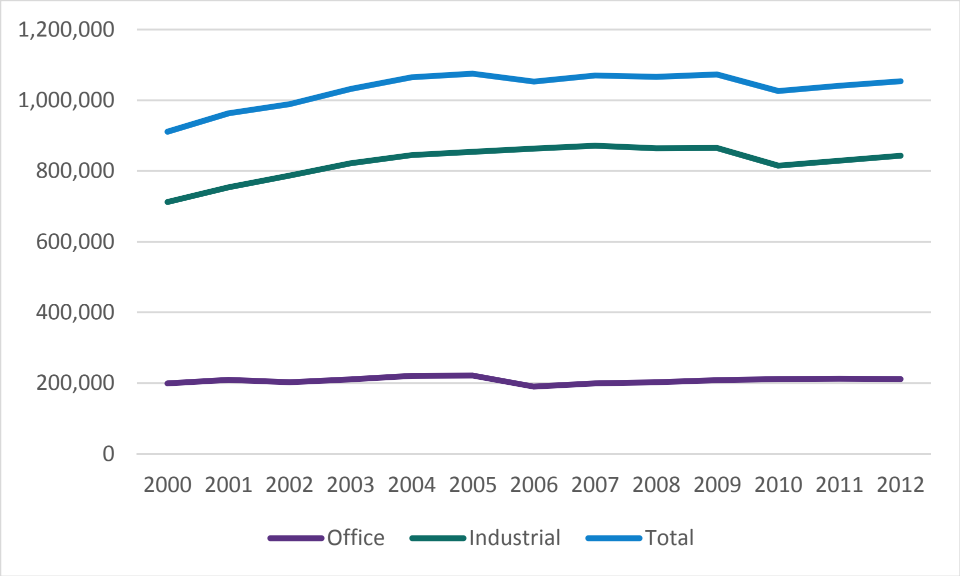
Source: Atkins based on VOA data, 2010

8.2.5 Figure 8-1 presents estimates of total B-class use floorspace in Harrogate District, for the period 2000 to 2012 using Valuation Office Agency (VOA) latest available data. Both office and industrial floorspace has gradually increased over the 12 year period although there is noticeable drop for industrial floorspace in 2009 during the economic downturn. The consistent office supply shows that Harrogate has a reasonably stable office market, although this has seen little growth

[8] commercial and industrial premises

over the period. The total supply of industrial and office floorspace has increased overall during the period.

Figure 8-1 B-class floorspace in Harrogate 2000-2012



Source: VOA – Commercial and Industrial Floorspace and Rateable Value Statistics Experimental Data

8.3 Existing employment areas

Sources of employment floorspace

8.3.1 The District has a number of potential sources that could bring forward new employment floorspace as follows:

Vacant floorspace

8.3.2 Vacant floorspace refers to vacant premises which are marketed as available (vacant land is considered below). Data obtained from site work undertaken as part of this study identifies vacant B-class floorspace within premises where this was advertised. The largest proportion of vacant B-class floorspace on sites reviewed as part of the site appraisals was within Site 25, although the site is currently being marketed as a mixed use scheme, for residential redevelopment which would reduce the floorspace used for B-class. The second largest marketed floorspace was available at Site: 40: Dunlopillo Park, although an outline planning application (14/02804/OUTMAJ) has been granted on site for a mixed use scheme with 2.7ha allocated for B1 use in the indicative masterplan. Tockwith Airfield also had a large amount of vacant floorspace although this was in relation to one large building likely to be for B2 or B8 use.

8.3.3 Table 8-3 provides an analysis of vacant floorspace identified at existing employment areas. The main concentration of vacant floorspace is light / general industrial (B1c/B2) use, representing a 68% share of the total vacant floorspace. Of this floorspace, the Bondgate Regeneration Area (Site 25) has the majority of B1c/B2 vacant space.

8.3.4 The second largest vacancy is for B1a offices, where Station Parade (Site 18) and Cardale Park (27) have the highest levels of vacancy.

8.3.5 With reference to warehouse / storage and distribution (B8), both Tockwith Airfield (site 23) and Dunlopillo (Site 40) has industrial units which appeared a mix of B8 and B1c/B2 use.

Table 8-3 Analysis of B-class vacant floorspace in the Harrogate District (2014)

Site No.	Site name	Office B1a (sqm)	Light / general industrial (B1c/B2) (sqm)	Warehouse / storage and distribution (B8) (sqm)	Total (sqm)
8	Ash Grove Industrial Estate	0	943	0	943
11	Glasshouses Mills	561	561	0	1,123
12	Haggs Farm, Spofforth	159	0	0	159
18	Station Parade, Harrogate	1,879	0	0	1,879
23	Tockwith Airfield	0	1,566	1,566	3,132
25	Bondgate Regeneration Area	650	6779	0	7,429
27	Cardale Park	1,580	0	0	1,580
28	Hornbeam Park	0	2113	0	2,113
29	St James Park, Knaresborough	285	2553	0	2,838
30	Melmerby Business Park	0	2336	0	2,336
31	Claro Park	600	857	0	1,457
32	Plumpton Park	239	239	0	478
39	Marston Business Park	0	324	0	324
40	Dunlopillo, Pannal	0	2427	2427	4,854
Total		5,953	20,698	3,993	30,645
Total %		19	68	13	100.00

Source: Atkins based on site visit and information from commercial agents in October 2014 It is not always possible to disaggregate the floorspace by use class and in these cases an even split has been applied. As such the data above in indicative only.

8.3.6 Given that PAF data presented in Table 8-1 forms the most current data on vacancies, this data has been used to conclude that there is an approximate vacancy rate of 6.3% (as identified across all B-class floorspace in the District). This represents an efficient, 'frictional' vacancy rate allowing a reasonable degree of churn in the market.

Commercial development pipeline

8.3.7 Harrogate Borough Council provided the most up-to-date monitoring data available which identified both B-Class commitments losses and gains. The data was analysed to estimate total net gain and loss of B-class floorspace. The data is indicative only, and in some cases vacant floorspace has been divided equally among the use types as the split by use type was not available.

8.3.8 As indicated in Table 8-4, within the district there are extant, as yet unimplemented B-class planning permissions for approximately 77,672 sqm of B-class floorspace. The table below provides a more detailed look at the proposed floorspace for varying use classes, and identified the proposed loss to other use types (such as residential or A-class) and change of use to other B-class uses, to predict a total net gain of 60,326sqm of B-class floorspace. Translating this to the equivalent estimate of land supply, we estimate this to be approximately 12ha.

Table 8-4 Commercial development pipeline (November 2014)

Use class	Proposed (sqm)	Proposed loss of B-class floorspace to other use types(sqm)	Change of use to other B-class uses	Net (sqm)
Office (B1a)	31,175	8,934	1,153	21,088
Light and General Industrial (B1c/B2)	29,985	1,443	1,590	26,952
Warehousing and Storage Uses (B8)	16,512	2,444	1,782	12,286
Total	77,672	12,821	4,525	60,326

Permitted development rights

8.3.9 In 2011 the Government consulted on proposed amendments to the General Permitted Development (PDR) Order to allow change of use from office (B1a) to residential use without planning permission, this change was implemented on 30th May 2013. These rights aim to reduce the oversupply of offices to boost the supply of new housing and will be in force for at least three years.

8.3.10 Since 2013 there have been 39 applications for PDR from office (B1a) to residential use, which equates to the potential loss of 22,375sqm of office accommodation. This is identified as a significant amount of office space which is being lost to residential use, the majority of which is within Harrogate Town, where office demand is greatest. It is therefore important for the District to ensure this is monitored regularly as it could result in significant further reduction in the supply of office space.

8.3.11 However, Harrogate Borough Council have acknowledged the potential threat to good quality office floorspace within Harrogate Town itself, where it is considerably valuable to the office market and have confirmed an Article 4 Direction affecting properties used as offices on Victoria Avenue in Harrogate, which will remove the right of owners of properties falling within B1(a) Use Class to convert these properties to residential use.

8.4 Longer term opportunities

Existing employment areas

8.4.1 Further opportunities exist to develop future floorspace opportunities through the capacity of vacant / underutilised land as identified in Table 7-4 in Chapter 7 and through other potential development sites which are detailed below.

8.4.2 As identified in Table 7-4 in Chapter 7, within the existing employment areas there are some key vacant sites which can be developed for employment uses. It is important to identify these opportunities as these areas offer potential supply of employment land. As shown in Table 7-1 there is a total of 11.34 hectares of vacant and underutilised land within existing employment areas.

8.4.3 Table 8-5 provides an indicative split by use class. This has been carried out to highlight the suitability of different vacant sites for a range of business occupiers and should not be considered prescriptive. It should be noted that due to the listed building the potential limitations of Site 15: The Maltings Ure Bank Top, has been removed from consideration as a longer term opportunity, and therefore a total of 11.04ha of land is assessed as being vacant or underutilised within existing employment areas.

8.4.4 The amount of floorspace potentially available has been estimated by applying the following plot ratios; B1(a) 75%, B2 and B1c (general industrial) 40% and B8 (storage and distribution) 50%. If a mixed use scheme is proposed, then it is assumed a 25% B-Class usage on the site. These plot ratios are based on ODPM's Employment Land Reviews: Guidance Note (2004), which although is now superseded by NPPG provides the most up to date data on plot ratios for different use classes.

8.4.5 Table 8-5 contains a summary of the additional floorspace that could potentially be developed on vacant / underutilised land within existing employment areas. It should be noted that the table provides an indicative and not prescriptive estimate of the types and quantum of B-class uses that could be accommodated on each site.

8.4.6 Based on the consultants experience the identified 6% vacant floorspace within existing employment areas appears to be at a level appropriate to allow sufficient market churn and therefore vacant floorspace has not been included in our calculation for potential supply.

Table 8-5 Vacant / underutilised land in existing employment areas

Site	Name	Potential supply	Indicative use (%)			Potential floorspace (sqm)			Total floorspace (sqm)
		Size of vacant / underutilised land	B1 a/b	B2 / B1c	B8	B1 a/b (based on plot ratio of 75%)	B2/B1c (based on plot ratio of 40%)	B8 (based on plot ratio of 50%)	
17	Former Cattle Market, Knaresborough	0.12 (25% of 0.46)	100	0	0	900	0	0	900
19	Coal Yard and Highways Depot, Pateley Bridge	0.17 (25% of 0.66)	0	100	0	0	680	0	680
30	Melmerby Business Park	5.95	0	50	50	0	11,900	14,875	26,775
38	Fearby Road, Masham	0.46	0	100	0	0	1,840	0	1,840
39	Marston Business Park	4.34	0	100	0	0	17,360	0	17,360
Total		11.04				900	31,780	14,875	47,555

8.4.7 Table 8-5 indicates that, in total, there is a theoretical potential for around 47,500 sqm of floorspace from vacant / underutilised land within existing employment sites. It can be seen that there is very little land available, within existing sites, which would be suitable for office B1a/b use (less than 2%). This is most likely due to the unsuitability of the location of surplus land which is outside the main urban areas of Harrogate and Knaresborough where the majority of demand for office floorspace is coming from. The majority of available land (67%) within existing employment sites is most suitable for B2/B1c general industrial use.

8.5 Total supply of employment floorspace

8.5.1 As identified above there is a potential supply of B-class employment floorspace through various sources.

8.5.2 The scale of currently vacant floorspace identified in Harrogate can only make a relatively minor contribution to meeting future employment needs in the District. Furthermore, the main requirement for new floorspace is largely for B1a/b and B8 so the industrial element of the vacant floorspace is not appropriate to meet these needs. Future employment needs are also sensitive to the market need for quality and location of premises; a site being vacant does not automatically mean that it is suitable for a new use in its current state or form.

8.5.3 This has been summarised in Table 8-6 below which has excluded vacant floorspace available for the reasons set out above. The table therefore represents an estimate of the potential commercial development pipeline which includes capacity estimates of vacant and underutilised land within existing employment areas.

Table 8-6 B-class employment floorspace (sqm) potential supply

Supply	Land area (ha)	B1 a/b (based on plot ratio of 75%)	B2/B1c (based on plot ratio of 40%)	B8 (based on plot ratio of 50%)	Total (sqm)
Commercial development pipeline	12.0 ha (estimate)	21088	26952	12286	60326
Vacant / underutilised land					
Former Cattle Market, Knaresborough	0.12 (25% of 0.46)	900	0	0	3450
Coal Yard and Highways Depot, Pateley Bridge	0.17 (25% of 0.66)	0	680	0	640
Melmerby Business Park	5.95	0	11,900	14,875	26775
Fearby Road, Masham	0.46	0	1,840	0	1840
Marston Business Park	4.34	0	17,360	0	17360
Total (sqm)		21988	58732	27161	110391
Total (ha)	11.04	2.93	14.68	5.43	110391

8.6 Key messages

8.6.1 Harrogate District has approximately 1,125,000 sqm of B-class employment floorspace. The majority of the stock consists of industrial use (B1c, B2, B8) with a 78% share and offices (B1a) accounting for a 22% share of total stock.

8.6.2 Vacancy rates in the District average at around 6.3% with offices at 11% and industrial at 5%. A 6% vacancy rate is considered an acceptable level to allow for market churn, although if it were to drop much lower it could be considered under supply.

8.6.3 The District has a number of potential sources that could bring forward new employment floorspace. These sources were split into the following categories:

– **Vacant Floorspace –** As identified in Table 8-1 there is approximately 70,922 sqm of actively marketed B-class employment space in the District (based on Q3 2014/15 PAF data). This presents a vacancy rate of 6% which provides a source of supply for the market to function efficiently. There will always need to be flexibility and a range of choices in premises to allow for movement of business and to allow businesses to expand and start up. Consequently, this was excluded from our analysis of future supply.

– **Commercial Development Pipeline** – As presented in Table 8-4 there is currently a predicted net gain of 60,326sqm of unimplemented B use class planning permissions within Harrogate District, some of which are on sites identified as vacant land (Pannal business park) and on longer-term opportunity sites (Manse Farm)

– **Vacant / Underutilise Land** – as presented in Table 8-5 existing employment sites were assessed to have approximately 11.04ha of vacant land that theoretically could provide potential B-class employment space. However the realisation of this latent supply would be subject to more detailed feasibility and viability analysis. This presents a source of supply that could potentially deliver up to 47,500sqm of B-class floorspace. However, the majority of this land is suitable mainly for general industrial B2/B1c use.

8.6.4 Table 8-6 provides the total identified potential supply of B-class employment floorspace through various sources, and converts the floorspace into land requirements in hectares. The table concludes that there is a potential supply of 2.93ha of B1a/b land, 14.68ha of B2/B1c land and 5.43ha of B8 land. Adding this to the existing commercial development pipeline supply (ie. schemes with planning permission), the total gross estimated supply of employment land in the District amounts to approximately 23ha.

9. Meeting employment needs

9.1 Introduction

9.1.1 Chapters 6-8 have highlighted the main issues facing Harrogate Borough Council in terms of current supply and future demand for employment. This section assesses the suitability of the existing employment areas identified within the District in terms of their potential for meeting future business requirements. It concludes by identifying the demand-supply balance for the Scenarios identified in Chapter 6, and the potential available floorspace identified in Chapter 8.

9.2 Refining a future portfolio of employment areas

9.2.1 According to the REM based scenario (discussed in Chapter 6), B1a/b floorspace demand will rise by approximately 33,000 sqm over the period 2014-2035, translating into an indicative need for 4 additional hectares of B1a/b land. Demand for B1c floorspace is forecast to grow by 20,000 sqm over the same period, translating to additional indicative demand for 5 ha of B1c land. B8 floorspace requirements are projected to increase by 45,000 square metres (indicatively 9 hectares of land). Demand for B2 floorspace is projected to decline however, decreasing by 26,000 square metres (-6 hectares in terms of land) over the period 2014-2035.

9.2.2 It should be noted that although forecasts provide the most appropriate evidence base to support plan preparation, they are not definitive and provide an indication of what might happen in terms of future employment growth. It is difficult to predict with any certainty the levels of future employment growth in a particular area and therefore care should be taken when interpreting employment forecasts. Forecasts for individual districts and sectors are usually extrapolated from regional growth forecasts and there are difficulties in preparing forecasts to this level of detail. Forecasts from different sources do provide different results.

9.3 Evaluation of site suitability

9.3.1 The suitability of existing employment locations has been considered in order to assess the existing balance of sites in terms of their location and suitability. Scoring matrices have been prepared utilising the following criteria (where applicable) to assess the sites:

- Access;
- Sustainable development criteria;
- Environmental quality of site and surroundings;
- Market requirements and perceptions; and
- Policy considerations.

9.3.2 A range of different indicators has been derived within each category to address different issues and constraints. Each site has been scored against all of the indicators. Points have been assigned based on descriptive criteria which most accurately reflected the site. A composite percentage score is then used to equally weight the results of the indicators. Sites are then ranked according to the composite score. It is important to highlight that the scoring system is intended to assist the local authority in taking a strategic view of the comparative suitability of each employment area for employment use. The scoring system should not be used in a prescriptive manner.

9.3.3 The assessment matrix is given in Appendix B, along with a table setting out a full explanatory rationale as to how each score has been assessed.

Access

Public transport access: Proximity to bus and train network

9.3.4 Access to efficient public transport links is an important determining factor in encouraging sustainable travel to work patterns. The distance from a public transport interchange and the frequency of the public transport service are important in determining public transport accessibility of existing and potential employment locations.

9.3.5 The assessment of public transport accessibility has been based upon proximity of each location to the public transport network. It is considered appropriate to measure each employment area by considering access to the bus network and train stations. This is because most employment areas have access to both modes of transport.

9.3.6 An excellent score of five was given to sites that had a bus stop within 100 m; sites were deemed to be good if they are within 400 m of a bus stop and awarded four points; three points were awarded for sites with fair access (within 800 m of a bus stop); and one point was awarded to sites that are further than 800 m from a bus stop. Distances were estimated based on the quickest pedestrian route from the site entrance. The distances are considered to be reasonable pedestrian walking distances.

Proximity to the strategic road network

9.3.7 The importance of being located close to the strategic road network (SRN) varies according to business sector, the stage in the supply chain, market access dependencies and the frequency of inward and outward deliveries. Firms within the B8 use class who are engaged in storage and distribution activities are likely to attach the most importance to proximity and access to the SRN. B1c firms may also have strong business need for good access to the road network.

9.3.8 Points have been awarded to employment areas on the following basis: five points (excellent) for sites immediately adjacent to the SRN; four points (good) for sites within 1 km of the SRN; three points (fair) for sites between 1 km and 3 km from the SRN; one point (poor) for sites between 3 and 10 km from the SRN; and no points for sites further than 10km from the SRN. Distances were measured on a straight line basis. The SRN serving the study area includes the following regional / national routes:

- A1(M);
- A59;
- A61;
- A661; and
- A658.

Sustainability

Sequential test

9.3.9 The location of employment areas has been considered on a sequential basis to provide a measure of the centrality (providing access to other services and firms) of the location and the extent to which the site can be accessed by the majority of people by sustainable modes of transport (access to labour). The highest score has been attributed to locations within the existing urban area (five points) followed by locations on the edge of existing urban areas i.e. adjacent to the settlement boundaries (three points), and rural locations i.e. outside settlement boundaries (one point).

Environmental quality of site and surroundings

Site quality, image and management

9.3.10 The quality of site landscaping in relation to other sites in the study area and evidence of site management (including upkeep of planting, removal of litter/vandalism etc.) have been considered, as these can influence the type of occupier a particular site may be able to attract. Sites of the highest quality with good landscaping, high specification occupiers and a good level of site management have been awarded five points (excellent). Sites of good quality with adequate landscaping, some evidence of management and a range of occupiers have been awarded four points (good). Sites where an adequate attempt has been made at landscaping and site management have been awarded three points (fair) and sites with little evidence of landscaping or site management one point (poor).

9.3.11 Access to amenities can be an important factor in deciding where to locate for certain types of occupier, for example office based businesses often prefer to be located in areas that have a range of amenities available as this makes their location more attractive to potential employees and existing employees. Sites with a range of on-site amenities (such as, childcare provision, sitting out areas, catering/food drink, banks, other services) have been awarded five points (excellent), sites with a café on site or immediately adjacent to site have been awarded four points (good), sites with local amenities within ten minutes' walk have been awarded three points (fair) and sites with no amenities within a ten minute walk one point (poor).

9.3.12 The condition of buildings within a site can also have an impact on site occupation. Where buildings have been considered to all be in good condition, with no requirement for change, five points have been awarded (excellent). If the majority of buildings are in good condition, but there is some need for maintenance four points (good) have been awarded. Sites where buildings appear to be adequate for the existing occupiers, and have no visual evidence of major dilapidation, have been awarded three points (fair). Lastly, should the majority of buildings require refurbishment, only one point (poor) has been awarded.

Market considerations (perception and demand)

9.3.13 The market attractiveness of employment areas varies according to the demand for different types of premises. Market perceptions are also influenced by factors such as the desirability of an area as an employment location, the quality of the environment surrounding employment areas and the accessibility of an employment area.

9.3.14 Good location and access are often viewed as pre-requisites for employment areas, and exert a strong influence on marketability of a site for employment use. A potential employment area must meet the minimum size requirement needed to make a given development economically viable. For B-class floorspace in new locations it is necessary to provide sufficient land for a critical mass of similar activities to be established. The size of a parcel varies according to the target sector and size of premises to be provided. Consequently, a relatively small employment area may be large enough to make B1(a) development feasible, but may be too small for B1(c) development.

9.3.15 Certain occupiers may have particular site requirements depending on the operations of their business, particularly in terms of accessibility and environmental requirements. For example, headquarters occupiers within some sectors have a preference for a high quality business park type environment in a prominent location whereas similar functions in other sectors are less prescriptive. B1(c) and B8 firms typically require purpose built low density sites in order to undertake their operations in an efficient manner and to allow room for expansion in situ.

9.3.16 An assessment has been made of the market attractiveness of each site in terms of:

- Suitability in meeting the locational, use class and size requirements for the area in which it is located;
- Flexibility of the site in meeting the needs of a range of employment requirements;
- Scope to meet market demand requirements;
- Accessibility by road and public transport;
- Potential to establish an attractive environment to meet the needs of the target use class(es); and
- Marketability of existing employment areas.

9.3.17 The marketability of existing employment areas has been assessed for both the present and the medium / long term future. The future marketability of each existing employment area has been assessed in order to evaluate the potential to meet future growth requirements, and accommodate growth sectors. This assessment has been made on the basis of the factors described above, using a scale of one to five (one = poor, five = excellent).

9.3.18 The maximum of the scores (present marketability and future marketability scores) has been used to represent the overall marketability of each existing site.

Policy Considerations

9.3.19 Each employment area has been assessed in accordance with the criteria of local policy, including the need for the main focus of employment being in Harrogate, Ripon, Knaresborough, Boroughbridge, Masham and Pateley Bridge within the district and ensuring the majority of all future development is well related to the existing or extended Key Bus and Rail Network.

9.4 Existing employment areas

9.4.1 Table 9-1 identifies the employment suitability score of existing employment areas in Harrogate District. Each employment area has been assessed as being poor, fair or good based on the overall suitability score (%) using the following grading system:

- poor (0-40%);
- fair (41-60%); and
- good (61-100%).

9.4.2 Of the 25 employment areas assessed over 80% received a fair or good score (over 41%). The worst performing sites, which scored poorly were Jubilee Mills, Copgrove, Glasshouses Mills and Concept Kitchens, Hunsingore.

Table 9-1 Employment suitability assessment score for existing employment areas

Site No.	Site name	Overall suitability score (%)	Scope for change
8	Ash Grove Industrial Estate, Ripon	Fair 44	Existing building stock is of poor quality however the premises have scope for change, the site performs an important role to small businesses by providing low cost units for uses such as car repairs, tyre centre and a small engineering firm. The premises could be improved over time.
9	Riffa Park, Huby	Fair 47	No scope for change. The premises could be improved over time.
10	Jubilee Mills, Copgrove	Poor 36	No scope for change, there is no scope for expansion but the premises could be improved over time.
11	Glasshouses Mills	Poor 20	The premises has large scope for change. The location of the site makes it more appropriate for a residential led, mixed used development with studio or rural office facilities
12	Haggs Farm, Spofforth	Fair 52	Change would require major redevelopment
13	Concept Kitchens, Hunsingore	Poor 39	Change to the site would require major redevelopment and there is no scope for expansion, currently very little B-class employment on the site.
14	Mantons, A59	Fair 49	Change would require major redevelopment
15	The Maltings, Ure Bank Top, Ripon	Good 63	Change would require major redevelopment and removal of listed building
17	Former Cattle Market, Knaresborough	Good 87	The site has large scope for change. The existing building stock is of poor quality with low occupancy. The site may be more suitable for mixed use development given the location of the site within a town centre.
18	Station Parade, Harrogate	Good 89	Change would require major redevelopment
19	Coal Yard and Highways Depot, Pateley Bridge	Fair 45	The site has scope for change. The sites location within a residential area and lack of existing employment suggests the site may be more appropriate for residential led mixed use development.

Site No.	Site name	Overall suitability score (%)	Scope for change
25	Bondgate Regeneration Area, Ripon	Good 72	Any change to the site would require major redevelopment. Existing vacant employment area may be improved over time, there is no scope for expansion.
27	Cardale Park, Harrogate	Good 84	Change would require major redevelopment
28	Hornbeam Park, Harrogate	Good 96	Change would require major redevelopment
29	St James Park, Knaresborough	Good 81	Change would require major redevelopment
30	Melmerby Business Park	Good 65	Scope for change – the vacant parcel of land could be utilised for new B-class development.
31	Claro Park, Harrogate	Good 71	Change would require major redevelopment
32	Plumpton Park, Harrogate	Good 84	Change would require major redevelopment
33	Manse Lane, Knaresborough	Good 68	Change would require major redevelopment
34	Boroughbridge Road, Ripon	Fair 55	Change would require major redevelopment
36	Dallamires Lane, Ripon	Fair 53	Change to the site would require major redevelopment although existing premises could be improved over time.
37	Bar Lane, Boroughbridge	Good 69	Change would require major redevelopment
38	Fearby Road, Masham	Fair 45	Scope for change - vacant parcel of land could be utilised for B-class development.
39	Marston Business Park	Fair 41	Change would require major redevelopment - existing premises may be improved over time.
40	Dunlopillo, Pannal	Fair 57	Scope for change – the site has planning consent for a mixed use development, employment uses are to be retained.

9.5 Demand supply balance

9.5.1 For the market to function efficiently and to allow effectively for churn, choice and flexibility it will always be necessary for pipeline supply to be in excess of projected levels of future demand. In simply planning for an amount of supply which matches future estimates of demand in quantitative terms, the operation of the market will be distorted which would result in a significant element of demand not being met. In allowing employment growth to materialise through new development, a surplus in supply is required to ensure that actual demand can be met in terms of location, type, timing, quality and size.

9.5.2 Table 9-2 shows the approximate B-class demand requirements (identified in Chapter 6) and identifies supply-demand balance by identifying the remaining surplus once the anticipated demand, identified in Chapter 8 has been removed from the potential supply of sites.

Table 9-2 Demand supply balance

B-class land use	Change 2014-2035 Preferred REM scenario (ha)	Potential identified supply (ha)	Supply / demand balance (ha)
B1a/b	+4	3	-1
B1c/B2	-1	15	+16
B8	+9	5	-4
Total	**+12**	**23**	**+11**

Source: Atkins

9.5.3 Under the preferred REM Scenario Table 9-2 identifies an over-supply of B1c/B2 land (approximately 16 hectares), but shortfalls in the supply of B1a/b (-1 hectare) and B8 (-4 hectares) land.

9.5.4 Assuming that all surplus industrial land could be reused for B1a/b and B8 purposes, Harrogate would theoretically have sufficient land to meet its needs over the period to 2035. However, it is unlikely that all surplus B1c/B2 land would be suitable for B1a/b or B8 use. Furthermore, it is possible that some of the Borough's existing B1 and B8 supply could be lost to other uses over the assessment period, e.g. as a result of permitted development rights allowing the conversion of B1 and B8 sites to residential.

9.5.5 Taking the above into consideration, and given that businesses are already experiencing a limited choice of sites and premises for expansion, there is a danger that, without consideration of the need for new allocations, there will be a continued trend of businesses being squeezed out of the area. Moreover, the limited supply may act as a significant constraint to potential inward investment to the area.

9.5.6 The market may dictate different levels of floorspace and phasing of development on sites, therefore the demand / supply balance in Table 9-2 is indicative of what could be achieved if all the floorspace opportunities identified in Table 8-6 come forward. In meeting the demand identified in this report, the Council will also need to consider the need to provide for a choice of locations and quality of site to meet employment land requirements. Therefore, for this reason the Council in planning for future requirements, should not assume that matching supply with demand in quantitative terms will mean that needs are met.

9.5.7 It should also be noted that the identified supply of land in Table 8-6 should not be relied upon as a guaranteed source of land supply for B-class development in the short-term. The availability of vacant sites or plans for significant levels of B use class development do not necessarily mean that developments will actually come forward over the assessment period. Planned and committed supply will not always be translated into the physical provision of floorspace and therefore it will be important to protect existing, viable employment sites, rather than rely on potential supply that may not reach the market place.

9.5.8 It should be noted that the quantitative supply / demand balance assessment reflects a level of uncertainty inherent in long-term employment forecasting, and the availability and development viability of the identified available supply. Furthermore, it does not consider the potential suitability of available sites to meet specific future business demands, e.g. in terms of location, quality, type, size, and layout.

9.5.9 Further detailed site analysis (relating to land ownership, owner aspirations etc) would be required to identify the likely time-scale of the vacant/underutilised land coming forward for development.

Office and R&D – B1a/B1b

9.5.10 Based on the Preferred REM Scenario, there is a shortfall of B1a/b supply available within the Borough. Furthermore, the possible future loss of B1a/b floorspace to other uses over the assessment period could further increase the need for the Council to allocate new sites for B1a/b development.

9.5.11 In terms of future potential sites, conclusions drawn from the Property Market Appraisal suggest the most appropriate sites for B1a/B1b sites, and where demand is highest is in the south of the District within Harrogate Town and Boroughbridge Sub Area, and considerably lower elsewhere, although this does not mean that there is no demand in the other sub areas at all.

General industrial activities – B2

9.5.12 It is anticipated that the need for B2 and associated floorspace will decline over the period to 2035. While there is no need for additional B2 floorspace, the Council should safeguard fit for purpose B2 sites to maintain a balanced mix of economic activity across the Borough. Sites that are not fit for purpose and unlikely to meet future business needs should be considered for release. Any release of employment sites should be subject to appropriate market evidence or robust viability assessments.

Warehousing and storage uses – B8

9.5.13 It is anticipated that the potential supply will not be sufficient to meet demand for B8 employment land under the preferred REM Scenario. Although some source of supply can come from vacant / underutilised land and from the commercial development pipeline, this will not provide sufficient land to meet future needs.

9.5.14 With a shortfall of at least 4 hectares of B8 land there will be a need for the Council to allocate additional sites for B8 development to ensure supply is not constrained. The majority of warehouse and storage supply sites should be concentrated on large sites, with good strategic road or public transport links.

9.6 Potential future employment allocations

9.6.1 As part of the 40 sites assessed as part of the review, 25 were identified as existing employment areas and the remaining 14 sites have been identified as potential future employment allocations. The sites located across the district were either identified by Harrogate Borough Council, submitted to the Council through previous consultations and 'Call-for- Sites' exercises or were previous employment allocations. All of these sites are listed in Table 9-3, a site plan of each site can be found in Appendix D.

Table 9-3 Potential future development sites as identified by HBC

Site No.	Site name	Approximate gross land area (ha)	Approximate land available for employment use (ha)
1	Flaxby	41.7	13.8
2	Cardale Park	7.9	7.9
3	South of Melmerby Business Park	4.1	4.1
4	Harrogate College	1.7	1.7
5	Manse Farm[9]	2.5	2.5
6	Fearby Road	1.4	1.4
7	Area around Kirk Deighton	n/a	n/a
16	Ripon Auction Mart	2.6	2.6
20	Masham Auction Mart	1.05	1.05
21	Ripon Barracks	67.6	Unknown, further assessment required
22	Dishforth Airfield	375.4	Unknown, further assessment required
23	Tockwith Airfield	283.6	Unknown, further assessment required
24	Hutton Bank, Ripon	0.6	0.6
26	Gas Storage Site, Ripon	1.3	1.3
35	Harrogate Road, Ripon[10]	1.6	1.6

[9] Manse Farm has gained outline planning consent for 2.5ha of employment land under application 13/00535/EIAMAJ
10 Harrogate Road, Ripon gained planning consent for B1 and B2 office blocks under planning consent 11/01947/FULMAJ

Site No.	Site name	Approximate gross land area (ha)	Approximate land available for employment use (ha)
	Total	793.05	

9.6.2 As can be seen in Table 9-3 approximately 793ha (gross) of land has been identified across 15 sites which could come forward for future employment allocations, although this is the maximum land available, it is expected, particularly on larger sites, that not all land will be suitable for employment development. As highlighted by the demand-supply balance in Table 9-2 there will be a need for Harrogate Borough Council to allocate employment land for B1a/b and B8 uses over the plan period until 2035.

9.6.3 To analyse which of the sites identified in Table 9-4 are most appropriate for development, an assessment has been carried out to rank all the sites. The assessment can be found in Appendix E and is formed of two parts as follows:

- Overall suitability - this assessment is based upon sustainability, planning, access and development constraints criteria.
- Overall marketability - this is based upon Atkins' understanding of the market needs in Harrogate. The scoring is formed of identifying the most appropriate B-class uses for each site. Given the identified need to provide more B1a/b and B8 uses within the district the assessment gives greater weight to sites which can provide these. The marketability of a site is vital to ensure the site can come forward for development, it has therefore been weighted higher than overall suitability in calculating the total score.

9.6.4 Site 7 has been assessed at a high level but not included in the assessment as it no longer contains a designated employment area to assess.

9.6.5 The assessment is summarised in Table 9-4, which ranks the sites from highest to lowest scoring. The full assessment can be found in Appendix E.

Table 9-4 Potential future employment allocation assessment results

Site No.	Site name	Land available for employment use	Total score (%)
5	Manse Farm[11]	42.07	89.5
4	Harrogate College	1.7	79.0
26	Gas Storage site, Ripon	1.3	72.0
1	Flaxby	13.8	71.5
35	Harrogate Road, Ripon[12]	1.6	66.0
2	Land South of Cardale Park	7.93	64.0
3	Land South of Melmberby Industrial Estate	4.09	63.5
21	Ripon Barracks	67.69	60.3
20	Masham Auction Mart	1.05	60.0
24	Hutton Bank, Ripon	0.63	56.0
22	Dishforth Airfield	375.39	54.0
7	Area around Kirk Deighton	N/A	53.0
6	Fearby Road HDLP Allocation, Masham	1.36	52.0
16	Ripon Auction Mart	2.6	52.0
23	Tockwith Airfield	283.57	48.0

Source: Atkins

[11] Manse Farm has gained outline planning consent for 2.5ha of employment land under application 13/00535/EIAMAJ

[12] Harrogate Road, Ripon gained planning consent for B1 and B2 office blocks under planning consent 11/01947/FULMAJ

9.6.6 In summary, 25 existing employment sites have been assessed, evaluating their suitability for employment use, access, environmental quality and planning policy considerations. The majority of the 25 sites scored fair or good.

9.6.7 With an identified undersupply of employment land for B1 and B8 purposes, Harrogate Borough Council identified 15 potential employment sites which were assessed for suitability. This scoring was based on overall suitability and marketability, which takes into account Harrogate's local market needs. Table 9-3 presents the site scoring and ranks from highest to lowest, full detailed assessment can be found in Appendix E.

10. Conclusions and recommendations

10.1 Introduction

10.1.1 This section sets out our conclusions and recommendations for informing the preparation of employment land policies in Harrogate's forthcoming Local Plan.

10.2 Meeting future employment needs

10.2.1 According to the projections of the preferred employment growth scenario (Scenario 1), B use class employment will grow by approximately 3,070 FTE jobs over the period 2014-2035 (9% increase). This translates into additional need for 33,000 square metres of B1a/b floorspace, 20,000 square metres of B1c floorspace, and 45,000 square metres of B8 floorspace. B2 floorspace requirements are projected to decrease by 26,000 square metres.

10.2.2 The above floorspace requirements translate into indicative additional need for 4 hectares of B1a/b land, 5 hectares of B1c land and 9 hectares of B8 land. B2 land requirements are projected to decrease by 6 hectares over the period 2014-2035.

10.2.3 While some of the surplus B2 land could be re-used for B1 and B8 uses, it is unlikely that all surplus B2 sites would have the qualitative characteristics (e.g. quality, location, size, layout, accessibility) required for B1 or B8 redevelopment. Furthermore, with permitted development rights now expanded to allow the conversion of both B1 and B8 floorspace to residential, it is possible that some of the current B1 and B8 stock could be lost over the coming years.

10.2.4 Taking the above into consideration, it is recommended that Harrogate plans for at least 18 hectares of additional employment land over the period 2014-2035 (a mix of B1 and B8 sites). This should be considered as a minimum given the need to allow flexibility and choice in supply relative to demand. Furthermore, in planning for a balanced and sustainable local economy it is important not to constrain important 'windfall' demand opportunities, arising for example from significant inward investment enquiries. In the case of Harrogate this is an important issue as the economy is to a degree skewed towards the business tourism, conferences and retail related sectors.

10.2.5 In looking forward, the District would benefit from the realisation of opportunities to diversify its economy from both the expansion of existing businesses and inward investment. While B2 land requirements are projected to further decline, it will still be important to safeguard fit for purpose, well occupied industrial sites in order for the Borough to maintain a balanced economic base. Any surplus B2 sites with no realistic prospect of being used for employment purposes should be considered for release to alternative uses.

10.2.6 Whilst this report has sought to provide an estimate for future employment land needs in Harrogate broken down by use class, these should be considered as guidelines and used as one of many factors to inform the preparation of robust employment policies in the forthcoming Local Plan. The quantitative estimates should not be applied in a rigid or prescriptive manner as the market and wider economic forces will dictate actual demand as it materialises over the plan period. However, the estimates provide a reasonable basis and order of magnitude for planning for an efficient and productive economy.

10.2.7 Given the uncertainties surrounding long term forecasting however, and the many externalities that could affect Harrogate's economy over the period to 2035, it is recommended that the Council adopts a flexible approach to employment land planning, providing a range of sites that meet the needs of businesses of different type and size. It is important that the supply and demand for employment land and premises is regularly monitored and updated, and the Council monitors levels of employment and housing growth to ensure a balance is maintained. Although the forecasts set out in this section are disaggregated into B1, B2 and B8 uses, these, in particular, should be treated as indicative. We recommend that the overall quantum of land for allocation provides the main focus of planning policy along with the identification of sites that are suitable for a variety of B use. The exception to this will be for sites with specific locational qualities which restrict their use in accordance with other planning objectives (for example, town centre employment sites would, in most cases, be restricted to B1a uses).

10.3 Sources of supply

10.3.1 In order to meet employment land requirement to 2035, Atkins have assessed the potential of supply from a variety of sources. With a vacancy rate of 6% of existing floorspace, it was concluded that this floorspace be excluded from our estimates for meeting future identified need. This is because a vacancy rate of 6% is considered a reasonably 'frictional' rate to allow for churn and choice in an efficient market. A rate much lower than this would indicate that the local market is out of balance with supply not meeting demand.

10.3.2 The commercial development pipeline and vacant / underutilised land provides theoretical opportunities for new B-use floorspace of approximately 110,400 sq. m. This equates to approximately 23 ha of employment land. However, it should be noted that the majority of this land is mainly suitable for industrial rather than office use.

10.3.3 The report has assessed the theoretical employment land supply-demand balance in the District. This indicates a theoretical net undersupply of at least 5 ha of B1 and B8 land using the REM demand scenario. Whilst there is some potential supply likely to be made available in the District, quantitatively this is insufficient to meet total estimates of future need. Indeed, the demand-supply balance indicates that Harrogate is subject to an acute shortage of readily available, viable and deliverable employment land to meet future needs. Supply is particularly in short supply for B1a/b and B8 use.

10.3.4 In light of the analysis contained in this report, we firmly recommend that Harrogate Borough Council considers allocating additional employment land in order to fully meet demands over the plan period. Without sufficient employment land, projected job growth will be very difficult to achieve as existing businesses within the District may find it difficult to meet their aspiration to expand and inward investment to the District may be hindered due to a lack of suitable sites. This could ultimately mean that existing businesses and those looking to locate or invest in the District may choose to look elsewhere for suitable sites. Housing growth needs to be supported by new jobs, failure to provide sufficient land to meet the projected growth targets would impact on the number of jobs available to the existing and future residents of the District, and hence more residents would need to look outside the District for employment.

10.4 Policy recommendations

10.4.1 This section of the report seeks to provide Harrogate Borough Council with recommendations to ensure that sufficient employment land is available for the next plan period up until 2035, through protection policies and bringing forward new unallocated employment sites to address the shortfall.

Employment protection policy

10.4.2 The evidence set out in this study shows that the majority of existing employment areas are operating effectively and are viable as employment locations, particularly within the Harrogate and Knaresborough area. However, some sites (Site 10: Jubilee Mills; Site 11: Glasshouses Mills; and Site 13: Concept Kitchens) were identified as having an overall poor suitability score.

10.4.3 The future supply-demand balance shows that there is sound justification for the continued protection of the majority of existing employment areas. As this study has shown, given the shortfall in available employment land to meet the projected B1 and B8 need over the period to 2035, the Council should continue to seek protection of its existing employment land supply and resist the potential loss of significant amounts of employment land in the future. There are four potential exceptions to this recommendation. Considered in light of other Local Plan objectives and the need to make efficient and effective use of land, the sites listed below have been identified as being more suitable for mixed use development. This reflects their current function, location and potential appeal relative to market demand:

- Site 11: Glasshouses Mills – This site is largely unoccupied and deteriorating in quality. The very rural location of the site means there is unlikely to be high demand for sole B-class use on site and a mixed-used development may be more appropriate.
- Site 17: Former Cattle Market Knaresborough - Given its location with poor site access and proximity to residential uses, the site may be more suitable for a mixed use scheme.

- Site 19: Coal Yard and Highways Depot, Pateley Bridge – The site is set within a wider mixed quality environment, characterised by residential uses. The disused depot to the east is formed of low quality warehousing buildings and likely to be of limited interest to the market in terms of reusing the buildings for future employment use. The site offers a good opportunity for mixed use development.

10.4.4 Given that the analysis has identified a shortage of readily available, viable and deliverable employment sites to meet future B1 and B8 needs, we recommend that in addition to identifying new employment allocations, the Council should include a strong employment protection policy in the Local Plan. This policy should seek to protect all existing employment areas from redevelopment to other uses with the exception of the sites identified above. Closely related to this policy should be a complementary policy that positively seeks to accommodate the expansion of existing businesses in the area either in situ (subject to other planning objectives and constraints) or with a choice of alternative locations.

10.4.5 Strict criteria should be included in the employment sites protection policy to define the circumstances where redevelopment to non- B use employment would be considered by the Council. These may include:

- Evidence of active marketing for employment uses over a sustained period of time (at least two years);
- Evidence of significant viability constraints;
- Contravention with other planning and environmental objectives; and
- Evidence that redevelopment proposals would result in the creation of alternative non-B use class employment that would contribute to the competitiveness of the District's economy.

10.5 Approach to identifying future allocations

10.5.1 The demand supply analysis in Chapter 9 has demonstrated that across Harrogate District there is a projected shortfall of B1 and B8 land over the period to 2035. Over the same period there is a projected over supply of industrial land (B1c/B2).

10.5.2 The quantitative analysis contained in this report indicates that:

- Theoretically there is a surplus of some 11ha of employment land but for this to be the case it assumes that all of the surplus industrial land could be reused for B1a/b and B8 purposes but this is unlikely.
- There will be a need for at least 13ha of new B1/B8 employment land which, when compared to the theoretical maximum available supply from vacant/under-utilised land within existing employment areas reveals a shortfall of some 5ha

10.5.3 It is considered that there is scope over the period of the plan to 2035 to bring forward new allocations of land for employment purposes to address the shortfall in B1/B8 uses and to create a better balance in the type of employment land available. It is recommended that the Council considers making allocations in the order of 20-25ha. The key rationale to this recommendation is as follows:

- While Harrogate is projected to have an oversupply of industrial land, it is unlikely that surplus industrial sites will have the qualitative characteristics (e.g. location, size, layout, quality of buildings and surroundings, accessibility, parking provision) to meet the future needs of B1 businesses in particular. Therefore, the Council will need to provide new, good quality sites for B1 and B8 use.
- In reality, it is very unlikely that 100% of the supply capacity identified in the study will be developable, viable and deliverable within the plan period. From experience throughout the country, it is typical that only 50% or less of identified 'capacity' is readily available for development.
- It is possible that some of the existing B1 and B8 stock will be lost to non-B class uses over the coming years, as both B1 and B8 sites are subject to permitted development rights that grant prior approval for residential re-development. Therefore, in addition to meeting new B1 and B8 requirements, an allowance needs to be made for the replacement of lost stock.
- For the local economy to operate efficiently, there is a need to provide businesses, developers and investors with a sufficient degree of choice and flexibility in the employment

land market. Without reasonable choice, there is a danger that businesses will choose to locate in areas outside the District.

- Harrogate is subject to significant constraints in the supply of employment land which is threatening the scope to accommodate the expansion needs of existing local businesses. We strongly recommend that the Local Plan make specific provision of expansion opportunities for established businesses.
- At present, there are no significant site options for major inward investment opportunities. In the interests of encouraging local economic diversification and prosperity, it is important for the Local Plan to offer at least one significant opportunity site or location.

10.5.4 Table 9-4 identifies potential employment sites which have been identified and could in part or whole be allocated as employment land. The table ranks the sites in terms of marketability and suitability. The following sites have been determined as the most suitable for future employment allocations, taking into account the market requirement. Although scoring highly, Site 5, Manse Farm and Site 35: Harrogate Road Ripon, have been excluded from the following list given their existing planning consents. These sites should be considered by Harrogate Borough Council for allocation in the emerging Local Plan. A brief summary of the potential sites is described below:

- **Site 4: Harrogate College** (Hull College Group)- The site is currently occupied by premises used by Harrogate College for college purposes however they are due to ~~will~~ be vacating these buildings ~~site~~ within the next two years, and consolidating on their present main site at another location on Hornbeam Park. The site is extremely well served by public transport, is within close proximity to a range of services and provides a good opportunity for office development near to Harrogate Town
- **Site 26: Gas storage Site, Ripon -** located to the south east of Ripon to the east of the Ripon by-pass this site would provide excellent access to the strategic road network via the A61, the site would be most suitable for B8 use, although other uses may be accommodated
- **Site 1: Flaxby -** is a 41 ha site located at the intersection of the A1(M) and A59 and has excellent access to the strategic transport network. Moreover, the site will benefit from planned improvements to Junction 47 of the A1(M). A draft masterplan has been produced by the site owners for a proposed ‘green business park’, focusing on high quality business uses. A pre-planning application was submitted in 2013 for 13.8 ha of new employment development in two phases. The site provides an excellent opportunity for B8 employment use as part of a mixed B Use Class Business Park and given its size has the potential to provide a major inward investment site to serve the Harrogate district. We consider there is a strong economic and policy case for the allocation of the site including: providing an attractive opportunity to diversify the local economy through significant inward investment and expansion of existing businesses; ensuring Harrogate’s economic role within the wider area is reinforced and the opportunity to realise the financial and business benefits of the district’s membership of two Local Enterprise Partnerships
- **Site 2: Land South of Cardale Park** – is a greenfield site located to the south of the existing Cardale Park. The site could act as an extension to the existing popular Cardale Business Park offering a good opportunity for B1a/b office floorspace within Harrogate Town.
- **Site 3: Land to the south of Barker Business Park, Melmerby -** has the opportunity to provide an extension to the existing Barker Business Park, and would be able to provide land for the expansion of existing B class use businesses on site.

10.5.5 Further to the above, it is understood that Ripon Barracks have been identified by the Ministry of Defence (MOD) for phased closure in 2015 and 2017-18. The scale and location of the site means it lends itself well for a residential- led mixed- used development, and therefore consideration should be given by Harrogate Borough Council for the potential of employment floorspace on this site.

10.6 Assessing market signals

10.6.1 The NPPF requires local authorities to be responsive to market signals to ensure that there is adequate provision of the right type of employment land to meet the needs of the business communities. This study represents part of the evidence base to identify what the market requires in terms of employment needs. The consultants recommend that in order to respond to market signals the Council should do the following:

- Undertake regular reviews of employment land every 3-5 years as appropriate.
- Undertake surveys of businesses to understand local businesses needs and aspirations. This will require an appropriate sample size and will need to explore aspirations for growth / expansion, perceptions of the suitability of the location, type, size and quality of the premises. The business survey should be undertaken alongside the employment land review.
- Continue to carry out and monitor existing employment areas by carrying out regular surveys of the existing employment areas (every two years) which provides useful information on the quantity of B-class floorspace and considers issues of suitability of the existing employment areas and quality of the premises.
- Consult regularly with local property agents to gain perspectives of local market conditions, through meetings such as the Property Agents Forum.

10.7 Monitoring

10.7.1 This study has provided further evidence that can be used in support of the District's employment land policies. This will need to be updated on a periodic basis to ensure that the Council is responding appropriately to market signals.

10.7.2 The Council should carry out regular surveys of the existing employment areas (every 3-5 years) which provides useful information on the quantity of B-class floorspace and considers issues of suitability of the existing employment areas and quality of the premises. Where possible vacant floorspace in existing employment areas should be mapped (to assist with tracking of vacancy over time), and any new vacant land parcels should be identified so that the Council might take a more proactive approach in bringing forward employment development, whether through the preparation of planning briefs, and or through identifying and working with land owners to assess potential issues with bringing forward land for employment uses.

10.7.3 The Council should ensure that the information collected is shared widely within the Council and in particular with those officers that are responsible for economic development. This would help the Council develop a more proactive approach to planning for employment land and supporting economic development. The primary indicators to monitor the performance of the District's employment policies should include:

- Vacant units and land – this indicates how the current supply of premises is matching the requirements of businesses.
- New jobs by sector - which sectors are growing / declining, which will have implications for premises requirements.
- Commercial development pipeline (Annual Monitoring Report) - identifies the supply and type of new B class development coming forward and how much B class floorspace will be lost.

Appendices

Appendix A Socio-economic analysis

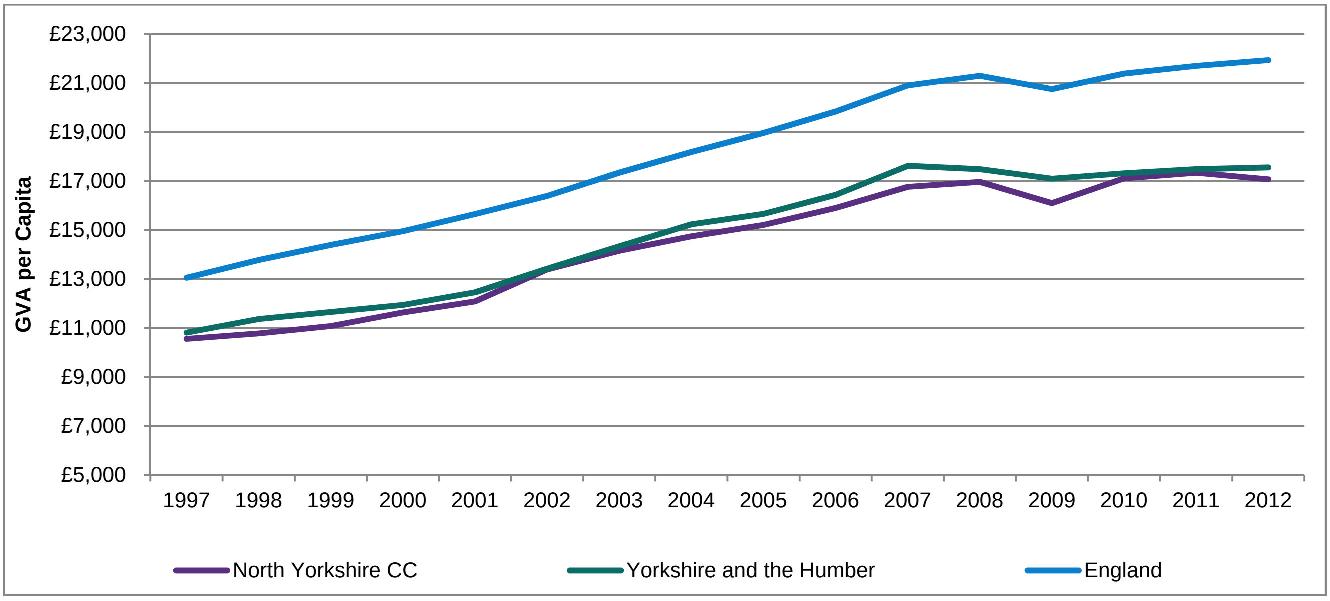
A.1. Introduction

This section provides a profile of the prevailing socio-economic conditions in Harrogate. It aims to provide the economic context which shapes employment land demand and supply factors in the local authority. It provides an important input to understanding employment land demand in the study area, and within the context of the wider regional and national economies. Although regional plans have been abolished, the East of England has been used as a regional benchmark. Harrogate District Council is part of two local enterprise partnership's (LEP's); Leeds City Region and York, North Yorkshire and East Riding Economic Partnerships. Where evidence base is available, Harrogate has been also benchmarked against the LEP's and the wider region.

Economic performance

Figure A.1 examines the total level of Gross Value Added (GVA) per head in England, Yorkshire and the Humber and North Yorkshire county. As GVA data is not available at a district level, North Yorkshire county has been considered as the nearest benchmark which includes Harrogate District and six other local authorities. In the twelve years up to 2009 the GVA per head of North Yorkshire grew slightly below trend when compared against England and the East of England, averaging 3.6% growth per annum between 1997 and 2009 compared to 3.9% each in England and the East of England (1997-2009). North Yorkshire GVA per head performed better during the tough economic period from 2009-2012, growing at 2.0% per annum; higher than the 0.9% average growth seen in Yorkshire and the Humber the same period. The county GVA per head remains 3% below the Yorkshire and the Humber average and 22% below the national average in 2012.

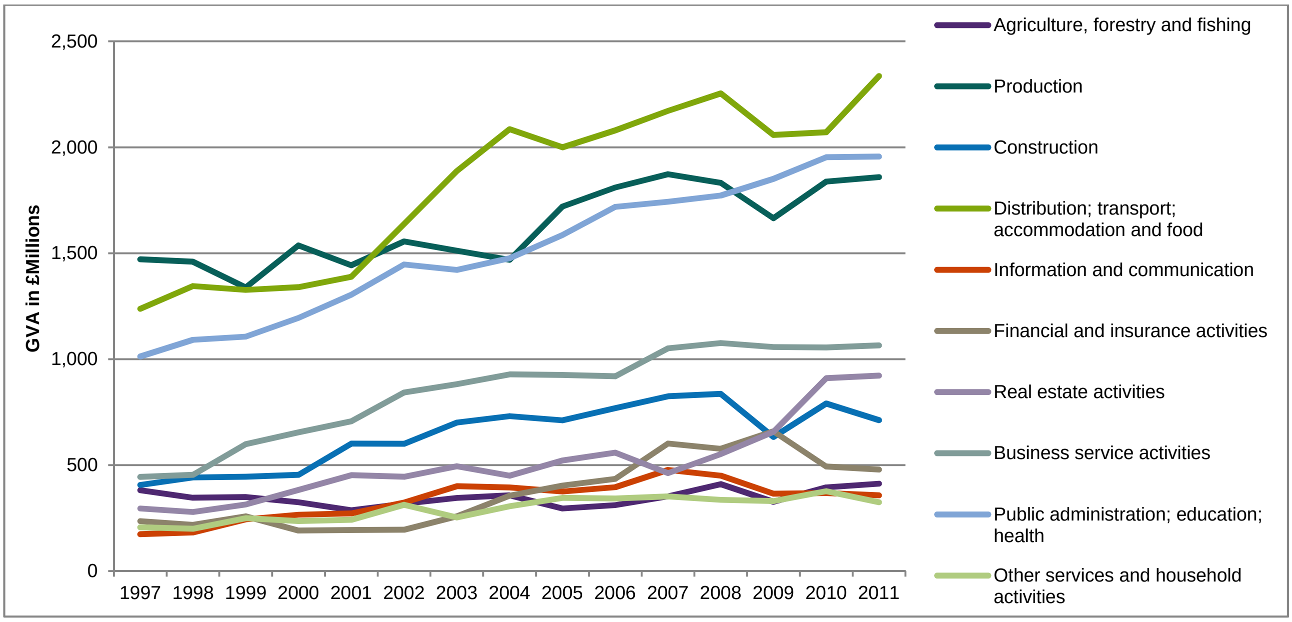
Figure A.1 North Yorkshire CC, Yorkshire and Humber and England GVA per head between 1997 to 2012



Source: ONS – Headline GVA per head at current prices, NOMIS

Figure A.2 identifies the level of GVA within North Yorkshire by general sector (no data is available post 2011) based on the income approach. The table shows that distribution, transport, accommodation and food; public administration, and production (of which 75% is manufacturing) were the drivers of growth in North Yorkshire and are continuing to see growth. Other fast emerging sectors include real estate activities and business services which have seen an annual growth of over 6%. Overall the annual GVA growth has been 4.4% with only agriculture declining during the pre-recession period and financial services declining during the recession's period 2009-2011.

Figure A.2 North Yorkshire County Council GVA by major sector (£m) between 1997 to 2011

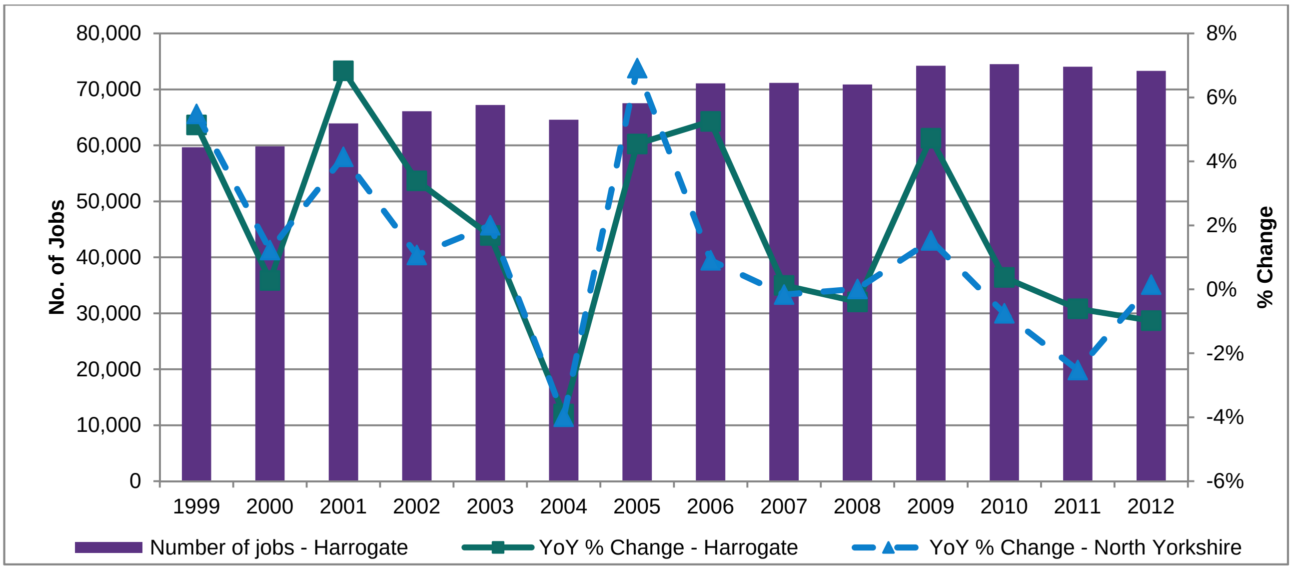


Source: ONS – Workplace GVA (Income Approach) by industry sectors at current basic prices, NOMIS

Employment

There were over 70,394 jobs in Harrogate District in 2012, representing an annual growth of around 2% since 1998; the District has experienced an annual decline of 0.8% since the peak in 2009. Total employment grew by 31%. The rate of employment growth was slightly slower during the second half of the 14 year period, with annual growth running at 2.4% between 1998 and 2008 and 1.1% between 2004 and 2012.

Figure A.3 Total employment in Harrogate District



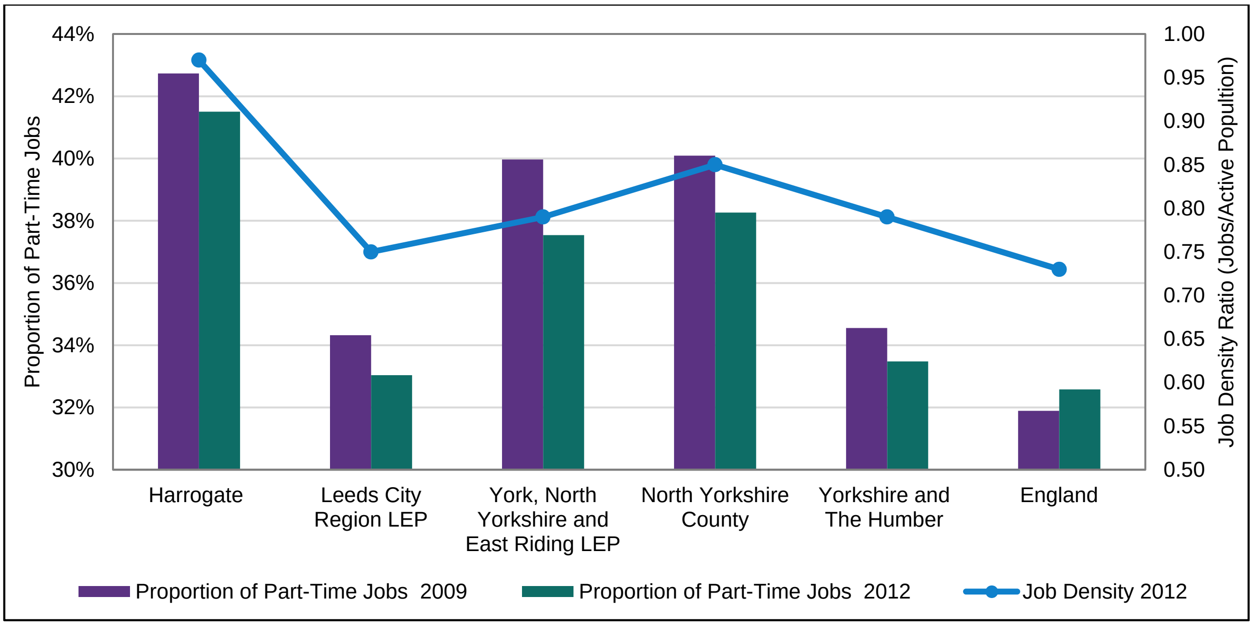
Source: NOMIS, Business Registrar and Employment Survey (BRES), Annual Business Inquiry (ABI)

The total jobs in Figure A.3 does not consider the proportion of part-time jobs which is seen as relative level of competitiveness within the District which is discussed in subsequent sections. Broad Sector Analysis in Harrogate District.

Job density and part-time employment

Although Harrogate has the highest job density[13] in the region, the District has the highest proportion of part-time jobs as seen in Figure A.4. Leeds City Region LEP on the other hand has the lowest proportion of part-time jobs and the lowest job-density.

Figure A.4Job density and proportion of part time employment in Harrogate District



Source: NOMIS, Business Registrar and Employment Survey (BRES)

Employment – sector trends

This section analyses the historic trends in employment by sector pre-2008 using Standard Industrial Classifications (SIC) covering the period 1998 to 2008 based on the Annual Business Inquiry (ABI) (using SIC 1992 classification) and for the period after 2008 we have used the more recent Business Register and Employment Survey (BRES) (using SIC 2007 classifications). The post 2008 analysis also considers the impact of the recession and the gradual recovery. Table A.1 shows the pre-recession growth sectors and Table A.2 shows the major employment sectors (in 2012) in Harrogate with a comparison with the proportion of employment seen in Hertfordshire, East of England and England. The comparison table includes the annual growth in employment experienced during the recession recovery period (2009-2012) and may identify key resilient sectors.

Historic employment sectors: pre-2008 from 1998 to 2008 (SIC 1992)

Table A.1 shows the comparison of Harrogate District across the top 15 key industrial sectors ranked by most prominent sector in the District in 2008. The shaded table is used to visually aid identifying key sectors and to show the level of growth; with the darker green shades signifying high growth, while the red and orange tones are used to signify negative growth. Employment in the District was dominated in 2008 by wholesale / retail trade, repair etc (20%) and real estate, renting, business activities (16%). Manufacturing and Real estate, renting & business activities showed the highest average annual increase of 456 and 383 jobs respectively. There was no major change across the remaining sectors, and was similar in proportion when compared to the county, Region and Country as whole. The fastest growing sectors in terms of annual growth rate were Manufacturing (8%), Real estate, renting and business activities (4%), and Transportation, storage and communication (4%). Overall the District showed an annual growth of 2.2%. Fishing was the largest declining sector with an annual decline of -7 and 4% respectively.

[13] Job Density: The number of jobs in an area divided by the resident population aged 16-64 in that area. For example, a job density of 1.0 would mean that there is one job for every resident aged 16-64.

Table A.1 Harrogate historic industry sectors change (1998-2008)

	Harrogate		North Yorkshire		Yorkshire and The Humber		England		Harrogate 1998-2008	
	1998	2008	1998	2008	1998	2008	1998	2008	Growth rate	Change in jobs
G : Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods	25%	20%	21%	18%	18%	17%	18%	17%	0.2%	29
K : Real estate, renting and business activities	13%	16%	10%	13%	11%	15%	15%	19%	4.2%	383
N : Health and social work	14%	12%	12%	11%	11%	13%	10%	12%	0.9%	73
D : Manufacturing	7%	12%	14%	13%	20%	13%	17%	10%	7.9%	456
M : Education	9%	9%	9%	9%	9%	11%	8%	9%	2.4%	136
H : Hotels and restaurants	8%	9%	9%	10%	7%	6%	6%	7%	3.2%	169
O : Other community, social and personal service activities	6%	6%	5%	5%	4%	4%	5%	5%	2.1%	76
F : Construction	5%	4%	5%	5%	5%	5%	4%	5%	0.7%	19
I : Transport, storage and communication	3%	4%	4%	6%	6%	6%	6%	6%	4.1%	91
J : Financial intermediation	4%	4%	2%	3%	4%	4%	4%	4%	2.4%	57
L : Public administration and defence; compulsory social security	5%	3%	6%	5%	5%	5%	5%	5%	-2.4%	-60
A : Agriculture, hunting and forestry	0%	1%	1%	1%	0%	0%	0%	0%	5.6%	19
E : Electricity, gas and water supply	0%	0%	1%	1%	1%	0%	1%	0%	-7.2%	-14
C : Mining and quarrying	0%	0%	1%	0%	0%	0%	0%	0%	-12.2%	-20
B : Fishing	0%	0%	0%	0%	0%	0%	0%	0%	-100.0%	-1

Source: Annual Business Inquiry (ABI), NOMIS

Historic employment sectors: post-2008 from 2009 to 2012 (SIC 2007)

The assessment post 2008 is based on the SIC 2007 classifications. This covers a period of recession (early 2009) and subsequent periods of low and negative economic growth. This period provides a useful indication of recent trends, but the difficult economic climate needs to be taken into account when considering the data for this period. Out of the top five employment sectors only one has witnessed growth. The net change in employment was an annual loss of around 900 jobs in the last 4 years primarily in retail and financial & insurance, with other sectors witnessing marginal losses. The health sector is the largest employer in Harrogate with a much higher proportion when compared to the County and England as a whole, although lower than the Yorkshire and The Humber region average. Of the major employment sectors only education and business administration, mining/quarrying and agriculture/fisheries had an annual growth over 3%. With the exception of mining/quarrying, all these sectors had historically (1998-2008) seen strong employment growth. Typical B class uses have seen a change in performance:

- Manufacturing has seen growth of 2.8 % and is currently the seventh largest employer in the District, although slowed in comparison to the strong pre-2008 growth of over 7%.
- Transport and storage saw 2.3% growth and is currently the twelfth largest employer, although growth has slowed when compared to the pre-2008 level of over 4%.
- The information & communication sector has witnessed decline in recent years, although this was part of a growth sector pre-2008.
- Business administration is seeing over 7% growth and pre-2008 was a strong growth sector in the area.
- The financial and insurance sector has declined post-2008 and is one of the smaller sectors in the District.

Table A.2 Harrogate key sectors comparative by employment (2012)

		Proportion of employment				Growth rate	
	Employment in 2012	Harrogate	North Yorkshire	Yorkshire and The Humber	England	Harrogate	Annual change in employment 2009-2012
Health (Q)	10,271	**14.0%**	13.1%	14.6%	13.0%	**-0.4%**	-44
Education (P)	7,511	**10.2%**	10.2%	10.5%	9.6%	**3.9%**	268
Retail (Part G)	7,345	**10.0%**	9.4%	9.6%	10.2%	**-4.2%**	-335
Information & communication (J)	7,133	**9.7%**	3.9%	2.8%	4.1%	**-1.3%**	-95
Accommodation & food services (I)	6,822	**9.3%**	10.4%	6.0%	6.8%	**-1.0%**	-68
Professional, scientific & technical (M)	5,124	**7.0%**	6.0%	6.0%	7.7%	**-1.5%**	-82
Manufacturing (C)	4,560	**6.2%**	11.1%	11.6%	8.5%	**2.8%**	121
Wholesale (Part G)	4,315	**5.9%**	4.6%	4.2%	4.2%	**-2.2%**	-99
Business administration & support services (N)	3,988	**5.4%**	5.5%	7.4%	8.5%	**7.9%**	271
Arts, entertainment, recreation & other services (R,S,T and U)	3,556	**4.8%**	5.2%	4.2%	4.4%	**-0.3%**	-10
Construction (F)	2,844	**3.9%**	5.0%	4.7%	4.4%	**2.0%**	55
Transport & storage (inc postal) (H)	2,528	**3.4%**	4.1%	5.0%	4.6%	**2.3%**	57
Financial & insurance (K)	2,369	**3.2%**	2.5%	3.3%	3.9%	**-7.3%**	-201
Public administration & defence (O)	2,015	**2.7%**	4.3%	5.3%	4.8%	**-5.0%**	-111
Motor trades (Part G)	1,555	**2.1%**	1.8%	1.7%	1.7%	**0.4%**	7
Property (L)	810	**1.1%**	1.2%	1.1%	1.6%	**-10.0%**	-100
Mining, quarrying & utilities (B,D and E)	365	**0.5%**	1.3%	1.3%	1.1%	**3.5%**	12
Agriculture, forestry & fishing (A)	216	**0.3%**	0.4%	0.7%	0.7%	**50.0%**	51

Source: Business Registrar and Employment Survey (BRES), NOMIS

A summary of the key growth sectors during the recession period (2009-2012) is presented in Table A.3. This ranks growth sectors by the annual employment increase, and compares annual growth in employment to the region and LEP's. The top five growing employment sectors constitute less than a third of total employment in Harrogate.

Table A.3 Harrogate key sectors comparative (2009 – 2012)

		Growth rate				Proportion of employment			
	Annual employment change 2009-2012	Harrogate	Yorkshire and The Humber	Leeds City Region LEP	York, North Yorkshire and East	Harrogate	Yorkshire and The Humber	Leeds City Region LEP	York, North Yorkshire and East
Business administration & support services (N)	271	**7.9%**	0.1%	1.0%	-2.8%	**5.4%**	7.4%	7.9%	5.1%
Education (P)	268	**3.9%**	-0.1%	-0.3%	0.5%	**10.2%**	10.5%	10.3%	10.5%
Manufacturing (C)	121	**2.8%**	-0.3%	-0.6%	0.0%	**6.2%**	11.6%	10.9%	10.0%
Transport & storage (inc postal) (H)	57	**2.3%**	0.9%	2.5%	2.1%	**3.4%**	5.0%	4.9%	5.4%
Construction (F)	55	**2.0%**	0.3%	1.3%	1.1%	**4%**	5%	5%	5%
Agriculture, forestry & fishing (A)	51	**50.0%**	4.4%	41.0%	47.0%	**0.3%**	0.7%	0.1%	0.3%
Mining, quarrying & utilities (B,D and E)	12	**3.5%**	4.5%	3.7%	2.1%	**0%**	1%	1%	1%
Motor trades (Part G)	7	**0.4%**	-1.7%	-0.9%	-2.4%	**2.1%**	1.7%	1.6%	1.7%

Source: Business Registrar and Employment Survey (BRES), NOMIS

A.2. Broad sector relative representation

Tables B.4 show the employment location quotients for Harrogate District with respect to North Yorkshire County, Yorkshire and The Humber and England. An employment location quotient of less than 1.00 indicates that employment in the sector is under-represented in the study area compared to the wider area. A quotient of greater than 1.00 indicates that employment in the sector is over-represented. The colour representation shows under represented sectors in blue and over represented in red.

Broad sector relative representation in Harrogate District

As per the table key, overrepresented sectors are information & communication and accommodation & food services, while the key underrepresented sectors are manufacturing and finance & insurance across all the comparative regions.

Table A.4 Harrogate employment quotients post 2008 (2009-2012)

Broad sector	Harrogate: England		Harrogate: Yorkshire and The Humber		Harrogate: North Yorkshire	
	2009	2012	2009	2012	2009	2012
1 : Agriculture, forestry & fishing (A)	0.1	0.4	0.1	0.4	0.7	0.7
2 : Mining, quarrying & utilities (B,D and E)	0.4	0.4	0.4	0.4	0.3	0.4
3 : Manufacturing (C)	0.6	0.7	0.5	0.5	0.5	0.6
4 : Construction (F)	0.7	0.9	0.8	0.8	0.8	0.8
5 : Motor trades (Part G)	1.2	1.2	1.2	1.2	1.1	1.2
6 : Wholesale (Part G)	1.5	1.4	1.3	1.4	1.1	1.3
7 : Retail (Part G)	1.1	1.0	1.0	1.0	1.0	1.1
8 : Transport & storage (inc postal) (H)	0.7	0.7	0.7	0.7	1.0	0.8
9 : Accommodation & food services (I)	1.4	1.4	1.5	1.6	0.9	0.9
10 : Information & communication (J)	2.5	2.4	3.6	3.5	2.6	2.5
11 : Financial & insurance (K)	1.0	0.8	1.1	1.0	1.3	1.3
12 : Property (L)	0.9	0.7	1.0	1.0	0.9	0.9
13 : Professional, scientific & technical (M)	1.0	0.9	1.4	1.2	1.2	1.2
14 : Business administration & support services (N)	0.5	0.6	0.6	0.7	0.8	1.0
15 : Public administration & defence (O)	0.6	0.6	0.5	0.5	0.7	0.6
16 : Education (P)	1.0	1.1	0.9	1.0	1.0	1.0
17 : Health (Q)	1.1	1.1	1.0	1.0	1.1	1.1

Broad sector	Harrogate: England		Harrogate: Yorkshire and The Humber		Harrogate: North Yorkshire	
	2009	2012	2009	2012	2009	2012
18 : Arts, entertainment, recreation & other services (R,S,T and U)	1.1	1.1	1.2	1.1	1.0	0.9

Source: Business Registrar and Employment Survey (BRES), NOMIS

Employment location quotients analysis in Harrogate

Figures B.5 to B.7 compares location quotients for Harrogate against past and emerging strategic economic relationships. This area comparison includes the abolished region of Yorkshire and The Humber and the two LEP's of Leeds City Region and York, North Yorkshire and East Riding. Only the 14 major employment sectors (above 2,000 employees) have been considered for this analysis, against the difference in growth for sectors in each of the three areas. The size of the circle representing each sector's proportion to the amount of total employment for the study area. Sectors identified (based on SIC2007) in the upper right quadrant of each graph are those which are well represented in the District and have experienced relative growth when compared to the wider economy. The lower left hand quadrant contains those sectors that are under-represented in the District and are in comparative decline in the wider economy. The upper left quadrant contains those that are under-represented and are growing in the wider economy and the lower right quadrant contains those that are over-represented in the District and are declining in the wider economy. It should be noted that only a short-term growth has been considered (2009-2012) which gives a good indication of the relative performance of Harrogate during the tough economic climate.

- **Health:** Health is the largest single sector employer that has seen marginal growth in the wider economy but is declining in Harrogate. The sector is equally represented when compared to the region and the two LEP's.
- **Major Sectors:** A quartet of major employment sectors of 6,500-7,500 jobs each and representing a total of almost 40% of employment in the District:
  - **Education:** The second largest sector in Harrogate. Education in particular is witnessing strong growth in percentage terms when compared to the wider region.
  - **Retail:** The third largest sector in Harrogate is witnessing relative growth when compared to the wider region and is marginally over represented when compared to the Leeds City Region LEP area.
  - **Information & Communication:** The fourth largest sector in the Harrogate is heavily over represented, forming the most over represented sector when compared to the wider region. Information & communication remains over-represented even when compared to the national context. The sector currently remains neutral in terms of relative growth.
  - **Accommodation & food services:** The fifth largest sector and the smallest of the major sectors. Accommodation & food services is witnessing marginal relative growth and is over represented compared to the Leeds City Region LEP and Yorkshire and The Humber region. The sector is however evenly represented when compared to the York, North Yorkshire and East Riding LEP.
- **Medium Sectors:** A quartet of medium sized segments (4,000-5,500 jobs each), constituting 25% of total jobs in the District and undergoing major transformation:
  - **Professional, scientific & technical:** The largest of the remaining sectors seeing the fastest decline and is relatively over represented when compared to the York, North Yorkshire and East Riding LEP and the Region but is in-line with the Leeds City Region LEP.

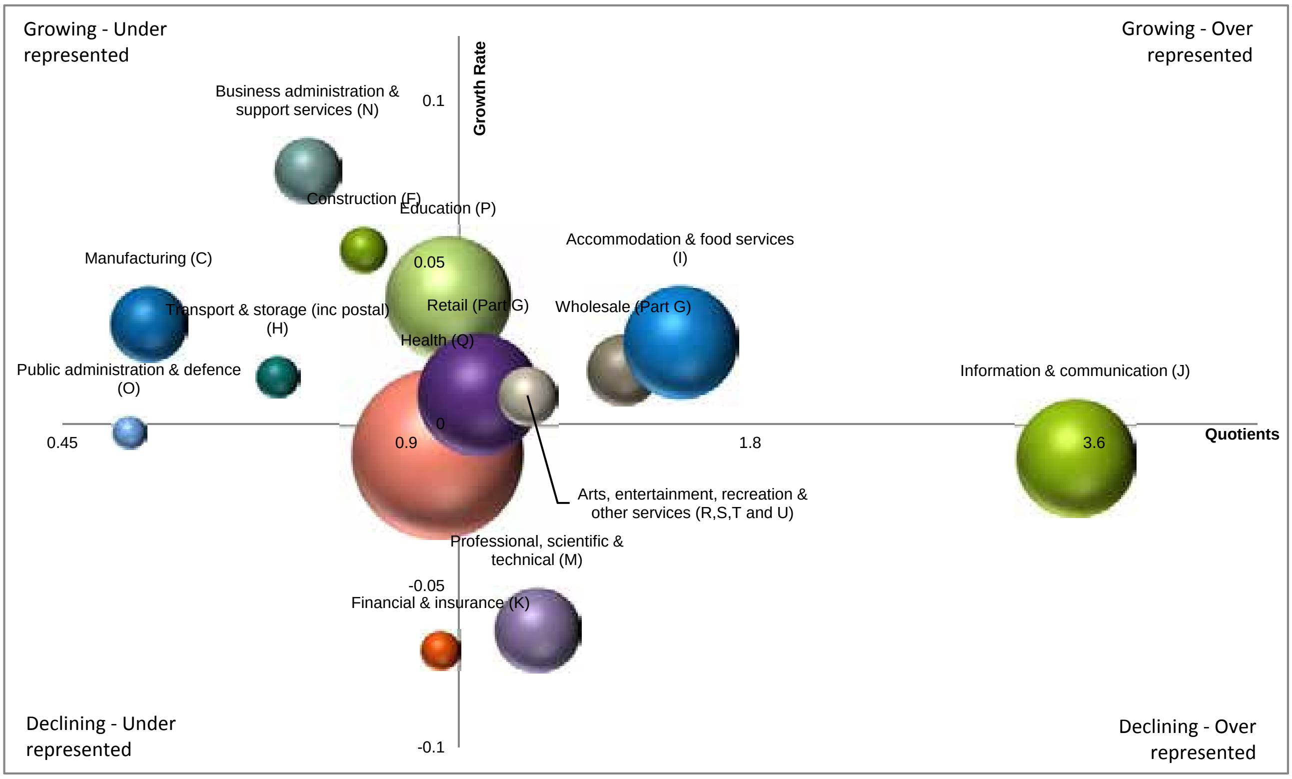
- **Manufacturing:** Although manufacturing has experienced a small net increase in recent years, this sector remains significantly underrepresented in the District when compared to the wider region and national economy. Although the sector as a whole is forecast to reflect national trends and continue to experience long term decline there are niche manufacturing activities that may experience a degree of growth (e.g. advanced manufacturing of specialist goods).

- **Wholesale:** One of the most overrepresented sectors in Harrogate when compared to the wider region and is witnessing moderate growth.

- **Business administration & support services:** The fastest growing sector in the District is under represented when compared to the Leeds City Region LEP and the Yorkshire and The Humber Region, but in-line with the York, North Yorkshire and East Riding LEP.

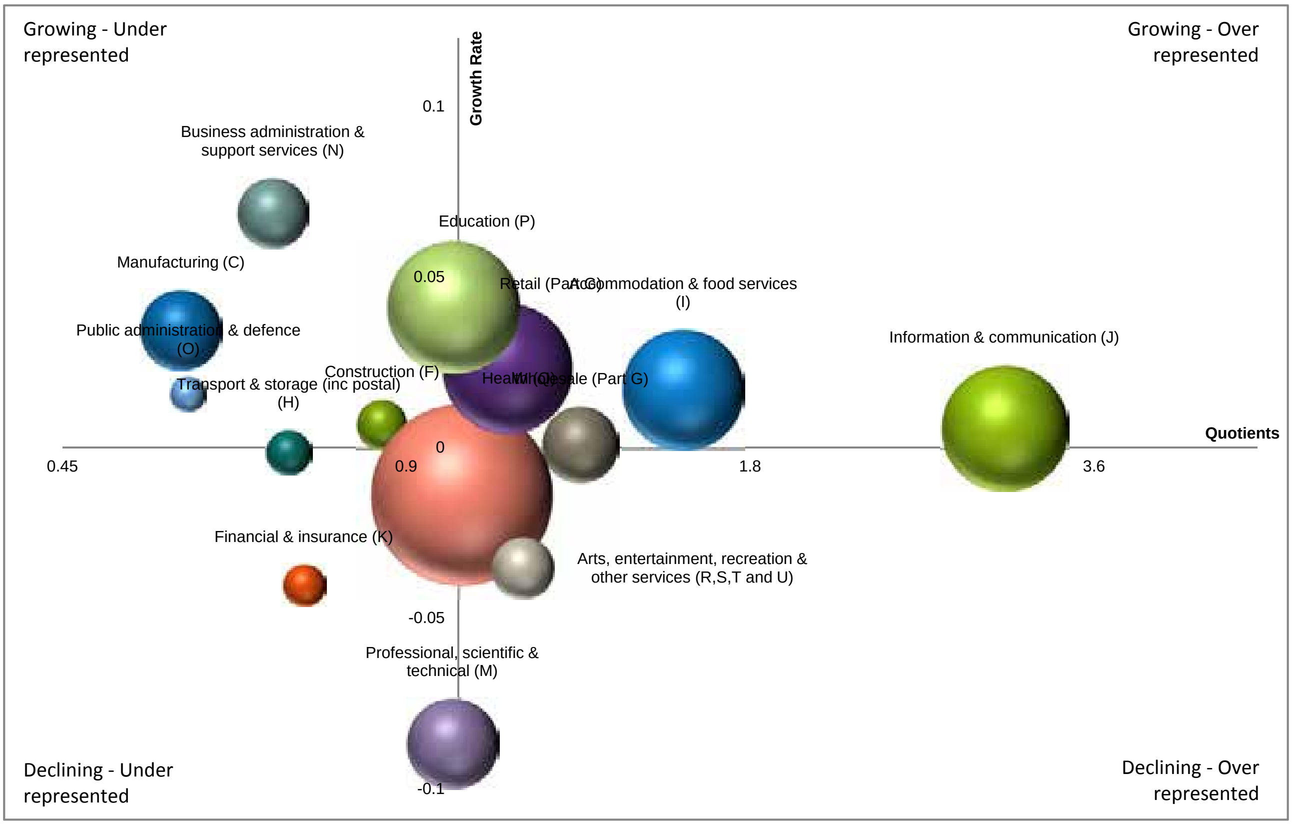
- **Other sectors:** The relatively smaller sectors (under 3,500 jobs) that represent 18% of the total jobs in the District. Arts, entertainment, recreation & other services is more or less in line with the regional and two LEPS's level that are underrepresented. Furthermore, Public administration & defence, Construction, and Transportation & storage are underrepresented sectors still in relative marginal growth. Key high-value sector of finance & insurance are rapidly declining sectors in the District and marginally under-represented when compared to Leeds City Region LEP and wider Region.

Figure A.5 Harrogate: location quotients (2012) on sector growth in Yorkshire and The Humber



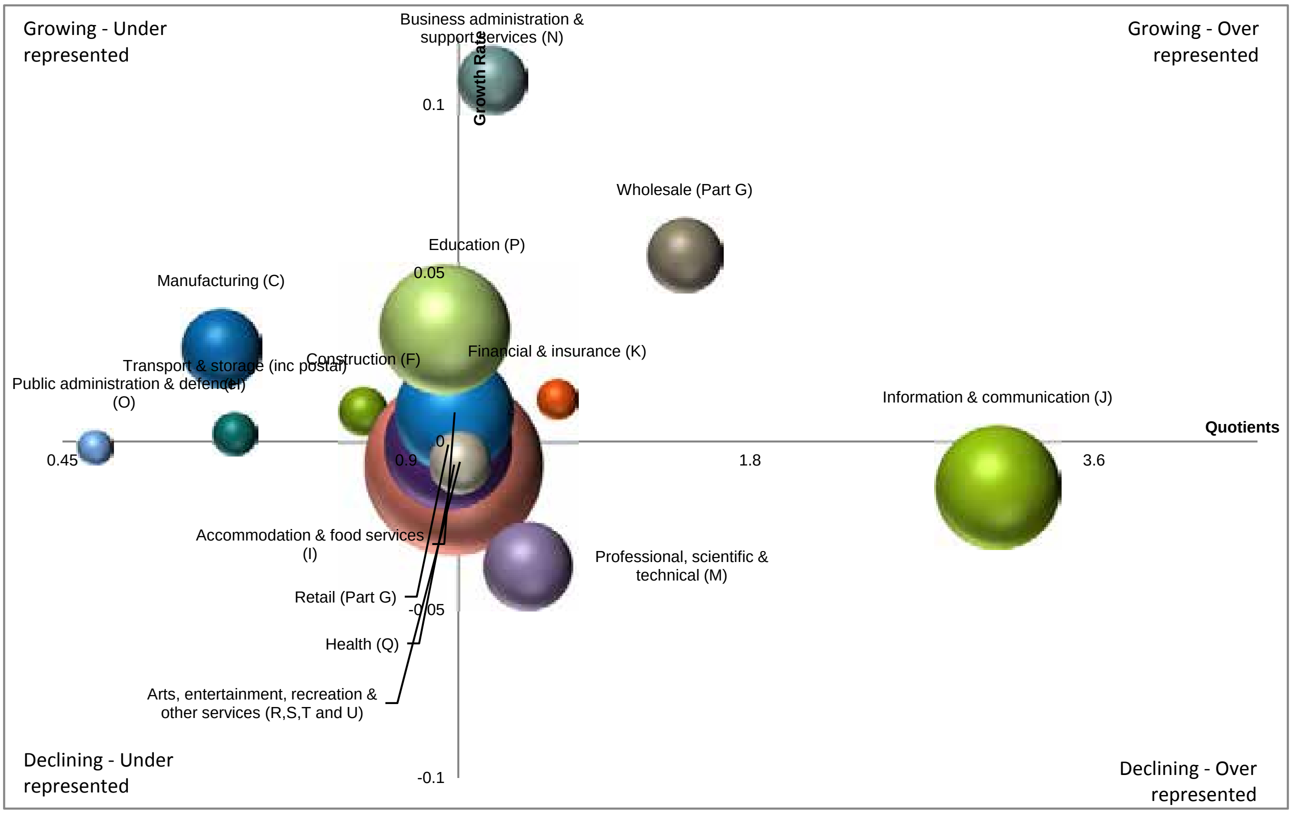
Source: Business Registrar and Employment Survey (BRES), NOMIS

Figure A.6 Harrogate: location quotients (2012) on sector growth in Leeds City Region LEP



Source: Business Registrar and Employment Survey (BRES), NOMIS

Figure A.7 Harrogate: location quotients (2012) on sector growth in York, North Yorkshire and East Riding LEP



Source: Business Registrar and Employment Survey (BRES), NOMIS

Detailed sub-sector analysis in Harrogate

In understanding the dynamics of the local economy, it is useful to examine changes in employment by sub-sector (2-digit SIC code).The 2 digit SIC codes the type of business. Table A.5 shows the main sub-sectors in Harrogate as a share of total employment. The largest five sub-sectors account for over a third of all employment for the District while the top 20 sub-sectors captures 78% of total employment. It should be noted that this assessment is based on the tough economic period (2009-2012) and some sectors which have shown a decline in recent years such as retail are expected to recover to growth in line with historic trends.

Table A.5 looks at the key major employment sub-sectors in 2012 in Harrogate together with the annual growth (2009-2012). The two largest employment sectors in the District were education and retail trade that are growing at a little over 3% and declining at over 4% respectively. In comparison the 3rd and 4th largest employers, human health activities and publishing activities, have seen an annual rise of 0.6% and decline of 2% respectively. The change in annual growth seen is both positive and negative through all the major sub-sectors. This is likely to lead to a reshuffle of sub-sectors, however this should be taken into context of the tough economic climate.

Table A.5 Harrogate key sub-sectors (2009 – 2012) 2007 SIC classification

	2012		Average annual % growth
Industry	**No**	**%**	**2009-2012**
85 : Education	7,511	10%	3.9%
47 : Retail trade, except of motor vehicles and motorcycles	7,345	10%	-4.2%
86 : Human health activities	5,528	8%	0.6%
58 : Publishing activities	5,330	7%	-2.2%
56 : Food and beverage service activities	4,602	6%	-3.5%
46 : Wholesale trade, except of motor vehicles and motorcycles	4,315	6%	-2.2%
88 : Social work activities without accommodation	2,484	3%	-7.2%
87 : Residential care activities	2,259	3%	6.6%
55 : Accommodation	2,221	3%	5.4%
84 : Public administration and defence; compulsory social security	2,015	3%	-5.0%
66 : Activities auxiliary to financial services and insurance activities	1,771	2%	5.8%
43 : Specialised construction activities	1,610	2%	-3.8%
45 : Wholesale and retail trade and repair of motor vehicles and motorcycles	1,555	2%	0.4%
93 : Sports activities and amusement and recreation activities	1,407	2%	-1.0%
62 : Computer programming, consultancy and related activities	1,344	2%	9.0%

Industry	2012 No	2012 %	Average annual % growth 2009-2012
81 : Services to buildings and landscape activities	1,235	2%	7.0%
49 : Land transport and transport via pipelines	1,207	2%	-2.6%
72 : Scientific research and development	1,115	2%	-3.9%
69 : Legal and accounting activities	1,079	1%	10.6%
71 : Architectural and engineering activities; technical testing and analysis	1,069	1%	-2.5%
Total	57,002	78%	

Source: Business Registrar and Employment Survey, NOMIS

Key growth sectors in Harrogate District

Table A.6 shows the key growth sub-sectors since 2009 in Harrogate District. The top 15 fastest growing sectors constitute only 31% of the total sub-sector employment but have contributed a total of 4,799 jobs since 2009.

Table A.6 Harrogate key growing sub-sectors (2009 – 2012) 2007 SIC classification

Industry	2012 No	2012 %	Change in jobs 2009-2012 no	Average annual % growth 2009-2012
85 : Education	7,511	10%	805	3.9%
73 : Advertising and market research	673	1%	517	62.8%
80 : Security and investigation activities	967	1%	512	28.6%
87 : Residential care activities	2,259	3%	394	6.6%
55 : Accommodation	2,221	3%	325	5.4%
62 : Computer programming, consultancy and related activities	1,344	2%	307	9.0%
52 : Warehousing and support activities for transportation	916	1%	306	14.5%
69 : Legal and accounting activities	1,079	1%	282	10.6%
42 : Civil engineering	475	1%	282	35.0%
66 : Activities auxiliary to financial services and insurance activities	1,771	2%	274	5.8%

	2012		Change in jobs 2009-2012	Average annual % growth
Industry	No	%	no	2009-2012
81 : Services to buildings and landscape activities	1,235	2%	228	7.0%
10 : Manufacture of food products	953	1%	195	7.9%
26 : Manufacture of computer, electronic and optical products	438	1%	128	12.2%
27 : Manufacture of electrical equipment	261	0%	123	23.7%
78 : Employment activities	823	1%	121	5.4%
Total	22,926	31%	4,799	

Source: Business Registrar and Employment Survey, NOMIS

Key decline sectors in Harrogate District

Table A.7 shows the key declining sub-sectors in Harrogate District. The top 15 declining sectors constituting 43% of the total sub-sector employment and has resulted in a loss of 6,004 jobs since 2009.

Table A.7 Harrogate key declining Sub-Sectors (2009 – 2012) 2007 SIC classification

	2012		Change in jobs 2009-2012	Average annual % growth
Industry	No	%	No	2009-2012
47 : Retail trade, except of motor vehicles and motorcycles	7,345	10%	-1,006	-4.2%
64 : Financial service activities, except insurance and pension funding	564	1%	-904	-27.3%
70 : Activities of head offices; management consultancy activities	773	1%	-770	-20.6%
88 : Social work activities without accommodation	2,484	3%	-620	-7.2%
56 : Food and beverage service activities	4,602	6%	-527	-3.5%
58 : Publishing activities	5,330	7%	-370	-2.2%
84 : Public administration and defence; compulsory social security	2,015	3%	-332	-5.0%
68 : Real estate activities	810	1%	-300	-10.0%
46 : Wholesale trade, except of motor vehicles and motorcycles	4,315	6%	-296	-2.2%

	2012		Change in jobs 2009-2012	Average annual % growth
Industry	No	%	No	2009-2012
43 : Specialised construction activities	1,610	2%	-196	-3.8%
18 : Printing and reproduction of recorded media	383	1%	-146	-10.2%
79 : Travel agency, tour operator and other reservation service and related activities	143	0%	-145	-20.8%
72 : Scientific research and development	1,115	2%	-142	-3.9%
75 : Veterinary activities	58	0%	-128	-32.2%
63 : Information service activities	264	0%	-122	-11.9%
Total	31,811	43%	-6,004	

Source: Business Registrar and Employment Survey, NOMIS

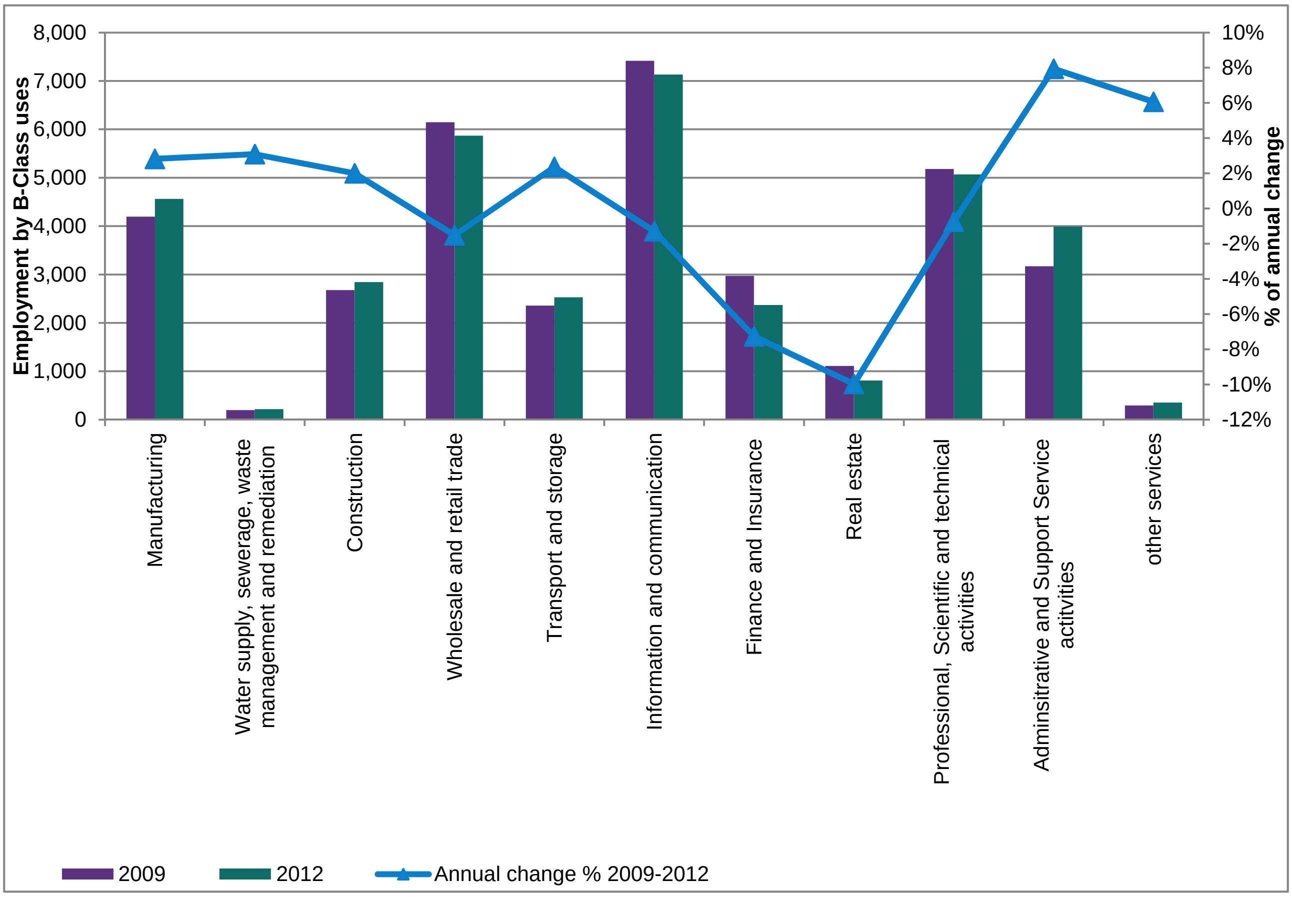
B-use class employment

Most ‘employment’ policies contained in development plans relate to jobs associated with premises which accommodate business and industrial activities categorised under the B-Use Class (B1a, B1b, B1c, B2 and B8). Although an important component of total employment is generated by activities not classified as B-use, it is important for our analysis to consider separately activities which are traditionally the subject of employment policies in development plans. B-use employment has been estimated using an in-house modelling technique[14]. B-use employment accounts for 51% of total employment in Harrogate District with the remaining in retail, health and education services.

Figure A.8 traces the trend of B-Use employment by sector from 2009 to 2012 within Harrogate District. When considering annual change in employment, administrative and support service (8.0% pa), manufacturing (3% pa), transport & storage and construction (2% pa) are stable large-scale B-Use sectors which have seen positive growth. Manufacturing growth was consistent with historic growth during the 1998-2008 period. Real estate services, wholesale and retail trade, finance & insurance and professional scientific services are the other major employment sectors, although they have seen marginal decline during the tough economic climate witnessed since 2009. Information and communication are the largest B-use which has seen a major decline.

[14] See table B.10 for a list of SIC codes that constitute the B-use class employment categories.

Figure A.8 Change in B-use class employment 2009-2012

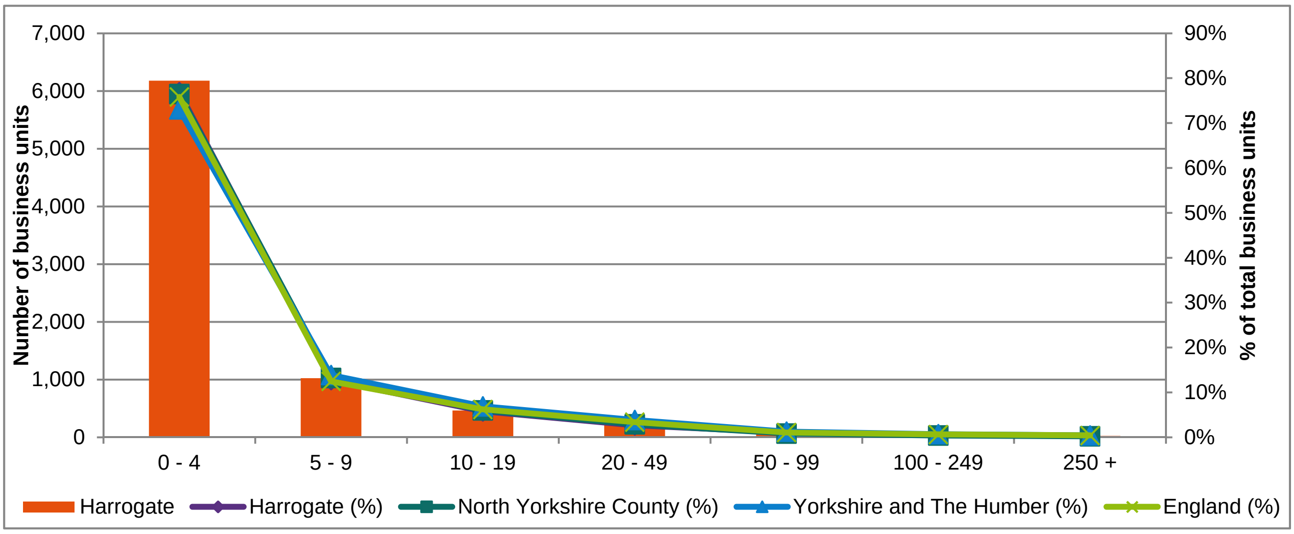


Source: Business Registrar and Employment Survey, NOMIS

A.3. Business structure

Figure A.9 shows the proportion of business units in Harrogate represented by the bar chart and benchmarked against the County, Region and England represented in line form. Within Harrogate District the distribution of business units is similar to that of the wider region with 90% of business units occupied by micro firms (under 10 employees), 8% of business units are occupied by small firms (10-49 employees) and 2% of business units occupied by large firms.

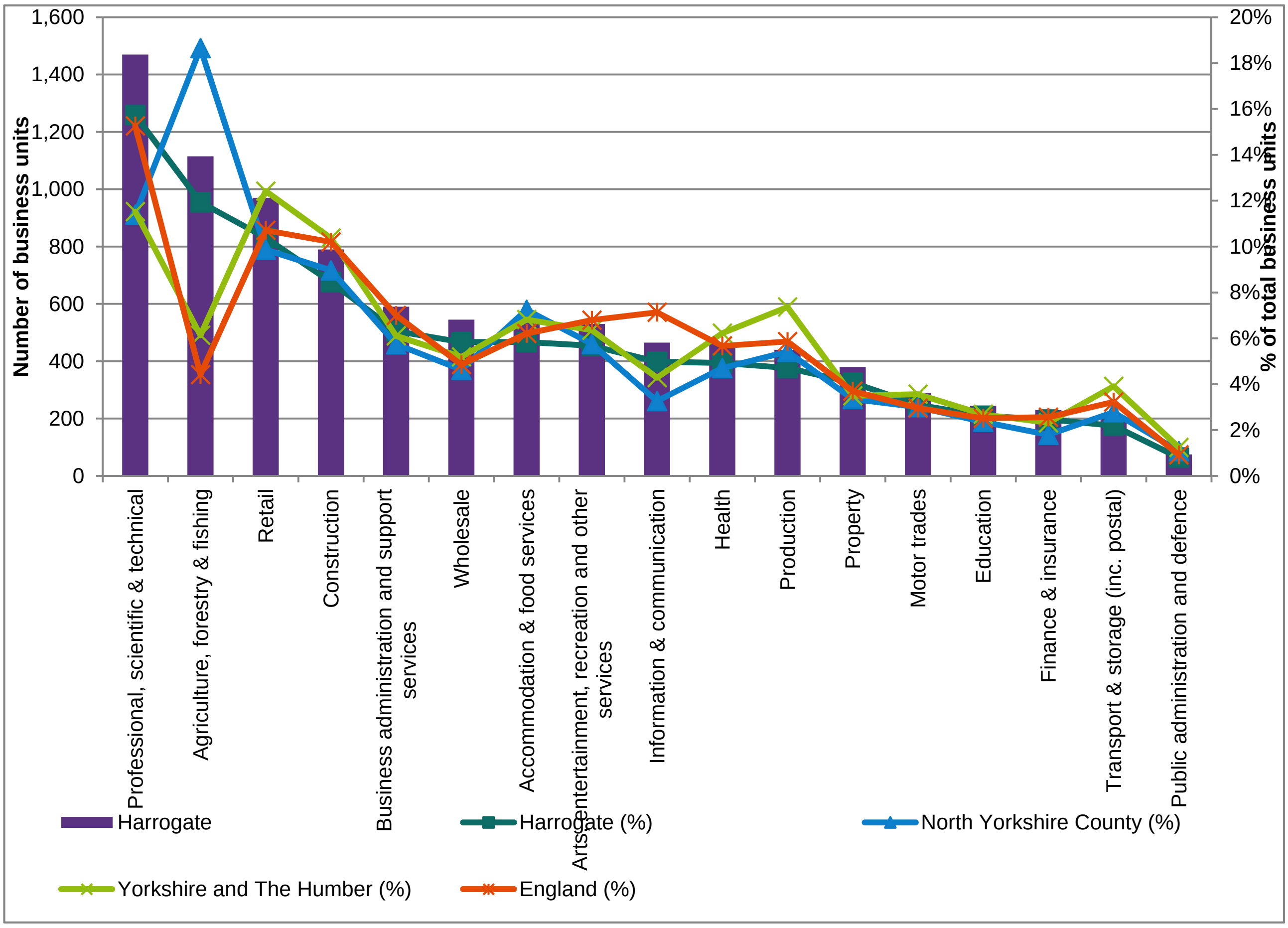
Figure A.9 Proportion of business units by size (2012)



Source: Business Registrar and Employment Survey, NOMIS & ONS UK Business: Activity, Size and Location 2012

In Figure A.10 we see that businesses in the professional, scientific and technical sector constitute 20% of business units in the District which is in line with the County but a substantially higher proportion when compared to the wider region. The proportion of business units in agriculture and fisheries appear particularly high in the County and Harrogate. This reflects in a contrast in the proportion of business units in traditionally strong B-class uses such as transportation & storage and information & communication.

Figure A.10 Harrogate key sectors comparative by business units (2012)

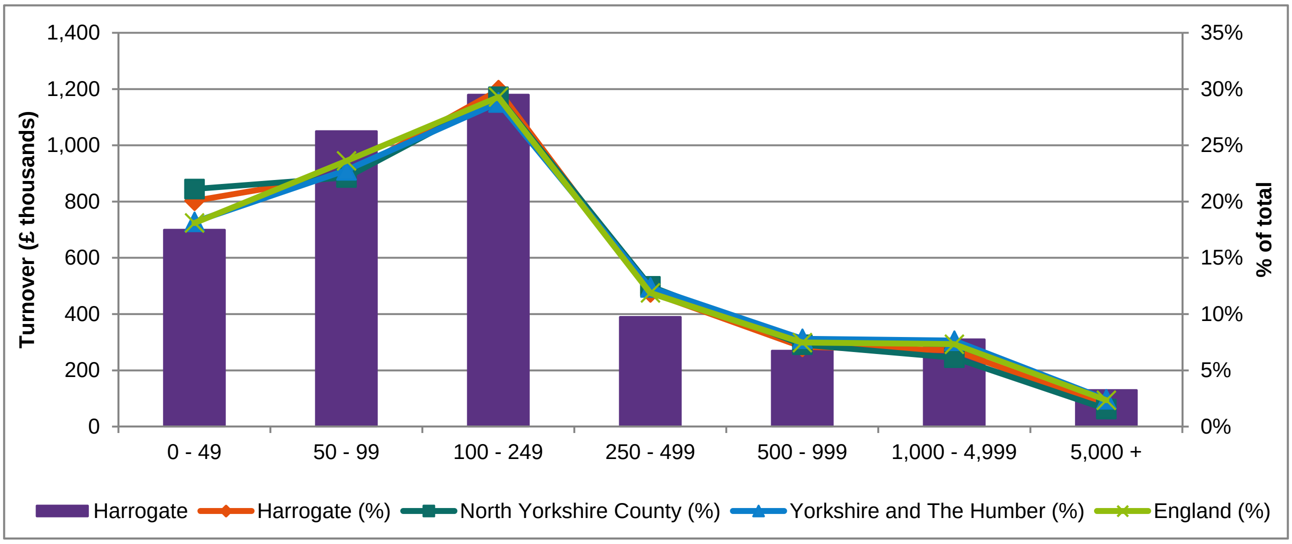


Source: ONS UK Business: Activity, Size and Location 2013

A.4. Enterprise

VAT registrations can be used as a proxy for measuring enterprise activity and business survival rates. As seen in Figure A.11 the number of enterprises by turn over size shows that Harrogate and North Yorkshire has a slightly higher proportion of small business units with a turnover of under £49,000 when compared to the regional and national averages.

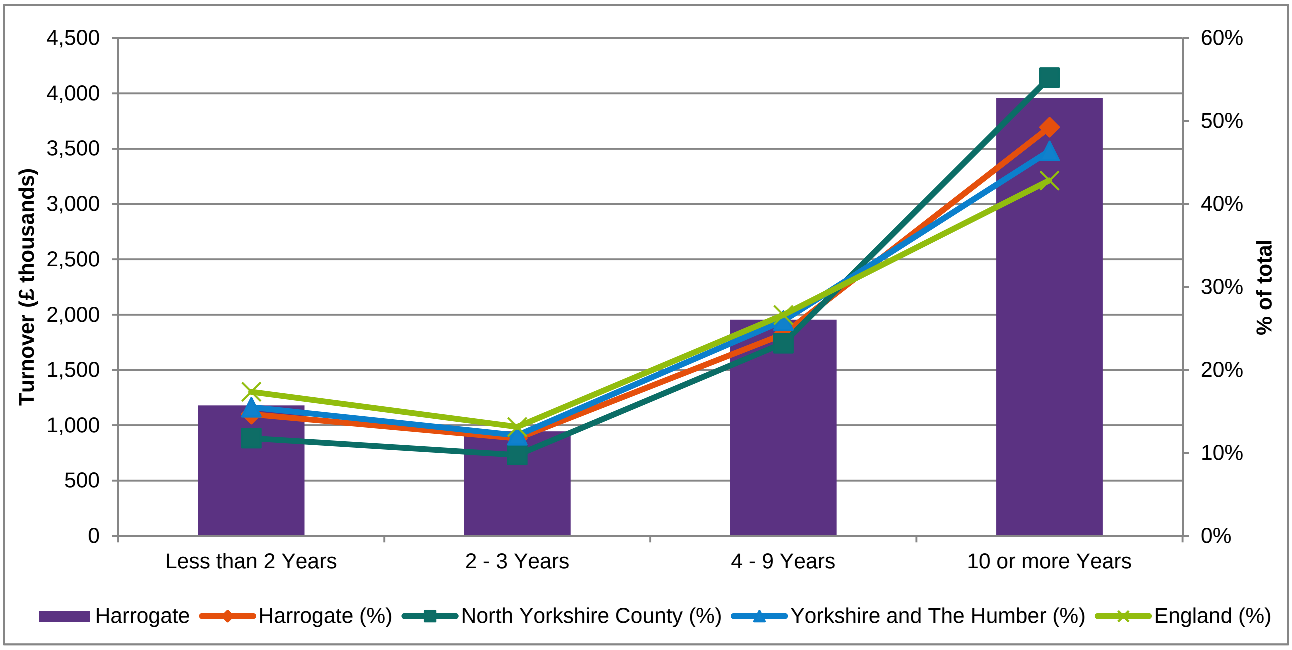
Figure A.11 VAT registrations by turn over size



Source: ONS UK Business: Activity, Size and Location 2013

As seen in Figure A.12 the number of enterprises by turnover size in Harrogate is seen to have a slightly older proportion of businesses when compared to regional and national averages.

Figure A.12 VAT registrations by age of the business



Source: ONS UK Business: Activity, Size and Location 2013

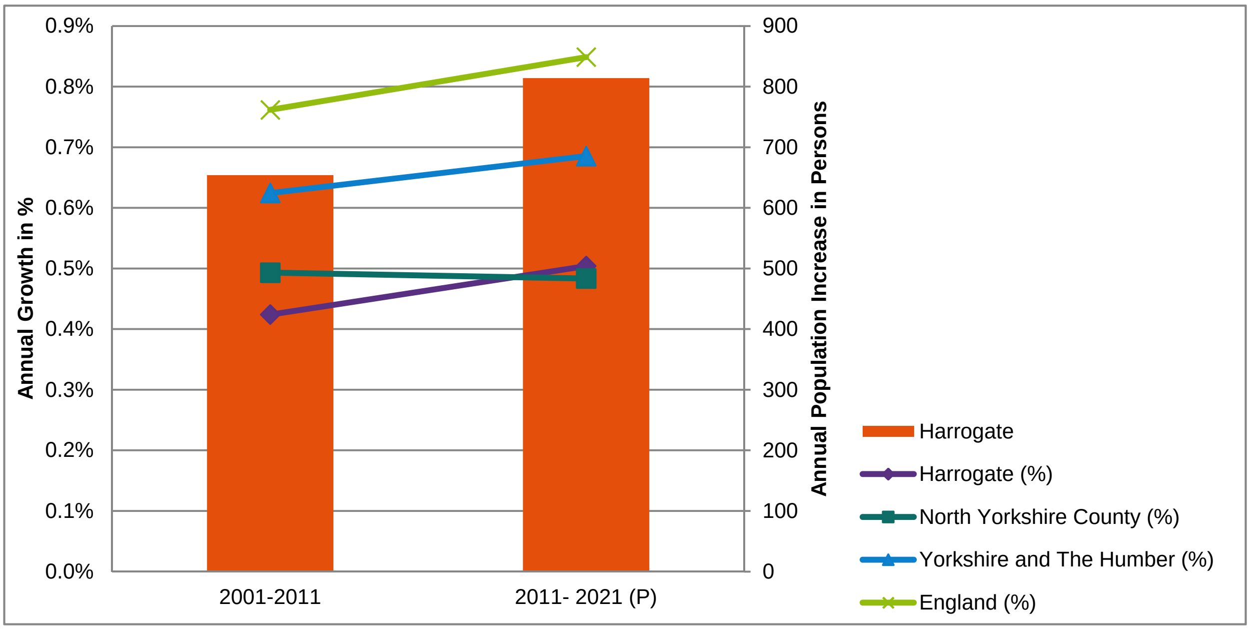
A.5. Population and labour market

Population and labour market in Harrogate District

This section refers to the resident population in the study area (i.e. those living in the study area). Based on the census benchmark, in 2011 the population of Harrogate District reached approximately 157,869, an increase of 4% since 2001 when population stood at 151,329. Annual population growth in Harrogate District (0.4%) has been substantially lower than both regionally (0.6%) and nationally (0.8%) and saw an annual increase of 650 persons, as shown in Figure A.13. The ONS projects that the population growth rate is expected to marginally increase to 0.5% per annum (800 persons) compared to a regional and national average of around 0.8%.

The primarily rural North Yorkshire County is expected to maintain no change in population growth.

Figure A.13 Annual growth rate change in Harrogate District

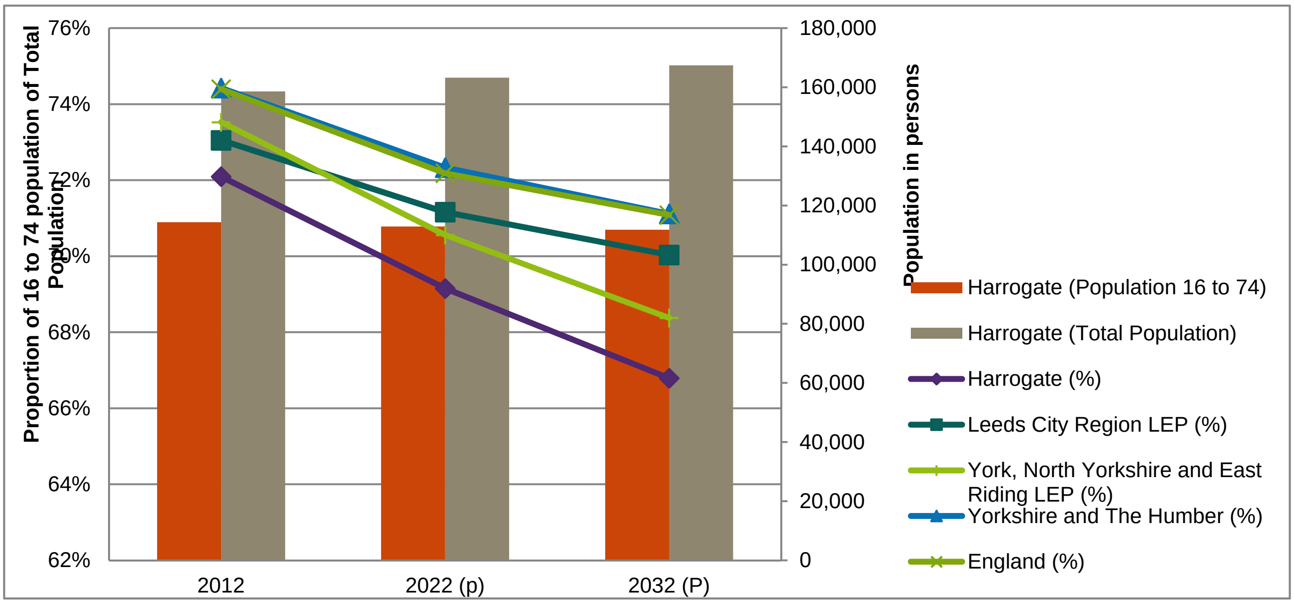


Source: Census 2001, 2011; NOMIS and ONS interim-population projects 2012 (census 2011 adjusted)

Figure A.14 shows that the age of the population in Harrogate District has a different age structure when compared to the surrounding region. The proportion of Harrogate's working-age population is expected to see a decline over the next two decades has been assessed for competitiveness against Leeds City Region LEP and York, North Yorkshire and East Riding LEP. This is substantially higher than the comparative decline in working age population witnessed in the two LEP's, and at region and national level. The Leeds City Region is expected to see the least reduction in working-age population.

It will be important to ensure that the aging population growth anticipated for the District over the next decade is matched by a commensurate increase in local job opportunities. This will be particularly important in encouraging a sustainable and balanced local economy in the District.

Figure A.14 Working age population projection (Aged 16 to 74)

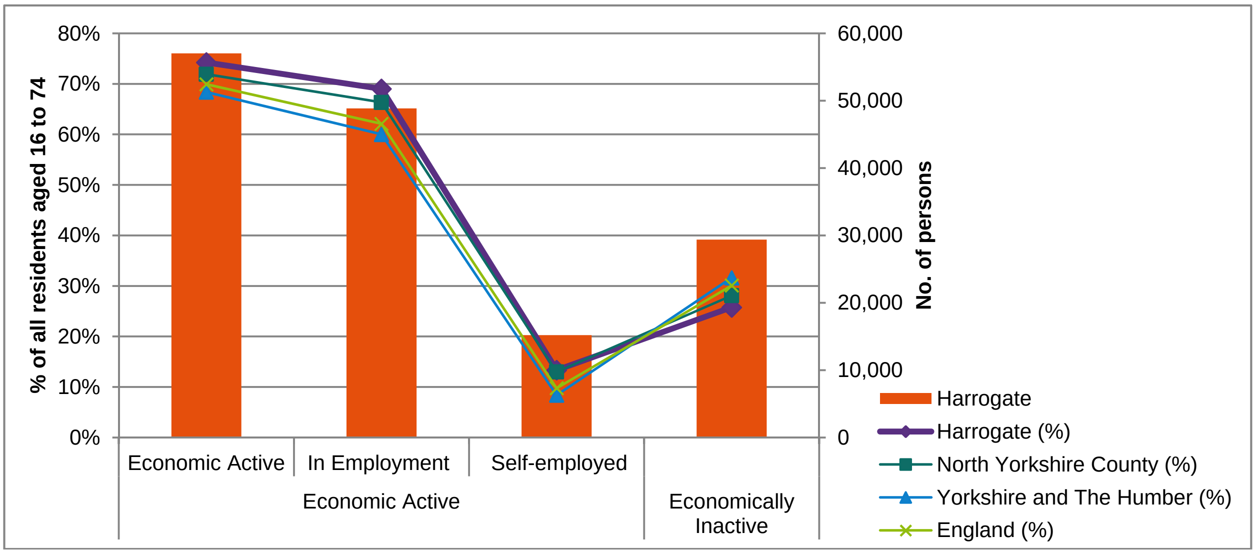


Source: ONS 2012 subnational population projections (2012-2037 extract)

Economic activity

The level of economic activity, often referred to as the available workforce, is the sum of working age population who are either in employment, or actively looking for employment. The economic activity rate is calculated by the quotient of workforce to working age population, and can be regarded as a measure of economic participation. Table A.4 details economic activity levels and rates for Harrogate District and the wider areas.

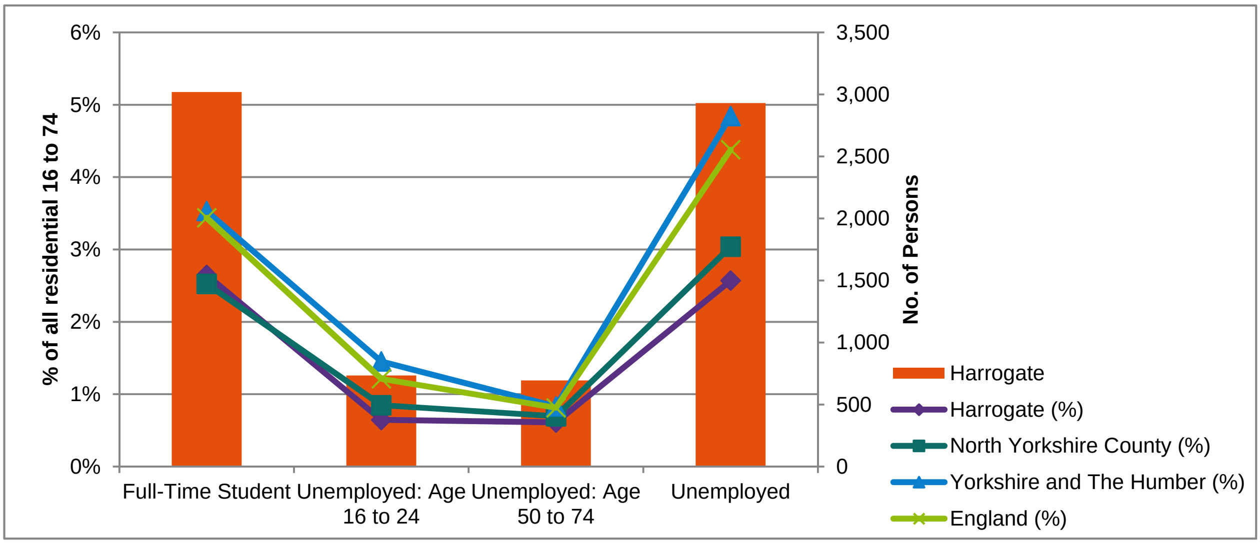
Figure A.15 Population economically active, self-employment and inactive



Source: NOMIS Census 2011

The economically active proportion in Harrogate District and the County is marginally higher at 74% when compared to region and England as a whole as seen in Figure A.15. Harrogate and the County has a higher proportion in employment and self-employed when compared to the wider region. The inactive population is lower in comparison, and the District has an unemployed population of only 3% as compared to the Yorkshire and The Humber average of 5%.

Figure A.16 Economically inactive and unemployed



Source: NOMIS Census 2011

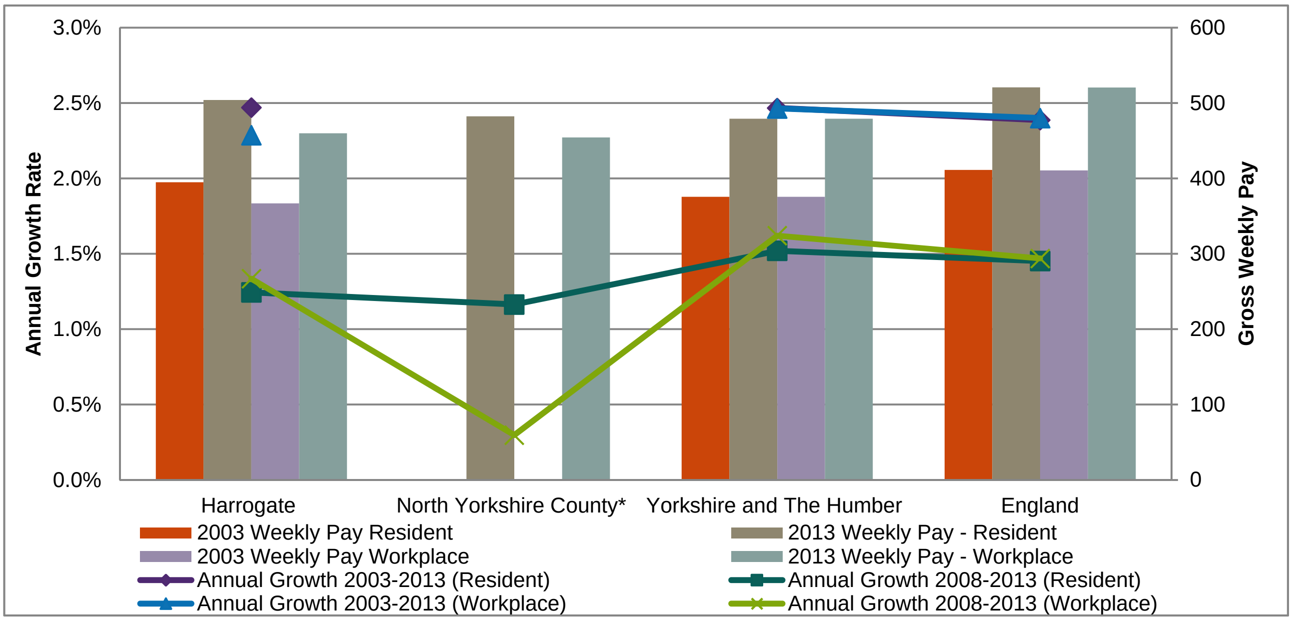
Although Harrogate District is found to have a smaller proportion of economically in-active population when compared to the wider area, the main source of inactive population is in the population aged between 50 to 74 years, as seen in Figure A.16. The relatively small proportion of full-time students may lead to a long-term skills shortfall for the District.

Wages

Figure A.17 shows the median level of gross weekly pay in Harrogate District, North Yorkshire, Yorkshire and The Humber and England. It shows that the residence weekly pay in the District is above the county and regional median. The workplace weekly pay has remained below the regional and county median. In the last 5 years the county has experienced a substantial drop in growth of workplace weekly pay which has not been seen in the Harrogate District. Although annual growth has not matched the regional or national average over the last 5 years, the 10 year period has seen above regional average growth.

Residence-based pay in Harrogate District (that is, the weekly pay for those living in the District but not necessarily working there) is above workplace-based pay (that is, for people working in the study area). The workplace pay average is marginally lower that the regional average and may be at risk of losing out to regional centres – commuting out of Harrogate District due to the higher paid jobs.

Figure A.17 Gross weekly pay £ (median, full time workers)[15]



Source: Annual Survey of Hours and Earnings – Resident and Workplace analysis

Occupational profile

Table A.9 shows the occupational profile for Harrogate District, the county, region and England at 2011. The local authority area has a slightly higher proportion of the economically active population employed as managers and higher professional occupations, as well as managerial/administrative occupations. The lighter shades show a higher proportion when compared to the wider region. The District and county share a higher a proportion of higher managerial, professional and administrative profiles when compared to the region and England.

Table A.9 Occupational profile

	Harrogate (%)	North Yorkshire County (%)	Yorkshire and The Humber (%)	England (%)
Large employers and higher managerial and administrative occupations	4%	3%	2%	3%
Higher professional occupations	11%	9%	8%	9%

[15] Gross weekly pay available at a county level only from 2008

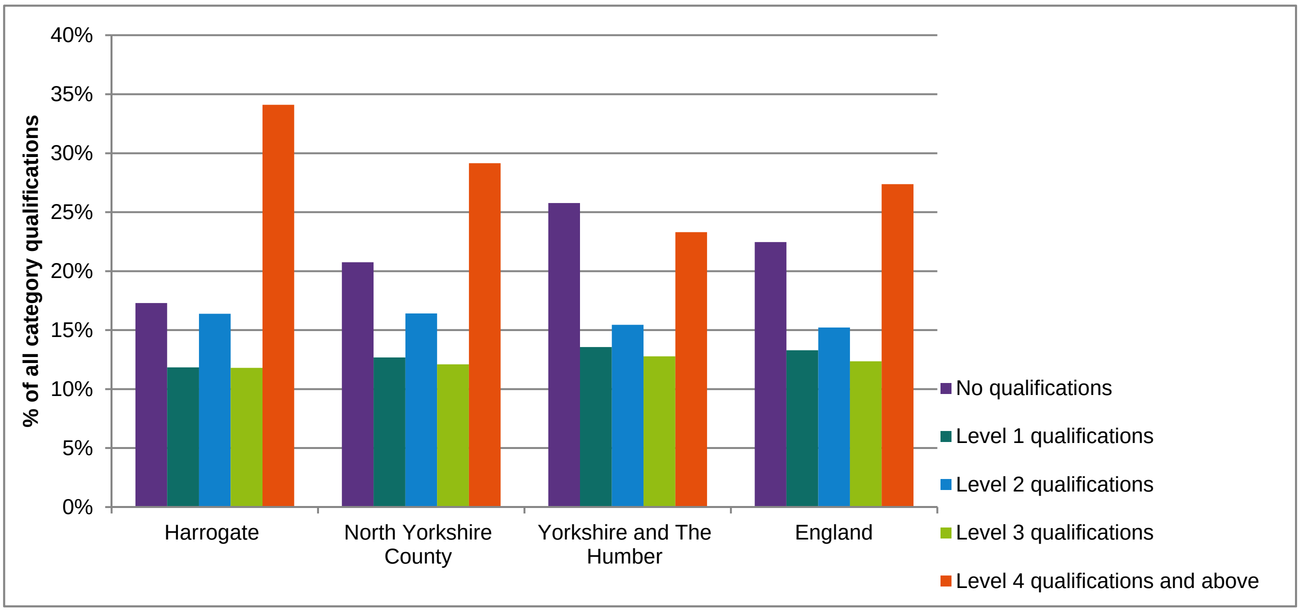
	Harrogate (%)	North Yorkshire County (%)	Yorkshire and The Humber (%)	England (%)
Lower managerial, administrative and professional occupations	28%	25%	22%	24%
Intermediate occupations	14%	14%	14%	15%
Small employers and own account workers	13%	14%	10%	11%
Lower supervisory and technical occupations	7%	8%	9%	8%
Semi-routine occupations	14%	15%	18%	16%
Total	100%	100%	100%	100%

Source: Census 2011; NOMIS

Qualifications

Figure A.18 looks at the qualification levels of Harrogate District working age residents compared to the wider areas. The local authority has a well-qualified resident workforce. The District had the highest proportion of the resident workforce with level 4+ qualifications, forming a third of total working age population. The District is higher skilled when compared to the wider region, and has the lowest proportion of working age population with no qualifications in the region.

Figure A.18 Qualifications as a percentage of the relevant working age population (2012)



Source: Department for Education (Annual Population Survey)

B-class activities and SICs

B Use class activities are categorised as follows:

Class B1 – Business - Use for all or any of the following purposes:

(a) as an office other than a use within Class A2 (financial and professional services),

(b) for research and development of products or processes, or

(c) for any industrial process being a use which can be carried out in any residential area without detriment to the amenity of that area by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit.

Class B2 – General Industrial - Use for the carrying on of an industrial process other than one falling within Class B1 above.

Class B8 – Storage or distribution – Use for storage or as a distribution centre.

Standard Industrial Classification (SIC) - is used to classify business establishments and other statistical units by the type of economic activities they are engaged in, as set out in Table A.10.

Table A.10 B-use class activities

Activities (1992 SIC)		Activities (2007 SIC)	
	D : Manufacturing		**C : Manufacturing**
15	Manufacture of food and beverage	10	Manufacture of food products
16	manufacture of tobacco products	11	Manufacture of beverages
17	manufacture of textiles	12	Manufacture of tobacco products
18	manufacture of apparel	13	Manufacture of textiles
19	tanning and dressing of leather	14	Manufacture of wearing apparel
20	manufacture of wood products	15	Manufacture of leather and related products
21	manufacture of pulp paper and paper products	16	Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials
22	publishing and printing	17	Manufacture of paper and paper products
23	manufacture of coke and petroleum	18	Printing and reproduction of recorded media
24	manufacture of chemicals and chemical products	19	Manufacture of coke and refined petroleum products
25	manufacture of rubber and plastics	20	Manufacture of chemicals and chemical products
26	manufacture of other non-metallic mineral products	21	Manufacture of basic pharmaceutical products and pharmaceutical preparations
27	manufacture of basic metals	22	Manufacture of rubber and plastic products
28	manufacture of fabricated metal products	23	Manufacture of other non-metallic mineral products
29	Manufacture of machinery & equipment	24	Manufacture of basic metals
30	Manufacture office machines & computer	25	Manufacture of fabricated metal products, except machinery and equipment
31	Manufacture of electrical machinery	26	Manufacture of computer, electronic and optical products
32	Manufacture of television & line telephone	27	Manufacture of electrical equipment
33	Manufacture of medical & optical instruments	28	Manufacture of machinery and equipment n.e.c.
34	Manufacture of motor vehicles & trailers	29	Manufacture of motor vehicles, trailers and semi-trailers

Activities (1992 SIC)		Activities (2007 SIC)	
35	Manufacture of other transport equipment	30	Manufacture of other transport equipment
36	Manufacture of furniture & Manufacture not elsewhere classified	31	Manufacture of furniture
37	Recycling	32	Other manufacturing
		33	Repair and installation of machinery and equipment
	E : Electricity, gas and water supply		**E : Water supply; sewerage, waste management and remediation activities**
90	Sewage & refuse disposal	37	Sewerage
		38	Waste collection, treatment and disposal activities; materials recovery
		39	Remediation activities and other waste management services
	F : Construction		**F : Construction**
45	Construction	41	Construction of buildings
		42	Civil engineering
		43	Specialised construction activities
	G : Wholesale/retail trade; repair, etc		**G : Wholesale and retail trade; repair of motor vehicles and motorcycles**
50	Sale maintenance motor vehicle	45	Wholesale and retail trade and repair of motor vehicles and motorcycles
51	Wholesalers trade & commission	46	Wholesale trade, except of motor vehicles and motorcycles
	I : Transport, storage and communication		**H : Transportation and storage**
60	Land transport	49	Land transport
61	Water transport	50	Water transport
62	Air transport	51	Air transport
63	Supporting & auxiliary transport	52	Supporting & auxiliary transport
64	Post & telecommunications	53	Postal and courier activities
			J : Information and communication
72	Computer & related activities	58	Publishing activities
		59	Motion picture, video and television programme activities
		60	Programming and broadcasting activities
		61	Telecommunications
		62	Computer programming, consultancy and related activities
		63	Information service activities
	J : Financial intermediation		**K : Financial and insurance activities**
65	Financial intermediation	64	Financial service activities, except insurance and pension funding
66	Insurance & pension funding	65	Insurance & pension funding

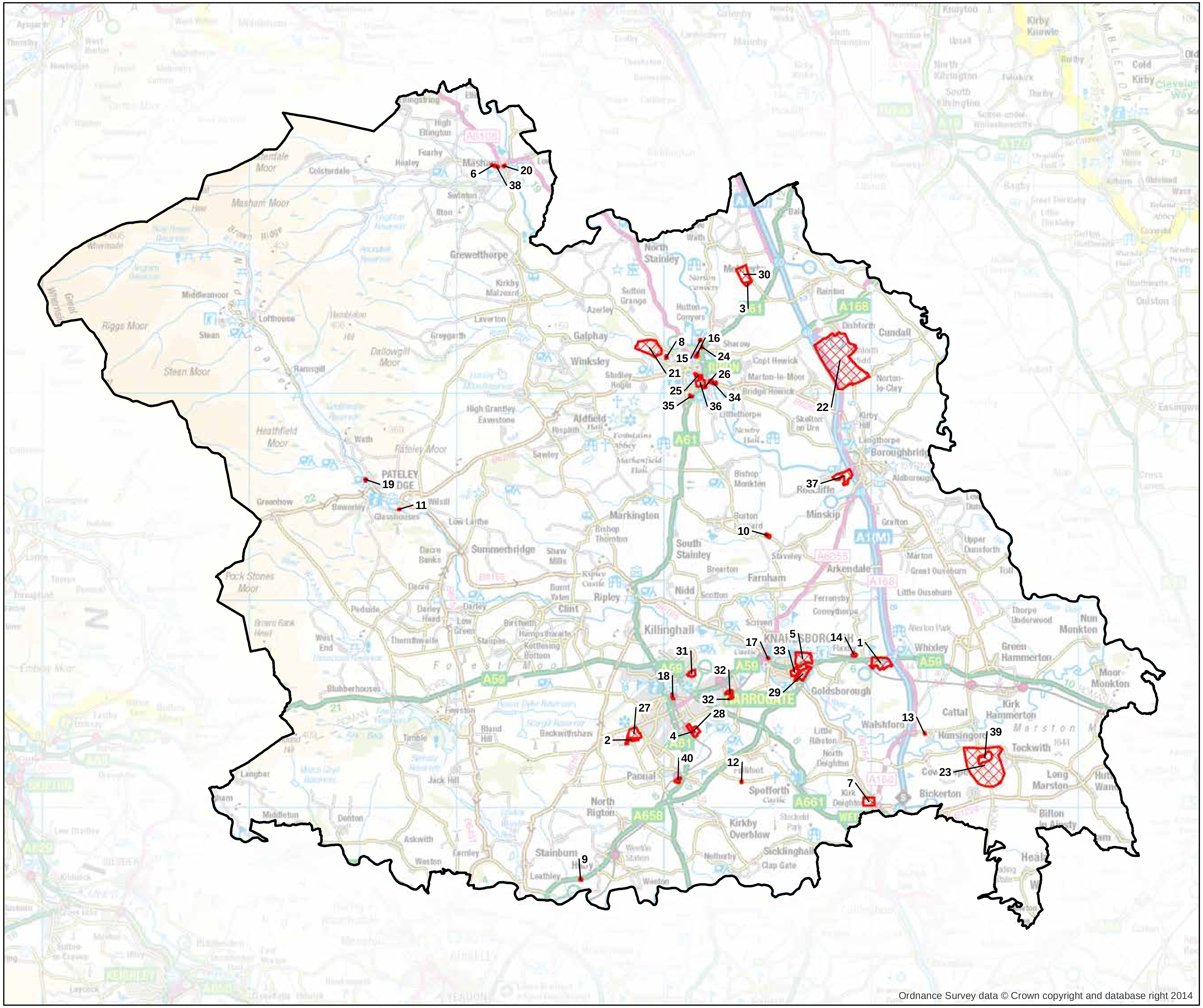
Activities (1992 SIC)		Activities (2007 SIC)	
67	Activities auxiliary to finance	66	Activities auxiliary to financial services and insurance activities
	K : Real estate, renting, business activities		**L : Real estate activities**
70	Real estate activities	68	Real estate activities
			M : Professional, scientific and technical activities
73	Research & development	69	Legal and accounting activities
74	Other business activity	70	Activities of head offices; management consultancy activities
		71	Architectural and engineering activities; technical testing and analysis
		72	Scientific research and development
		73	Advertising and market research
		74	Other professional, scientific and technical activities
			N : Administrative and support service activities
		77	Rental and leasing activities
		78	Employment activities
		79	Travel agency, tour operator and other reservation service and related activities
		80	Security and investigation activities
		81	Services to buildings and landscape activities
		82	Office administrative, office support and other business support activities
	O : Other community, social/personal service		**S : Other service activities**
91	Activities membership organisations	94	Activities of membership organisations
92	Recreational cultural & sport	95	Repair of computers and personal and household goods

Appendix B Site suitability matrix

		Access							Sustainability			Environmental quality of site and surroundings							Market considerations				Composite Value
		Public Transport Access				Strategic Road Network			Sequential test			Site quality & image		Local Amenities		Building Condition/ Fit for Purpose			Present Market-ability		Local Employment Policies	Local Employment Policies	
Site Number	Site Name	Proximity to train network		Proximity to the bus network		Proximity to the strategic road network		Access Score (5 = best, 0 = worst)	Within urban area = Good; Urban Fringe = Fair; rural Location = Poor		Sustain-ability Score (5 = best, 0=worst)	Site quality & image		Access to amenities		Condition of buildings, age		Environ-mental Quality Score	Marketability of B Class Uses	Market Considerations Score	Evaluation against local employment policies	Employment Policies Score	Overall suitability Score %
8	Ash Grove Industrial Estate	Poor	1	Fair	3	Fair	3	2	Good	3	3	Poor	1	Fair	3	Poor	1	2	1	1	3	3	44
9	Riffa Park, Huby	Poor	1	Poor	1	Excellent	5	2	Poor	1	1	Fair	3	Poor	1	Fair	3	2	5	5	1	1	47
10	Jubilee Mills, Copgrove	Poor	1	Poor	1	Poor	1	1	Poor	1	1	Good	4	Poor	1	Good	4	3	3	3	1	1	36
11	Glasshouses Mills	Poor	1	Poor	1	Poor	1	1	Poor	1	1	Poor	1	Poor	1	Poor	1	1	1	1	1	1	20
12	Haggs Farm, Spofforth	Poor	1	Poor	1	Good	4	2	Poor	1	1	Good	4	Poor	1	Good	4	3	4	4	3	3	52
13	Concept Kitchens, Hunsingore	Poor	1	Fair	3	Good	4	3	Poor	1	1	Fair	3	Fair	3	Fair	3	3	2	2	1	1	39
14	Mantons, A59	Poor	1	Good	4	Excellent	5	3	Poor	1	1	Good	4	Poor	1	Good	4	3	4	4	1	1	49
15	The Maltings, Ure Bank Top	Poor	1	Fair	3	Good	4	3	Good	5	5	Fair	3	Fair	3	Fair	3	3	2	2	3	3	63
17	Former Cattle Market,	Good	4	Excellent	5	Good	4	4	Good	5	5	Fair	3	Good	4	Fair	3	3	4	4	5	5	87
18	Station Parade, Harrogate	Excellent	5	Excellent	5	Good	4	5	Good	5	5	Fair	3	Excellent	5	Fair	3	4	4	4	5	5	89
19	Coal Yard and Highways Depot	Poor	1	Excellent	5	Poor	1	2	Poor	1	1	Fair	3	Fair	3	Fair	3	3	2	2	3	3	45
25	Bondgate Regeneration Area	Poor	1	Excellent	5	Good	4	3	Good	5	5	Fair	3	Excellent	5	Fair	3	4	3	3	3	3	72
27	Cardale Park	Poor	1	Excellent	5	Fair	3	3	Fair	3	3	High	5	Excellent	5	High	5	5	5	5	5	5	84
28	Hornbeam Park	Excellent	5	Excellent	5	Good	4	5	Good	5	5	Good	4	Excellent	5	Good	4	4	5	5	5	5	96
29	St James Park, Knaresborough	Poor	1	Good	4	Excellent	5	3	Fair	3	3	Good	4	Good	4	Good	4	4	5	5	5	5	81
30	Melmerby Business Park	Poor	1	Excellent	5	Poor	1	2	Poor	1	1	Good	4	Good	4	Good	4	4	4	4	5	5	65
31	Claro Park	Poor	1	Fair	3	Good	4	3	Fair	3	3	Fair	3	Fair	3	Fair	3	3	4	4	5	5	71
32	Plumpton Park	Poor	1	Good	4	Good	4	3	Good	5	5	Fair	3	Fair	3	Fair	3	3	5	5	5	5	84
33	Manse Lane	Poor	1	Fair	3	Excellent	5	3	Good	5	5	Fair	3	Fair	3	Fair	3	3	3	3	3	3	68

		Access							Sustainability			Environmental quality of site and surroundings							Market considerations				Composite Value
		Public Transport Access				Strategic Road Network			Sequential test			Site quality & image		Local Amenities		Building Condition/ Fit for Purpose			Present Market-ability		Local Employment Policies	Local Employment Policies	
Site Number	Site Name	Proximity to train network		Proximity to the bus network		Proximity to the strategic road network		Access Score (5 = best, 0 = worst)	Within urban area = Good; Urban Fringe = Fair; rural Location = Poor		Sustain-ability Score (5 = best, 0=worst)	Site quality & image		Access to amenities		Condition of buildings, age		Environ-mental Quality Score	Marketability of B Class Uses	Market Considerations Score	Evaluation against local employment policies	Employment Policies Score	Overall suitability Score %
34	Boroughbridge Road, Ripon	Poor	1	Good	4	Good	4	3	Fair	3	3	High	5	Poor	1	High	5	4	4	4		0	55
36	Dallamires Lane, Ripon	Poor	1	Good	4	Excellent	5	3	Fair	3	3	Fair	3	Fair	3	Fair	3	3	4	4		0	53
37	Bar Lane, Boroughbridge	Poor	1	Poor	1	Good	4	2	Fair	3	3	Fair	3	Good	4	Fair	3	3	4	4	5	5	69
38	Fearby Road, Masham	Poor	1	Fair	3	Poor	1	2	Poor	1	1	Good	4	Fair	3	Good	4	4	2	2	3	3	45
39	Marston Business Park	Poor	1	Poor	1	Poor	1	1	Poor	1	1	Fair	3	Good	4	Fair	3	3	2	2	3	3	41
40	Dunlopillo, Pannal	Good	4	Good	4	Good	4	4	Fair	3	3	Fair	3	Good	4	Fair	3	3	3	3	1	1	57

Appendix C Overview map



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Legend

Employment Review Site

Harrogate Borough Boundary

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Harrogate Sites for Review

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Drawing Number	Rev
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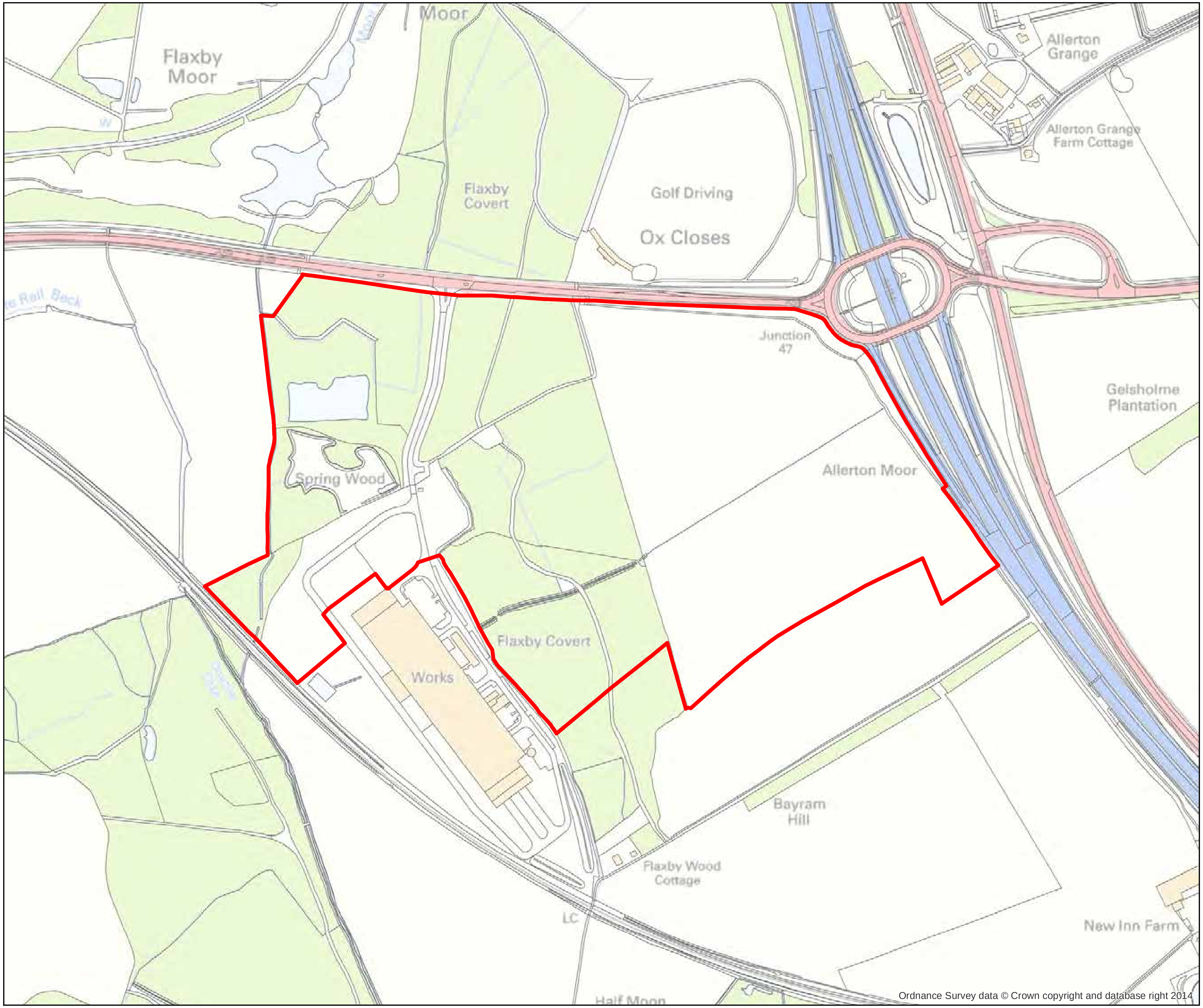
Appendix D Site maps



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Vacant / Derelict Land

Vacant Employment Floorspace

Harrogate Borough Boundary

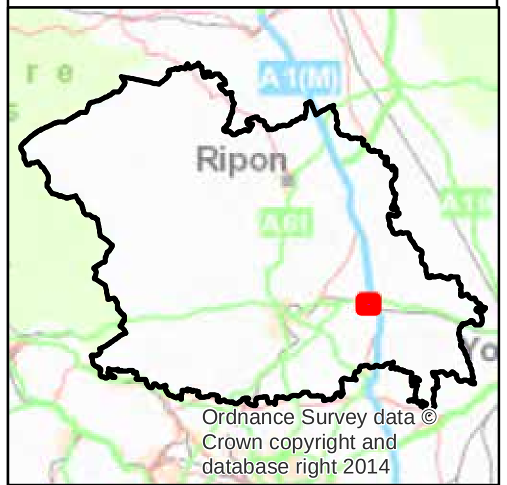

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Figure 1
Flaxby

416,696.37sqm

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Drawing Number	Rev
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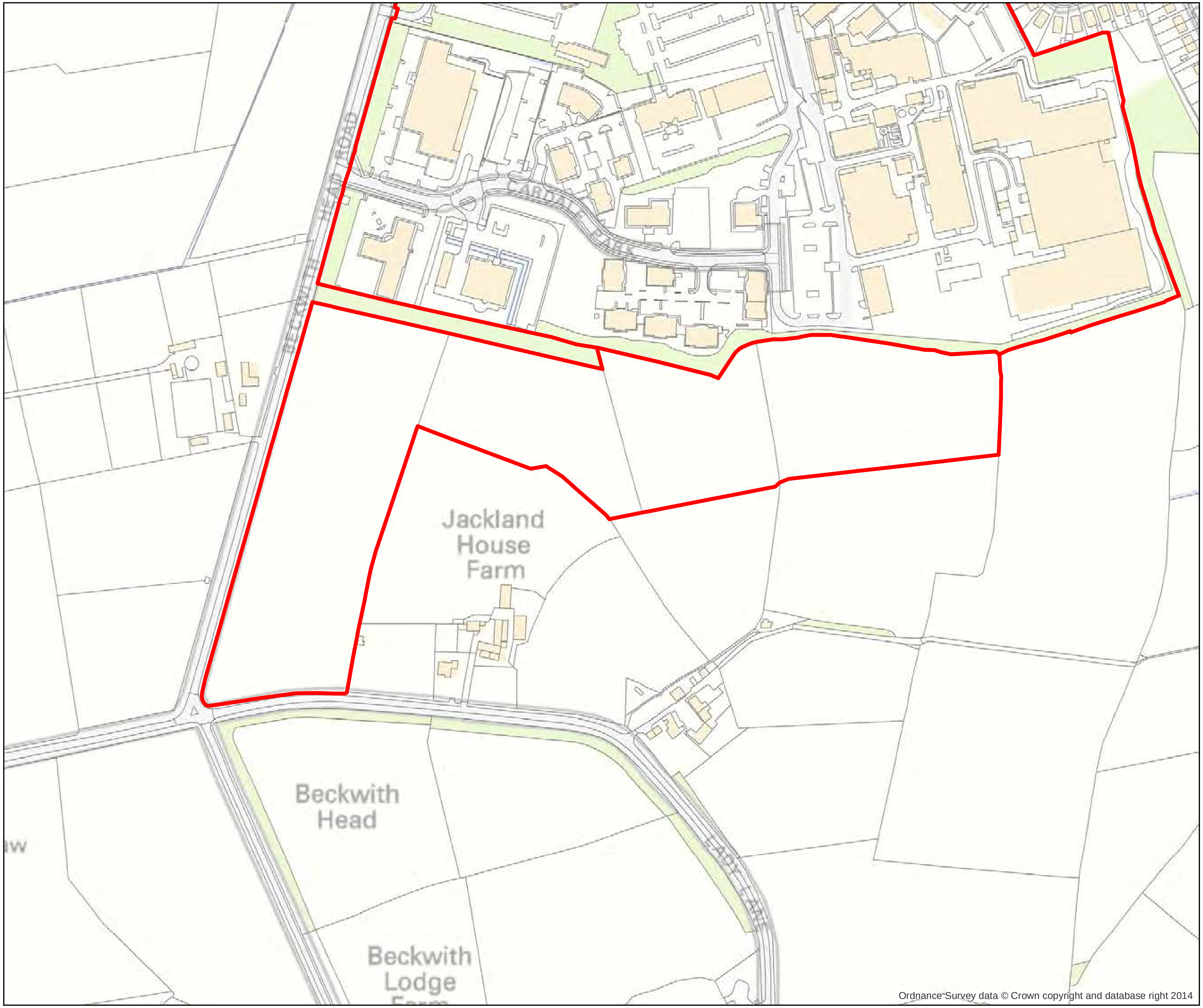

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- Vacant / Derelict Land
- Vacant Employment Floorspace
- Harrogate Borough Boundary

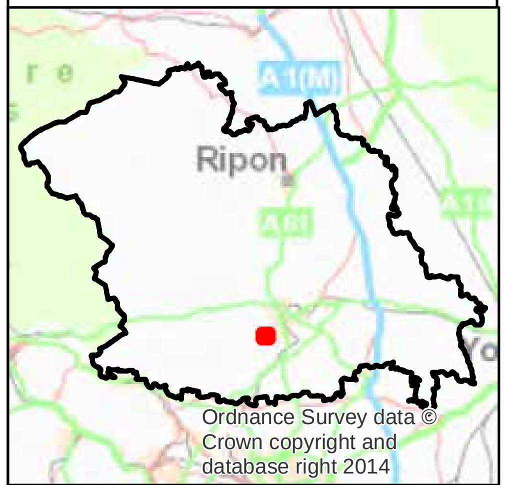

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Figure 2
Land to South of Cardale Park

79,291.41sqm

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Employment Review Site

Vacant / Derelict Land

Vacant Employment Floorspace

Harrogate Borough Boundary

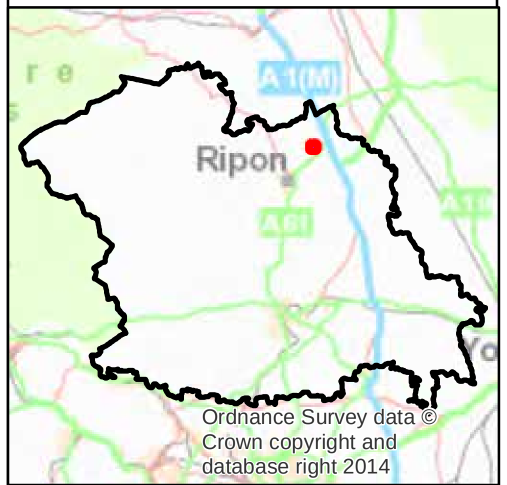

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Figure 3
Land South of Barker Business Park, Melmerby

40,907.86sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
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Drawing Number	Rev
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Employment Review Site

Vacant / Derelict Land

Vacant Employment Floorspace

Harrogate Borough Boundary

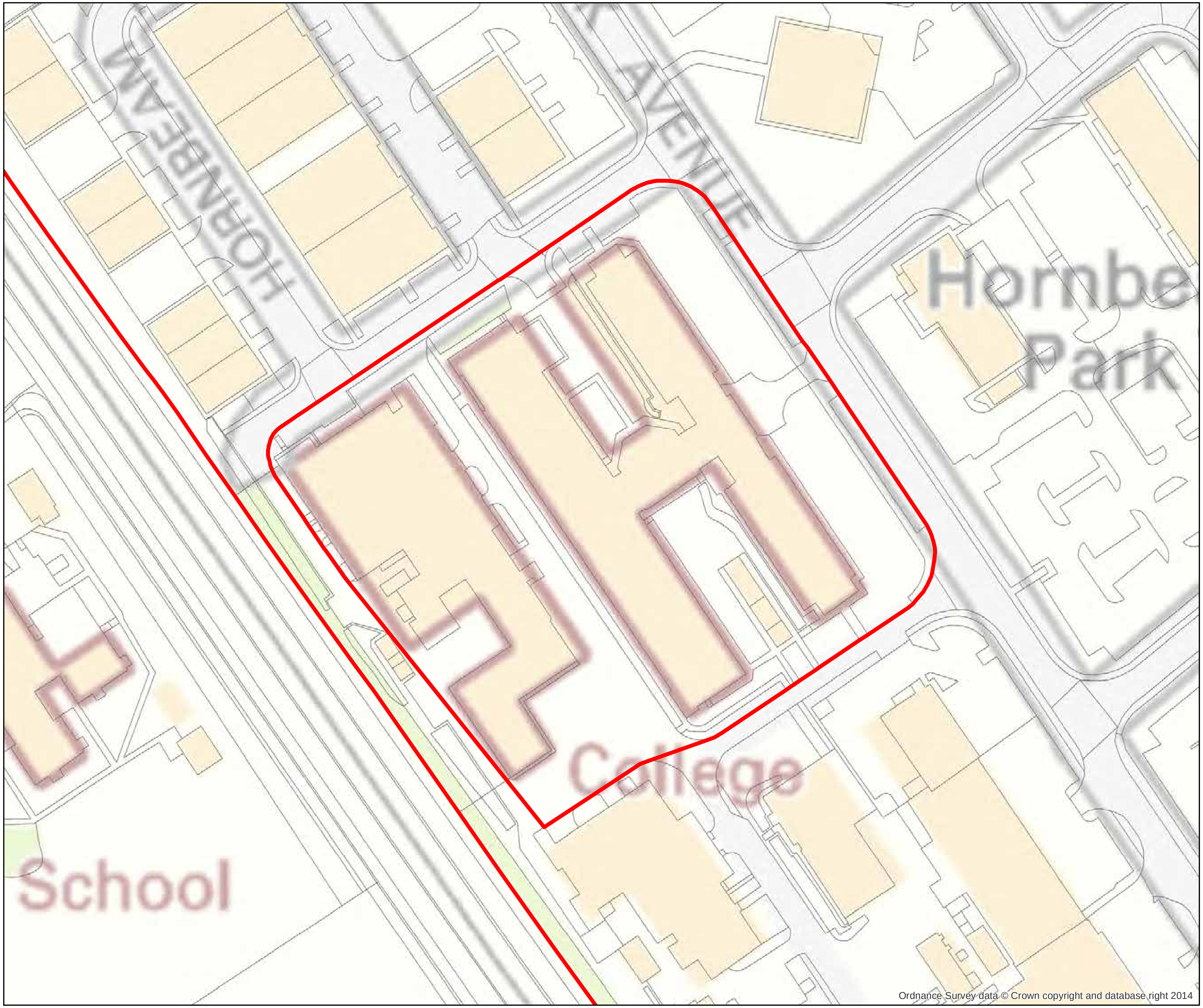

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Figure 4
Harrogate College

16,120.28sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
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Drawing Number: Figure 4 - GEO004

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Employment Review Site

Vacant / Derelict Land

Vacant Employment Floorspace

Harrogate Borough Boundary

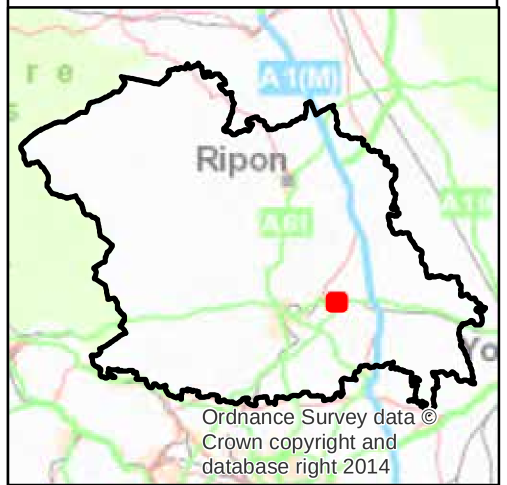

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Figure 5
Manse Farm

420,740.29sqm

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Drawing Number	Rev
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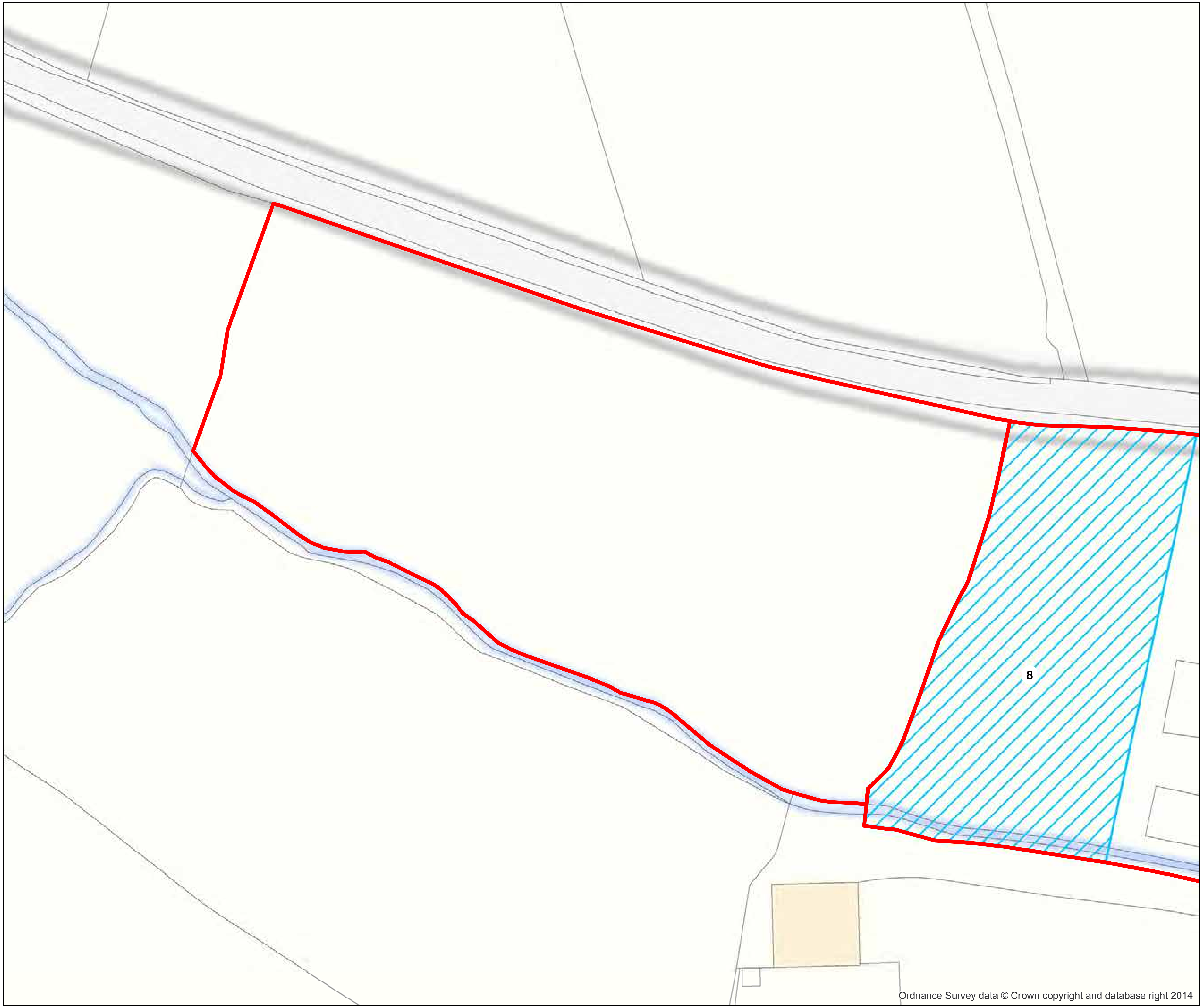

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Figure 6
Fearby Road, Masham – HDLP Allocation

13,633.88sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
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Drawing Number: Figure 6 - GEO006

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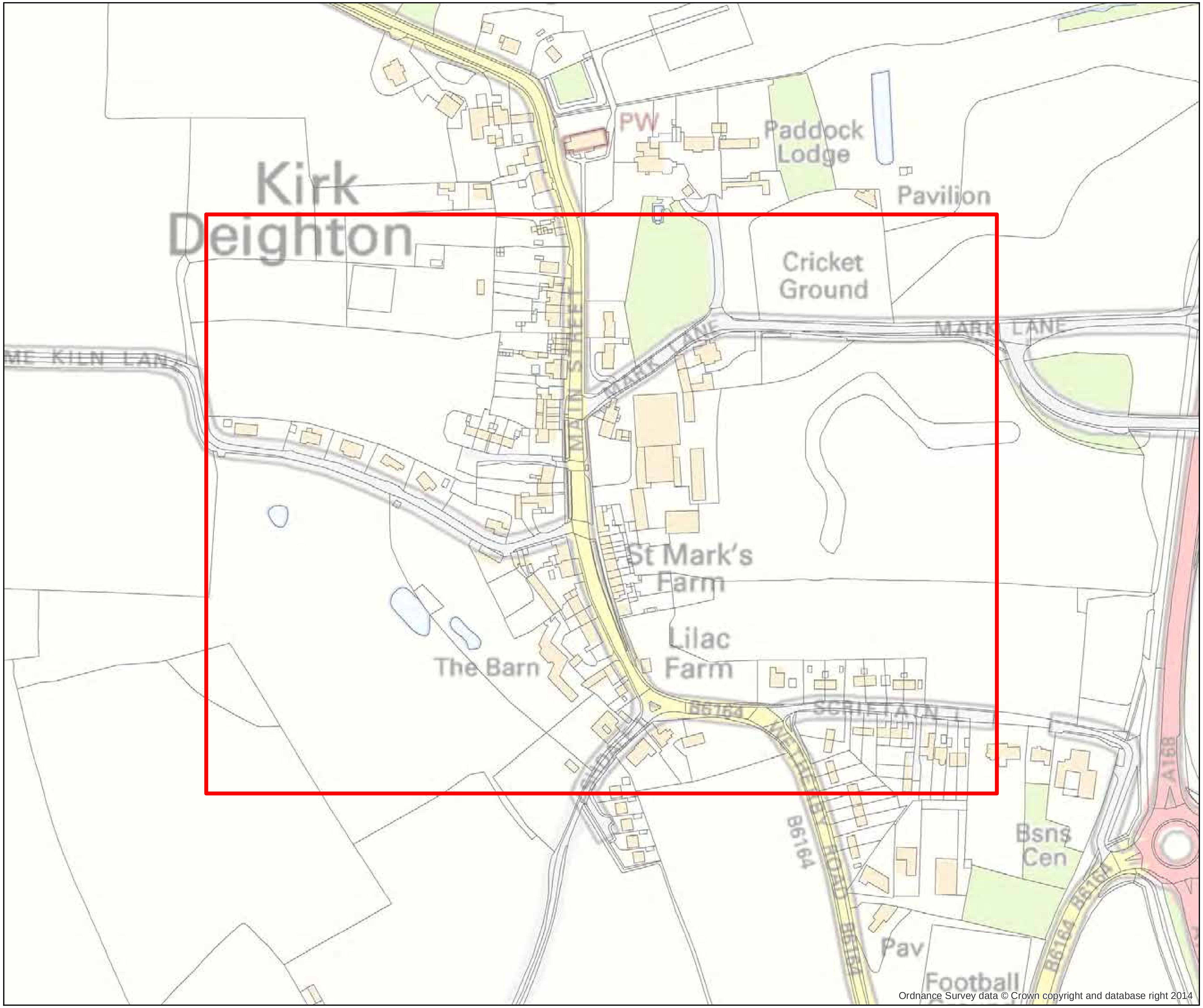

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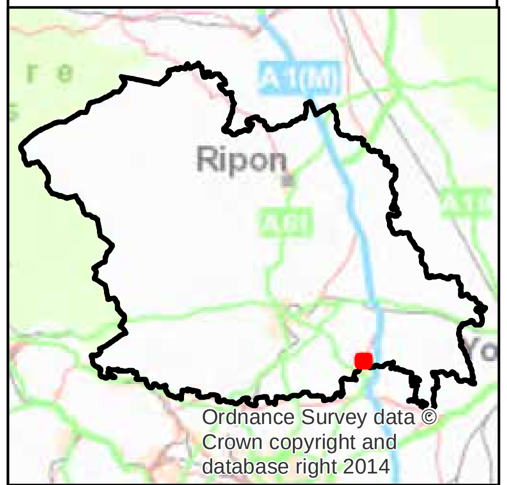

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Figure 7
Area around Kirk Deighton

212,575.79sqm

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Drawing Number	Rev
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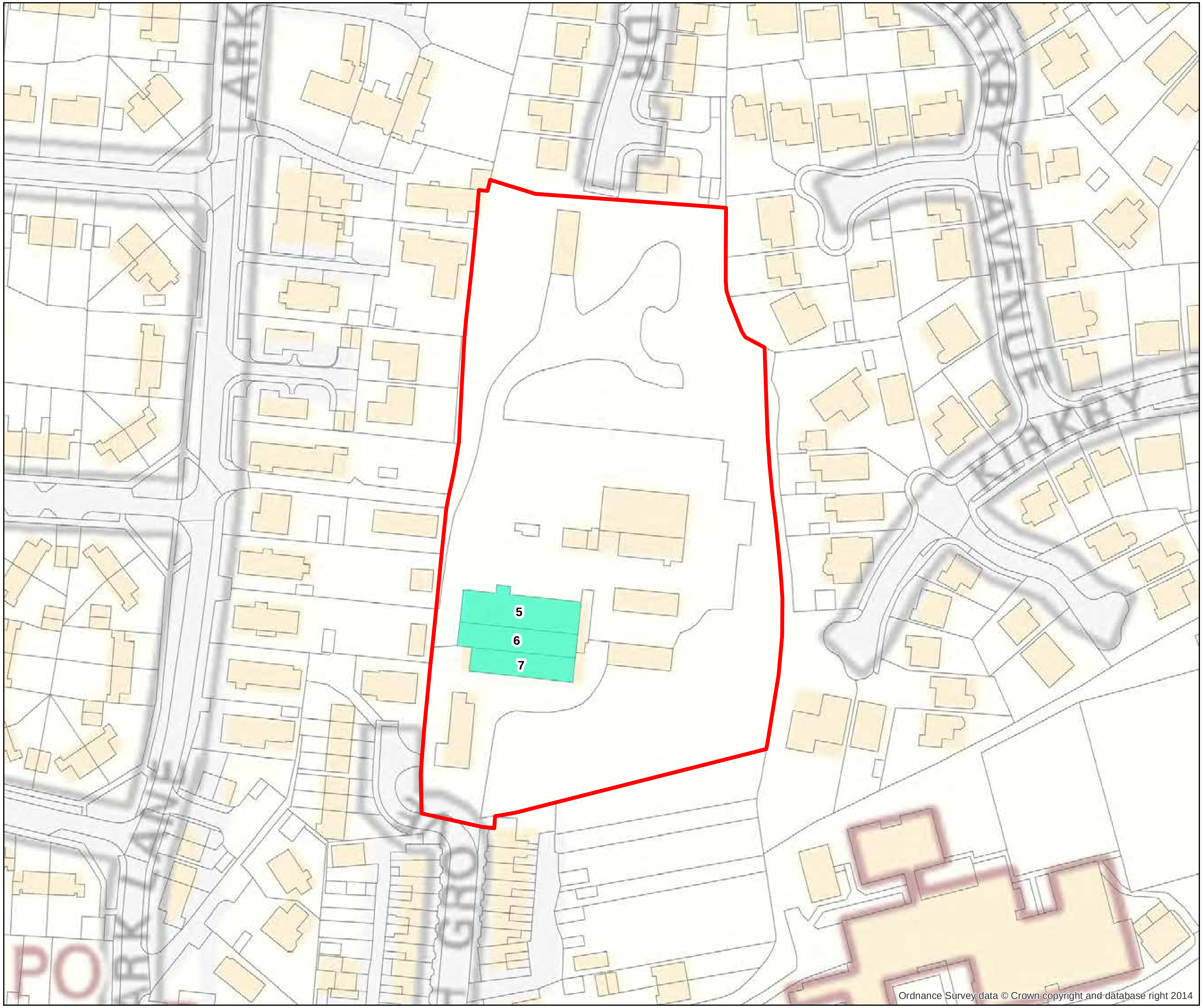

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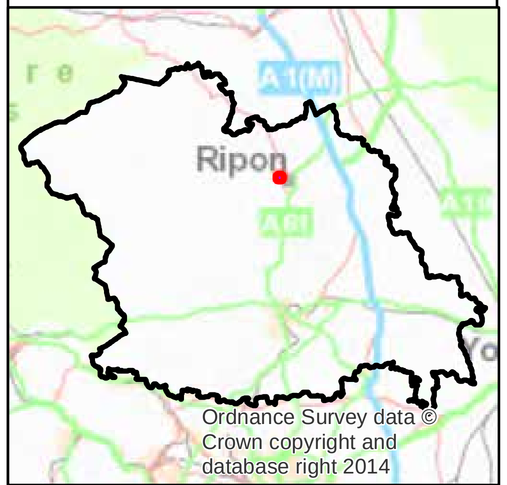

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Figure 8
Ash Grove Industrial Estate, Ripon

15,014.18sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
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Drawing Number	Rev
Figure 8 - GEO008	00

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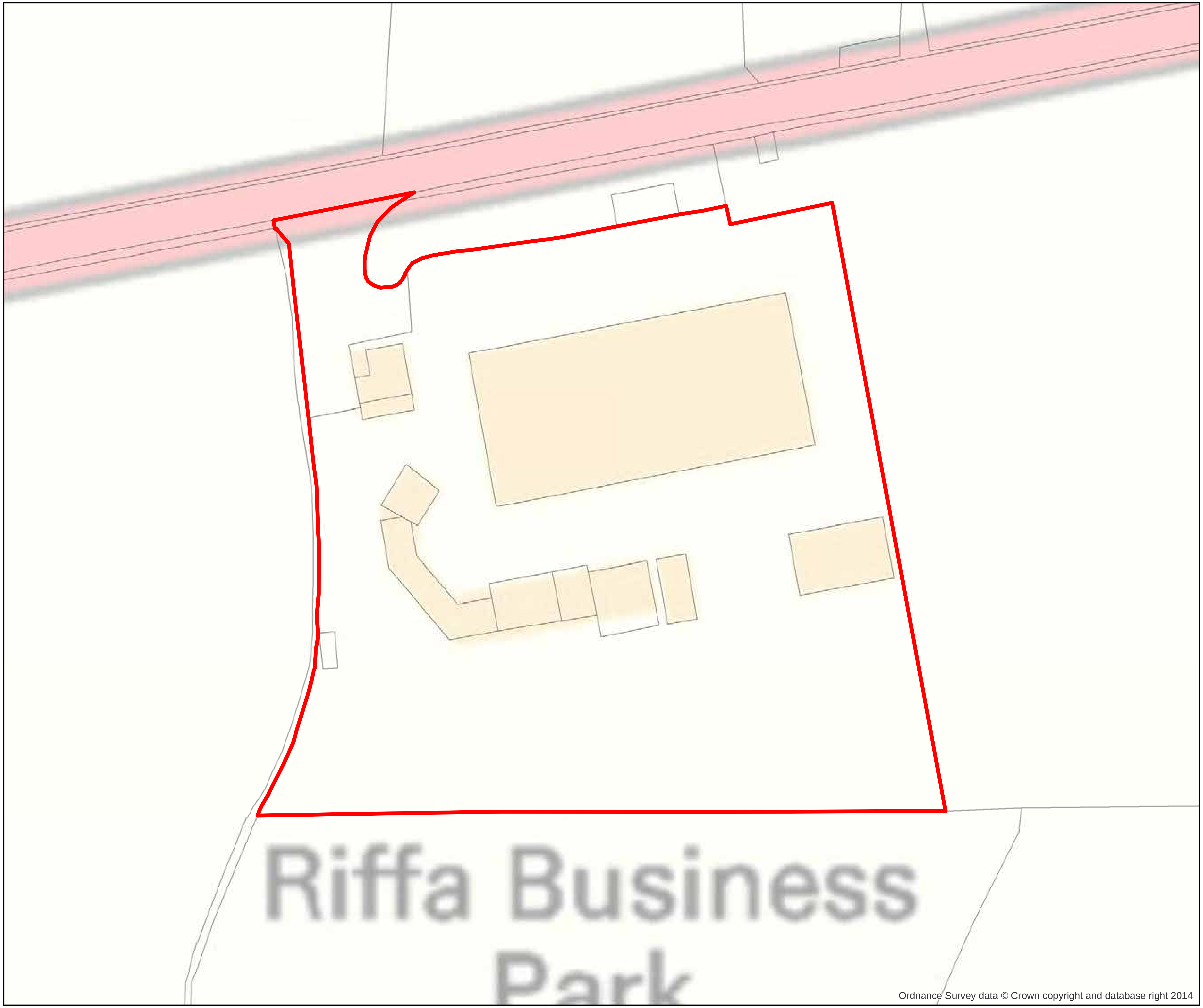

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Figure 9
Riffa Park, Huby

13,549.84sqm

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Drawing Number	Rev
Figure 9 - GEO009	00

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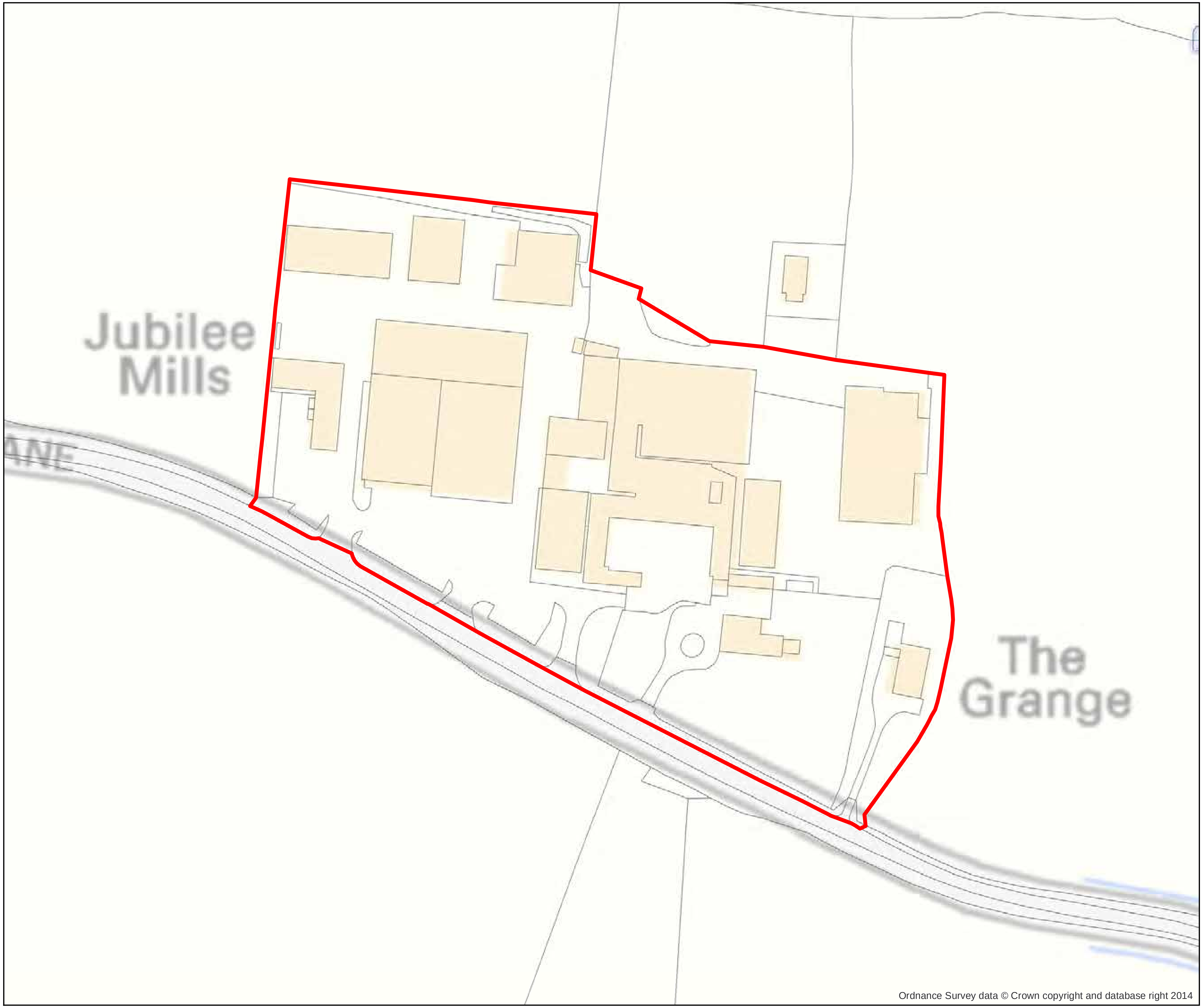

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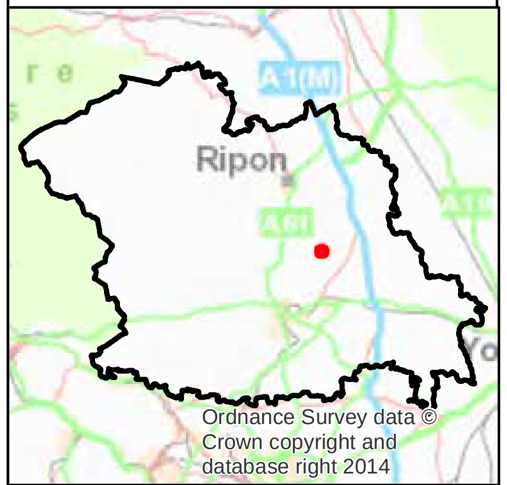

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Figure 10
Jubilee Mills, Copgrove

32,535.21sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
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Drawing Number: Figure 10 - GEO010
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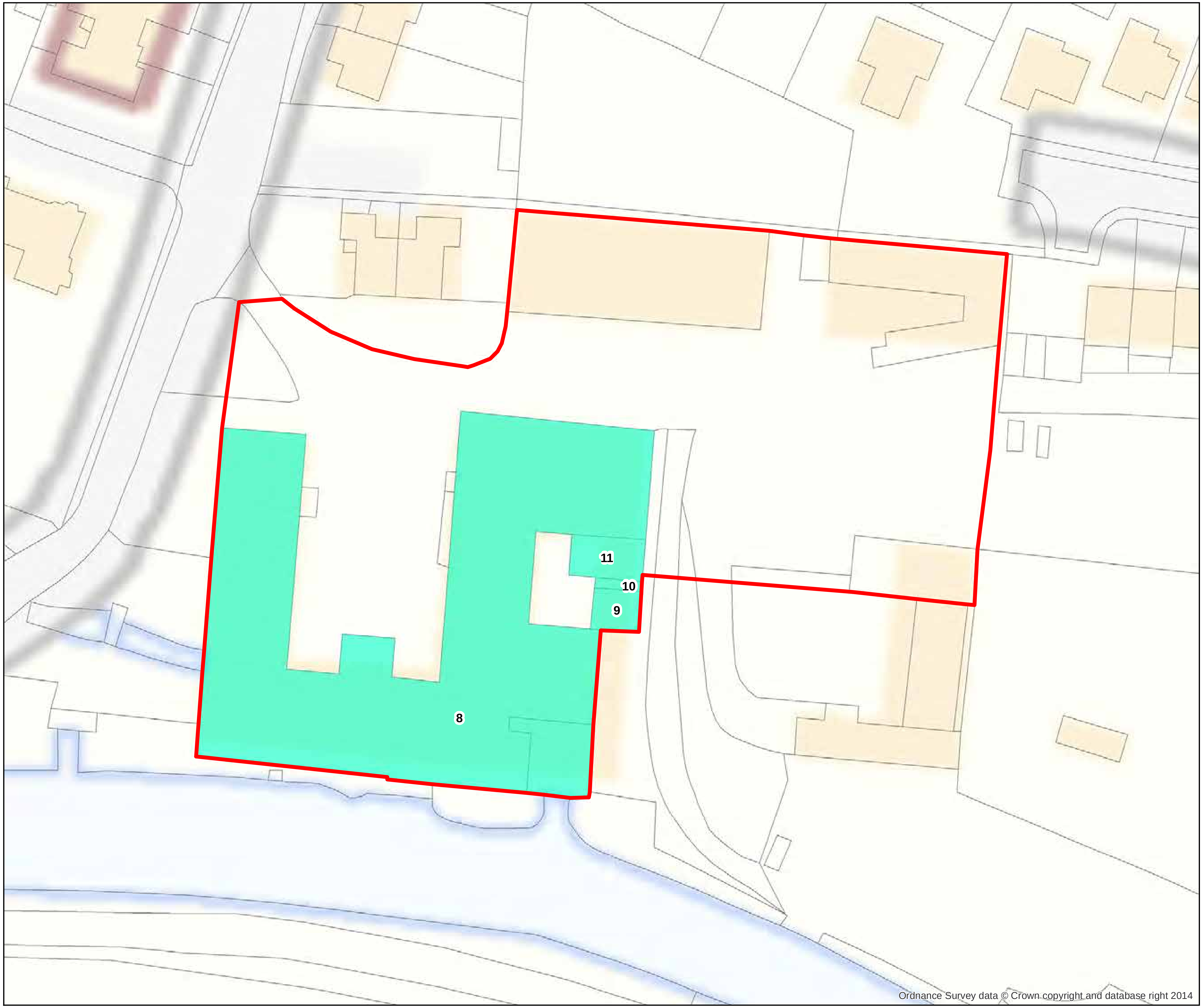

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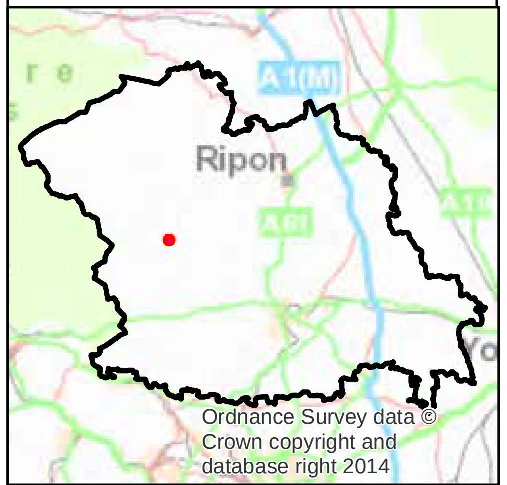

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Figure 11
Glasshouses Mills, Glasshouses

6,488.43sqm

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Drawing Number	Rev
Figure 11 - GEO011	00

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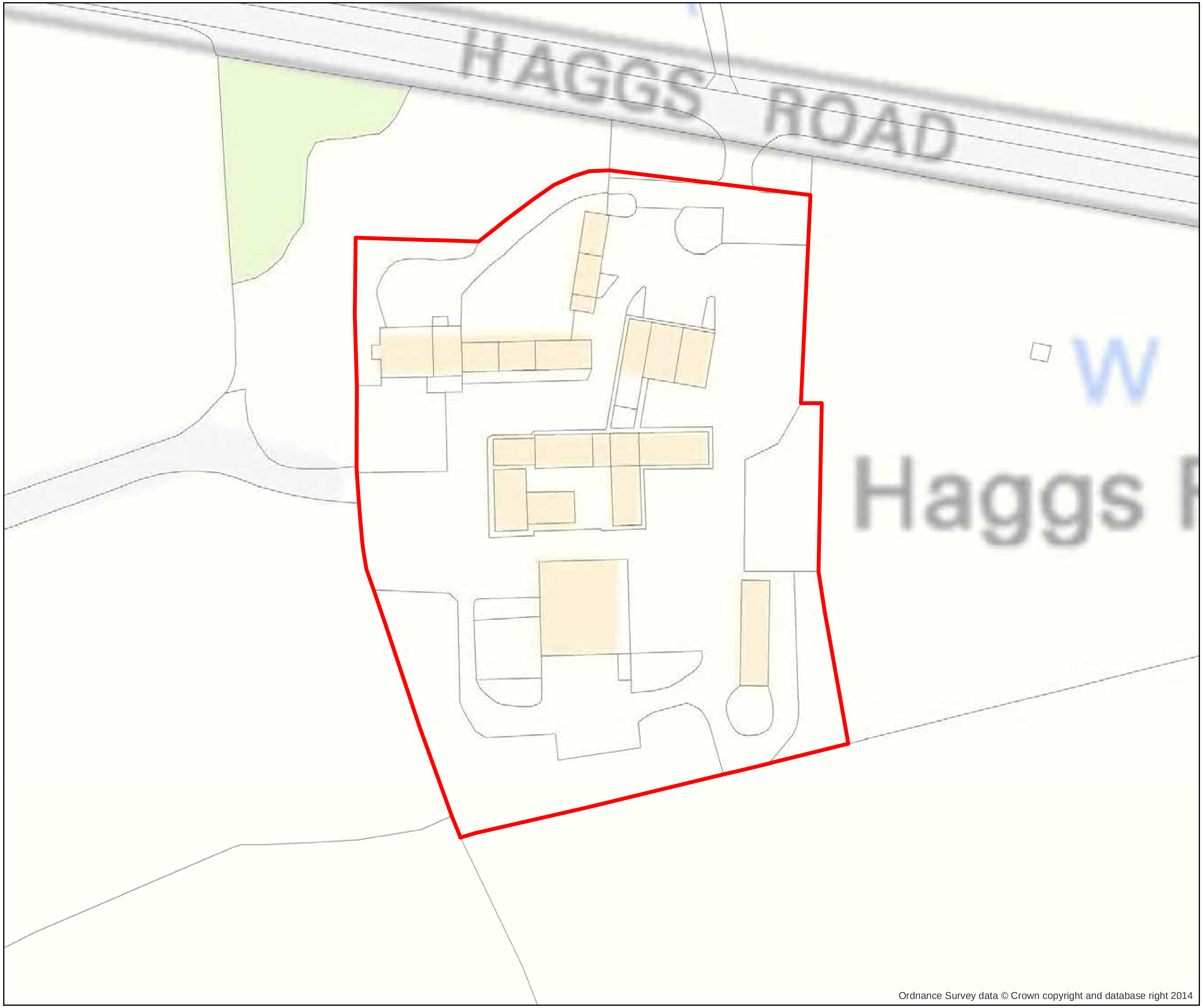

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Vacant Employment Floorspace

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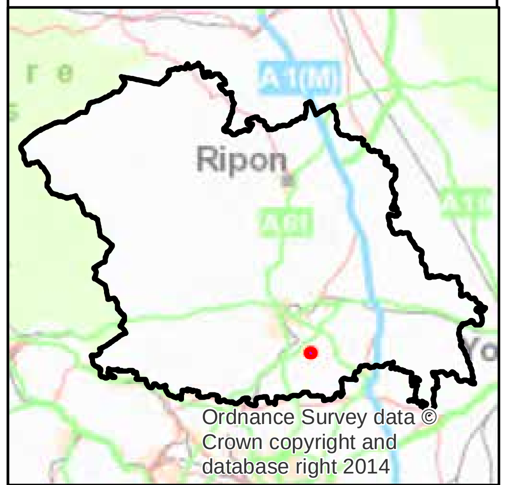

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Figure 12
Haggs Farm, Haggs Rd, Spofforth

10,403.47sqm

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Drawing Number	Rev
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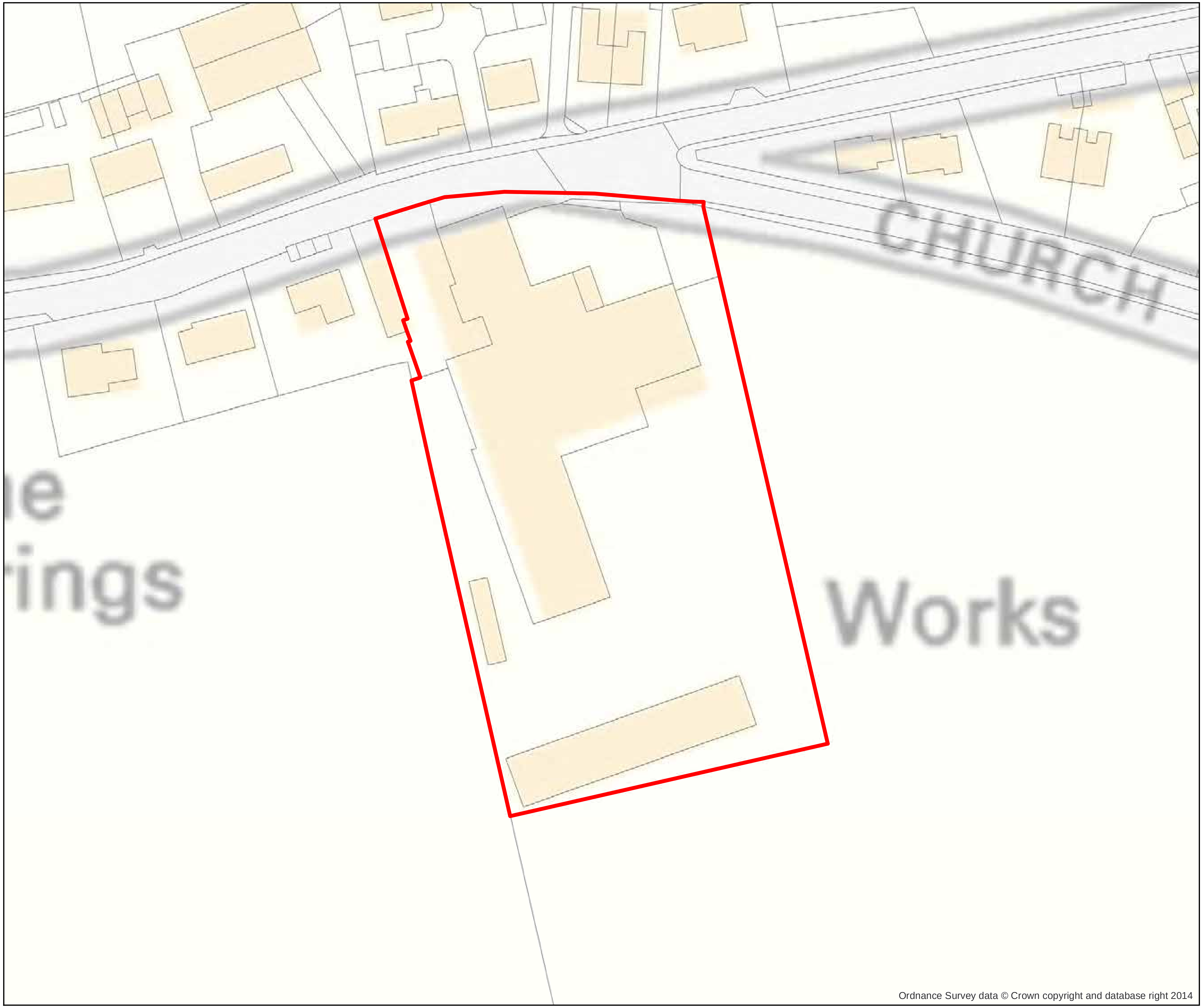

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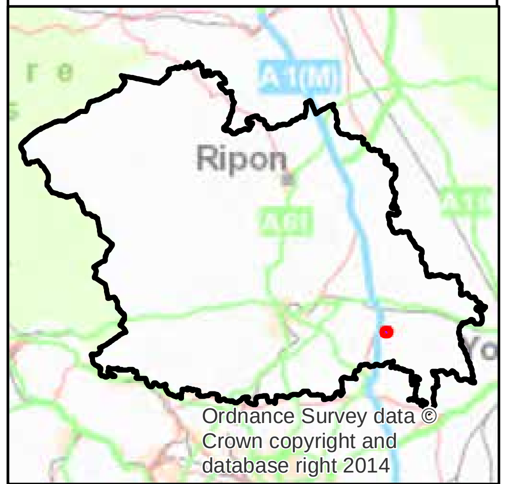

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Figure 13
Concept Kitchens, Hunsingore

7,620.24sqm

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Drawing Number	Rev
Figure 13 - GEO013	00

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Figure 14
Mantons, A59

37,886.28sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
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Drawing Number: Figure 14 - GEO014

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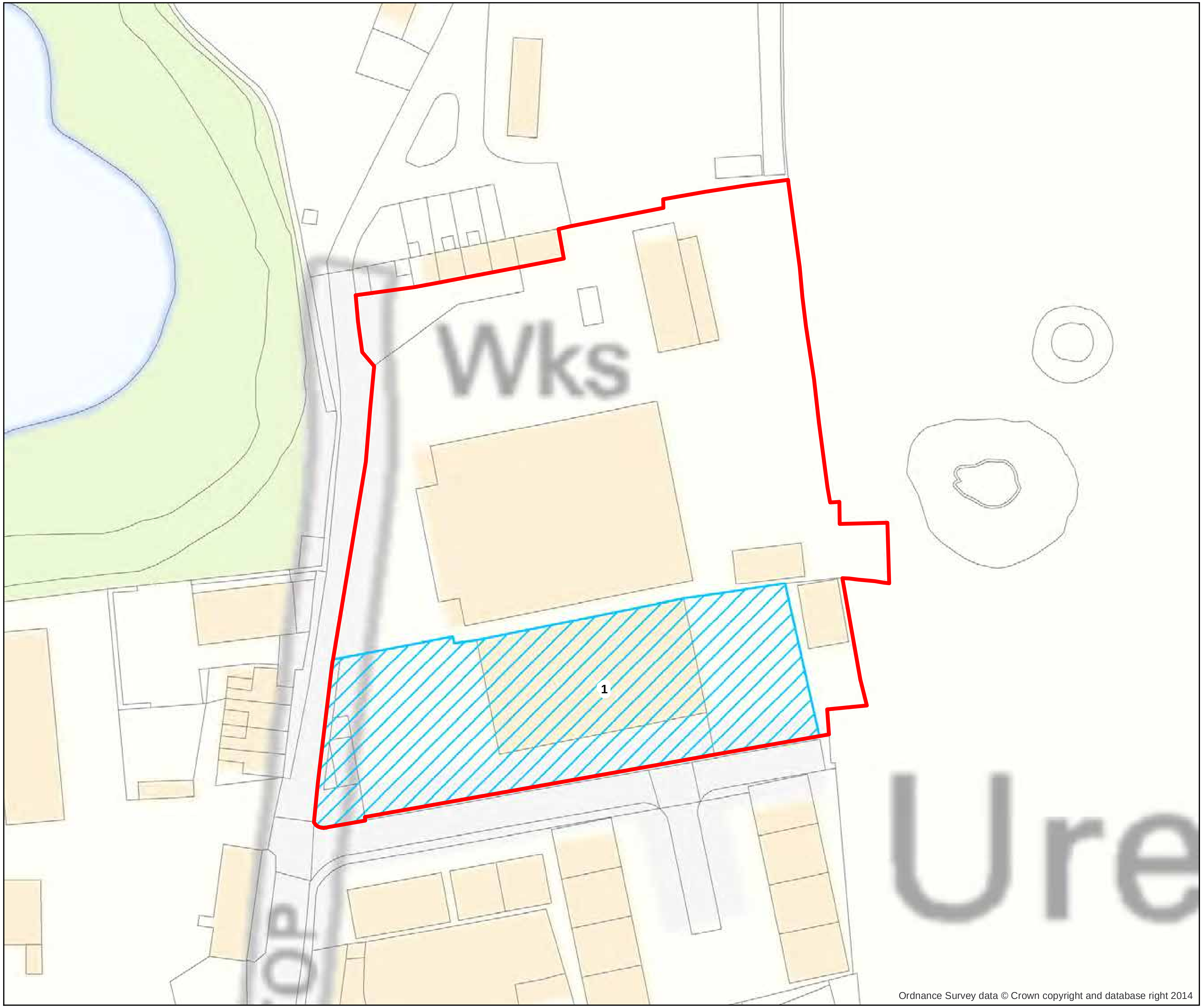

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Figure 15
The Maltings, Ure Bank Top

10,371.35sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
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Drawing Number: Figure 15 - GEO015

Rev: 00

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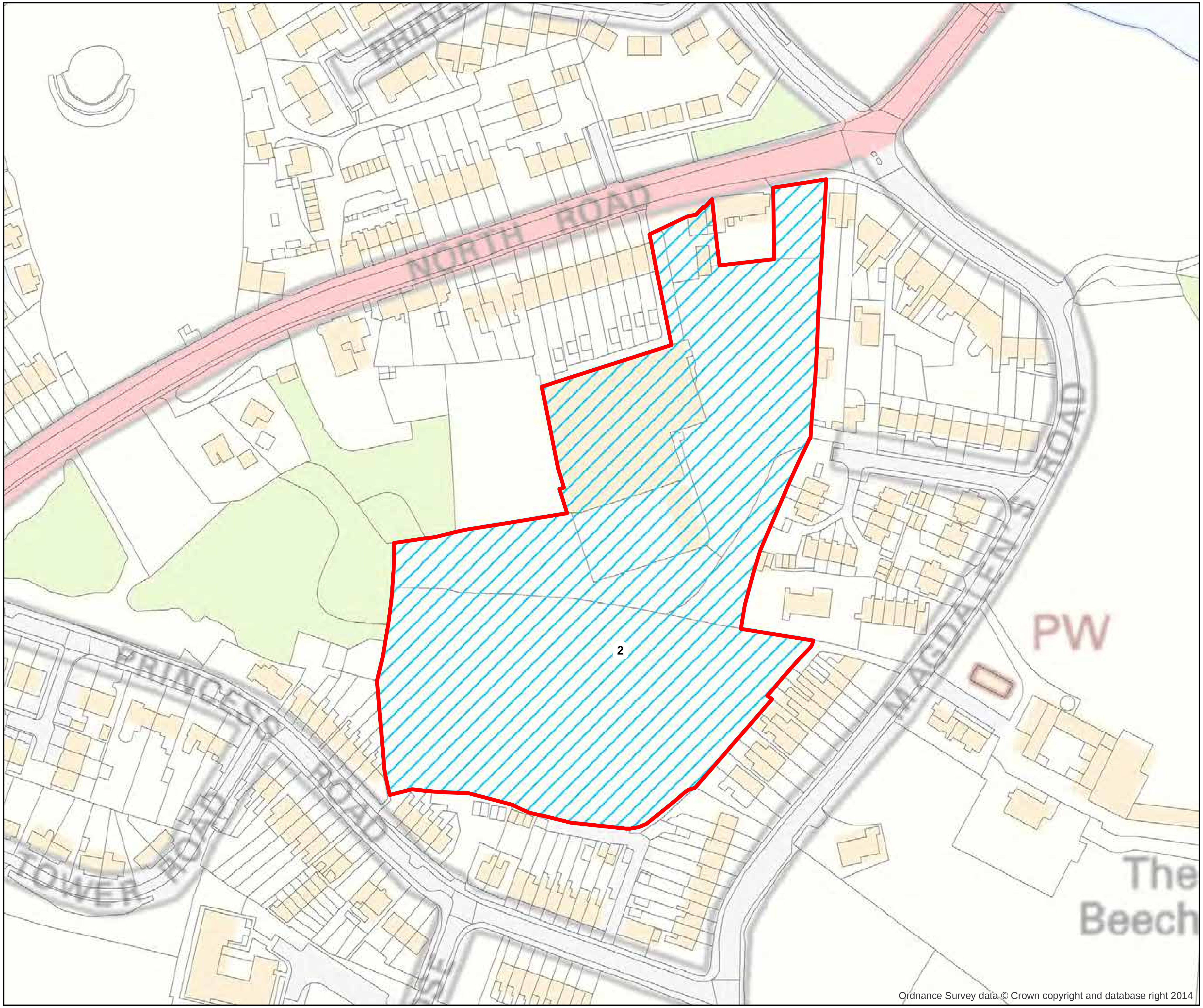

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Kilometres

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Figure 16
Ripon Auction Mart, Ripon

26,046.22sqm

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A3	1:1,400	HJM	HW	MT
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Drawing Number	Rev
Figure 16 - GEO016	00

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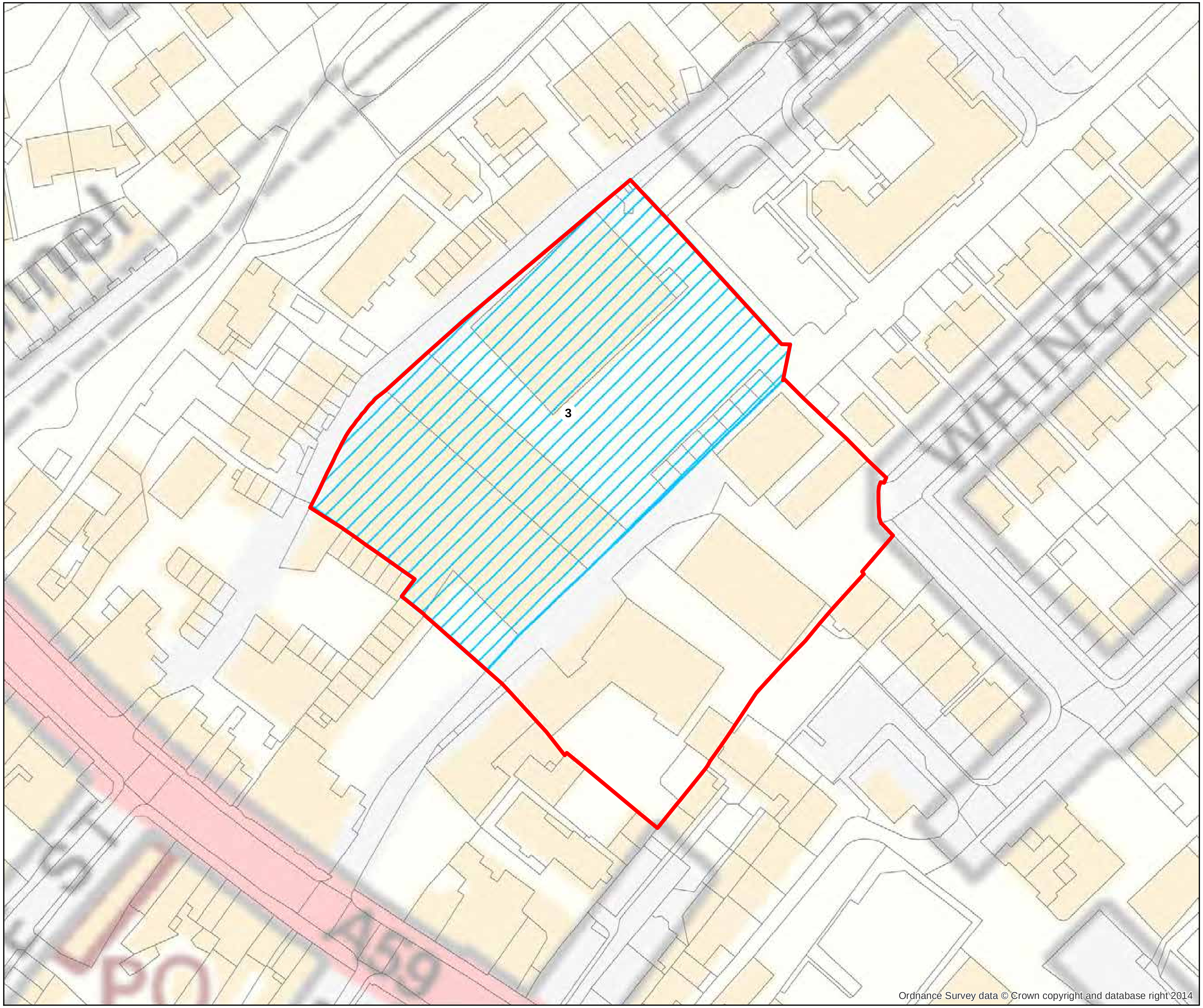

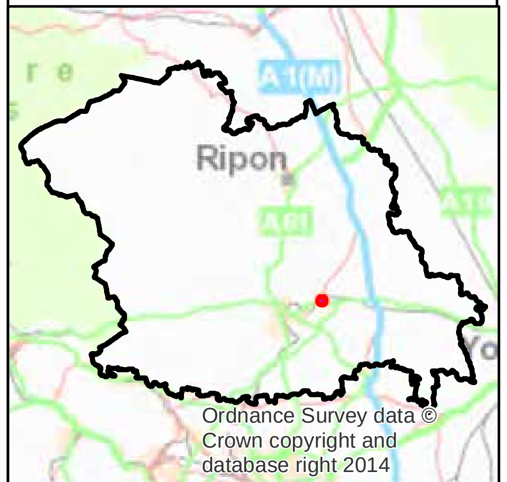

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Figure 17
Former Cattle Market, Stockwell Road

7,933.72sqm

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Drawing Number	Rev
Figure 17 - GEO017	00

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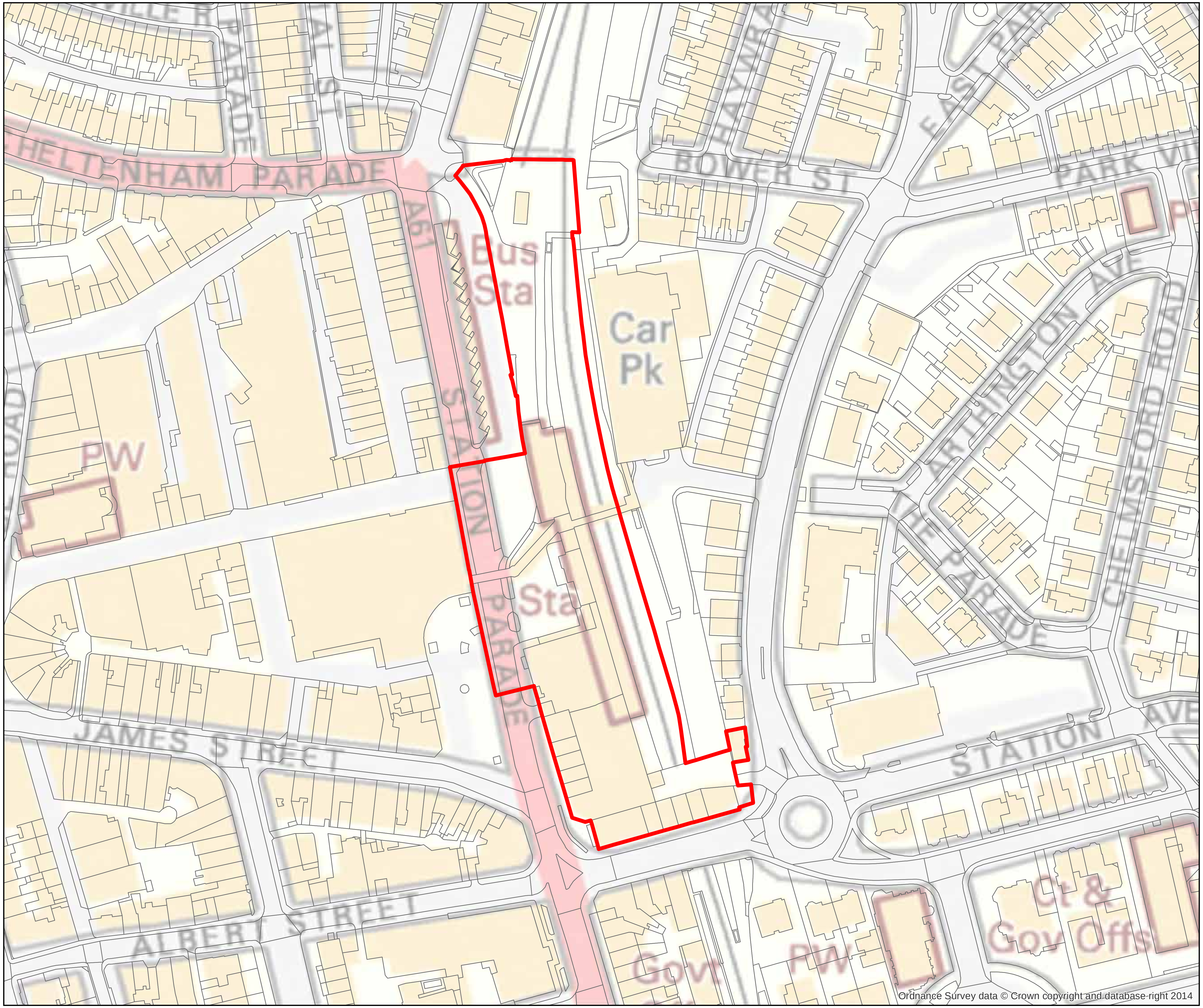

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Figure 18
Station Parade & Copthall Bridge House, Harrogate

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Drawing Number	Rev
Figure 18 - GEO018	00

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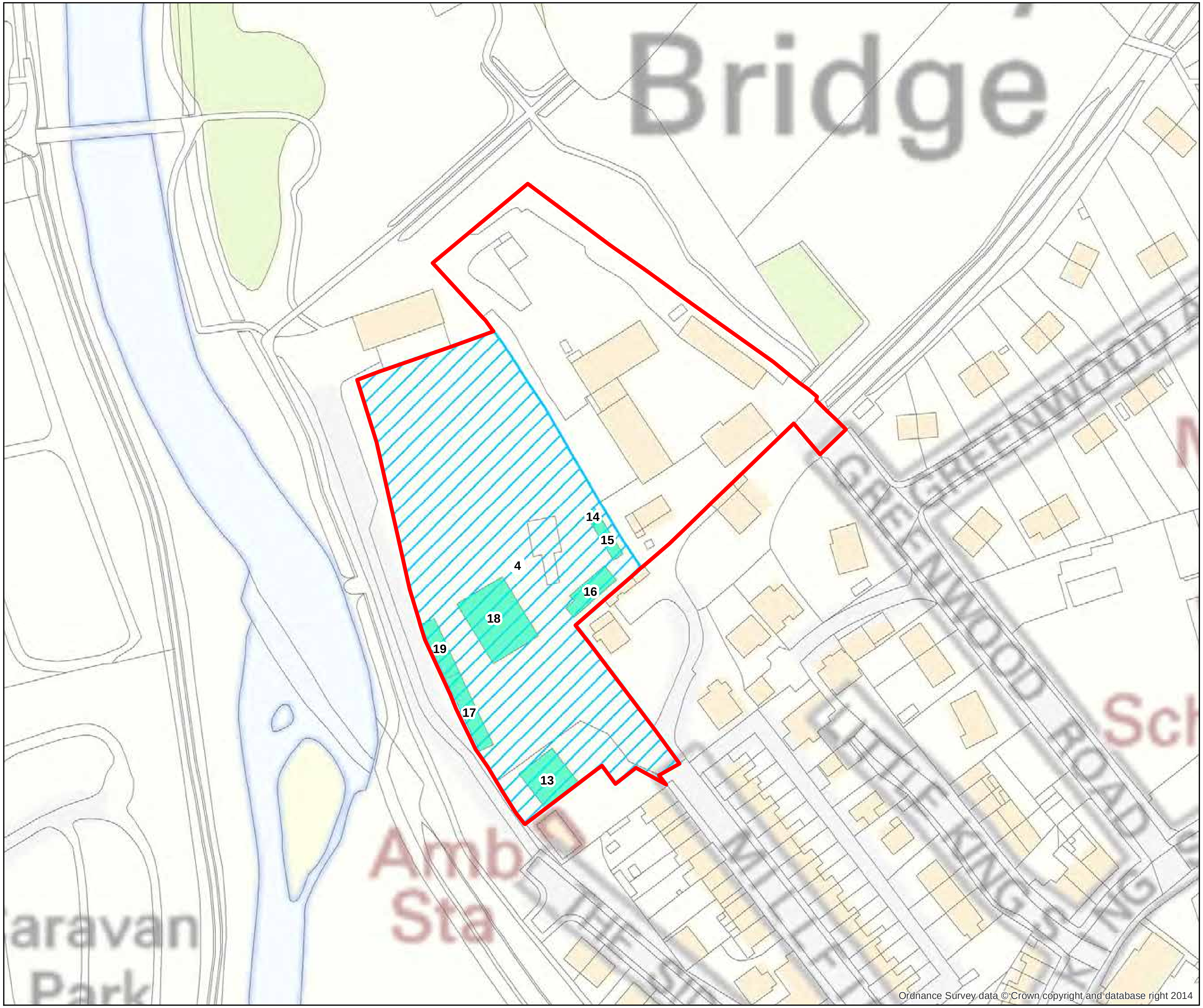

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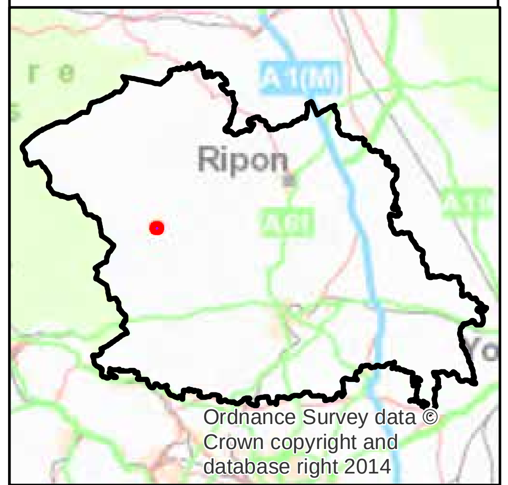

Kilometres

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Figure 19
Coal Yard and Highways Depot, Pateley Bridge

11,946.76sqm

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Drawing Number	Rev
Figure 19 - GEO019	00

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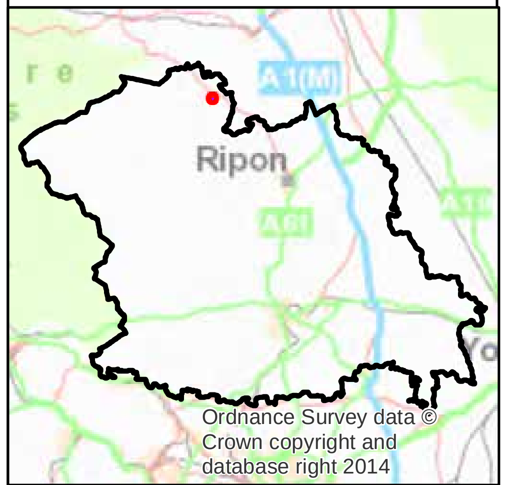

Kilometres

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Figure 20
Masham Auction Mart, Masham

10,459.2sqm

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Drawing Number	Rev
Figure 20 - GEO020	00

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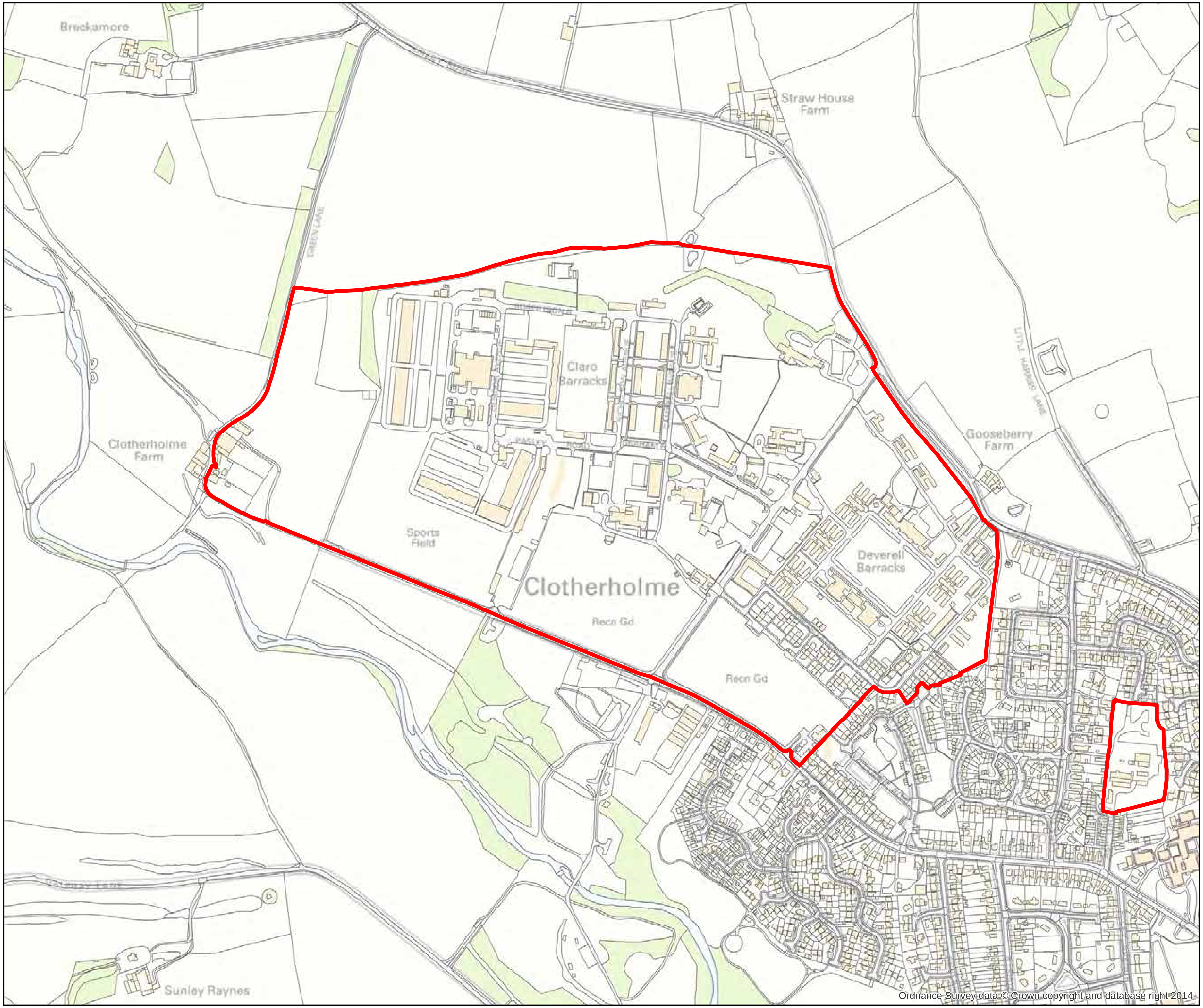

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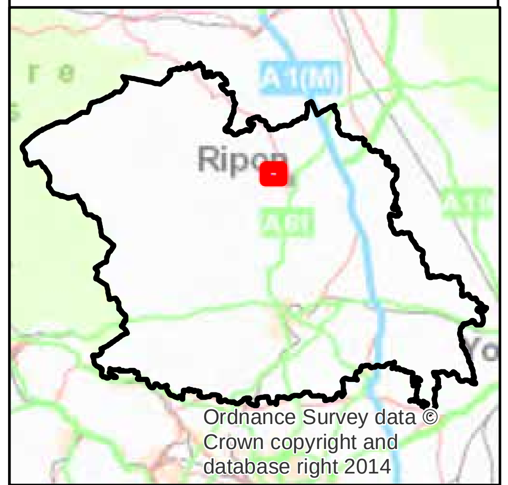

Kilometres

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Figure 21
Ripon Barracks, Clotherholme Rd, Ripon

676,941.26sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
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Drawing Number	Rev
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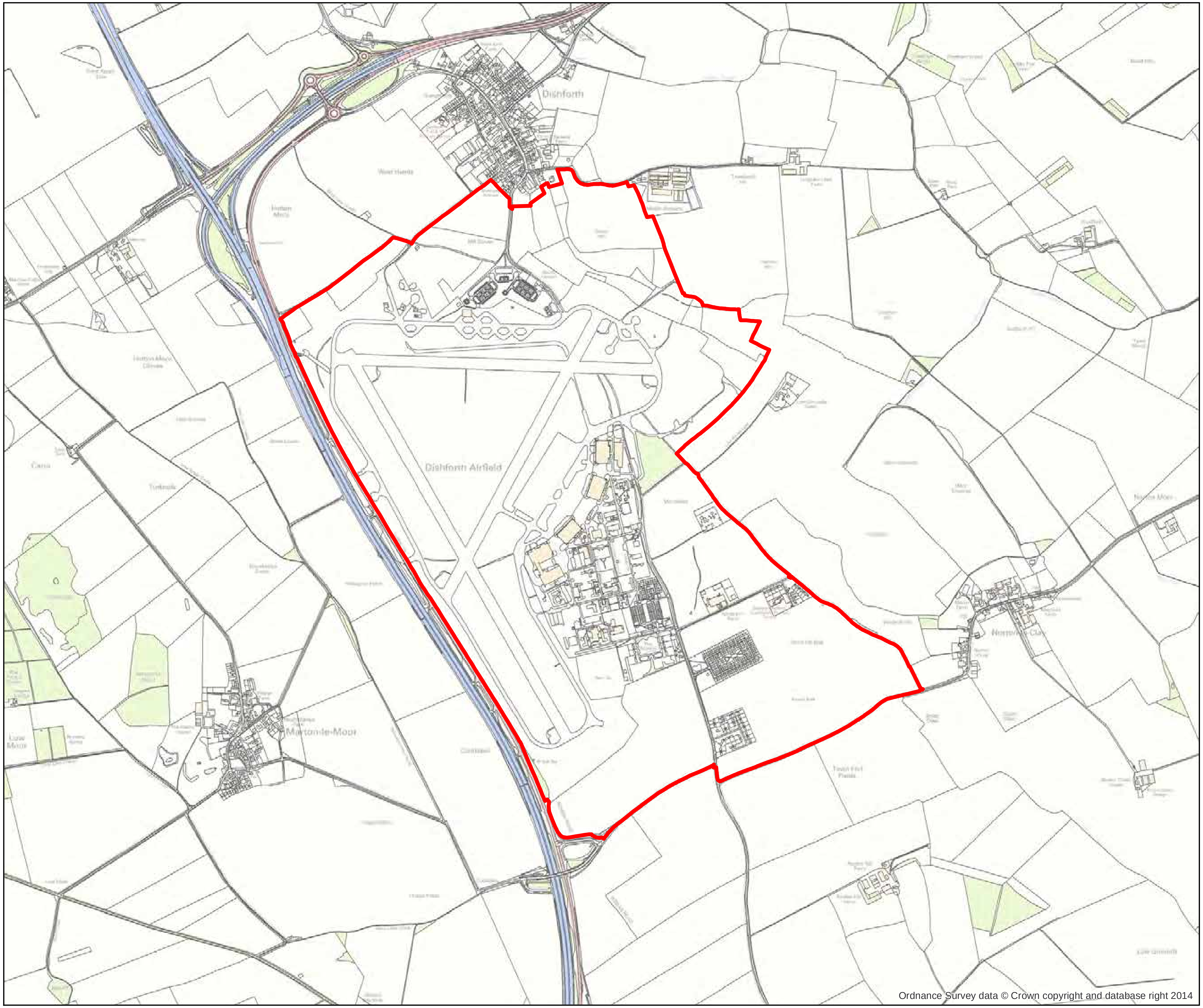

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Figure 22
Dishforth Airfield

3,753,884.27sqm

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Drawing Number	Rev
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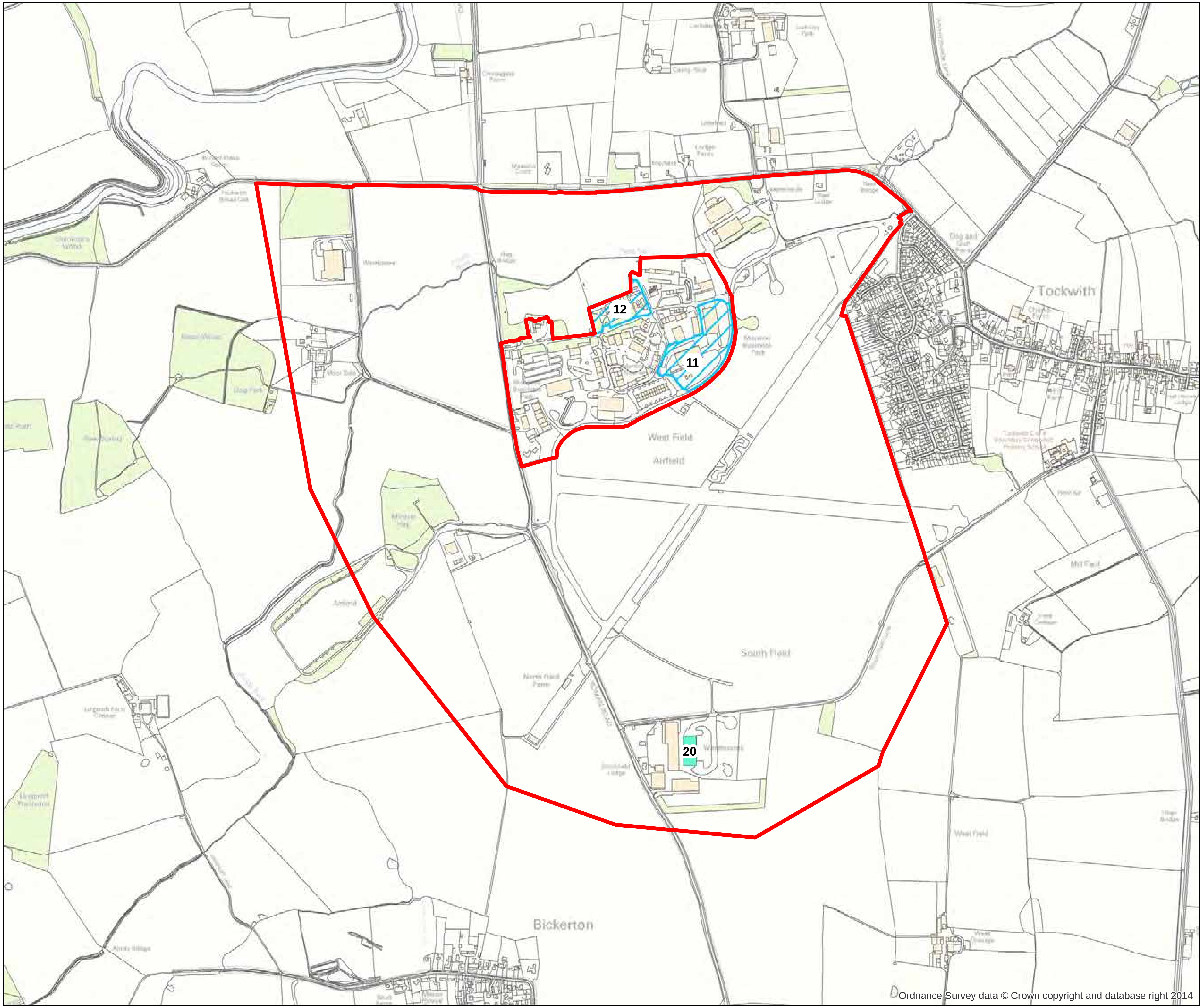

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Kilometres

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Figure 23
Tockwith Airfield

2,835,677.88sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
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Drawing Number	Rev
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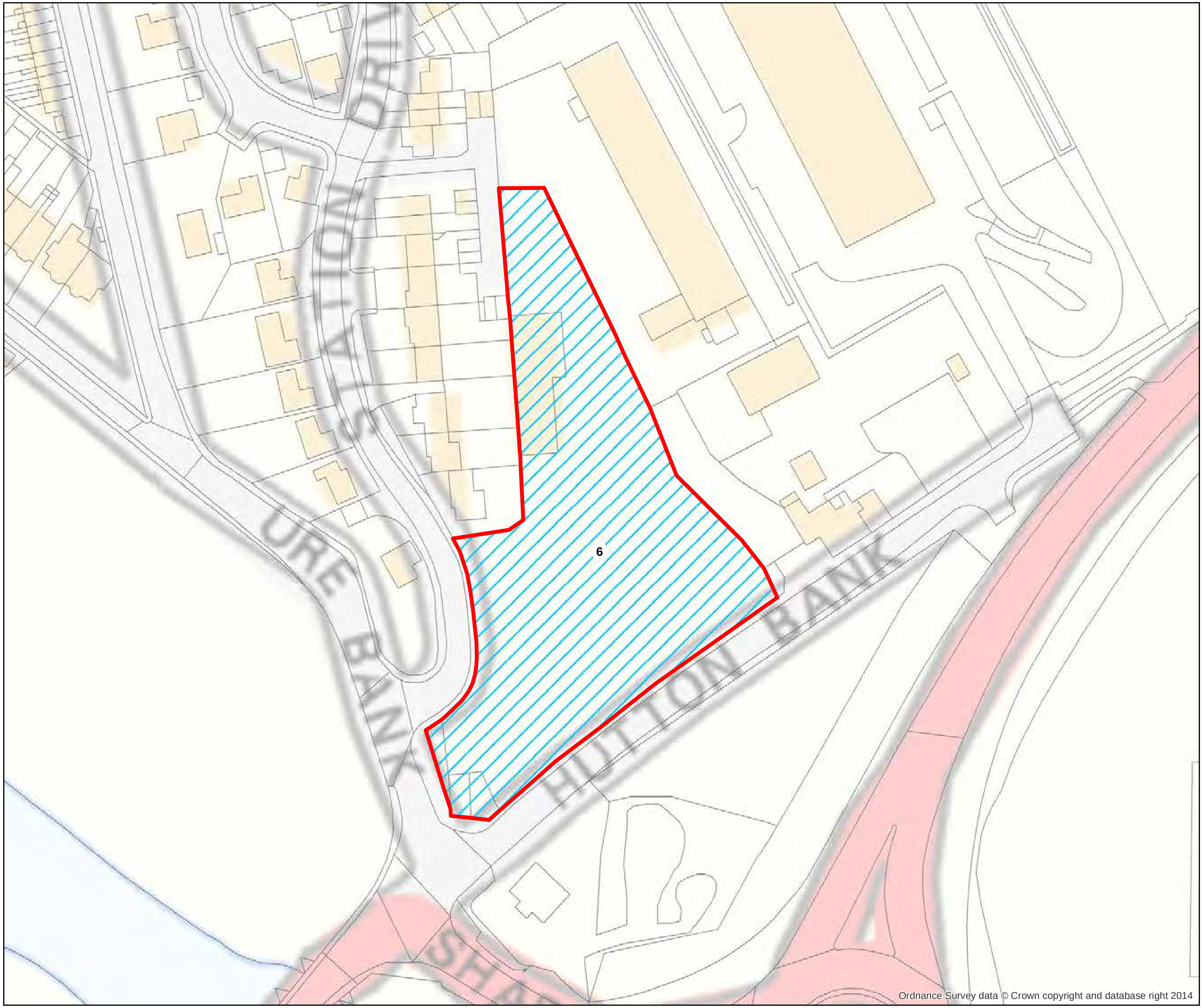

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Figure 24
Hutton Bank, Ripon

6,334.19sqm

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Drawing Number	Rev
Figure 24 - GEO024	00

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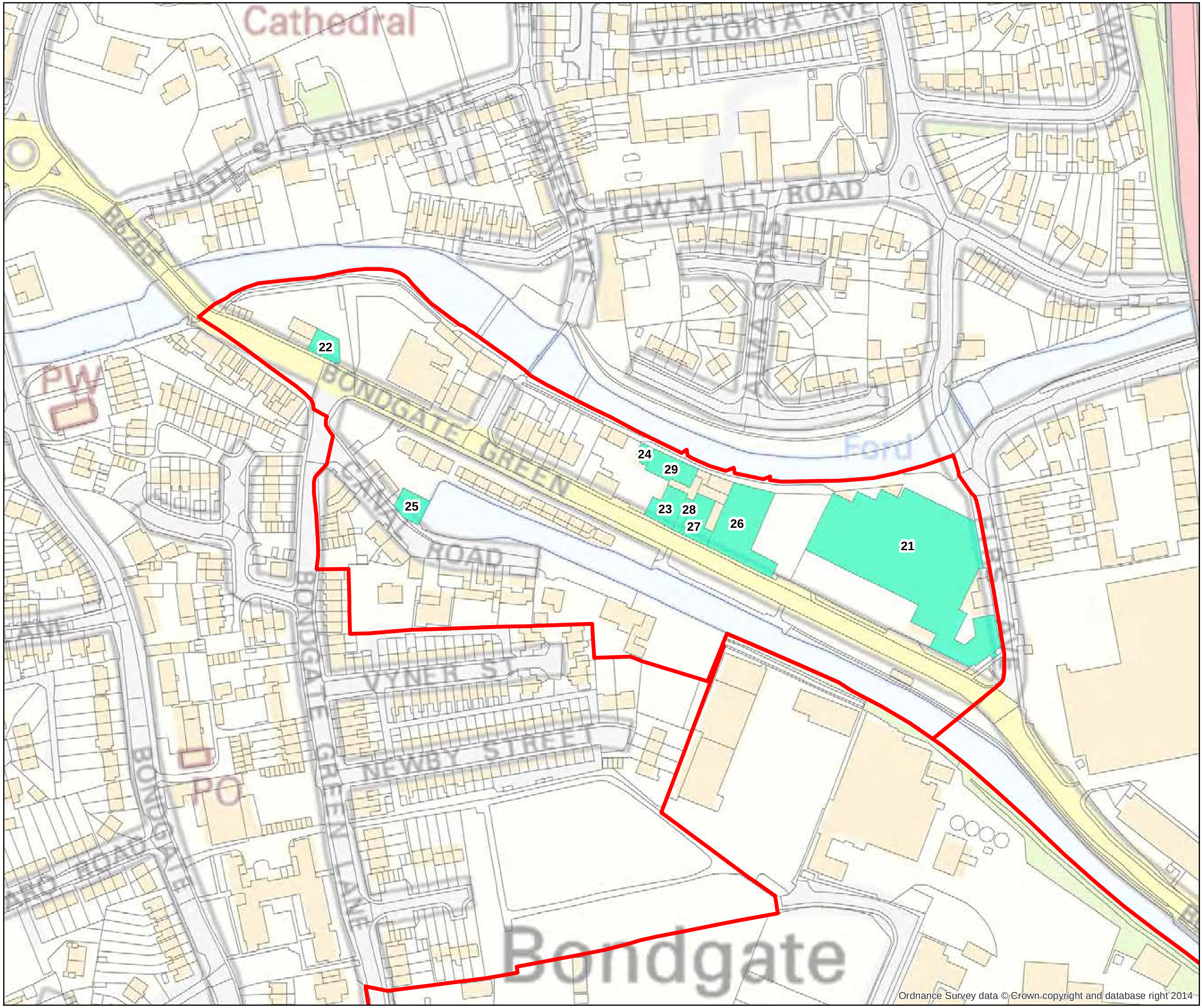

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Figure 25
Bondgate regeneration area, Ripon

45,911.46sqm

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Drawing Number	Rev
Figure 25 - GEO025	00

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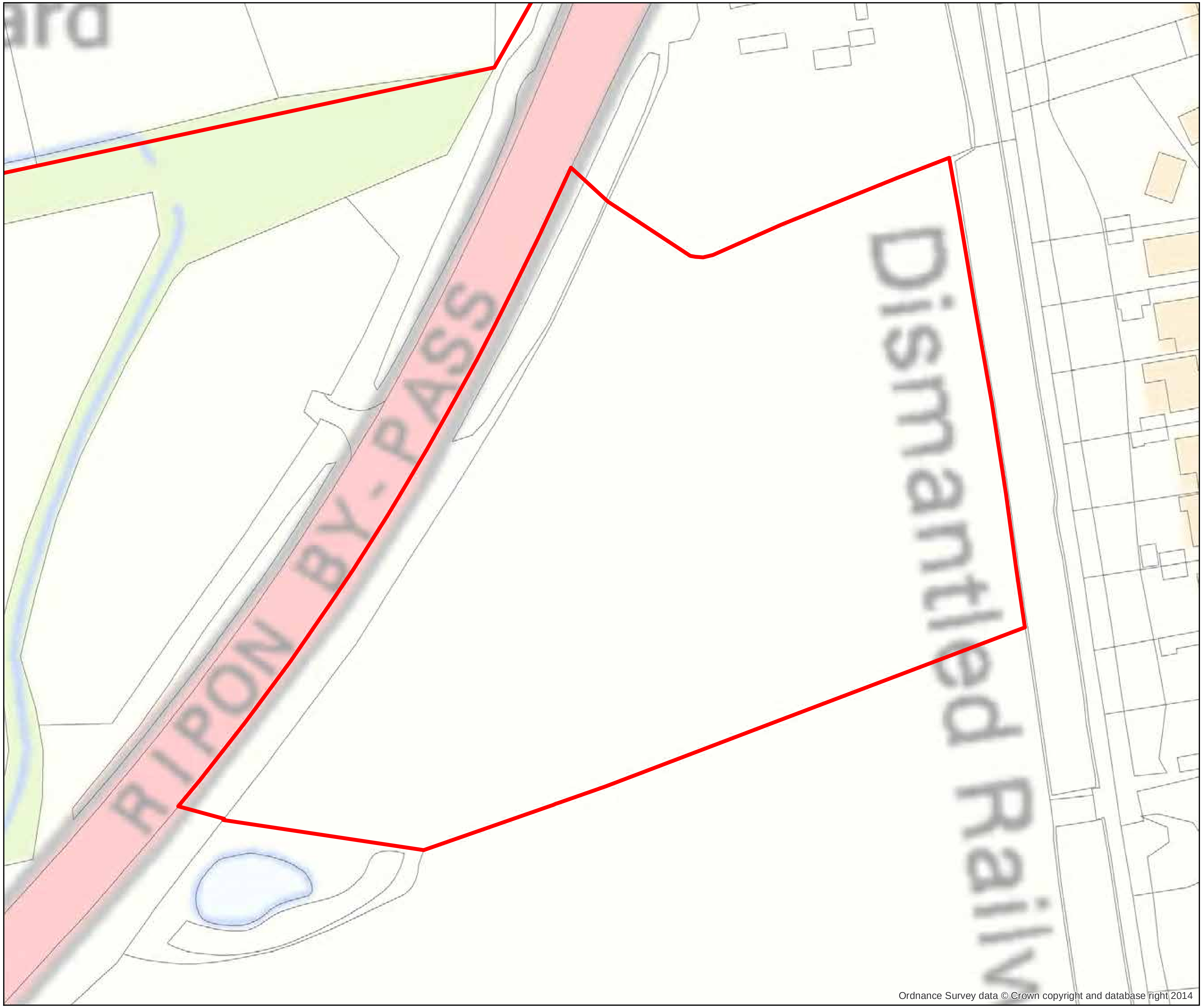

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Kilometres

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Figure 26
Gas storage site, Ripon

13,292.01sqm

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Drawing Number	Rev
Figure 26 - GEO026	00

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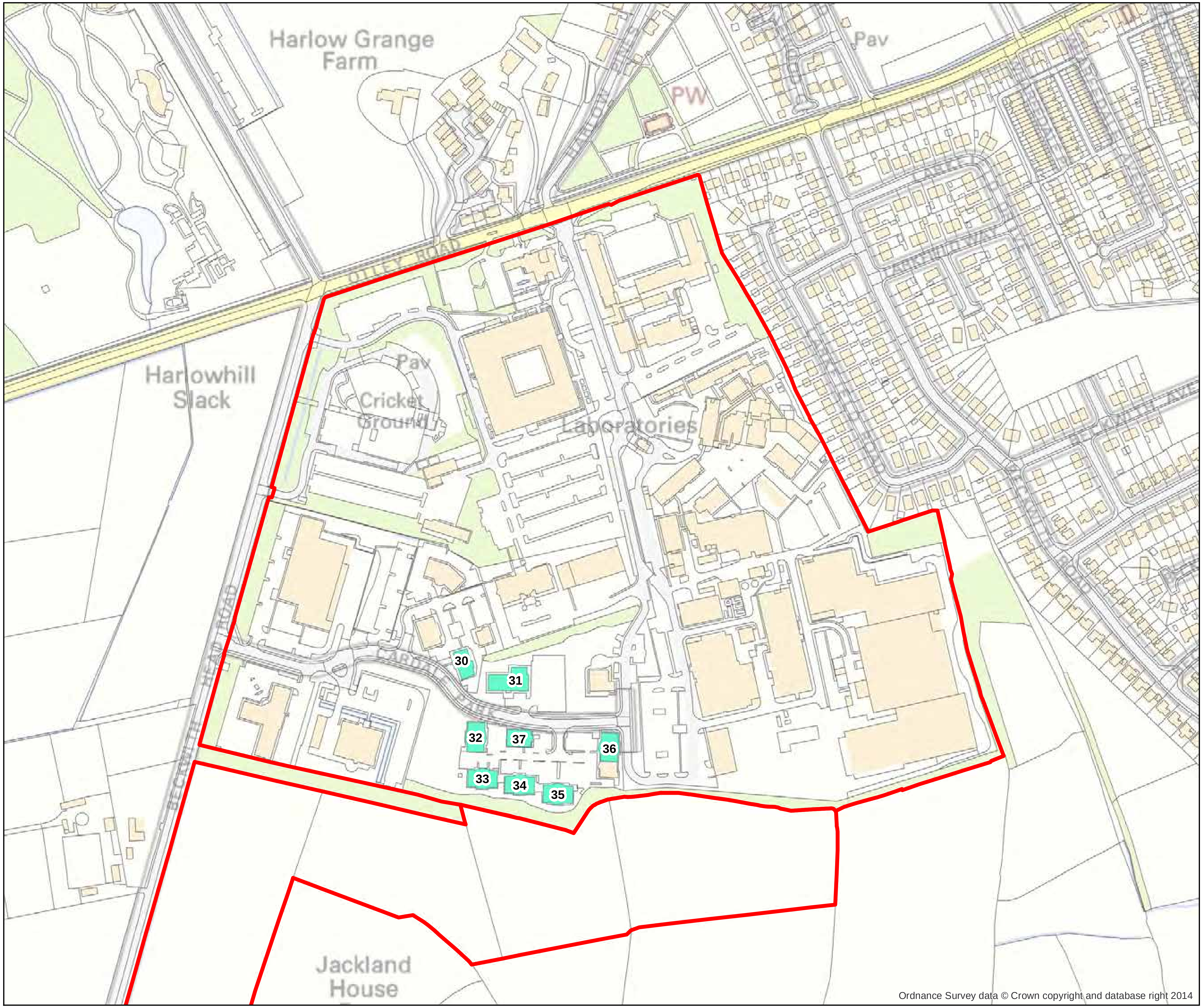

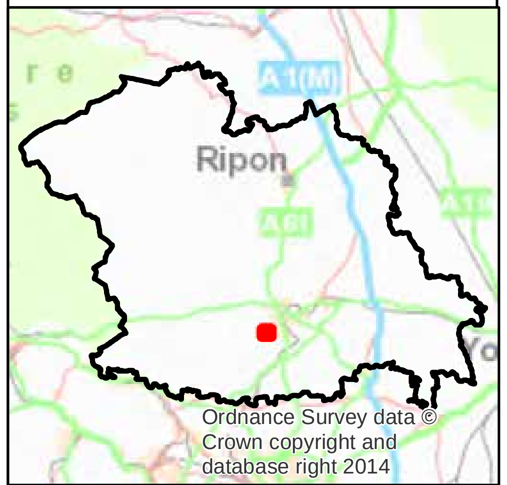

Kilometres

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Figure 27
Cardale Park, Harrogate

248,774.07sqm

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Drawing Number: Figure 27 - GEO027

Rev: 00

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Figure 28
Hornbeam Park, Harrogate

166,192.76sqm

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Drawing Number

Figure 28 - GEO028

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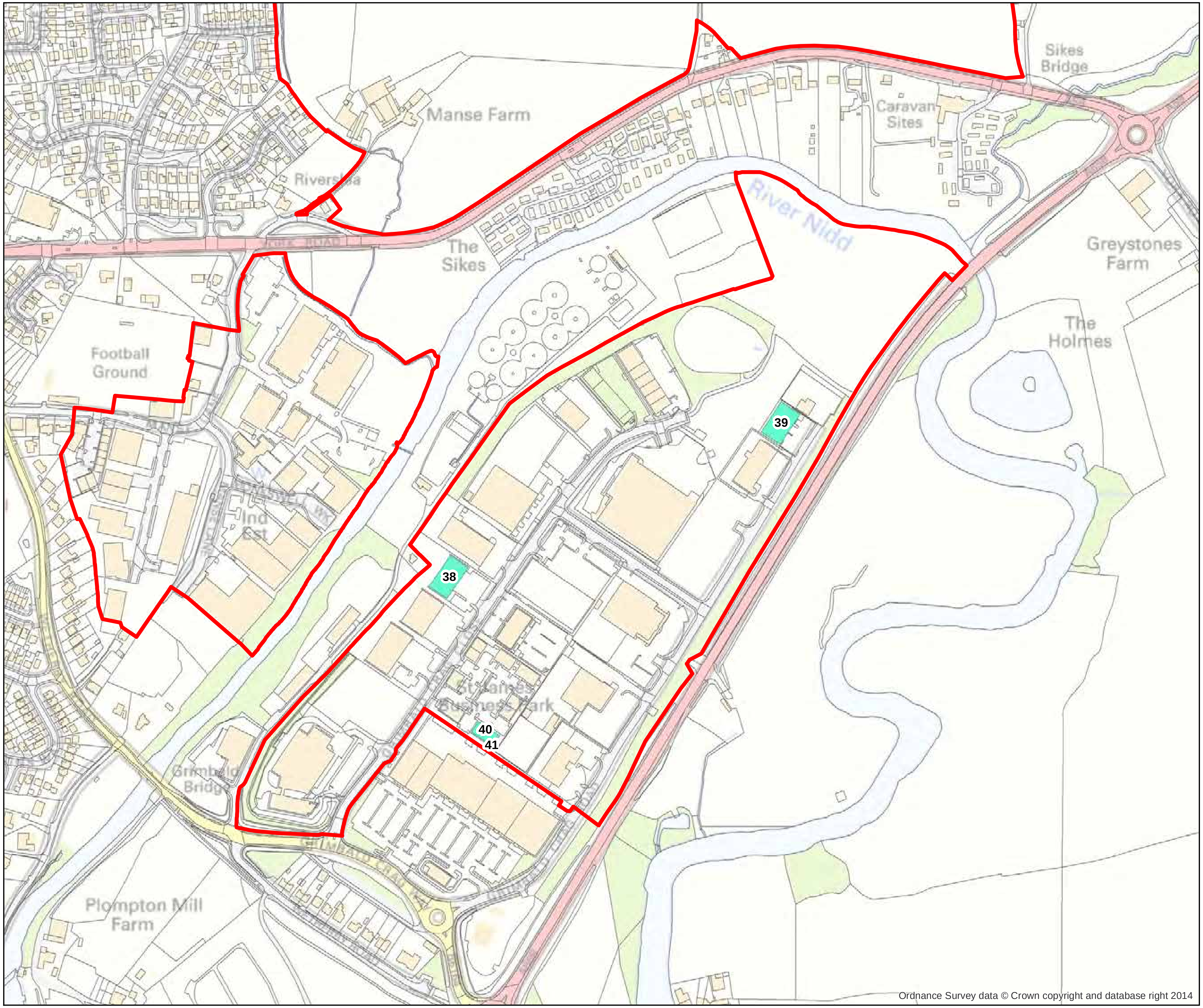

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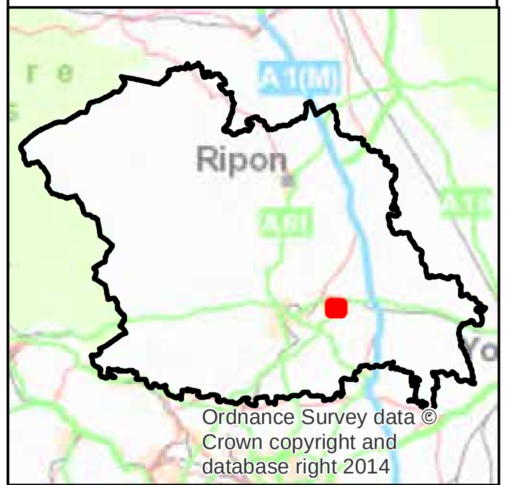

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Figure 29
St James Park, Knaresborough

224,923.41sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
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Drawing Number	Rev
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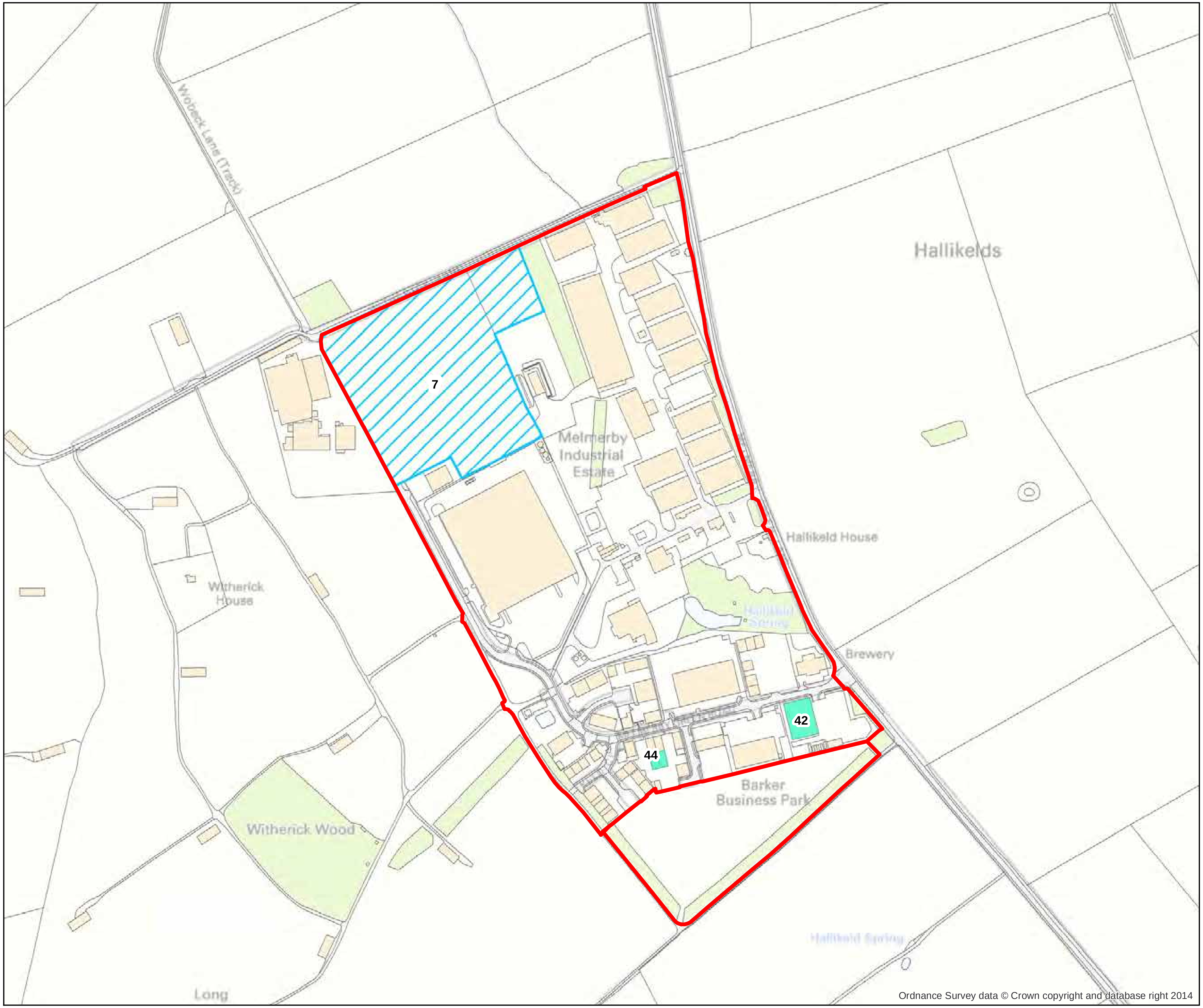

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Kilometres

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Figure 30
Melmerby Business Park, Nr Melmerby

351,649.38sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
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Drawing Number: Figure 30 - GEO030

Rev: 00

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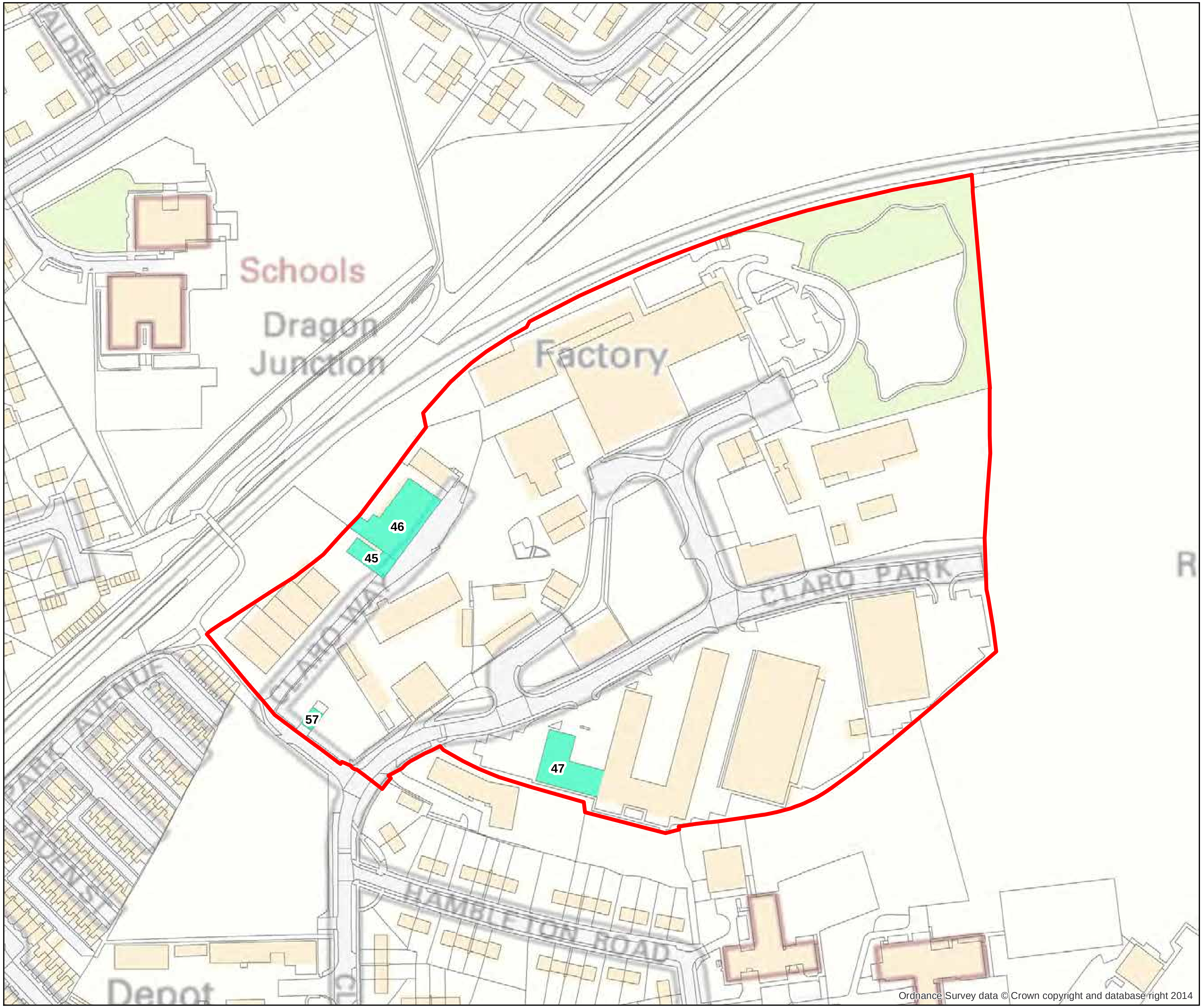

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Figure 31
Claro Park, Harrogate

87,143.49sqm

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		Date: 31 Oct 2014	Date: 31 Oct 2014	Date: 31 Oct 2014

Drawing Number: Figure 31 - GEO031 | Rev: 00

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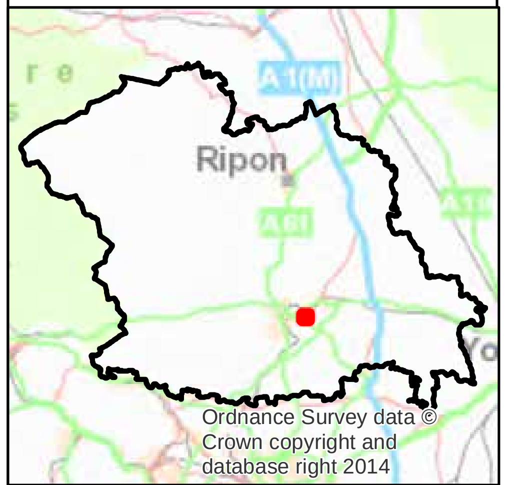

Kilometres

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Figure 32
Plumpton Park, Harrogate

83,405.41sqm

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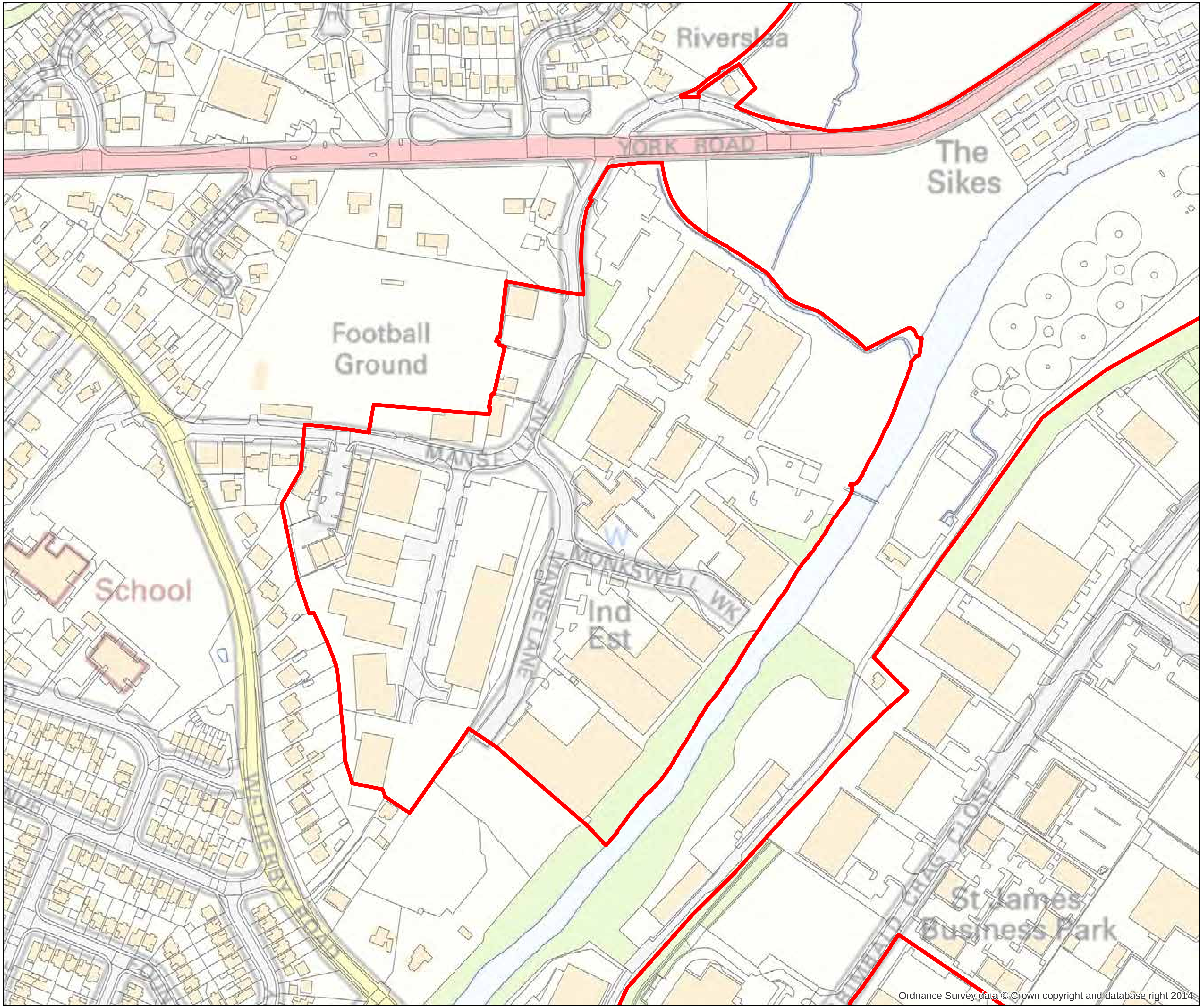
		Date: 31 Oct 2014	Date: 31 Oct 2014	Date: 31 Oct 2014

Drawing Number: Figure 32 - GEO032

Rev: 00



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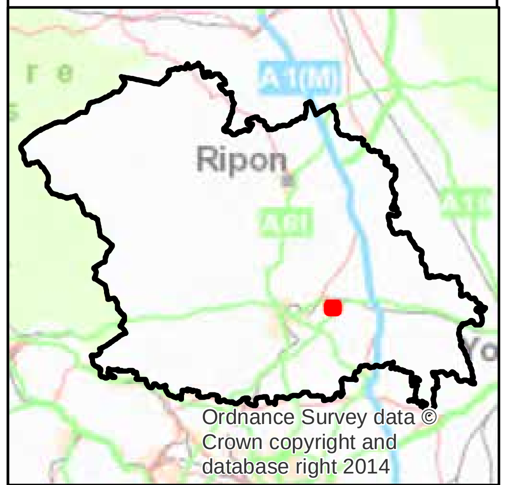

Kilometres

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Figure 33
Manse Lane, Knaresborough

99,906.12sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
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Drawing Number	Rev
Figure 33 - GEO033	00

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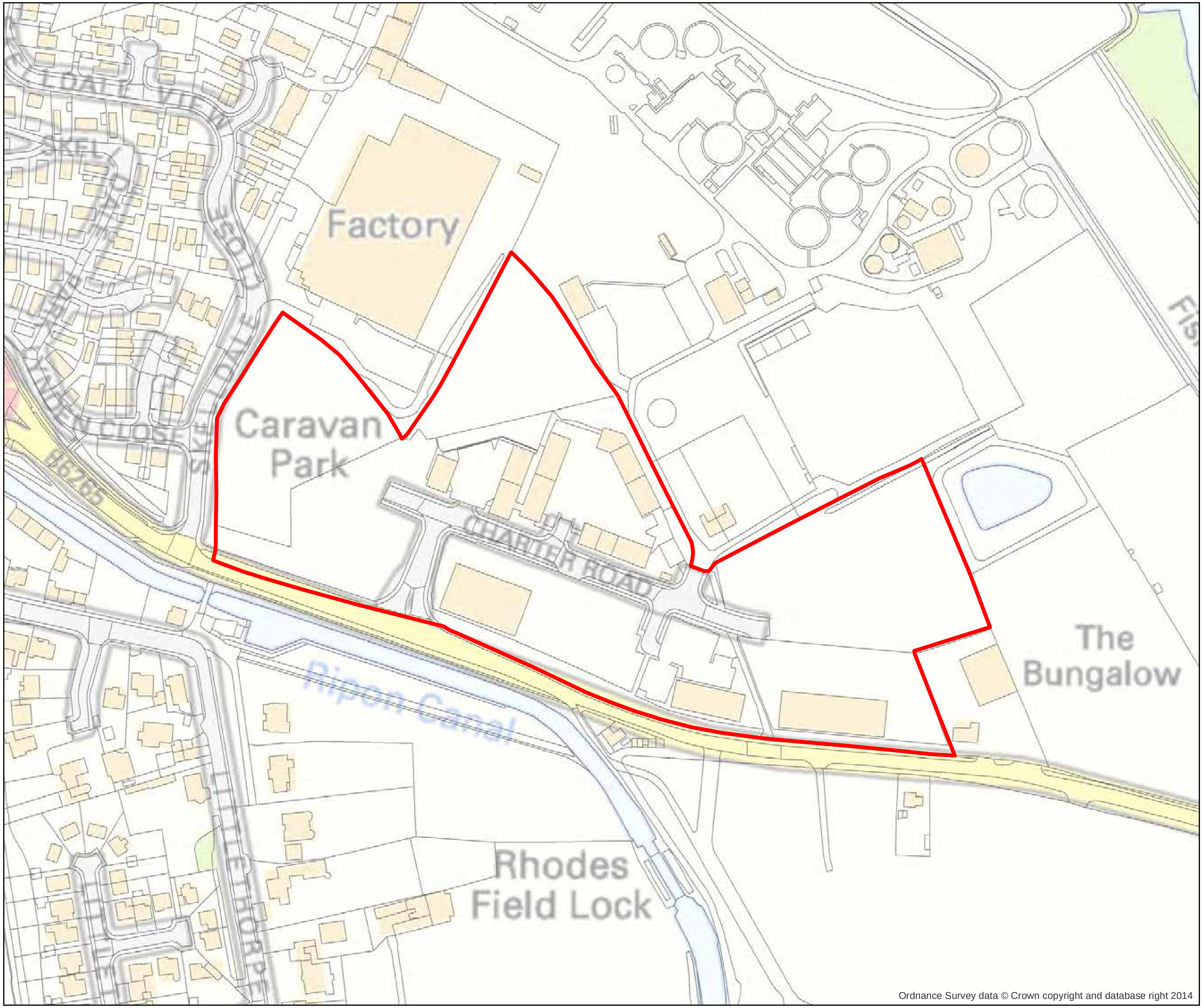

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- Employment Review Site
- Vacant / Derelict Land
- Vacant Employment Floorspace
- Harrogate Borough Boundary

Kilometres

0.015 0.0075 0 0.015 0.03 0.045 0.06 0.075

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Figure 34
Boroughbridge Road, Ripon

49,556.83sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
A3	1:1,800	HJM	HW	MT
		Date: 31 Oct 2014	Date: 31 Oct 2014	Date: 31 Oct 2014

Drawing Number	Rev
Figure 34 - GEO034	00

Employment Review Site

Vacant / Derelict Land

Vacant Employment Floorspace

Harrogate Borough Boundary

Kilometres

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Figure 35
Harrogate Road, Ripon

16,017.64sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
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		Date: 31 Oct 2014	Date: 31 Oct 2014	Date: 31 Oct 2014

Drawing Number	Rev
Figure 35 - GEO035	00

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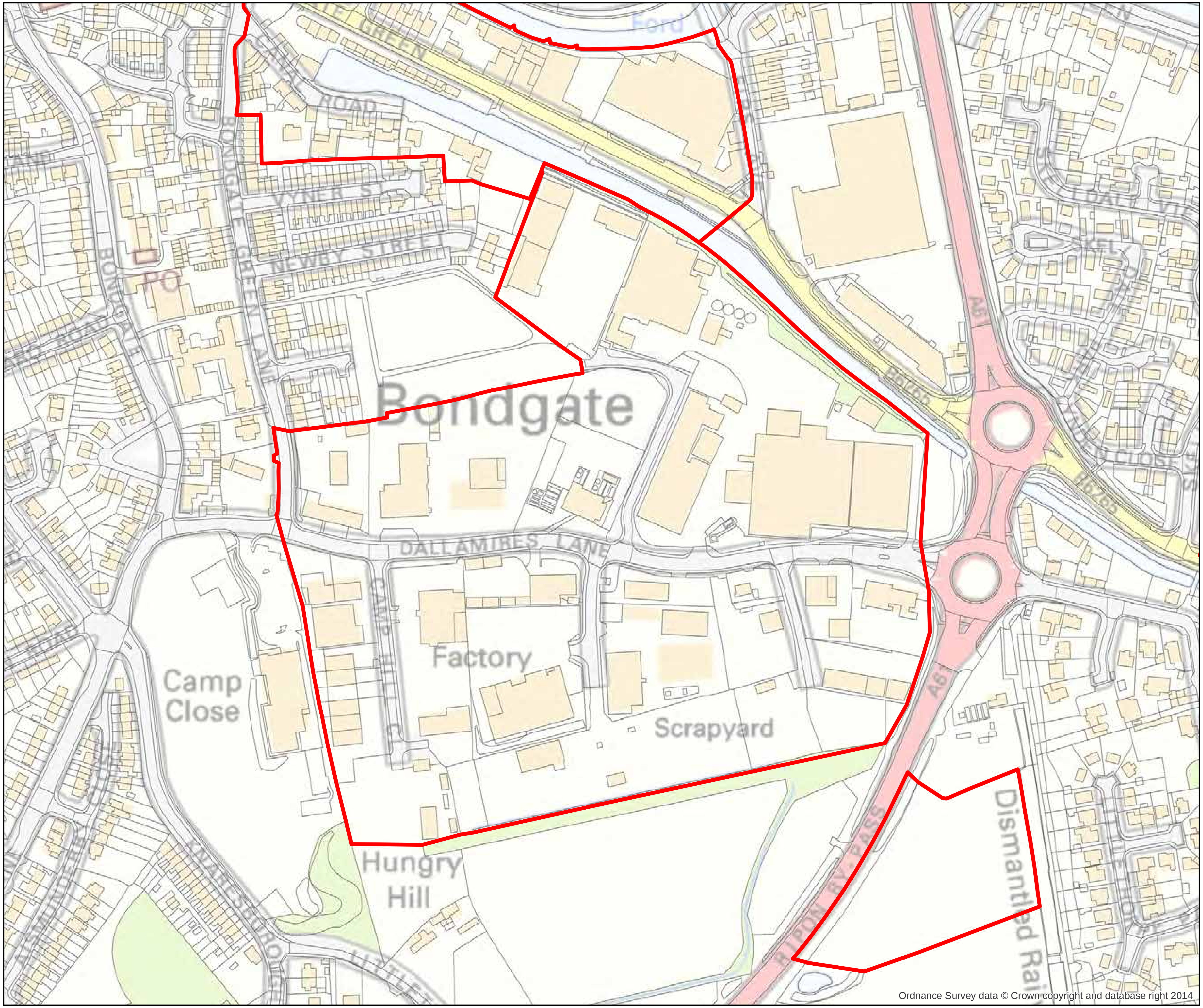

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Kilometres

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Figure 36
Dallamires Lane, Ripon

135,542.07sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
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Drawing Number: Figure 36 - GEO036

Rev: 00

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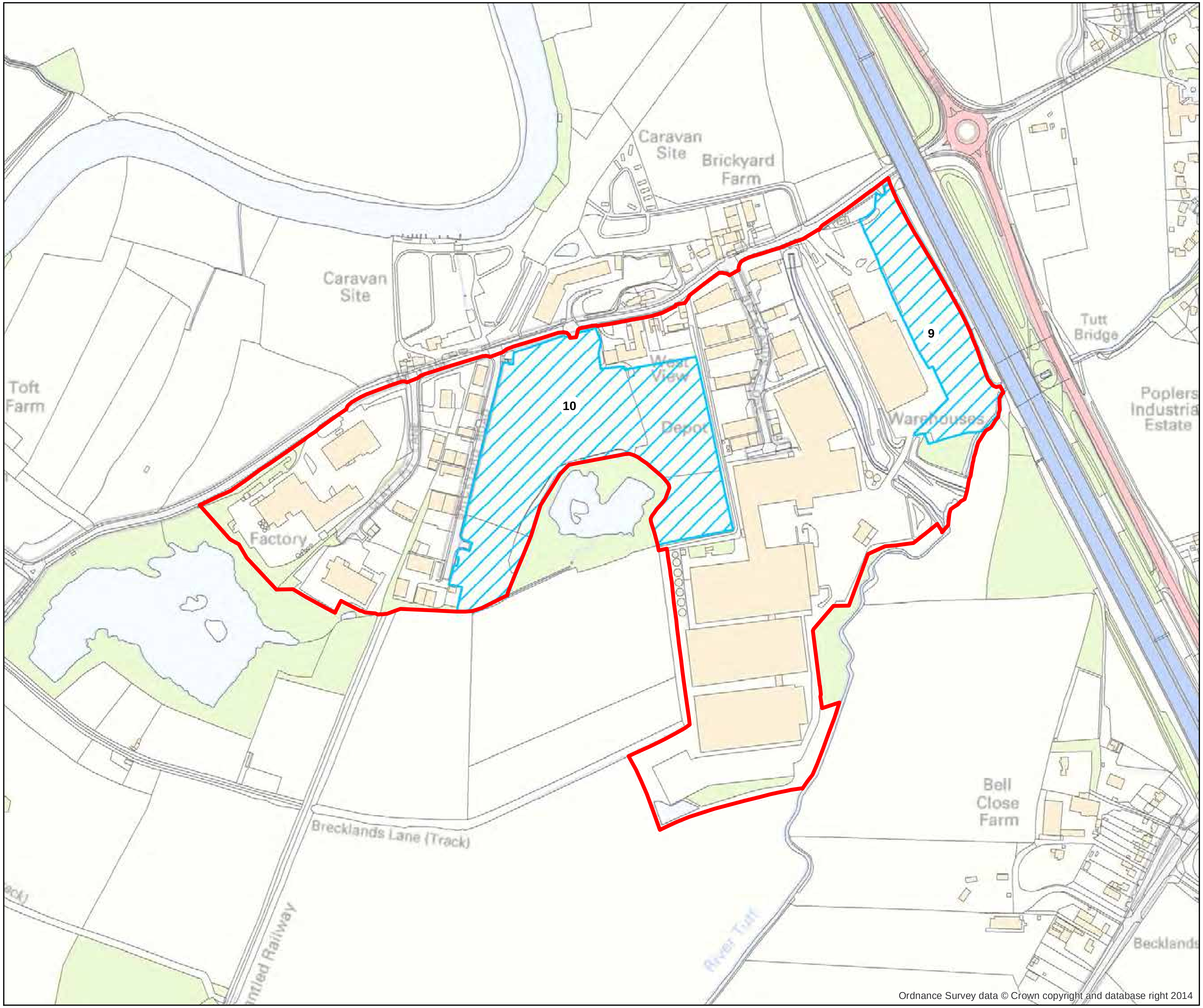

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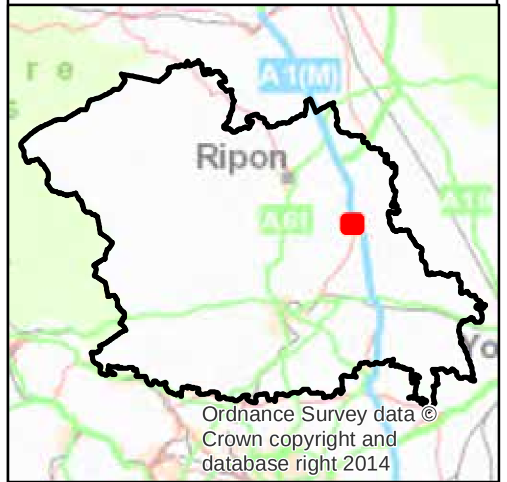

Kilometres

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Figure 37
Bar Lane

301,088.72sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
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		Date: 31 Oct 2014	Date: 31 Oct 2014	Date: 31 Oct 2014

Drawing Number: Figure 37 - GEO037

Rev: 00

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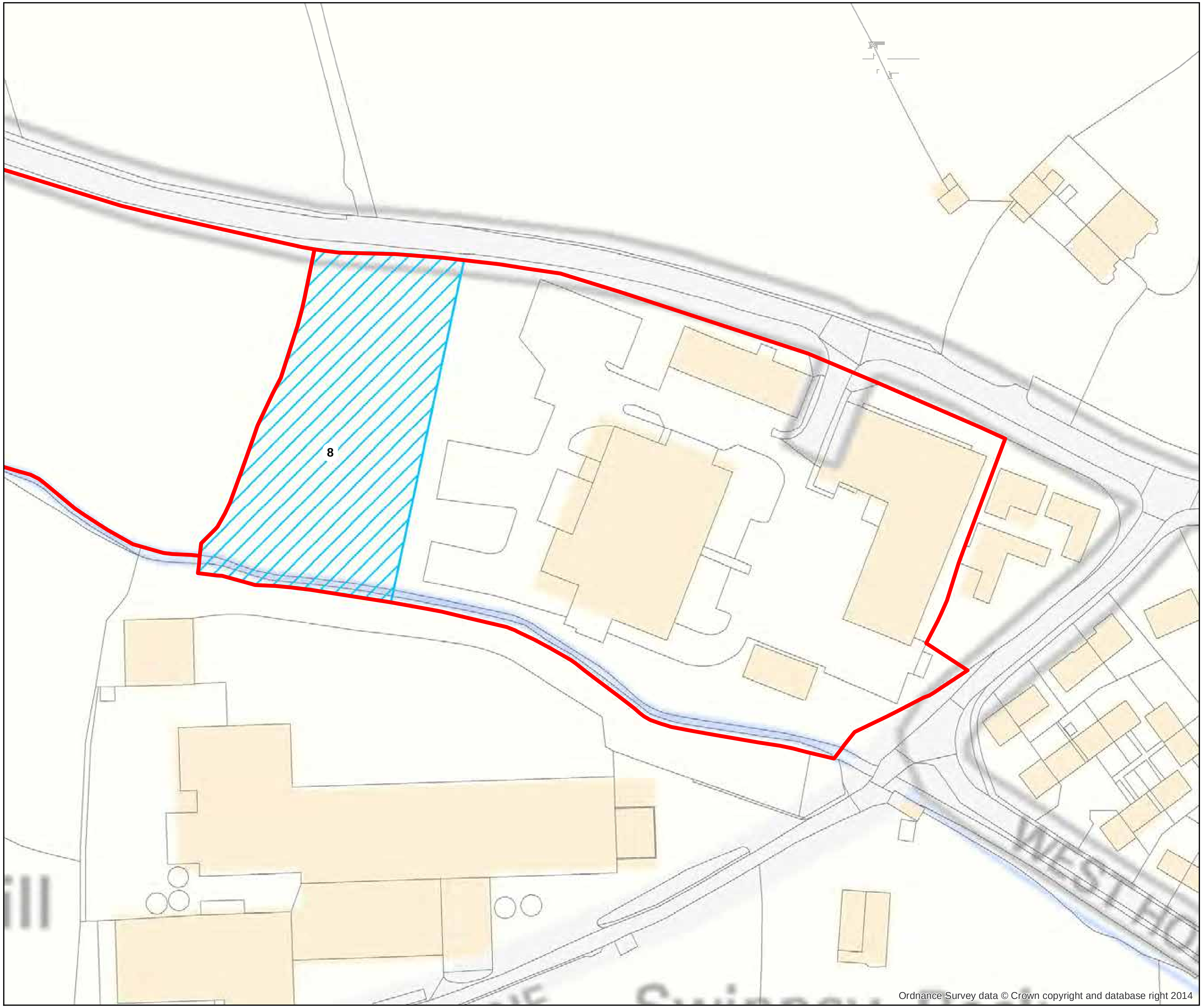
Employment Review Site

Vacant / Derelict Land

Vacant Employment Floorspace

Harrogate Borough Boundary



Kilometres

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Figure 38
Fearby Road, Masham

20,806.26sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
A3	1:1,000	HJM	HW	MT
		Date: 31 Oct 2014	Date: 31 Oct 2014	Date: 31 Oct 2014

Drawing Number: Figure 38 - GEO038

Rev: 00

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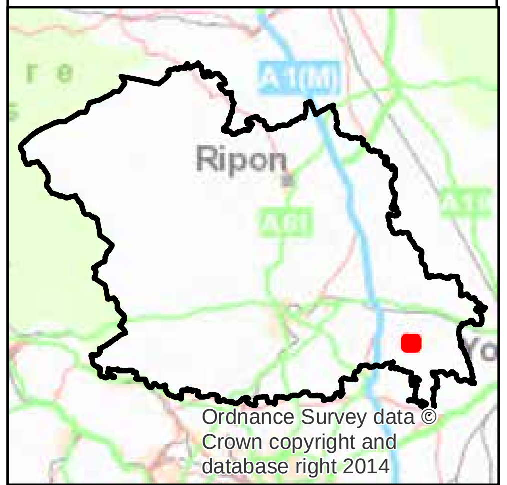
Vacant / Derelict Land

Vacant Employment Floorspace

Harrogate Borough Boundary



Kilometres

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Figure 39
Marston Business Park, Tockwith

233,012.27sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
A3	1:3,200	HJM	HW	MT
		Date: 31 Oct 2014	Date: 31 Oct 2014	Date: 31 Oct 2014

Drawing Number	Rev
Figure 39 - GEO039	00

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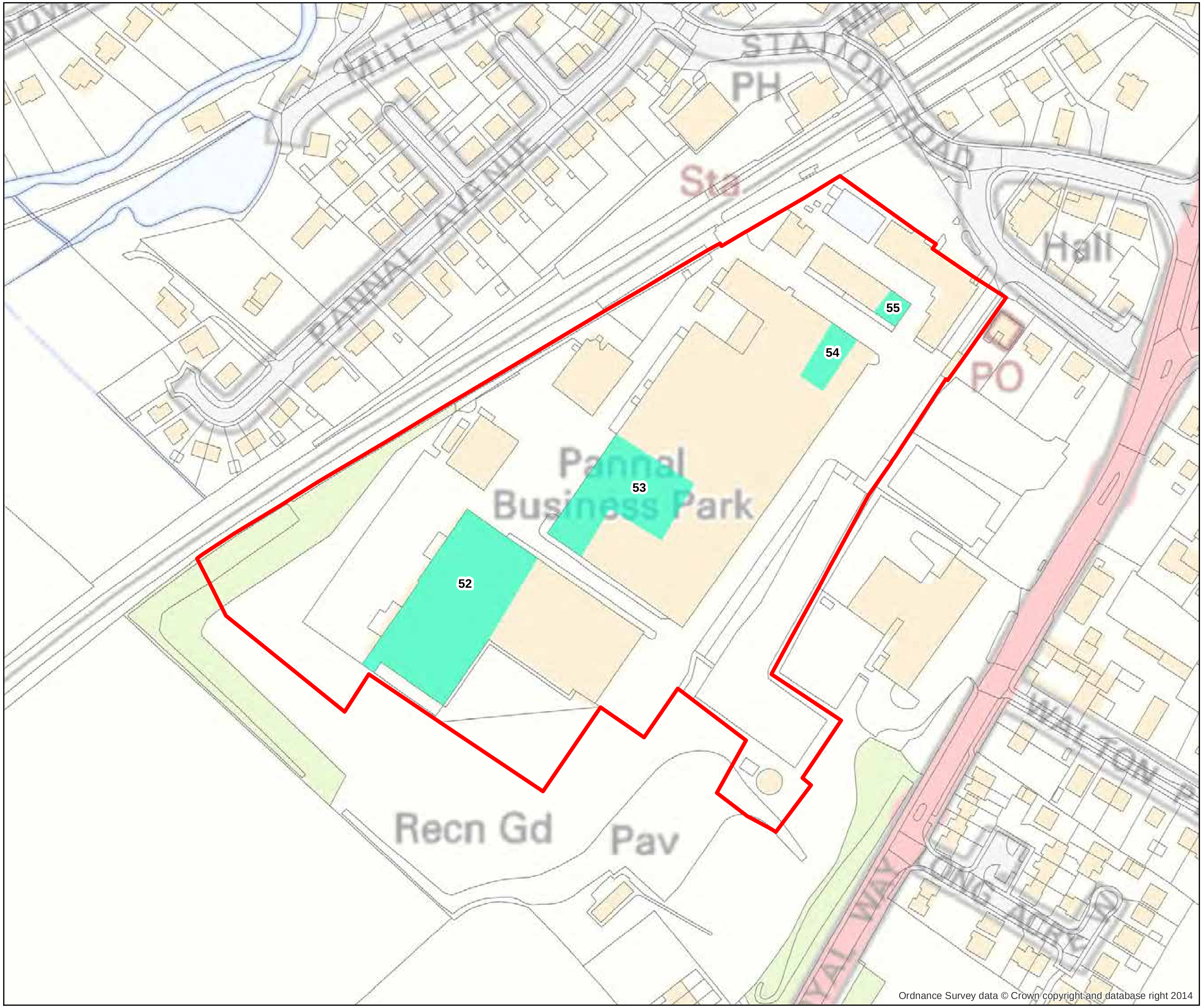

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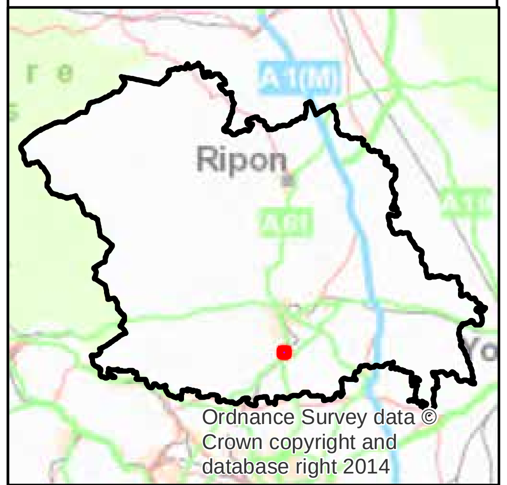

Kilometres

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Figure 40
Dunlopillo Site, Pannal (mixed use)

45,931.32sqm

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
A3	1:1,500	HJM	HW	MT
		Date: 31 Oct 2014	Date: 31 Oct 2014	Date: 31 Oct 2014

Drawing Number: Figure 40 - GEO040

Rev: 00

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Appendix E Potential future employment allocation assessment

				Access							Sustainability					Planning					Development Constraints				Market Sector					
Site Number	Site Name	Total Size of Site (ha)	Size of Opportunity Area	Public Transport Access: Excellent= Station within/adj to Site; Good = within 400m of station; Fair = within 800m of station; Poor = further than 800m from station		Proximity to Bus Network: Excellent= Bus Route within/adj to Site; Good = within 100m of bus stop; Fair = within 200m of bus stop; Poor = further than 200m from bus stop		Proximity to the Strategic Road Network (M4/A472/A465): Excellent = Immediately Adjacent to SRN; Good = Under 1 km from SRN; Fair = between 1km and 3 km from SRN; Poor = between 3 and 10 km from SRN		Access Score (5 = best, 0 = worst)	Previously developed land: Yes / No		Sequential test: Within urban area = Good; Urban Fringe = Fair; rural Location = Poor		Sustainability Score (5 = best, 0=worst)	Planning Status for undeveloped land (full planning 5, outline 3 none 1)	Alignment with HBC Development Stratrgy: Ensuring that the majority of development is well related to the existing or xtended key bus and rail network	To seek the use of appropriate previously developed land within the district in preference to developing greenfield land	To ensure Ripon, Knaresborough, Boroughbridge, Masham and Pateley Bridge are main focus for employment in the district	Planning Score	Physical Development Constraints: Excellent = No Constraints, Good = Minor Constraints easily overcome, Fair = Constraints resolved through investment Poor = Major Constraints difficult to resolve		Availability Score	Overall suitability Score %	Market Sector Suitability (5 = strong 3= fair 1 = poor): B1(a)	B2 / B1c	B8	Marketability Score	Overall Marketability %	TOTAL SCORE
1	Flaxby	41.7	41.7	Poor	1.0	Fair	3.0	Excellent	5.0	3.0	No	1.0	Poor	2.0	1.5	1.0	1.0	1.0	1.0	1.0	Fair	3.0	3.0	25.5	4.0	5.0	5.0	23.0	46.0	71.5
2	South of Cardale Park	7.9	7.9	Poor	1.0	Good	4.0	Fair	3.0	2.7	No	1.0	Good	5.0	3.0	1.0	5.0	1.0	5.0	3.0	Good	4.0	4.0	38.0	5.0	3.0	0.0	13.0	26.0	64.0
3	Land South of Melmberby Industrial Estate	4.1	4.1	Poor	1.0	Good	4.0	Fair	3.0	2.7	No	1.0	Poor	2.0	1.5	1.0	5.0	1.0	1.0	2.0	Excellent	5.0	5.0	33.5	0.0	5.0	5.0	15.0	30.0	63.5
4	Harrogate College	1.7	1.7	Good	4.0	Excellent	5.0	Fair	3.0	4.0	Yes	5.0	Good	5.0	5.0	1.0	5.0	5.0	5.0	4.0	Good	4.0	4.0	51.0	5.0	4.0	0.0	14.0	28.0	79.0
5	Manse Farm	42.1	42.1	Poor	1.0	Excellent	5.0	Excellent	5.0	3.7	No	1.0	Fair	3.0	2.0	3.0	5.0	1.0	5.0	3.5	Good	4.0	4.0	39.5	5.0	5.0	5.0	25.0	50.0	89.5
6	[illegible] HDLP Allocation, Masham	1.4	1.4	Poor	1.0	Fair	3.0	Poor	1.0	1.7	No	1.0	Fair	3.0	2.0	5.0	5.0	1.0	5.0	4.0	Excellent	5.0	5.0	38.0	0.0	3.0	2.0	7.0	14.0	52.0
7	Area around Kirk Deighton	Undefined		Poor	1.0	Fair	3.0	Excellent	5.0	3.0	No	1.0	Fair	3.0	2.0	1.0	1.0	1.0	1.0	1.0	Fair	3.0	3.0	27.0	0.0	3.0	5.0	13.0	26.0	53.0
16	Ripon Auction Mart	2.6	2.6	Poor	1.0	Good	4.0	Good	4.0	3.0	Yes	5.0	Fair	3.0	4.0	1.0	5.0	5.0	1.0	3.0	Good	4.0	4.0	42.0	1.0	3.0	0.0	5.0	10.0	52.0
20	Masham Auction Mart	1.0	1.1	Poor	1.0	Good	4.0	Poor	1.0	2.0	Yes	5.0	Fair	3.0	4.0	1.0	5.0	5.0	5.0	4.0	Good	4.0	4.0	42.0	1.0	3.0	2.0	9.0	18.0	60.0
21	Ripon Barracks	67.7	67.7	Poor	1.0	Poor	1.0	Poor	2.0	1.3	Yes	5.0	Fair	3.0	4.0	1.0	5.0	5.0	5.0	4.0	Excellent	5.0	5.0	43.0	0.0	3.0	3.0	9.0	18.0	61.0
22	Dishforth Airfield	375.4	375.4	Poor	1.0	Poor	1.0	Excellent	5.0	2.3	Part	3.0	Poor	1.0	2.0	1.0	3.0	3.0	1.0	2.0	Fair	3.0	3.0	28.0	0.0	3.0	5.0	13.0	26.0	54.0
23	Tockwith Airfield	283.6	283.6	Poor	1.0	Poor	1.0	Poor	1.0	1.0	Yes	5.0	Poor	1.0	3.0	1.0	5.0	5.0	1.0	3.0	Fair	3.0	3.0	30.0	0.0	3.0	3.0	9.0	18.0	48.0
24	Hutton Bank, Ripon	0.6	0.6	Poor	1.0	Good	4.0	Good	4.0	3.0	Yes	5.0	Fair	3.0	4.0	1.0	5.0	5.0	5.0	4.0	Excellent	5.0	5.0	48.0	0.0	4.0	0.0	4.0	8.0	56.0
26	Gas Stroage site, Ripon	1.3	1.3	Poor	1.0	Poor	1.0	Excellent	5.0	2.3	Yes	5.0	Fair	3.0	4.0	1.0	5.0	1.0	5.0	3.0	Good	4.0	4.0	40.0	1.0	4.0	5.0	16.0	32.0	72.0
35	Harrogate Road, Ripon	1.6	1.6	Poor	1.0	Good	4.0	Fair	3.0	2.7	No	1.0	Fair	3.0	2.0	5.0	5.0	1.0	5.0	4.0	Good	4.0	4.0	38.0	1.0	4.0	4.0	14.0	28.0	66.0

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