

Scarborough Borough Council  
November 2015

# Scarborough Borough Local Plan Employment Land Review



*A great place to live, work & play*



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## 1.0 INTRODUCTION

### BACKGROUND

1.1 The National Planning Policy Framework (NPPF) requires Local Plans to be based on up-to-date and robust evidence. Paragraph 160 of the NPPF states that local planning authorities should prepare and maintain a robust evidence base to understand both existing needs and likely changes in the economic markets operating within their area. Paragraph 161 of the framework states this evidence should be used to assess:

- The needs for land or floorspace for economic development, including the qualitative and quantitative needs for foreseeable types of economic activity over the plan period; and
- The existing and future supply of land available for economic development and its sufficiency and suitability to meet identified needs.

1.2 Annex 2 of the NPPF identifies “economic development” as including development within the B Use Classes, public and community uses and main town centre uses (but excluding housing development). An Employment Land Review (ELR) focuses on the B Use Classes of the Town and Country Planning (Use Classes) Order 1987 (as amended), those being:

Use Classes Order	Use / Description of Development
B1: Business	a) Offices, other than a use within Class A2 (Financial Services)
	b) Research and development of products or processes
	c) Light industry
B2: General Industrial	General industry: use for the carrying out of an industrial process other than one falling in class B1
B8: Storage & Distribution	Use for storage or distribution centre

### PURPOSE

1.3 This Employment Land Review seeks to provide an up-to-date position on economic issues in the Borough and an evidence base to allow for the development of robust planning policies within the emerging Scarborough Borough Local Plan. It is an update to the ELR that was published alongside the Draft Local Plan in May 2014, with changes focussed on providing transparency and ensuring compliance with national planning policy.

### ECONOMIC VISION

1.4 The NPPF states that in drawing up local plans, local planning authorities should set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth.

1.5 Scarborough Borough falls entirely within the York, North Yorkshire and East Riding Local Enterprise Partnership (LEP) area. The LEP’s “Economic and Investment Strategy” provides the following vision, to:

*“...make York, North Yorkshire and East Riding the best place in England to grow a small business, combining a quality business location with a great quality of life”.*

- 1.6 Within the strategy, Plan area is shown to fall within the “Coast” local economy area. The key priorities for this area focus around improving workforce skills and employability, creating successful and distinctive places and creating a well-connected economy. In particular, there is an emphasis placed on strengthening the non-tourism related aspects of the local economy, capitalising on opportunities presented by emerging markets, improving east to west connectivity and shaping the future roles of settlements.
- 1.7 The Borough Council has worked proactively with the LEP to help shape the Economic and Investment Strategy, particularly those elements relating to Scarborough Borough and the wider coastal economy, and to ensure that the strategy encourages sustainable economic growth.

## REPORT STRUCTURE

- 1.8 The report has been structured as follows:
  - **Chapter 2** outlines the context within which any decisions about employment land will need to be undertaken;
  - **Chapter 3** provides the methodology for how the Employment Land Review will be conducted;
  - **Chapter 4** provides a breakdown of the local economy, including the economic geography of the area and an analysis of past and present trends within the market;
  - **Chapter 5** looks at the current supply (quantity) of employment land within the Local Plan area of the Borough;
  - **Chapter 6** looks at how the Borough’s economy is likely to change over the emerging plan period and assesses the implications for current and future employment land provision;
  - **Chapter 7** provides a summary of the consultation work undertaken with local businesses, land and property agents and other stakeholders, including the Local Enterprise Partnership and neighbouring authorities;
  - **Chapter 8** provides an assessment of the quality of employment land within the Borough and makes recommendations as to which sites are able to meet the needs of modern businesses;
  - **Chapter 9** identifies the level of employment land required to satisfy future demand through an analysis of job growth forecasts and through consultation with local businesses; and
  - **Chapter 10** provides recommendations on which sites should be taken forward for allocation in the emerging Local Plan in the context of anticipated future demand

## 2.0 STRATEGIC CONTEXT

- 2.1 This section of the report sets out the strategic context within which the Employment Land Review is set. Policy at the national and local level, together with more general guidance will be discussed, and their implications identified. The findings of this part of the report are intended to inform and guide the rest of the report and as such, this ELR is considered by SBC to be in line with policy requirements at all strategic levels.

### NATIONAL POLICY

#### National Planning Policy Framework

- 2.2 In March 2012, the Government published the National Planning Policy Framework (NPPF), setting out overall planning policies and objectives. The NPPF must be taken into account in the preparation of Local Plans and is a material consideration in planning decisions. Equally, evidence supporting Local Plan policies should be in accordance with the Framework.
- 2.3 The NPPF states that the purpose of the planning system is to contribute to the achievement of sustainable development, and identifies three roles within this:
- **an economic role** - contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure;
  - **a social role** - supporting strong vibrant and healthy communities, by providing the supply of housing required to meet the needs of present and future generations, and by creating a high quality built environment, with accessible local services that reflect the community's needs and support its health, social and cultural well-being; and
  - **an environmental role** - contributing to protecting and enhancing our natural, built and historic environment; and a part of this, helping to improve biodiversity, use natural resources prudently, minimise waste and pollution, and mitigate and adapt to climate change including moving to a low carbon economy.
- 2.4 At the heart of the NPPF is a **presumption in favour of sustainable development**, which should be seen as a golden thread running through both plan-making and decision-taking. For **plan-making** this means that:
- local planning authorities should positively seek opportunities to meet the development needs of their area;
  - local plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless;
    - Any adverse impact of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in the Framework taken as a whole; or
    - Specific policies in the Framework indicate development should be restricted.

- 2.5 Paragraph 17 of the NPPF states that within the overarching roles that the planning system ought to play, a set of core land-use planning principles should underpin both plan-making and decision-taking. There is one principle that is directly relevant to economic development and this Employment Land Review. This principle states that planning should:
- Proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made to objectively identify and then meet the housing, business and other development needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of the residential and business communities.
- 2.6 Paragraphs 18 to 22 present the Government's policies for building and strong, competitive economy. Here it states that in order to help achieve economic growth, local planning authorities should plan proactively to meet the development needs of business and support an economy fit for the 21<sup>st</sup> century. In particular, paragraph 21 states that in drawing up local plans, local planning authorities should:
- Set out a clear economic vision and strategy for their area, which positively and proactively encourages sustainable economic growth;
  - Set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
  - Support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new and emerging sectors likely to locate in their area. Policies should be flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstance;
  - Plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
  - Identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and
  - Facilitate flexible working practices such as the integration of residential and commercial uses within the same unit.
- 2.7 The NPPF also states in paragraph 22 that planning policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose, and, that land allocations should be reviewed regularly.
- 2.8 In terms of using a proportionate evidence base on which to base economic policies, paragraph 160 of the NPPF states that in order have a clear understanding of business needs, local planning authorities should:
- work together with county and neighbouring authorities and with Local Enterprise Partnerships to prepare and main a robust evidence base to understand both existing business needs and likely changes in the market; and
  - work closely with the business community to understand their changing needs and identify and address key barriers to investment, including a lack of housing, infrastructure or viability.
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2.9 Paragraph 161 states that local planning authorities should use the evidence base to assess:

- the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;
- the existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs. Reviews of land available for economic development should be undertaken at the same time as, or combined with, Strategic Housing Land Availability Assessments and should include a reappraisal of the suitability of previously allocated land.

### **National Planning Practice Guidance**

2.10 The National Planning Practice Guidance (NPPG) provides guidance on how needs assessments for both housing and economic uses (employment land reviews) should be undertaken. In effect the NPPG provides an abbreviated version of the more detailed guidance that was set out in the previous “Employment Land Reviews – Guidance Note” (DCLG, December 2004). In terms of the methodology, the NPPG provides guidance under the following headings:

- How should the current situation in relation to economic and main town centre uses be assessed?
- How should employment land be analysed?
- How should future trends be forecast?
- What type of employment land is needed?
- How should employment land requirements be derived?

2.11 As set out in Chapter 3, the methodology used by this Employment Land Review broadly corresponds with the detailed requirements of the NPPG and the previous ELR guidance note.

## **LOCAL POLICY**

### **Scarborough Borough Local Plan (SBC, 1999)**

2.12 The Scarborough Borough Local Plan was adopted in April 1999 and provides the framework for decisions on development proposals and the allocation of land for specific purposes, and will do so until replaced by the new Local Plan. The Plan’s guiding principles are:

- to meet the need for new development while safeguarding the area’s character and environmental quality;
- to assist the economic development of the Borough by securing the availability of land for development;
- to improve the accessibility of the area and reduce the need for frequent and distant travel;
- to enhance the quality of the area’s environment and conserve its natural resources;



- to ensure that housing meets the needs of the community and there is a balance between housing growth and employment opportunities; and
  - to maintain and promote prosperous town centres offering a good range of services and shopping facilities.
- 2.13 The Local Plan identifies the town of Scarborough and its surrounding areas as being able to accommodate further housing and industrial development. In Whitby, the opportunities for expansion are more limited with the emphasis placed on the provision of land to meet employment needs. In the smaller settlements within the Borough, development should be limited to small scale housing and employment generating development, in order to avoid altering their unique rural character.
- 2.14 The Plan's strategy for new industrial and business development emphasises the need to:
- attract new industry and expand firms in the area by providing an adequate supply of land for industrial and business development;
  - encourage high technology manufacturing and office developments; and
  - promote self employment and entrepreneurship.
- 2.15 The Plan sets out the following broad principles for land allocations in the Borough:
- concentrate major industrial activities on Scarborough Business Park;
  - make provision for factory space in Whitby to assist the economic regeneration of the town; and
  - make provision for smaller industrial developments in Scarborough, Filey and Hunmanby.

### **The emerging Scarborough Borough Local Plan and the Objective Assessment of Housing Need**

- 2.16 The conclusions of this Employment Land Review will inform the production of the Borough's new Local Plan and the policies contained therein. Equally, this ELR will also have to take into account those other pieces of evidence that influence planning policy at the local level. This includes issues such as the level of housing to be delivered over the plan period, new infrastructure that may be required to support development and the desire to progress and diversify the Borough's economy in a way that ensures resilience to changing economic conditions. It is essential that all these individual elements of local planning policy are aligned, and that they all seek to meet the same overall aims and objectives.
- 2.17 To this end, there is an important and direct relationship between jobs and homes; in essence, there is a need to ensure that new job opportunities are provided alongside new housing development. As such, in determining the target for job growth and, subsequently, the employment land requirement, full account must be taken of the extent to which the Borough's housing stock will grow.
- 2.18 The Borough Council has produced a report titled 'Delivering a Local Plan Housing Target (including an Objective Assessment of Housing Need)', which sets out the Council's intended target for housing to be delivered through the

new Local Plan. The objective assessment analysed the potential impact of several key indicators of housing need, such as demographic change, population projections, and predicted economic growth, on the Borough's housing stock. One of the key considerations in the analyses was the impact on the local job market, particularly job creation and succession. It also takes into account other market signals and established a range of objectively assessed need. The points below provide a summary of the impact of each scenario, with the table providing an overview of the total amount of housing to be delivered through each scenario.

- **Natural Change** - the current demographic profile of an ageing population will result in a declining population and a significant amount of jobs becoming available as people currently in employment move past retirement age.
- **2012-Based Household Projections**- by simply providing the number of houses required to meet the Government's household and population projections, there would not be enough economically active people of working age in the Borough to fill the jobs that had now become vacant. In essence, whilst this approach would mean planning for more housing, it would also mean planning for economic decline.
- **No Job Growth** - in order to merely maintain the current number of jobs in the Borough, i.e. no job growth, an increased population over and above that predicted within the latest ONS population projections would be required.
- **Medium Employment Forecast** – projection based on the average REM figures for a period of five years suggests an approximate net additional 3000 FTE jobs in the Borough by 2032.
- **High Employment Forecast** - projection based on the average REM figures for the previous two years suggests an approximate net additional 5000 FTE jobs in the Borough by 2032.
- **Very High Employment Forecast** – the projection is not based REM data but on the suggestions of the Borough council's Economic Development team that in excess of 7000 net additional FTE jobs could be created in the Borough by 2032.

Scenario	Total Housing Growth	Annual Delivery Rate
Natural Change	1191	57
Household Projections	3668	175
No Job Growth	3329	159
Medium Employment Forecast	7209	344
High Employment Forecast	9681	461
Very High Employment Forecast	12,153	579

Source: 'Delivering a Local Plan Housing Target (including an Objective Assessment of Housing Need)

2.19 The document then sets out the implications of the various scenarios in respect of deliverability (both in historic terms and future delivery) and its impact on the ability to deliver an appropriate level of affordable housing.

2.20 The conclusion is that the Local Plan should seek to support current and emerging industries by delivering the amount of housing required to produce the workers that they will require. As such, it is recommended that the target for housing delivery between 2011 and 2032 should be 9681 dwellings (461 dwellings per year).

### Scarborough Employment Land Review (Halcrow Group Ltd, May 2006)

- 2.21 The first Employment Land Review for the Borough was published alongside the 2006 Core Strategy (Preferred Options) Development Plan Document. It presented a detailed investigation into the supply and demand of employment land and made recommendations as to those employment sites that could be released for other uses. The review also provided the Borough Council with a GIS database of employment land sites across the Borough.
- 2.22 The review identified 98 ha of land allocated for B1/B2/B8 uses, where 16 ha had been taken up by non B1/B2/B8 uses (e.g. residential, retail etc) and a further 14 ha were undeveloped, vacant or derelict. A breakdown of the employment land identified with the review is presented below.

<b>B1/B2/B8 employment land</b>	98 ha
<b>Non B1/B2/B8 uses</b>	16 ha
<b>Undeveloped, vacant or derelict land</b>	14 ha
<b>Undeveloped land to the south of SBP</b>	65 ha
<b>Unknown</b>	3 ha

- 2.23 One of the main findings of the review was that employment growth up to the year 2016 was forecast to be modest, creating little additional need for employment land. However, given that the ELR pre-dated and took no account of the need to significantly grow the Borough's housing stock.
- 2.24 As such, the data collected through the 2006 review will be used as the starting point for this update. However, for the reasons outlined above, this new review will utilise a different methodology for forecasting demand for employment land over the plan period.

### Strategic Housing and Employment Land Availability Assessment (SHELAA)

- 2.25 Paragraph 161 of the National Planning Policy Framework states the "Reviews of land available for economic development should be undertaken at the same time as, or combined with, Strategic Housing Land Availability Assessments (SHLAA)". As such, the Borough Council will seek to combine the findings of this ELR update with the Borough's annual SHLAA and produce a "Strategic Housing and Employment Land Availability Assessment" (SHELAA), the broad objectives for which will be to:
- Identify sites with potential for housing development;
  - Identify sites with potential for employment development;
  - Assess the potential of these sites; and
  - Assess when these sites are likely to be developed.
- 2.26 The findings of the SHELAA will feed into the production of the emerging Local Plan to demonstrate that the targets for development set within the plan are deliverable. However, it is not a policy making document and as such it will not make detailed decisions on individual development sites; this is the purpose of the Local Plan itself.

### 3.0 METHODOLOGY

- 3.1 This chapter provides an overview of relevant planning policy and guidance and how these have influenced the methodology used to undertake this Employment Land Review.

#### NATIONAL PLANNING POLICY FRAMEWORK

- 3.2 The key points from the National Planning Policy Framework (NPPF) relating to developing a robust evidence base for economic development are as follows (the key words and phrases are highlighted in bold font):

- Taking account of where **existing business sectors are expanding or contracting**
- Identify and plan for **new and emerging sectors**
- Be **flexible enough to accommodate needs not anticipated in the plan** and to allow a **rapid response to changes in economic circumstance**;
- **Work with county and neighbouring authorities and with LEPs** to prepare and maintain a robust evidence base to **understand both existing business needs and likely changes in the market**
- Work with the **business community to understand their changing needs** and identify and address key barriers to investment, including a lack of housing, infrastructure or viability
- Assess the needs for land and floorspace for economic development, including both the **quantitative and qualitative needs** for all foreseeable types of economic activity over the plan period
- Assess the existing and future supply of land available for economic development and its **sufficiency and suitability to meet the identified needs**

- 3.3 In addition to ensuring that each of these points is fully covered within this ELR, it is essential that the guidance provided by the NPPG is followed. Given that the NPPG is in essence an abbreviated version of the methodology recommended in the previous “Employment Land Reviews – Guidance Note” (DCLG, December 2004), the 3-step process contained therein provides a useful overview of the recommended ELR approach:

**“Stage 1: Taking Stock of the Existing Situation** – take stock of the existing situation, including an assessment of ‘fitness for purpose’ of existing allocated employment sites.

**Stage 2: Creating a Picture of Future Requirements** – assess, by a variety of means (i.e. economic forecasting, consideration of recent trends and/or assessment of local property market circumstances) the scale and nature of likely demand for employment land and the available supply in quantitative terms.

**Stage 3: Identifying a ‘New’ Portfolio of Sites** – undertake a more detailed review of sites supply and quality and identify and designate specific new employment sites in order to create a balanced local employment land portfolio.”

*(Source: Department for Communities and Local Government (DCLG), (2004) "Employment Land Reviews – Guidance Note", paragraph 2.37)*

## **SCARBOROUGH'S APPROACH**

3.4 The methodology used to undertake the Employment Land Review for Scarborough Borough accords with national planning policy and broadly corresponds with that outlined within the guidance note. The information presented below provides a brief breakdown of the process used to complete the review – more detailed information is presented within the relevant chapters.

### **Step 1: Market Analysis / Trends (Chapter 4)**

3.5 This part of the review will provide an overview of current and historic trends within the local economy, including change in employment levels, working population, economic activity, unemployment, skills and earnings. It will also provide an analysis of recent development trends, including the take-up of planning permissions for office, industrial and warehouse uses and employment sites that have been lost / redeveloped for non-employment generating uses, e.g. housing.

### **Step 2: Quantity of Existing Supply (Chapter 5)**

3.6 Step 2 of the ELR process is to quantify the current supply of 'B Use' employment land within the Borough. It will provide a breakdown of occupied land and premises, in addition to land and premises that are vacant, derelict or undeveloped. Further analysis of site and floorspace type and size will also be undertaken. This will establish the baseline position, whereby any future land requirements (to be revealed in step 4) will be additional.

### **Step 3: Economic Projections and Emerging Sectors (Chapter 6)**

3.7 The next step is to establish the extent to which the economic and employment markets could change over the period of the emerging local plan (up to 2032). This process includes identifying those sectors that are likely to expand or contract and exploring the implications of the entirely new sectors that are emerging within the Borough; namely the potash mining and offshore wind energy industries. A key output from this stage will be anticipated job creation.

### **Step 4: Consultation with the Business Community, Agents and other Stakeholders (Chapter 7)**

3.8 In accordance with the NPPF a key stage in the ELR process is to work with the business community to understand their changing needs, both from a quantitative and qualitative perspective. Equally, it will be important to engage with local land and estate agents, who have a firm grasp on the property and land markets in the Borough. This information can be used to supplement the data derived from economic projections.

3.9 At this stage, discussions with the Local Enterprise Partnership, the County Council and neighbouring authorities will take place in order to understand the extent of the economic links between adjoining areas and to highlight any

strategic cross-boundary issues that could require a collaborative approach to planning for economic development.

### **Step 5: Assessing the Quality of Supply (Chapter 8)**

3.10 This part of the review comprises a qualitative assessment of employment sites against pre-determined criteria in order to identify those sites which should be retained and those which could be released for other uses. The headings for the main criteria used in this review are presented below, with the full list of criteria used in the assessments available in Appendix B:

- Physical and environmental criteria;
- Strategic access;
- Market conditions / Perception and demand;
- Sequential test and brownfield / greenfield;
- Site development constraints (undeveloped sites only);
- Accessibility; and
- Land ownership constraints.

3.11 One of the main outputs of this stage will be the identification of sites that have potential for redevelopment for other non-employment uses, i.e. housing. Sites that are considered to have potential for redevelopment would be those that are no longer suitable or viable for employment use and are likely to come under pressure.

### **Step 6: Future requirements (Chapter 9)**

3.12 The purpose of this stage is to bring together each of the previous information sources (steps 3 and 4) in order to reveal the future demand for employment land in the Borough over the Local Plan period. This will be done by translating the estimates for job creation into land requirements using the method developed by Roger Tym & Partners<sup>1</sup> for the Yorkshire and Humber Region (April 2010). The way in which the land requirement is derived is outlined below:

**i) Sector to land use**

Translate the above jobs by sector into jobs by land use, identifying those future jobs that will occupy 'employment' (B-class) space – that is, offices, industrial space and warehousing.

**ii) Jobs to land**

Translate the above employment change into change in land use, based on assumptions about employment densities (floorspace per worker) and plot ratios (ratio of floorspace to site area).

**iii) Margins**

To translate the net change above into a gross provision target, showing how much land should be allocated for B-class development, add to the net change above:

- An allowance to compensate for any existing employment sites that may be lost in future;

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<sup>1</sup> Planning for Employment Land: Translating Jobs into Land, Roger Tym & Partners, April 2010

- Further allowances for land in the planning and development pipeline and for choice, competition and uncertainty.

**Step 7: Identifying a 'New' Portfolio of Sites (Chapter 10)**

3.13 The next stage of the review is to identify what gaps exist between the current supply of vacant buildings or undeveloped sites (where new development could be accommodated) and the level of future demand (revealed by Step 6). Where there is an unbalance between demand and supply there may be a need to recommend the release of existing employment sites for other uses (in addition to those identified in through Step 5). Equally, there may be a need for new employment sites to be identified. Whilst the final judgements on new allocations will be made within emerging development plan, this stage of the review will identify potential broad locations for the new allocations.

## 4.0 LOCAL MARKET ANALYSIS

- 4.1 This section of the review provides an overview of the local economic market, looking at the drivers of economic activity, links with neighbouring authorities and economies, how the job market has changed over the last 15 years, the Borough's workforce profile and an analysis of recent developments (physical development) within the B-Use Classes.

### OVERVIEW AND KEY ECONOMIC DRIVERS

- 4.2 Historically, the Borough's economy has been highly dependent upon the fishing and tourism industries, both in terms of bringing in money and providing jobs for local people. Tourism in particular still forms a key part of the economy, with the Borough relying heavily upon the yearly influx of visitors to the area; over 7 million visitors are attracted to the Borough each year. In total, the tourism industry accounts for approximately 7,900 jobs<sup>2</sup> (19.1% of the employed workforce compared to the national average of 7.1%). Nevertheless, the majority of businesses within the tourism industry are outside of the scope of this Employment Land Review.
- 4.3 11.8% of all jobs are within the manufacturing industry, which is higher than the national average (8.5%) and marginally higher than the regional average (11.7%). The proportion of jobs within other industries, such as transport and communications, banking, finance and insurance are also below the national and regional averages. These industries are predominantly located within the various business and industrial parks located throughout the Borough, which provide opportunities for the development of offices, industrial units and storage / distribution operations.
- 4.4 Scarborough Business Park is the largest of the Borough's business parks and hosts some of the Borough's main employers and some internationally renowned companies. As such, it is one of the key drivers behind the area's economy. Over the period of the Local Plan the Business Park is likely to see major expansion and has recently seen the completion of a £10 million scheme to release over 40 ha of serviced development land. With a further 10 ha of employment land allocated (within the Borough Local Plan) for development, Scarborough Business Park has the potential to double in size and to create year round employment opportunities for local people, helping to bolster the prestige and importance of the Business Park to the local and sub-regional economy.
- 4.5 In the northern part of the Borough, Whitby Business Park performs a similar role to that of Scarborough Business Park, providing essential employment opportunities and acting as an economic driver for Whitby and its surrounding hinterland. It is estimated that the Business Park employs 17% of the working age population within Whitby (SBC figures). The Borough Council and the North York Moors National Park Authority have produced a joint Area Action Plan for the Business Park (adopted November 2014), which provides a comprehensive strategy to help ensure that the Business Park can make an increasingly important contribution to the economy of the area, providing jobs and servicing in the locality.

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<sup>2</sup> Source: Nomis ([www.nomisweb.co.uk](http://www.nomisweb.co.uk))



- 4.6 Projects such as the development of Woodend Creative Workspace (Scarborough), which provides a home to Scarborough’s burgeoning digital, media and creative community, has seen an increase in the number of small and medium enterprises (SMEs) within the Borough. Being named the ‘Most Enterprising Place in Britain’ in 2008, and as the ‘Most Enterprising Place in Europe’ in 2009, is a reflection of the entrepreneurial spirit within the Borough.

## FUNCTIONAL ECONOMIC MARKET AREA

- 4.7 The National Planning Policy Framework (paragraph 160) states that local planning authorities should have a clear understanding of business needs within the economic markets operating in and across their area. Draft national planning guidance states that such needs should be assessed in relation to the “functional economic market area”, which is influenced by factors including;

- extent of any Local Enterprise Partnership (LEP) within the area;
- travel to work areas;
- housing market area;
- flow of goods, services and information within the local economy;
- service market for consumers;
- administrative area; and
- transport network.

- 4.8 Scarborough Borough falls entirely within the York, North Yorkshire and East Riding LEP area. The “Economic and Investment Strategy” for the LEP area, which sets out the key economic issues, opportunities and priorities for the area, identifies Scarborough Borough as falling predominantly within the “Coast” economic area (see Map 4.1). In respect of the Coast area, the LEP Strategy aims to capitalise on two major opportunities for economic growth; the proposed potash mine near Whitby and the planned Dogger Bank off-shore wind farm.

- 4.9 Although the wider coast area has links to the “Hull & Humber” economic area to the south, Scarborough Borough’s links are mainly with settlements up and down the coast and the inland “Upland Rural” area (North York Moors National Park). Many of the villages in the western part of the Borough have important links with Ryedale and particularly the towns of Malton and Pickering. In the northern part of the Borough, Whitby has some links with Redcar and Cleveland, which is covered by the Tees Valley Local Enterprise Partnership.

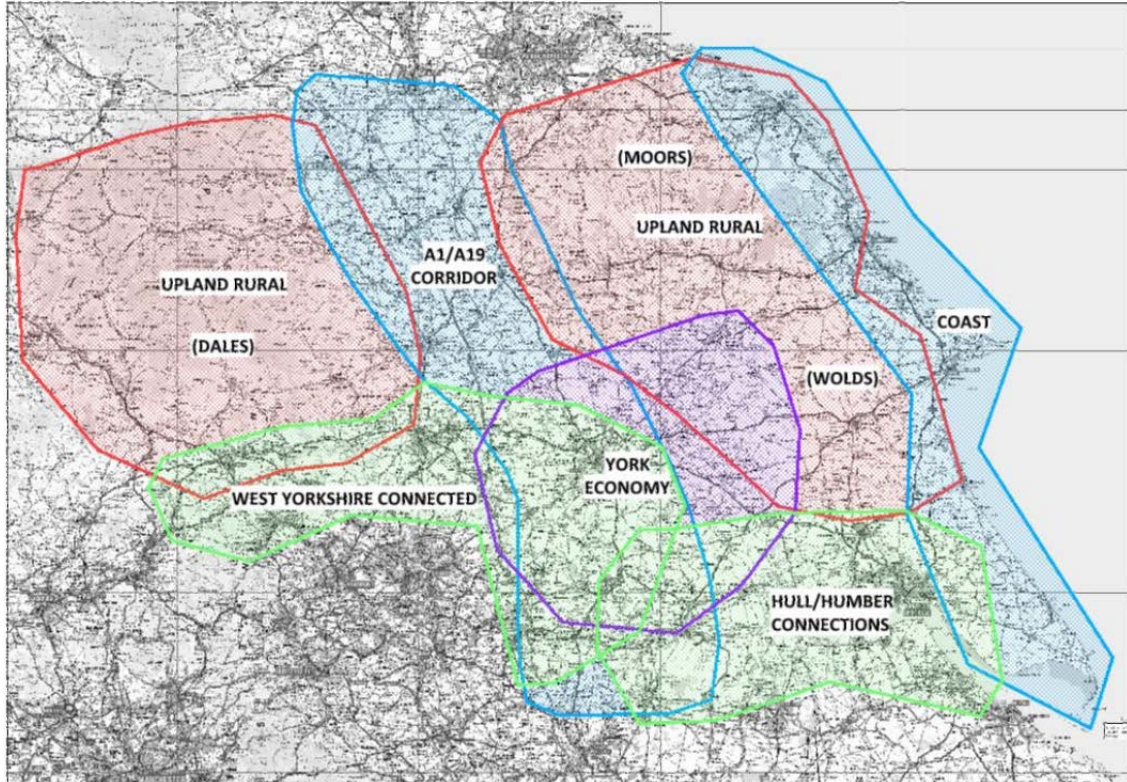
- 4.10 The LEP’s assessment of economic areas is supported by the “North Yorkshire Economic Assessment” (October 2010), which provides local authorities within the York and North Yorkshire area, with a robust analysis of the local economy. This assessment identifies Scarborough Borough as being within the “Coast” area (see Map 4.2), which is defined as being;

*“The area of Scarborough town, Whitby and its surrounding area. This **coastal economy**, particularly Scarborough Town, needs to move away from employment in traditional tourism to a more diversified economy, yet also has to address severe deprivation.”*

- 4.11 In terms of the area’s economic influences, Scarborough is recognised as having important links with the East Riding (to the south of the Borough).

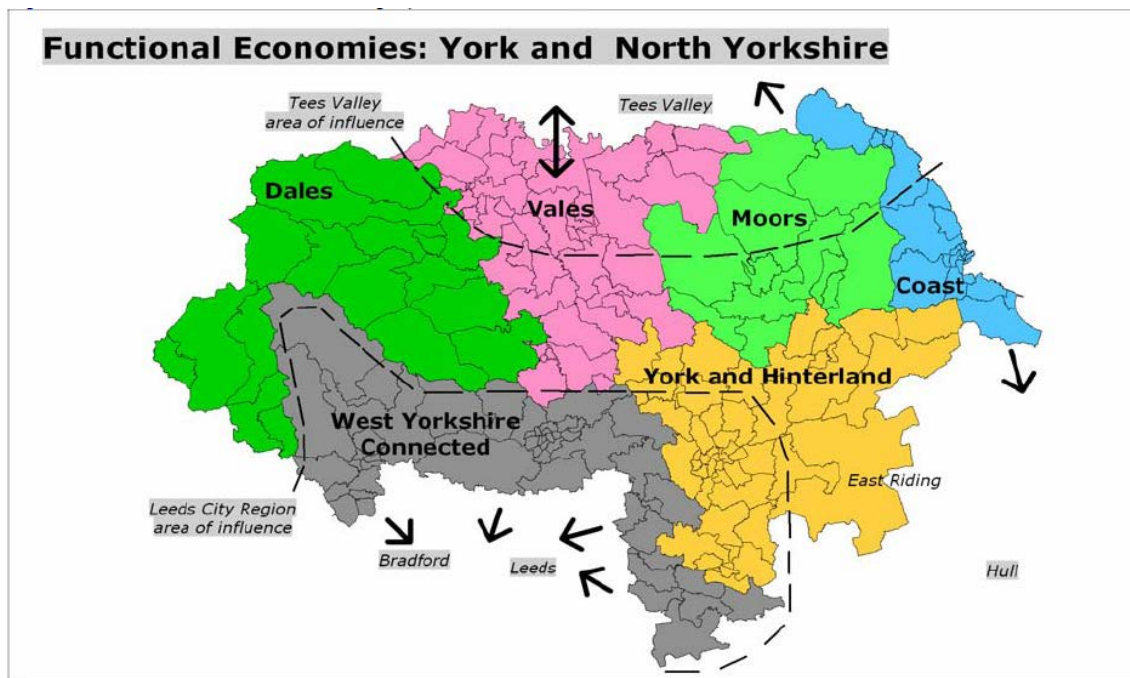
However, this influence is most felt in the retail sector rather than in terms of workforce migration. Any additional links are limited by the perceived geographic isolation of the Borough.

Map 4.1: Schematic Map of Local Economic Areas



Source: York, North Yorkshire and East Riding Enterprise Partnership

Map 4.2: Functional Economies within York and North Yorkshire

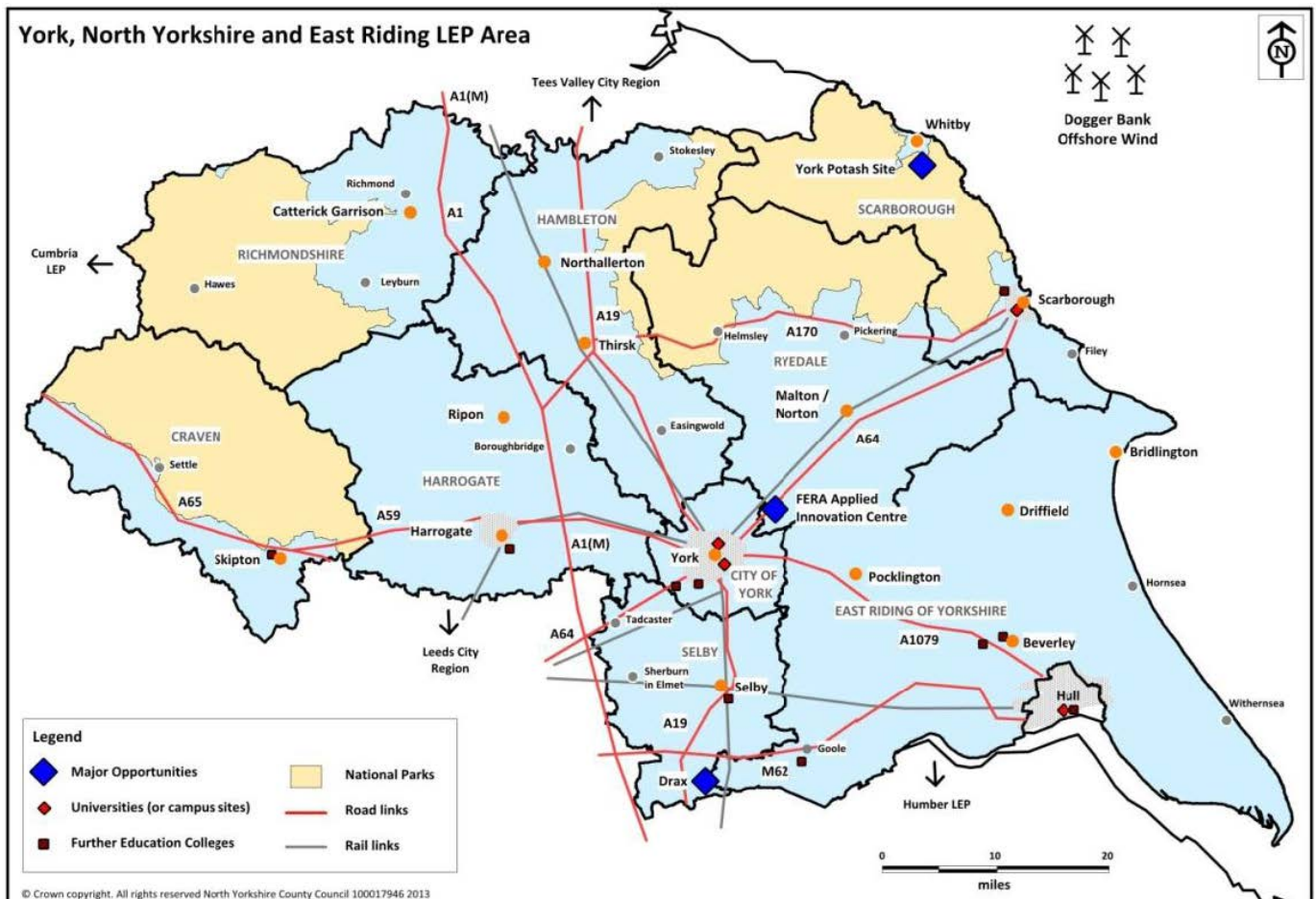


Source: North Yorkshire Economic Assessment (October 2010)

4.12 The 2015 “Strategic Housing Market Assessment” (SHMA) provides further evidence of the self-contained nature of the Borough. It uses a review of house prices, migration and travel to work patterns to derive a picture of the housing market area. Given that migration data from the 2011 Census suggests that 66.9% of households move within Scarborough Borough and 84.6% of residents in employment work within the Borough, the SHMA describes the Borough as a broadly self-contained housing market on the basis of migration, and strongly self-contained in terms of workplace. The SHMA concludes that the evidence confirms that Scarborough Borough is an appropriate Housing Market Area for the purposes of Local Plan policy making.

4.13 The self-sustaining nature of the Borough’s employment market is mainly due to the perceived geographic isolation of the area; Scarborough town itself is a 1 hour drive away from the city of York and a further 20 minutes from the A1 motorway. However, these journey times owe as much to the limited capacity of the A64 as to they do to the actual distance between the locations. The westbound rail link between Scarborough and Leeds is a popular route for commuters working in locations along the line, including Malton and York. Improvements to east / west connectivity through investment in these transport links would open up the Borough as an economic destination and is one of the main priorities of the LEP Investment Strategy.

Map 4.3: York, North Yorkshire and East Riding LEP area



Source: York, North Yorkshire and East Riding Enterprise Partnership



4.14 Although the workforce is self-contained, there are a number of established manufacturing businesses in the Borough who export their goods to locations outside of the area. However, on the basis that businesses want to be close to their respective markets, the extent to which new manufacturing businesses can be attracted to the Borough will be limited by the aforementioned geographic isolation of the area and the limited capacity of existing transport infrastructure. Nevertheless, the development of a potash mine near Whitby and the emergence of the offshore wind industry will see the introduction of new economic markets in the Borough, which will in turn bring significant employment opportunities (see Chapter 6).

## JOBS IN THE BOROUGH

### Employee Jobs (Business Register and Employment Survey, 2014)

4.15 A measure of the total number of jobs in the Borough is provided by the Business Register and Employment Survey (BRES). As shown in the table below, the most recent survey (2014) showed a total of 41,400 jobs, which represents an increase of 1,000 jobs from the previous year. An increase of 2,300 jobs is shown between 2011 (base date of the emerging Local Plan) and 2014.

Figure 4.1: Employee Jobs

Year	Full Time Jobs	Part Time Jobs	Total Employee Jobs	Net Change from Previous
2009	23,000	18,500	41,600	
2010	23,900	16,400	40,300	-1,300
2011	23,200	15,900	39,100	-1,200
2012	22,500	16,500	39,000	-100
2013	23,400	17,000	40,400	+1,400
2014	24,500	17,000	41,400	+1,000

Source: ONS Business Register and Employment Survey, 2014

4.16 In terms of net change from 2009, while there has been a loss of 200 jobs in total, the number of full time jobs has increased. However, the percentage of full time jobs (59%) is significantly lower than both the regional and national averages of 67.4% and 68.3% respectively. This owes to the importance of the tourism industry to the local economy, where there is likely to be more of a reliance on part time and seasonal employment.

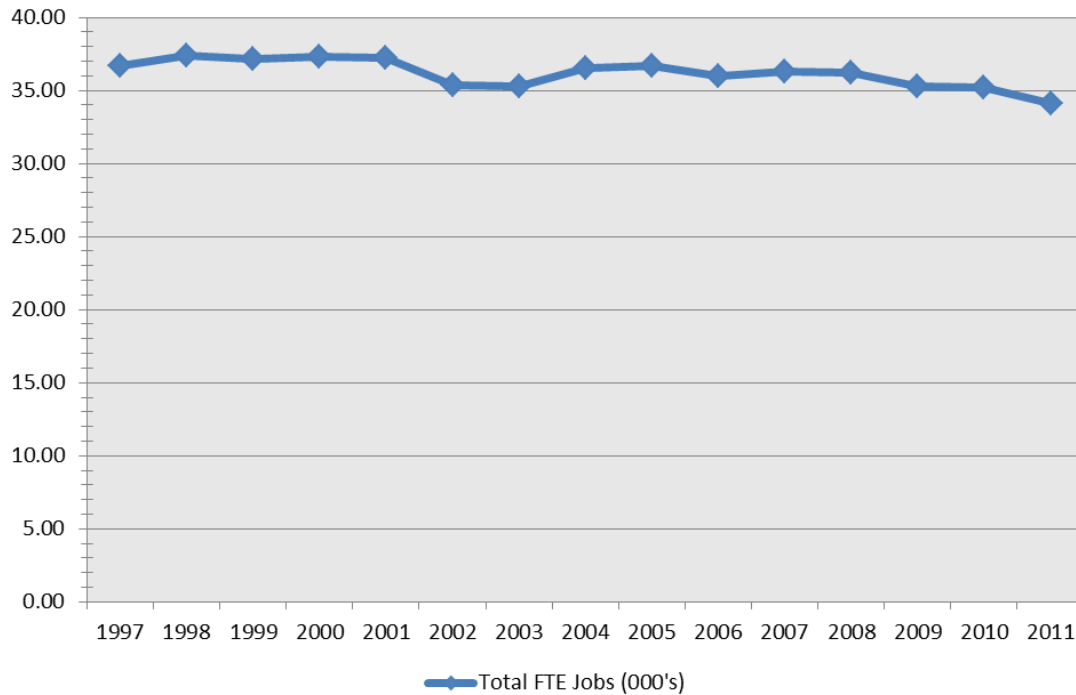
### Employment Forecasts

4.17 This ELR has used econometric forecasts provided by the Regional Econometric Model<sup>3</sup> (REM) to predict the potential future performance of the local economy. It has also been used to track historic change (from 1997 onwards). The figures used in this ELR were obtained from the REM in January 2015.

<sup>3</sup> The REM is produced by Experian and run by the Regional Economic Intelligence Unit (REIU), who are based at the West Yorkshire Combined Authority.

4.18 The REM data shows that employment levels in the Borough peaked in 1998, where 37,410 Full Time Equivalent<sup>4</sup> (FTE) jobs existed. While the number of FTE jobs is shown to have fluctuated over year-on-year (as demonstrated in Figure 4.1), the general trend is one of decline, culminating in a low point of 34,080 total jobs in 2011. For the most part, the decline experienced from 2009 onwards can be attributed to the impact of the economic recession.

Figure 4.1: Employment Change in Scarborough Borough (1997-2011)



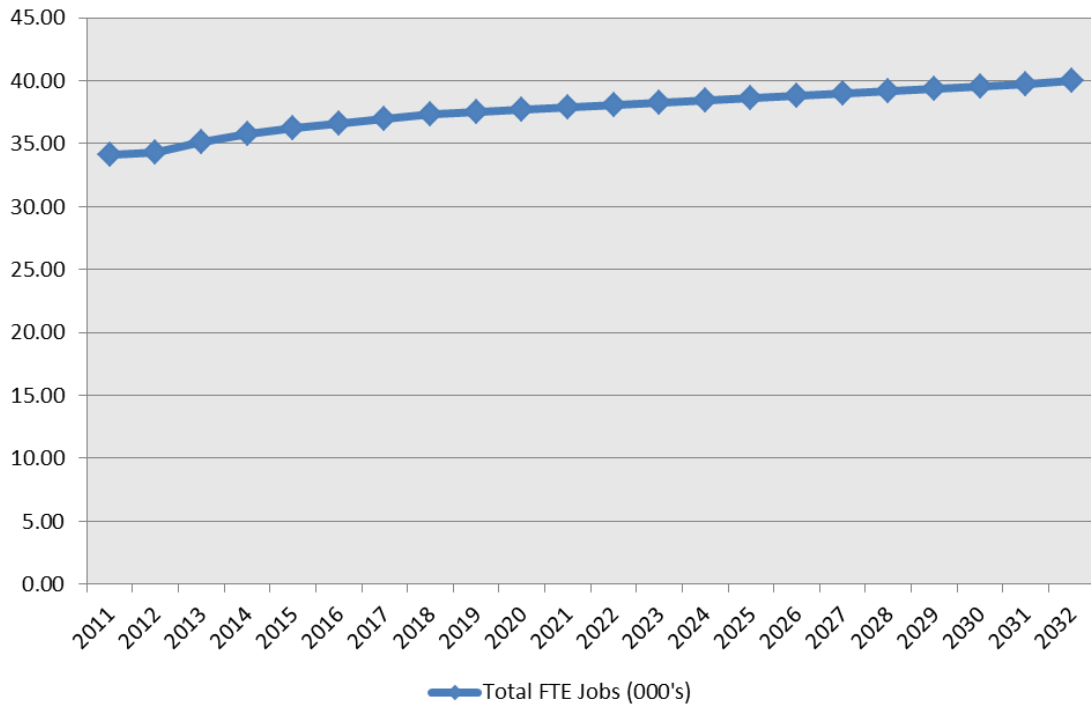
Source: *Regional Econometric Model (January 2015), Experian*

4.19 Moving forward, the REM forecast predicts that the number of FTE jobs could increase from 34,080 to over 39,770 by the year 2031. This figure has been projected forward on a pro-rata basis to cover the full period of the emerging Local Plan (2011 to 2032), with 39,970 FTE jobs by 2032 (see Figure 4.2). More information on economic projections is available in Chapter 6.

Figure 4.2: Forecast Employment Change in Scarborough Borough (2011-2032)

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<sup>4</sup> 1 Full Time Equivalent (FTE) job is equivalent to 1 employee working full-time (37.5 hours a week). One FTE job may also consist of several part-time employees whose combined work hours in a week equal 1 full-time employee.



Source: *Regional Econometric Model (January 2015), Experian*

## SOCIO-DEMOGRAPHIC PROFILE

### Working Age Population

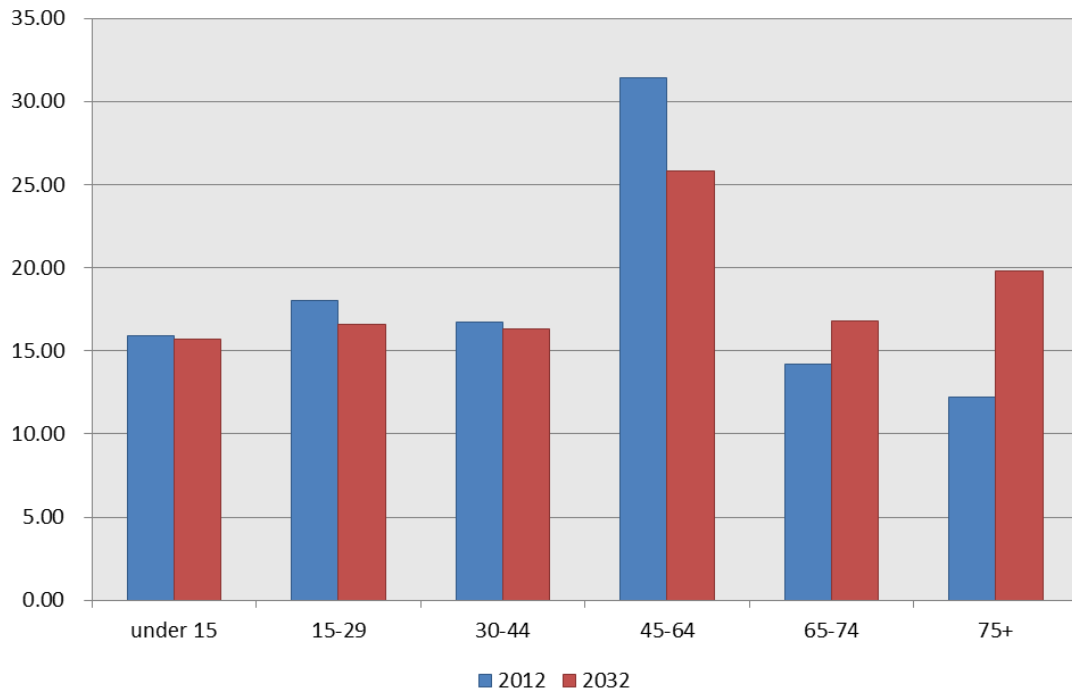
4.20 Figures from the ONS 2012-based Subnational Population Projections suggest that the population of Scarborough Borough is 108,600. This includes the area covered by the North York Moors National Park (NYMNP) Authority. It is estimated that the population of the Scarborough Borough Planning Authority area is 98,000 with the majority of people residing in the coastal towns of Scarborough, Whitby and Filey. The remaining population is spread across a number of rural villages.

4.21 While the working age population is typically defined as between the ages of 16 and 64, more people are working until after they are 65 due to the changes in pensionable age and the continued rise in life expectancy. On this basis, for the purpose of this ELR (and also the Objective Assessment of Housing Need), the potential upper working age has been increased from 64 to 74. Using data from the 2011 Census, the current working age population of the Borough is 79,278 (73% of the total population).

4.22 This stance is supported by retirement surveys produced by Liverpool Victoria, who have found a 43% increase in the number of people expecting to work beyond 65. Within the York and Humber region the number of years worked beyond retirement was estimated at 5.2 years. ONS has also found that, as of June 2012, 12% of older people work compared to 7.6% in 1993.

4.23 The 2012 ONS population projections also demonstrate that the Borough has an ageing population profile, insomuch that there will be fewer people of working age by 2032 than there is currently. This is demonstrated in Figure 4.3 below.

Figure 4.3: Age Group Comparison (2012-2032) (000s)

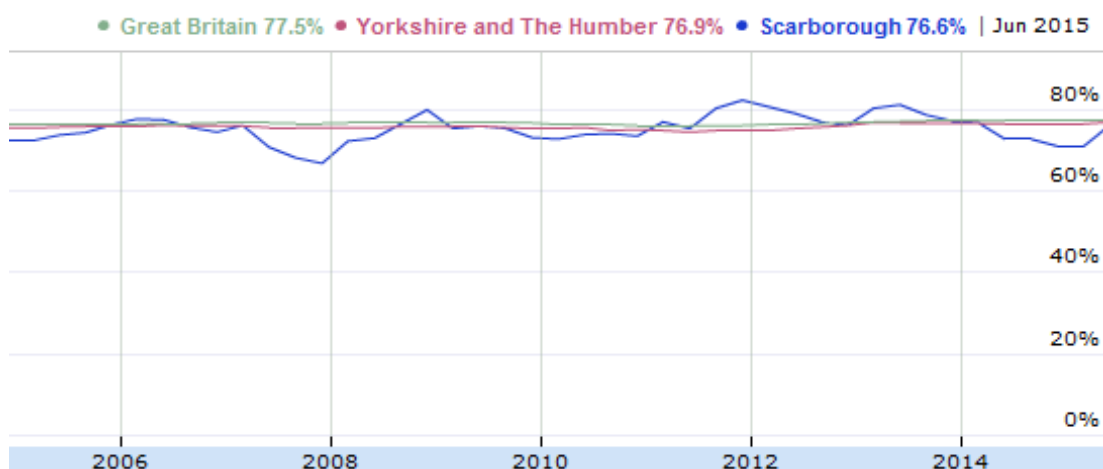


Source: 2012-based Subnational Population Projections, ONS

### Economic Activity

4.24 Although there are 79,278 people of working age (16-74) in the Borough, only 49,850 (62.88%) of these people are economically active<sup>5</sup>. This has been calculated using 2011 Census information. The latest information from NOMIS, which relates to a working age population of 16-64, indicated that economic activity rates in the Borough (76.6%) are slightly below both the regional and national averages of 76.9% and 77.5% respectively. Figure 4.4 below demonstrates how economic activity rates have changed over time.

Figure 4.4: Economically Active



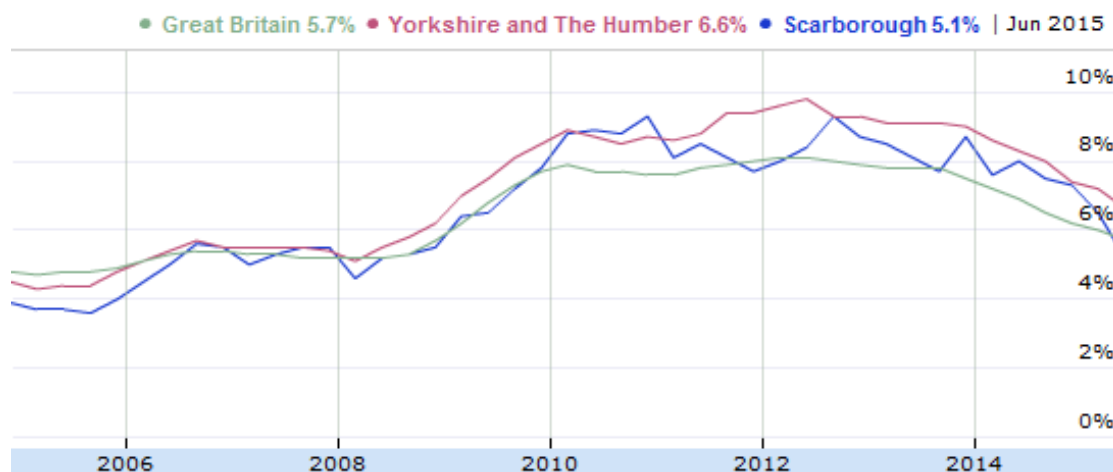
Source: Nomis ([www.nomisweb.co.uk](http://www.nomisweb.co.uk))

<sup>5</sup> 'Economically Active' is defined as people who are either in employment, or currently unemployed. 'Economically Inactive' includes those who are neither in employment nor unemployed.

## Unemployment

4.25 The latest figures (covering the period between July 2014 and June 2015) show that unemployment<sup>6</sup> in Scarborough Borough (5.1%) is lower than both the national (5.7%) and regional (6.6%) averages. Following a rise in unemployment experienced during the economic recession, rates have steadily declined in the Borough. This is clearly demonstrated by Figure 4.5 below.

Figure 4.5: Economically Active – Unemployed (Model Based)



Source: Nomis ([www.nomisweb.co.uk](http://www.nomisweb.co.uk))

## Deprivation

4.26 The 2015 Index of Multiple Deprivation showed that Scarborough Borough is in the top third most deprived local authorities in England (ranked as 90 out of 326 of local authorities in 2015). However, this represents a slight improvement on the 2010 figures, where the Borough was ranked as 85. The Borough is ranked 43 out of 326 for local concentration of deprivation, which is lower than the 2010 rank of 56. Two of the Borough's wards (Castle and Eastfield) are in the top 10% of deprived wards nationally.

## Skills

4.27 Figure 4.6 below shows the qualification levels of Scarborough Borough's residents. It demonstrates that 83.1% of residents aged between 16 and 64 have a basic level of qualification<sup>7</sup>, which is similar to the national (85%) and regional (83.4%) averages. However, the proportion of residents who are qualified to NVQ4 and above is considerably lower at 21.1%, which is lower

<sup>6</sup> Defined as those people who are economically active, currently not working and actively seeking employment – precise definition available from [www.nomisweb.co.uk](http://www.nomisweb.co.uk)

<sup>7</sup> **No qualifications:** No formal qualifications held

**Other qualifications:** includes foreign qualifications and some professional qualifications

**NVQ 1 equivalent:** e.g. fewer than 5 GCSEs at grades A-C, foundation GNVQ, NVQ 1, intermediate 1 national qualification (Scotland) or equivalent

**NVQ 2 equivalent:** e.g. 5 or more GCSEs at grades A-C, intermediate GNVQ, NVQ 2, intermediate 2 national qualification (Scotland) or equivalent

**NVQ 3 equivalent:** e.g. 2 or more A levels, advanced GNVQ, NVQ 3, 2 or more higher or advanced higher national qualifications (Scotland) or equivalent

**NVQ 4 equivalent and above:** e.g. HND, Degree and Higher Degree level qualifications or equivalent



than the regional average (29.7%) and substantially lower than the national average (36%).

Figure 4.6 Borough Qualifications (Jan 2010 – Dec 2010)

	Scarborough (%)	Yorkshire and The Humber (%)	Great Britain (%)
NVQ4 and above	21.1	29.7	36
NVQ3 and above	45.1	52.1	56.7
NVQ2 and above	61.9	70	73.3
NVQ1 and above	83.1	83.4	85
Other qualifications	*	6.8	6.2
No qualifications	13.6	9.8	8.8

Source: Nomis ([www.nomisweb.co.uk](http://www.nomisweb.co.uk))

\*Sample size too small for reliable estimate

## Earnings

4.28 While there is an apparent skills gap between Scarborough Borough and the rest of the region, this is not reflected in the resident earning figures. As shown within Figure 4.7, the average gross weekly pay for a resident of the Borough (£490.30) is higher than the regional average but lower than the national average. However, this trend does not carry through to the workplace earnings figures, whereby the average gross weekly pay for someone working in the Borough (£459.10) is lower than both the regional and national averages. This suggests that whilst many people within the Borough occupy higher earning positions, these jobs may not necessarily exist within the area.

Figure 4.7 Borough Earnings

	Scarborough (£s)	Yorkshire and The Humber (£s)	Great Britain (£s)
Earnings by Residence	490.3	479	520.8
Earnings by Workplace	459.1	479.1	520.2

Source: Nomis ([www.nomisweb.co.uk](http://www.nomisweb.co.uk))

## Travel to Work Patterns

4.29 The 2011 Census and data from the 2013 Annual Population Survey provides an analysis of travel to work patterns, including the extent to which residents of Scarborough Borough travel to other areas, together with details of how many people commute into the Borough.

4.30 The Census reports that of the economically active residents of Scarborough Borough, 84.6% live and work in the Borough, a further 4.5% work in Ryedale, 1.9% work in the East Riding of Yorkshire, 1.2% in York, 0.6% in Hambleton and 2.4% elsewhere in Yorkshire and the Humber. A further 1.4% work in Redcar and Cleveland, 0.6% in Middlesbrough, 0.8% elsewhere in the North East and 1.9% elsewhere in the UK. On this basis, Scarborough Borough is considered to be a self-contained market area.

- 4.31 The 2013 Annual Population Survey reports a total of 42,828 residents living and working in Scarborough, 9,567 commute in and 4717 commute out, resulting in net out-commute of 4,859. The APS indicated that overall 81.7% of residents lived and worked in Scarborough Borough.
- 4.32 Notwithstanding the self-contained nature of the local employment market, the importance of surrounding economies should not be overlooked, as they will continue to provide valuable jobs and services for a proportion of the Borough's households over the period of the emerging Local Plan.

## RECENT DEVELOPMENT TRENDS

- 4.33 By looking at recent development (both gains and losses) within the B-Use Classes, an understanding of how the market has operated can be gained. Although this information will not be used within the projections for future employment land requirements (see Chapter 6) it will provide useful context against which future requirements can be considered. The relevant information can be gathered from the Council's own monitoring data.

### Gains<sup>8</sup>

- 4.34 Since 2003/2004, almost 39,000m<sup>2</sup> of employment floorspace has been developed in the Borough, which equates to an annual rate of approximately 3,500m<sup>2</sup>. The rate of development peaked in 2007/2008, when almost 10,000m<sup>2</sup> of employment floorspace was completed. In contrast, in 2008/2009 only 78m<sup>2</sup> of floorspace was developed. This severe decline in development is a likely effect of the economic recession, whereby all forms of development (including residential) slowed down significantly from previous rates.
- 4.35 Of the employment development that has taken place over the past 9 years, almost one third (12,567m<sup>2</sup>) has been mixed-use<sup>9</sup>, whilst a similar level of office floorspace has also been developed (10,319m<sup>2</sup>). Figures 4.9 and 4.10 provide an overview of land developed for employment on a use-by-use basis.

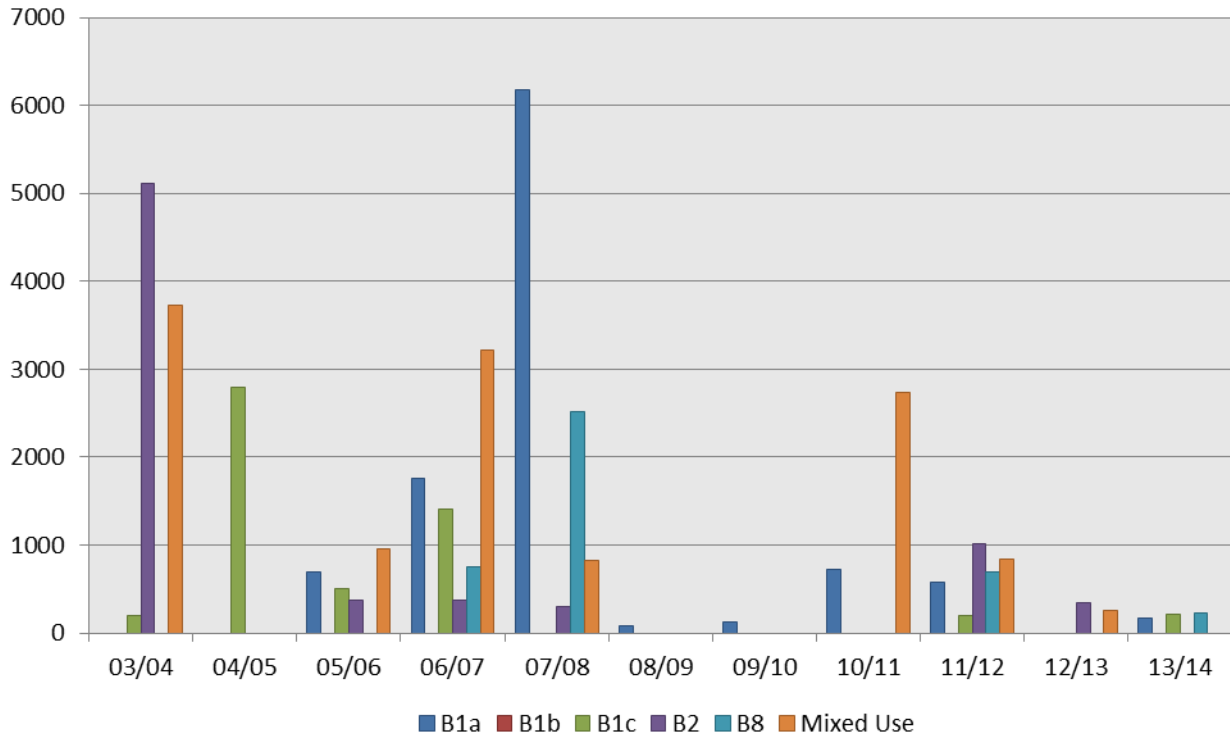
Figure 4.10 Employment Floorspace Developed by Use (m<sup>2</sup>)

	03 / 04	04 / 05	05 / 06	06 / 07	07 / 08	08 / 09	09 / 10	10 / 11	11/12	12/13	13/14	Total
B1a	0	0	689	1,766	6,178	78	130	730	580	0	168	10,319
B1b	0	0	0	0	0	0	0	0	0	0	0	0
B1c	200	2,790	500	1,409	0	0	0	0	200	0	218	5,317
B2	5,111	0	373	380	302	0	0	0	1,016	345	0	7,527
B8	0	0	0	746	2,522	0	0	0	698	0	232	4,198
Mixed Use	3,729	0	960	3,224	828	0	0	2,733	839	254	0	12,567
<b>Total</b>	<b>9,040</b>	<b>2,790</b>	<b>2,522</b>	<b>7,525</b>	<b>9,830</b>	<b>78</b>	<b>130</b>	<b>3,463</b>	<b>3,333</b>	<b>599</b>	<b>618</b>	<b>38,711</b>

Figure 4.11: Employment Floorspace Developed by Use (m<sup>2</sup>)

<sup>8</sup> For the purpose of this review 'Gains' are classified as employment development taking place on land that was either previously undeveloped, occupied by another land-use.

<sup>9</sup> 'Mixed-use' includes a site where two or more of the B-use categories have been developed



4.36 Given that the previous figures only relate to the gross external floorspace of the buildings and doesn't include the land on which they sit, this information cannot easily be compared to losses in employment land (see below). A quick approximation of the total land area can be made using a plot ratio (ratio of floorspace to the site area), which takes things such as parking and landscaping around the buildings themselves into account. This report has used a plot ratio of 0.35, which means that for every 3,500 m<sup>2</sup> of gross external floorspace, 1 hectare of land would be used. Using this method, it is estimated that roughly 11.4 hectares of employment land has been developed between 2003 and 2014. This is demonstrated in the table below.

Figure 4.12: Employment Land Developed by Use (Hectares)

	03/04	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	Total
B1a	0.00	0.00	0.20	0.50	1.77	0.02	0.04	0.21	0.17	0.00	0.05	2.95
B1b	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
B1c	0.06	0.80	0.14	0.40	0.00	0.00	0.00	0.00	0.06	0.00	0.06	1.52
B2	1.46	0.00	0.11	0.11	0.09	0.00	0.00	0.00	0.29	0.10	0.00	2.15
B8	0.00	0.00	0.00	0.21	0.72	0.00	0.00	0.00	0.20	0.00	0.07	1.20
Mixed Use	1.07	0.00	0.27	0.92	0.24	0.00	0.00	0.78	0.24	0.07	0.00	3.59
<b>Total</b>	<b>2.58</b>	<b>0.80</b>	<b>0.72</b>	<b>2.15</b>	<b>2.81</b>	<b>0.02</b>	<b>0.04</b>	<b>0.99</b>	<b>0.95</b>	<b>0.17</b>	<b>0.18</b>	<b>11.41</b>

**Losses<sup>10</sup>**

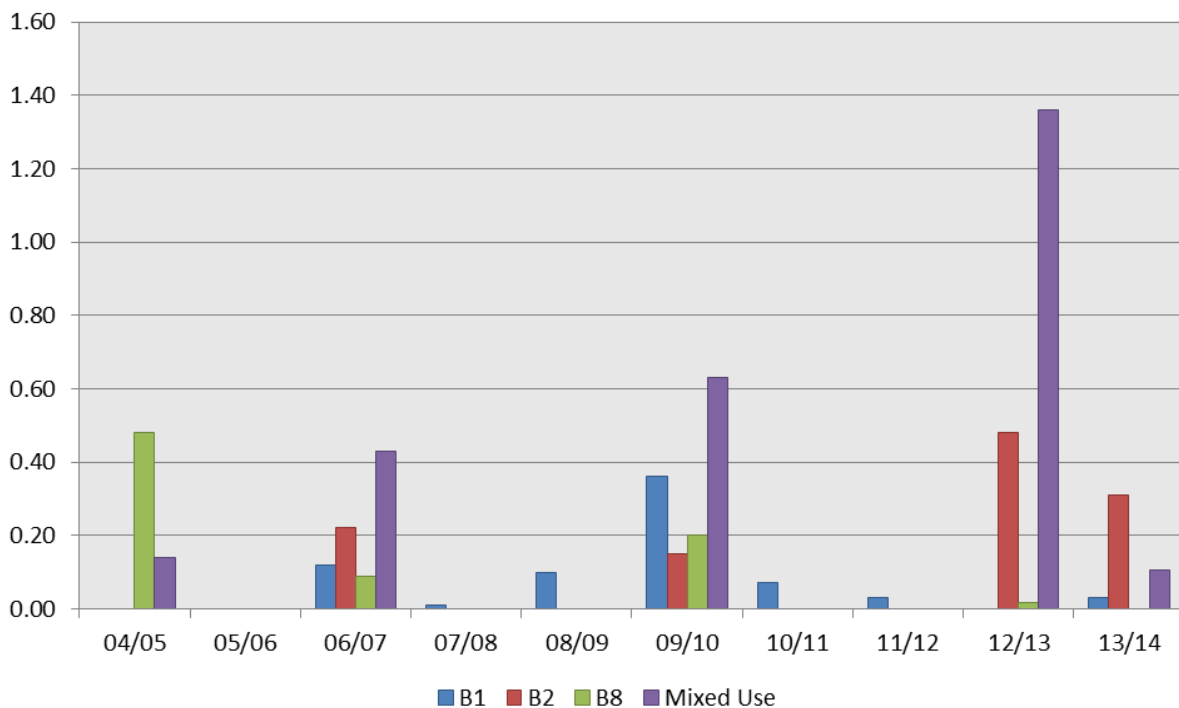
<sup>10</sup> For the purpose of this review, 'Losses' are classified as land that was previously occupied by an employment use that has been developed for a non-employment use, e.g. residential.

4.37 Since 2004/2005, approximately 3 hectares of employment land has been lost to other (non-employment) uses at a rate of 0.40 hectares per annum. However, the rate at which employment land has been lost varies on a year-to-year basis; for the periods 2007/2008 and 2008/2009, almost no land was lost to other uses, whereas in 2012/2013 almost 2 hectares of land was redeveloped, which is the highest loss over the monitoring period. The vast majority of the land lost in 2012/2013 is associated to the development of a supermarket at Whitby Business Park. Figures 4.12 and 4.13 provide an overview of employment land developed for other uses on a use-by-use basis.

**Figure 4.13: Loss of Employment Land (Hectares)**

	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	Total
B1	0	0	0.12	0.01	0.1	0.36	0.07	0.03	0.00	0.03	0.72
B2	0	0	0.22	0	0	0.15	0	0	0.48	0.31	1.16
B8	0.48	0	0.09	0	0	0.20	0	0	0.02	0.00	0.79
Mixed Use	0.14	0	0.43	0	0	0.63	0	0	1.36	0.11	2.67
<b>Total</b>	<b>0.62</b>	<b>0</b>	<b>0.86</b>	<b>0.01</b>	<b>0.1</b>	<b>1.34</b>	<b>0.07</b>	<b>0.03</b>	<b>1.86</b>	<b>0.45</b>	<b>5.33</b>

**Figure 4.14: Loss of Employment Land by Use (Hectares)**



**Net Gain / Loss**

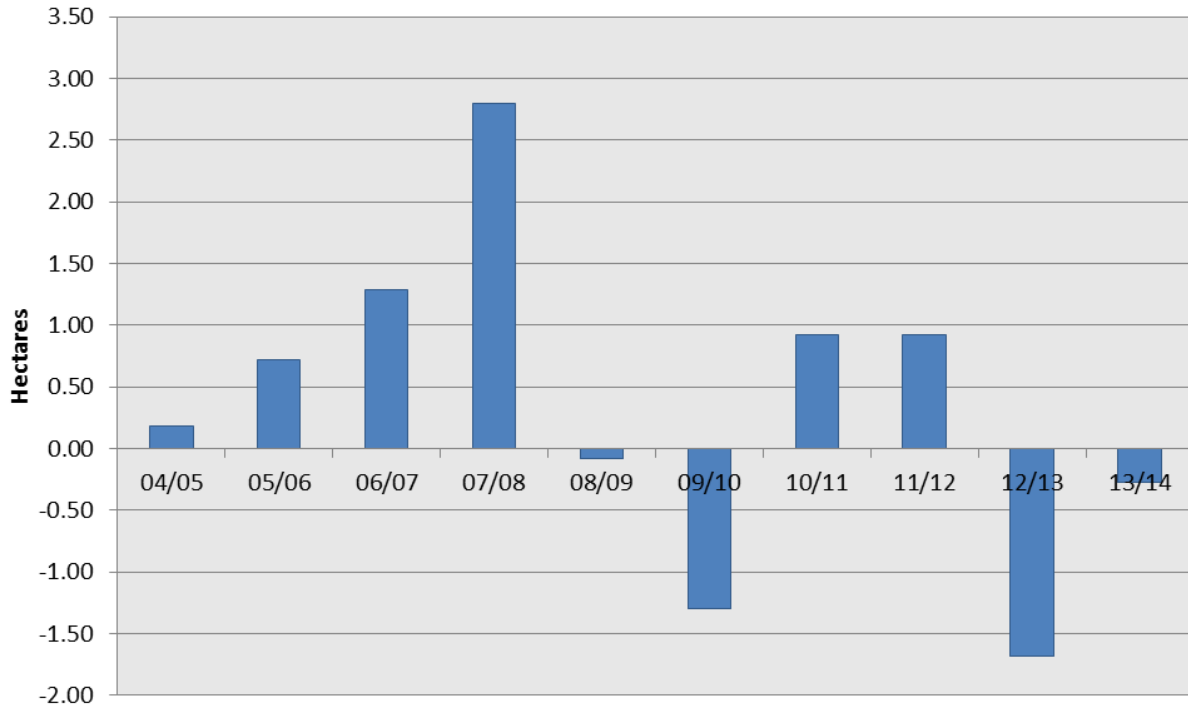
4.38 As demonstrated in the table below, when the gains in employment land are weighed against the losses there is a net gain of approximately 4 hectares over the period between 2004 and 2014, which equates to an average gain of approximately 0.35 hectares per annum. If this annual rate was applied over the emerging plan period (2011 to 2032), there would be a requirement for 7.33 hectares of employment land.

4.39 While the sample size is small, it is apparent that prior to the onset of economic recession (i.e. between 2004 and 2008), there was a net gain of approximately 5 hectares of employment land in the Borough. Applying an average yearly development rate of 1.27 hectares over the period of the plan would equate to 26.5 hectares of employment land.

Figure 4.15: Net Gain / Loss of Employment Land by Use (Floorspace) (Hectares)

	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12	12/13	13/14	Total
B1	0.80	0.34	0.79	1.76	-0.08	-0.32	0.14	0.19	0.00	0.08	3.69
B2	0.00	0.11	-0.11	0.09	0.00	-0.15	0.00	0.29	0.38	0.31	-0.47
B8	-0.48	0.00	0.12	0.72	0.00	-0.20	0.00	0.20	0.02	0.07	0.41
Mixed Use	-0.14	0.27	0.49	0.24	0.00	-0.63	0.78	0.24	1.29	0.11	-0.14
<b>Total</b>	<b>0.18</b>	<b>0.72</b>	<b>1.29</b>	<b>2.80</b>	<b>-0.08</b>	<b>-1.30</b>	<b>0.92</b>	<b>0.92</b>	<b>-1.67</b>	<b>-0.27</b>	<b>3.49</b>

Figure 4.16: Net Gain / Loss of Employment Land by Use (Floorspace) (Hectares)



## 5.0 TAKING STOCK OF THE EXISTING SITUATION

- 5.1 The purpose of this section is to establish the baseline position of employment land provision within the Borough, that being; the overall quantity and type of provision. The section is split into two parts. The first part provides a brief overview of provision on an area-by-area basis, looking at the key clusters of employment land within each area.
- 5.2 The second part comprises a detailed field survey of all employment sites and premises and seeks to quantify the overall amount of employment land, the distribution of existing employment land uses and typical cluster sizes. As part of the survey, an investigation into some of the qualitative aspects of sites and premises will also be undertaken. However, the results of the qualitative survey will be presented in Chapter 7.

### OVERVIEW OF EMPLOYMENT LAND PROVISION

- 5.3 The main employment land use areas in the Borough can be split into six separate areas. Whilst these areas are all inter-related, insomuch that they all interact, they are reflective of the Borough's geography and settlement hierarchy. The six areas are:
- Scarborough Urban Area<sup>11</sup>;
  - Whitby;
  - Filey;
  - the Service Villages; and
  - the Rural Villages

#### Scarborough Urban Area

- 5.4 The industrial and commercial aspect of the Scarborough Urban Area has developed, to a great extent, on a piecemeal basis as a result of outward growth over the last century. During this period, small and medium-scale businesses developed alongside and within residential areas, which have subsequently been overtaken and enclosed by further residential expansion. This has led to the presence of a large number of small back street industrial uses within the central urban area.
- 5.5 Whilst Scarborough still has a rail service, during the last century the rail provision was substantially greater and also generated a lot of support services which required land around and alongside the stations and railway line. As the requirement for land for railway use diminished this land became available for the private sector to develop. This is evident by a number of the existing employment land use sites located next to the railway line in Scarborough.
- 5.6 The industrial and commercial requirements for employment land during the early and middle part of the last century tended to be on a smaller scale, centred on the provision of services on a local level for Scarborough and the immediately surrounding areas. As Scarborough grew and some local and regional businesses prospered, the lack of available land and the general

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<sup>11</sup> Scarborough Urban Area is defined within the Core Strategy Preferred Options 2009 as including the settlements of Scarborough, Scalby, Newby, Osgodby, Eastfield, Cayton and Crossgates.

topography of Scarborough led to the requirement of larger, more level land that was easier to develop for larger uses. This in turn led to the development and expansion of the Scarborough Business Park.

- 5.7 Whilst Scarborough Business Park provided a relatively cheap and plentiful supply of industrial land, the small and restricted sites in the town continued to remain in demand. Occupancy of these smaller units continues to be high in spite of quite difficult physical limitations.
- 5.8 This is best demonstrated in the employment clusters alongside Prospect Street and Gladstone Lane where a number of occupiers are motor vehicle related and provide local services to the surrounding high density residential area. These businesses would find it difficult to meet the high occupation costs of newer buildings and customers would not readily follow them to an out of town location such as Scarborough Business Park.
- 5.9 Despite the slightly negative aspect of access and minor disturbance to nearby residential properties, the occupiers of this type of accommodation provide a valuable local service. They would only be encouraged to move if modern affordable alternatives were made available in a central inner town location, i.e. similar to the Larpool Lane scheme in Whitby.
- 5.10 Scarborough Business Park is the main area for commercial and industrial development in the Borough. It has grown and developed quite slowly, very much demand led by a number of large operators who have expanded on a piecemeal basis throughout the estate. Other examples of development include local companies relocating from more central urban locations to the Business Park, which is the only site capable of accommodating large-scale units in the Scarborough Urban Area.
- 5.11 More recently the Business Park has seen the completion of £10 million scheme that has opened up an additional 40 hectares of developable employment land. The scheme was completed in 2008 and delivered an internal road network, improvements and connections to the surrounding road network, drainage solutions to sensitive groundwater issues, a comprehensive landscape scheme and a fibre-optic broadband network. The onset of recession has meant that only a small amount of land at the business park has been developed since the supporting infrastructure was put in place.
- 5.12 Across Scarborough as a whole, the market availability of B1, B2 and B8 accommodation is predominantly to lease. Quite rarely do freeholds become available and they are often bought by property companies or individuals for investment purposes.

## **Whitby**

- 5.13 Industrial and commercial development in Whitby has generally been on the basis of local and regional service provision. The starter units at Larpool Lane Industrial Estate have provided an excellent base for new and small companies and is well occupied and clearly in reasonable demand. The Estate also provides a base for small businesses requiring a location as close as possible to the centre of the town.
- 5.14 The topography of Whitby does limit the potential for large scale commercial and industrial development and the Whitby Business Park on the A171 has

provided a location for larger business operators. The Business Park houses a wide variety of existing and relatively new occupiers in building which range from brand new to 1970s/1980s.

- 5.15 The most recent scheme on the Whitby Business Park provided a development of identically designed units of rather unusual style and construction, which are fully occupied. There is currently land available on Fairfield Way and on Enterprise Way for further development. Whilst the majority of buildings on the estate are occupied with little currently available, demand is not very high and properties placed on the market can take some time to become occupied. Conversely, if an occupier is looking for premises then there may be nothing available and with the time lag of planning approval, development and construction, that occupier may be forced to seek accommodation in a different location.
- 5.16 As previously mentioned, there is a general lack of property available to purchase within Whitby. By making properties available for purchase this could stimulate the market and provide an interest for owner occupiers to locate in the locality.

## **Filey**

- 5.17 As a relatively small, high value seaside town, the requirements for industrial and commercial development in Filey are not as significant as Scarborough and Whitby. Historically, employment development was focused on land formerly used to service the railway line, in particular off Clarence Drive, where there is a range of industrial units. However, this small industrial park is adjacent to residential properties and is not an ideal business location.
- 5.18 More recently the development of starter units off Station Avenue has provided employment uses close to the town centre. These units are adjoined by the old pumping station site, which is now vacant following its demolition a few years ago.
- 5.19 The town itself does not have a larger industrial estate and has to rely on the land provision available at Hunmanby, which is between 3 and 4 miles to the south of Filey.

## **Service Villages**

### Hunmanby

- 5.20 The Bridlington Road Industrial Estate at Hunmanby has seen development on a slow piecemeal basis over a number of years including the Cable Landing building, Cara-Verandas and the expansion of Hunpreco. Most development has been for a specific occupier's requirement, with only small amount speculative development in the smaller starter units.
- 5.21 On the basis of the relatively limited demand for the location (as a result of geographical and accessibility constraints; access can only be gained through the village or by a narrow country road), private sector speculation on new industrial units is likely to be modest and new construction is likely to be mainly demand led. However, there has been interest from the adjoining landowner regarding opening up adjoining fields for an expansion of the estate, which could provide a significant boost for the site.



- 5.22 Nevertheless, the constraints of the site and its relatively close proximity to the substantial industrial estate at Carnaby (near to Bridlington), a well-established Industrial Estate benefiting from a more prominent and visible location and a substantial availability of development land, could limit the extent to which Hunmanby Industrial Estate can attract new occupiers.

#### Burniston

- 5.23 Industrial and commercial premises within Burniston are limited to those within Willymath Close Industrial Estate, which is a purposely constructed site providing a small number of relatively modern units. Although the majority of existing units are occupied there is land currently available for development in the south east of the site, which has remained undeveloped for a number of years. This could point to an overall lack of developer / occupier interest in the site, or this could be a reflection of current development economics; development may not be viable for smaller businesses at this time.

#### East Ayton

- 5.24 The Betton Business Park is located outside of the village of East Ayton. It contains a number of mixed-use businesses with a range of different sized units. Located next to the site of Betton Farm, the site has developed following the decline of traditional farming economies and sought to diversify in order to encourage economic activity. At the moment two of the six units within the cluster are vacant.

#### Seamer

- 5.25 Bridge Farm Business Centre is a converted Grade II listed farm building, which provides four business units in the village of Seamer. All but one of the units are currently occupied, indicating that demand for these units is relatively high. Nevertheless, in the wider area, demand for new employment units is likely to be limited given the village's close proximity to Scarborough Business Park.

#### Snainton

- 5.26 Barkers Lane Industrial Estate is a small cluster of employment units located to the south of the village. Some of the structures are dated or tired and would be likely to require some form of refurbishment should they become vacant in order to attract new occupants. Despite this, demand seems to be high, with all of the units currently occupied.

### **Rural Villages**

#### Gristhorpe

- 5.27 Although now vacant, it is important to note that there are 3.5 ha of employment land in Gristhorpe; the TT Electronic site has the capacity to provide a high number of units for employment use, however, the remediation costs associated with redevelopment makes it an unviable prospect for new businesses. Equally, there is no indication of any potential end-user coming forward to occupy the current buildings. As such, the site is currently under discussion for redevelopment for housing; the site was recommended as a

housing allocation within the LDF Housing Allocations Development Plan Document (Preferred Options) (November 2009). However, this does not preclude the possibility of part of the site been retained for some form of employment use.

#### Ruswarp

- 5.28 Ruswarp village is located to the south-west of Whitby and adjoins the North Yorkshire Moors National Park boundary. The long established cluster found on Sneaton Lane comprises a number of small industrial and commercial units that have been developed on a piecemeal basis over a number of years.
- 5.29 Occupancy rates are high, with only one of the units currently unoccupied, which indicates a relatively high level of demand for these premises. However, should more units become vacant it is unlikely that they would be desirable to modern businesses that do not require a rural location.

#### Sawdon

- 5.30 Sawdon is a small village located to the north of Brompton and away from the main A170 road that connects Scarborough to Thirsk. The Viking Industrial Estate on Kirkgate is a small site with a limited number of industrial units. Given its isolated location, future demand for premises is likely to be limited.

#### Wykeham

- 5.31 Wykeham contains a small number of business clusters that play an important role in the wider rural economy, particularly in the western villages. The Farfield workspaces and Wykeham Business Centre make up the majority of these business units and supply small businesses with modern facilities for both office and industrial use. A large proportion of the units are currently occupied, which indicates that demand is high.

**QUANTITY OF EMPLOYMENT LAND**

5.32 In order to establish the overall quantity of employment land and premises within the Borough, a detailed field survey has been undertaken. This survey also presents information relating to the distribution of employment land, and typical cluster sizes.

**Scope**

5.33 Although this review is focused on B-use employment land, many of these sites and premises are contained within wider ‘employment clusters’, which may also contain other non B-use businesses including all types of retail use (supermarkets, car showrooms, etc.), sports facilities (gymnasiums, etc.) and restaurants / cafes, amongst others. As such, in order to identify the precise quantity of B-use employment land, a complete survey of the Borough’s employment clusters needs to be undertaken. The types of businesses that can be classified as B-use employment land are identified in Appendix A.

**Findings**

5.34 The starting point for undertaking the survey was the work completed as part of the 2006 Scarborough Employment Land Review, which compiled a GIS database of employment sites within the Borough. This ELR has sought to update the database, reflecting the present day employment land situation. A summary of the key information from the updated database is provided in Tables 5.1 and 5.2 with the overall findings of the survey present below:

- A total of 108 ‘employment clusters’ containing 590 individual businesses (including non B-uses) were identified and surveyed within the Borough;
- The clusters covered a gross<sup>12</sup> area of approximately 175.6 hectares;
- The net<sup>13</sup> area covered by the clusters is 157.4 hectares, which totals around 90% of the gross area; and
- There are 84 sites and premises totalling 13.2 hectares that are classified as ‘Non B-use Employment Land’.

Table 5.1: Existing Employment Clusters

<b>Number of Employment Clusters</b>	<b>Total Number of Businesses (all business types)</b>	<b>Gross Employment Cluster Area</b>
108	590	175.6 ha

Table 5.2: Existing Net Level of Employment Land and Non B-uses

<b>Net Employment Cluster Area</b>	<b>Non B-use Employment Land Area</b>
157.4 ha	13.2 ha

<sup>12</sup> including non B-Uses, former employment clusters that are now residential and some unknown sites

<sup>13</sup> excluding non B-use, residential and unknown uses, but including vacant and derelict employment sites

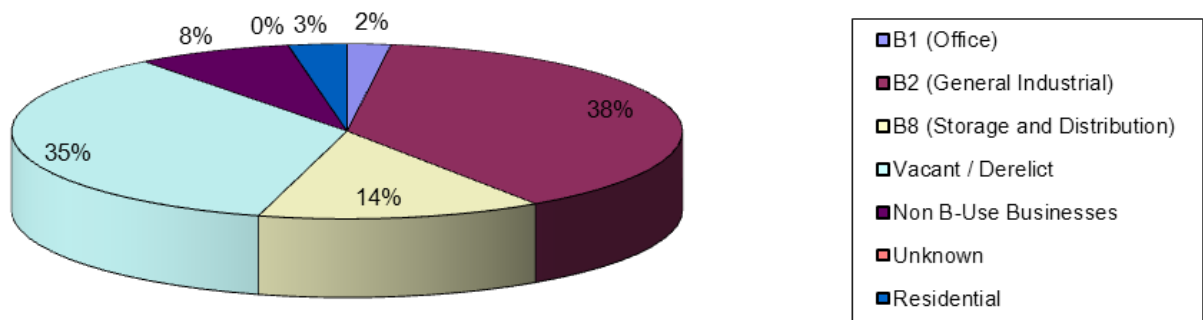
**Employment Land Use Analysis**

5.35 Using the previously identified employment land definitions, the key employment land use data from the survey has been collated and is presented in **Chart 5.1**.

5.36 It is clear that a large proportion of employment land within the Borough is currently vacant, undeveloped or derelict. However, it is important to note that the vast majority of these sites are attributed to the undeveloped land to the South of Scarborough Business Park. General Industrial (B2) uses cover 38% of the total employment land, with a further 14% covered by Storage and Distribution (B8) uses. Only 2% of employment land is covered by Office (B1) uses.

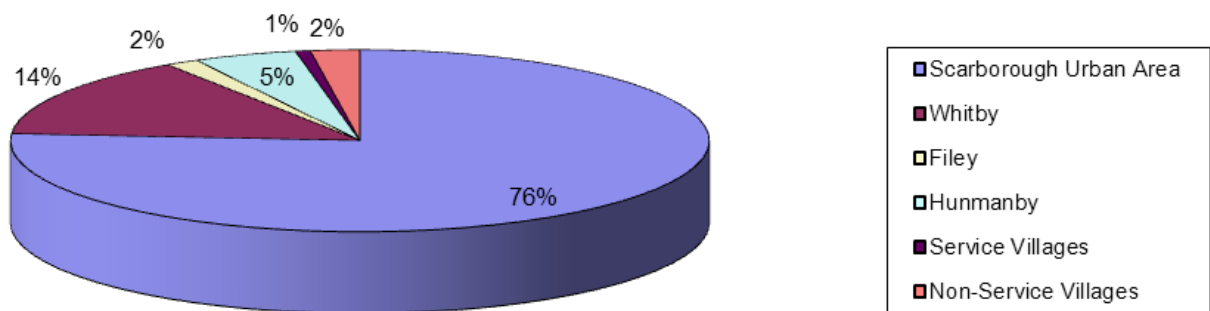
5.37 It should also be noted that a number of Non B-Use Businesses and Residential uses were identified through the survey, which account for 11% of employment land within the Borough. The remaining 35% of land is either vacant or derelict, which equates to approximately 62 hectares.

Chart 5.1: Existing Employment Land Uses



5.38 **Chart 5.2** shows the distribution of employment land between the Borough’s settlements. The Scarborough Urban Area provides over 133 ha (76%) of the total land surveyed, with Whitby holding just over 25 ha (14%). The remaining 10% of the land area is shared between the remaining settlements, Filey (2%), Hunmanby (5%), Service Villages (1%) and Rural Villages (2%).

Chart 5.2: Gross Area Distribution



**Cluster Size Distribution (Gross)**

5.39 A key factor in the renewal and development viability of existing employment land clusters will be the cluster size. Consequently, an analysis of the collected survey data has been undertaken to review the issue. The results of this assessment are illustrated in **Chart 5.3 and Chart 5.4** and the key findings relevant to this study are summarised below.

*It should be noted that the Cluster Size Distribution uses the Gross data to ensure that the total area is accounted for.*

- More than half (57%) of the Borough’s employment land can be found within two clusters, namely Scarborough Business Park and the Scarborough Business Park Extension. Approximately half of this land is either vacant or undeveloped.
- Four medium/large (5.1 ha - 15 ha) employment clusters account for a further 16% of employment land in the Borough. In total these four cluster along with both parts of Scarborough Business Park account for 76% of the Borough’s allocated employment land.
- A large proportion (83%) of the Borough’s employment land clusters are small (less than 1ha in size), with a further 57% of this range smaller than 0.1 ha.

Chart 5.3: Cluster Size Distribution (Area)

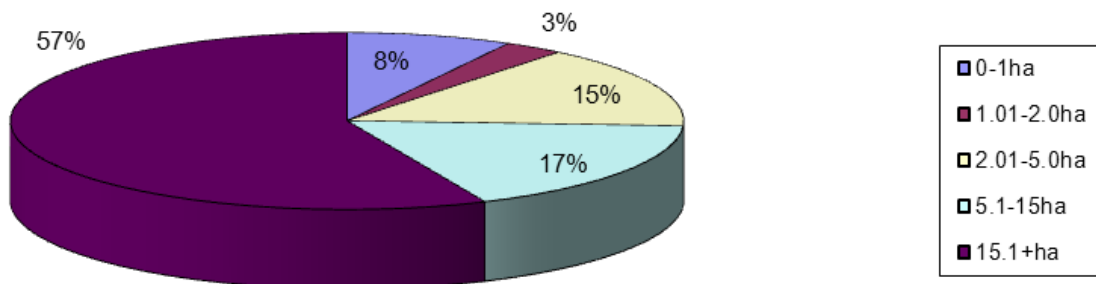
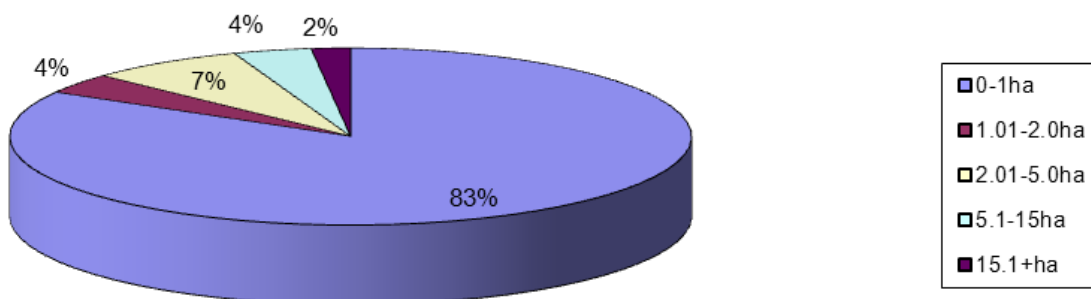


Chart 5.4: Cluster Size Distribution (Number of Clusters)



**Site Size Distribution (Net)**

5.40 The size of individual employment sites is also important in understanding the Borough's employment land supply. **Chart 5.5** and **Chart 5.6** illustrate the size distribution of all sites used for employment use (B1, B2, B8 and Vacant / Derelict) across the Borough. Key results can be summarised as follows:

- There is a broad spectrum of employment sites found within the Borough of Scarborough, from very small (less than 250 m<sup>2</sup>) through to extremely large (over 10,000 m<sup>2</sup>)
- The vast majority of sites are small to medium in size, with 60% of the site size being between 1 to 1,000 m<sup>2</sup>. However, these sites only cover 5% of the total employment size area being just over 9.28 ha.
- The medium sized sites (1,001 to 5,000 m<sup>2</sup>) account for 26% of all sites and 17% of total employment site area. This equates to around 29.73 ha.
- The final 14% being the largest sites (5,001 m<sup>2</sup> to 20,000+ m<sup>2</sup>) account for 77% of the total employment site area (131 ha).

Chart 5.5: Site Size Distribution (Number of Sites)

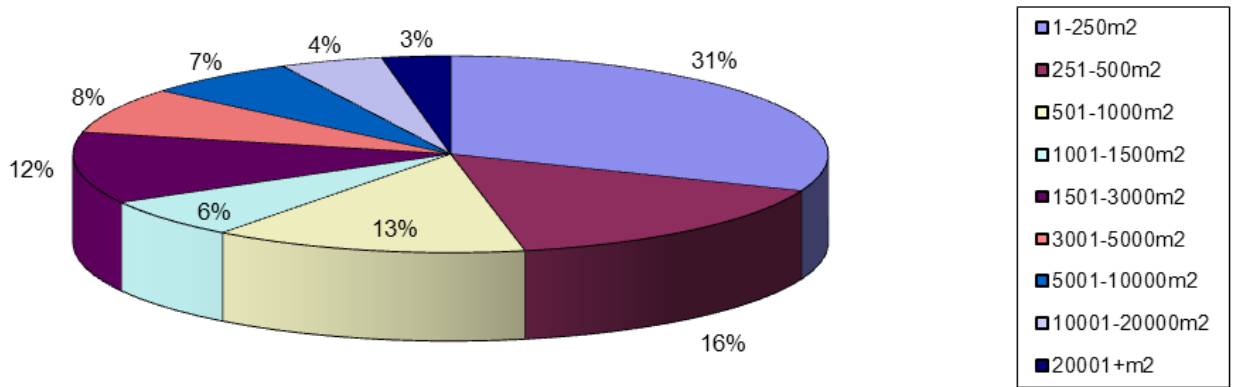
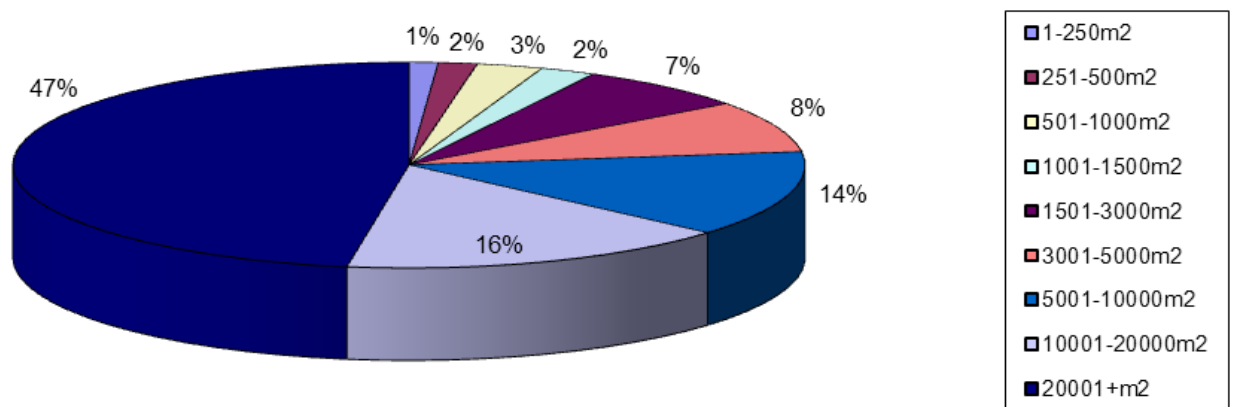


Chart 5.6: Site Size Distribution (Area)



## Employment Allocations

- 5.41 This section of the review provides an overview of existing employment land allocations. The allocated sites are taken from the 1999 Scarborough Borough Local Plan.
- 5.42 Existing Local Plan allocations In2 and In3 (see table 5.3) located to the South of the existing Scarborough Business Park have outline planning permission for mixed-use development (B1, B2, B8 and ancillary uses). The majority of land will be developed for business and industrial uses together with car showrooms, a hotel and ancillary retail uses. The supporting infrastructure including, roads, standard utilities and drainage, is already in place; significantly reducing the costs associated with any new development on the site.
- 5.43 Other allocated vacant land within Scarborough Business Park, namely In5 and In6, are infill sites that have remained undeveloped since they were originally allocated. These sites have been subject to enquiries although no formal proposals have come forward.
- 5.44 Local Plan allocations In1 and In4 have been developed either in part or in full. The former has almost been completely developed, with only a small parcel of land to the South remaining vacant, which is without any form of planning permission at this time. The latter, namely In4, has been developed in part through the construction of the Scarborough Building Society Headquarters, which has subsequently closed; meaning that the entire allocated site is now vacant. However, this large building offers a modern office space of which could support a single large-scale occupant or multiple small-scale occupants.
- 5.45 Other allocated vacant land taken from the 1999 Scarborough Local Plan includes the former Scarborough Rugby Ground (In8) which was granted planning permission for the development of a mixed use health village with hospital and residential care home. Also, In9, a site located to the North-West of the current Whitby Industrial Estate has in the most part been occupied by a waste recycling site, with the remaining space not having any planning permissions attached to it.

Table 5.3: Scarborough Borough Local Plan Allocations

<b>Scarborough Business park allocations (Vacant Land)</b>	<b>Hectares</b>
In1: East of Burton Riggs	6.6
In2: South of Eastfield Industrial Estate	20.8
In3: South of Eastfield Industrial Estate	16.7
In4: North of Burton Riggs	2.7
In5: Land at Wareham Road	0.5
In6: Land at Salter Road	0.7
<b>Sub-Total</b>	<b>48</b>
<b>Other Allocated (Vacant Land)</b>	
In8: Rugby Ground, Scalby Road	1.5
In9: North-West of Stainsacre Industrial Estate, Whitby	0.9
In11: Filey Workshops, Former Yorkshire Water Pumping Station	0.2
<b>Sub-Total</b>	<b>2.6</b>

<b>Other non vacant allocated land</b>	
In7: Telephone Exchange, Northway, Scarborough	0.4
In10: South West of Hunmanby Industrial Estate	1.3
<b>Sub-Total</b>	<b>1.7</b>
<b>GRAND TOTAL</b>	<b>52.3</b>



## 6.0 CALCULATING FUTURE EMPLOYMENT TRENDS

6.1 This chapter of the Employment Land Review seeks to understand the implications of the predicted changes in the local economy on current and future employment land provision in the Borough. In order to do this, the following techniques have been used in accordance with National Planning Practice Guidance:

- Projections based on an analysis of past take-up of employment land;
- Demographically derived assessment of future employment needs (labour supply technique); and,
- Sectoral and employment forecasts and projections (labour demand technique);

6.2 Once the findings of these techniques have been considered, one should be chosen as the basis for calculating an employment land requirement in Chapter 9.

### Past Delivery Rates

6.3 Chapter 4 of this ELR provides an overview of past delivery rates (gains and losses) of employment land. In summary, the analysis showed that 8.83 hectares of employment land was developed between the years of 2004 and 2014, while 4.82 hectares of land was lost other uses during this same period. As a result, there was a net gain of approximately 3.5 hectares over this period, which equates to an average gain of approximately 0.35 hectares per annum. If this annual rate was applied over the emerging plan period (2011 to 2032), there would be a requirement for 7.33 hectares of employment land. The split between the various B use classes is shown in Figure 6.1 below, with offices (B1a) accounting for the majority (70%) of projected demand.

Figure 6.1: Past Take-up Calculation (based on the period 2004 to 2014)

Land Use	Total	Annual Demand (Total /10 years)	Projected Demand over Plan Period (x21 years)
B1a (66% of B1 uses)	2.46	0.246	5.17
B1b/c (33% of B1 uses)	1.23	0.123	1.60
B2	-0.47	-0.047	
B8	0.41	0.041	0.86
Mixed Use	-0.14	-0.014	-0.29
<b>Total</b>	<b>3.49 ha</b>	<b>0.349 ha</b>	<b>7.33 ha</b>

6.4 Notwithstanding what appears to be a fairly significant level of demand for office (B1a) uses over the plan period, which is ultimately driven by the volume of office development that took place in the period 2007/08 (1.77 hectares), the projected demand levels shown in the table above are relatively low. This is perhaps reflective of the limitations of using past development trends as the basis for projections. More specifically, given that the monitoring period (for past take-up) includes a period of economic recession, it could be argued that

the above projection is illustrative of suppressed demand. For example, from 2009 onwards there was a net loss of 1.42 hectares of employment land.

- 6.5 While the sample size is small, it is apparent that prior to the onset of economic recession (i.e. between 2004 and 2008), there was a net gain of approximately 5 hectares of employment land in the Borough. As demonstrated in Figure 6.2 below, applying an average yearly development rate of 1.27 hectares over the period of the plan would equate to 26.5 hectares of employment land.

Figure 6.2: Past Take-up Calculation (based on the period 2004 to 2008)

Land Use	Total	Annual Demand (Total /4 years)	Projected Demand over Plan Period (x21 years)
B1a (66% of B1 uses)	2.46	0.615	12.92
B1b/c (33% of B1 uses)	1.29	0.323	7.23
B2	0.09	0.023	
B8	0.36	0.090	1.89
Mixed Use	0.86	0.215	4.52
<b>Total</b>	<b>5.06 ha</b>	<b>1.27ha</b>	<b>26.56 ha</b>

- 6.6 As with the wider projection period, the level of demand is still highest for office (B1a) uses. Again, given that this is driven primarily by an exceptionally high level of development during 2007/08, it is perhaps misleading. However, the increase in projected demand for industrial (B1b/c + B2) uses is welcomed when viewed in the context of the current supply of employment land in the Borough.
- 6.7 The limitations of calculating future demand for employment land uses based on the projecting forward of past take-up are such that it cannot be relied upon and should not be used for the purposes of this ELR, other than in providing useful context as to how the market has operated over recent years. Further techniques should be explored.

### Labour Supply Technique

- 6.8 The NPPG states that “Labour supply models are based on population and economic activity projections. Underlying population projections can be purely demographic or tied to future housing stock which needs to be assessed separately.” Similar calculations have been used in the Borough Council’s Objective Assessment of Housing Need (OAN).
- 6.9 While the OAN uses the 2012-based Household Projections as the starting point for assessing the need for housing in the Borough, i.e. as a ‘policy off’ scenario, it also considers the latest population projections. Additional scenarios have also been considered, however these are based on different levels of job growth, derived from an analysis of current and historical data from the Regional Econometric Model. As set out in paragraph 6.15 onwards, the REM data is akin to a ‘labour demand technique’ and has not been taken into account for the purposes of calculating labour supply.

- 6.10 The calculations set out in Figure 6.1 illustrate the difference in local labour supply over the emerging Local Plan period (2011-2032). The calculations use the same data sources and assumptions as the OAN, insomuch that the total population and working age population have been calculated using the 2012-based population projections, while it is assumed that current economic activity rates, unemployment and out-commuting will remain the same.
- 6.11 As demonstrated in Figure 6.3, while the population projections show an increase in population (+2,500 people) between 2011 and 2032, there will be a reduction in local labour supply (-3,025 people) over the same period. As set out in chapter 4, this is due to the demographic trend of an ageing population.

**Figure 6.3: Labour Supply Calculation**

	<b>2011</b>	<b>2032</b>
Total population	108,600	111,100
Working age population	79,278	74,215
Economically active (62.88%)	49,850	46,666
Unemployment (5%)	47,358	44,333
Net out-commuting (2,248)	45,110	42,085
<b>Local labour supply</b>	<b>45,110</b>	<b>42,085</b>

- 6.12 In order to simply retain the existing workforce numbers, economic activity rates would have to increase from 63% to around 67%. However, as set out in the OAN, there is no evidence to suggest such an increase in economic activity, hence the present activity rate has been assumed to remain constant over the emerging Local Plan period.
- 6.13 Alternatively, or in addition to an increase in economic activity rates, the current trend of net out-commuting of the local workforce would have to be reversed. Given that the local workforce is highly self-contained (85% of people live and work in the Borough), it would be unrealistic to expect a reduction in the number of people who travel to areas outside of the Borough to access employment opportunities.
- 6.14 Notwithstanding the potential reduction in the local workforce shown by the population projections, the OAN assumes that there will be growth within the local economy, as evidenced by econometric forecasts (see below). Therefore, this labour supply technique should not be considered as being illustrative of the potential future demand for employment land in the Borough and should not be explored further.

### **Labour Demand Technique (Regional Econometric Model)**

- 6.15 The Borough Council has used the Regional Econometric Model (REM), which adopts a labour demand technique, to provide employment forecasts throughout the production of the emerging Local Plan. The REM is produced by Experian and ran by the Regional Economy Intelligence Unit (REIU) (based at the West Yorkshire Combined Authority), who ensure that the model reflects local circumstances.

- 6.16 At the most basic level, the model seeks to apply historic trends to an estimation of future economic performance. As a result, the model is inherently sensitive to change and as the economy has evolved over time, so have the REM forecasts. It is important to note that the nature of econometric forecasts is such that they do not and cannot provide a definitive answer as to how the economy will perform; they are essentially a best guess, relevant to the time at which it was produced. However, the REM provides the most detailed level of evidence to which the Council has access and allows for an understanding to be gained as to how the local employment market (economy) could change in the future.
- 6.17 The Council has produced a paper titled “Econometric Forecasts and Job Growth Scenarios”, which looks at how the REM forecasts have changed over time (using forecasts dating from 2011 to 2015) and seeks to relate the growth forecast to what is happening / is likely to happen on the ground. The report concludes that while the most recently obtained REM data (January 2015) is perhaps overly optimistic in terms of the sheer level of growth, the distribution of growth across the sectors is sensible.
- 6.18 Given that a number of the sectors that are considered to be overly optimistic in terms of their level of growth (as shown by the January 2015 REM forecast) do fall within the B-Use classes, this forecast can be used as the basis for calculating an employment land requirement within this ELR.

#### Expanding Sectors

- 6.19 The January 2015 REM forecast identifies a number of potential growth sectors within the local economy. These are presented in the table below. However, it is notable that less than a third of job growth within these sectors are within those that would be traditionally be located on employment land (highlighted in green). These sectors could create approximately 2,390 additional FTE jobs in the Borough by 2032.

Figure 6.4: Expanding Sectors

<b>Industry</b>	<b>FTEs (000s)</b>
Accommodation & Food Services	+0.29
Administrative & Support Service Activities	+0.11
Agriculture, Forestry & Fishing	+0.28
Civil Engineering	+0.12
Computing & Information Services	+0.03
Construction of Buildings	+0.36
Education	+0.54
Food, Drink & Tobacco	+0.36
Health	+1.23
Land Transport, Storage & Post	+0.16
Metal Products	+0.09
Other Manufacturing	+0.02
Professional Services	+0.12
Real Estate	+0.41
Recreation	+0.74
Residential Care & Social Work	+0.64

Specialised Construction Activities <sup>14</sup>	+0.42
Wholesale	+0.59
Wood & Paper	+0.08
<b>Expanding Sector Total</b>	<b>+6.59</b>
<b>Employment Land Sectors</b>	<b>+2.39</b>

### Contracting Sectors

6.20 The REM forecast also highlights sectors that could contract over the forecast period. These are set out in the table below. In contrast to the growth sectors, the majority of the contracting sectors do fall within the traditional B-Use industries, including 320 jobs in sectors that fall within the broad sector of manufacturing. However, it should be noted that in respect of the full range of manufacturing sectors, the overall net change is +260 FTE jobs.

6.21 The most significant levels of decline are in the “Printing and Reproduction of Recorded Media” and “Public Administration & Defence” sectors. In terms of the latter sector, the level of decline reflects the influence of central government policy, public sector reform, budget constraint and the introduction of new spending priorities, following the onset of economic recession in 2008 and the subsequent change(s) in government.

6.22 With regard to the former sector, it is thought that this forecast is perhaps based around a general decline in the sector across the country, rather than a specific indication that local factories are going / could go out of business. This highlights a need to consult with local businesses (see Chapter 7), particularly those within the manufacturing sectors, as a means of establishing their short, medium and long-term prospects and ensuring that their requirements can be taken into account when planning for a new portfolio of employment sites and premises.

Figure 6.5: Contracting Sectors

<b>Industry</b>	<b>FTEs (000s)</b>
Computer & Electronic Products	-0.05
Finance	-0.02
Machinery & Equipment	-0.01
Printing and Reproduction of Recorded Media	-0.16
Public Administration & Defence	-0.24
Retail	-0.08
Rubber, Plastic and Other Non-Metallic Mineral Products	-0.04
Textiles & Clothing	-0.01
Transport Equipment	-0.07
<b>Contracting Sector Total</b>	<b>-0.68</b>

### Emerging Sectors

6.23 Paragraph 21 of the National Planning Policy Framework states that in addition to supporting existing business sectors, taking into account where they are

<sup>14</sup> These activities are usually performed at the site of the construction, although parts of the job may be carried out in a special shop.

expanding and contracting, local planning authorities should also identify and plan for new and emerging sectors likely to locate in their area. It also states that policies should be flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances.

- 6.24 Over the development plan period (up to the year 2032) there are 2 business sectors that could potentially have a significant impact on the Borough's economy; these being the potash mine near Whitby and the off-shore wind industry. These will see the introduction of entirely new economic sectors in the Borough and as such, they have not been picked up within the REM forecasts. The scale and nature of the impact of these schemes, both in terms of job creation and land requirements, is discussed in further detail below.

#### *Potash Mine*

- 6.25 Planning permission for the construction of a potash mine, located approximately 5 kilometres to the south of Whitby along the B1416 road, was granted by the North York Moors National Park Authority in May 2015.
- 6.26 Information submitted as part of the approved planning application indicated that 455 FTE jobs will be created at the minehead site itself, with the majority (75%) (331) of these jobs occupied by residents of the North York Moors National Park and the remaining 25% (124) occupied by residents of the Scarborough Borough plan area. However, given that the nearest areas of significant population to the minehead are the towns of Whitby and Scarborough (outside of the National Park), the Borough Council has queried the robustness/accuracy of these figures throughout the decision making process. However, it should be noted that jobs created directly at the minehead site and the composition / distribution of these jobs from a geographical perspective has no implications for the provision of employment land in the Borough.
- 6.27 While the Potash Mine will generate a greater number of jobs at the minehead site itself, the planning application also predicts that around 150 jobs could be created within supply chain and servicing industries (indirect employment benefits). It is assumed that these services and jobs would likely fall within uses that would be located on B-Use employment land.
- 6.28 It should be noted that the Council considers this figure to be extremely conservative and potentially undersells the indirect employment benefits of the project. With this in mind, it is important that the supply of employment land over the plan period provides flexibility to maximise the potential benefits of the mine and to continue to allow new economic development opportunities to come forward.

#### *Off-Shore Wind Industry*

- 6.29 Similar to the Potash Mine, the offshore wind industry has the potential to generate jobs within the sector. In particular, Dalby Offshore are planning to construct a 'Business Management and Marine Control Centre' at Endeavour Wharf, Whitby. The intention is that the centre will open in 2016 subject to the approval of the Harbour Board (planning permission is not required).

- 6.30 The centre will directly employ 100 people upon its opening, with the building providing expansion space for future operations and/or accommodation for other companies. In terms of indirect employment benefits, the indication from the Borough Council's Economic Development team is that this scheme alone could generate an additional 150 jobs within companies that would be located on B-Use employment land.
- 6.31 It is helpful to consider this scheme within the wider context of the offshore wind sector. In particular, the Dogger Bank offshore wind farm (located in the North Sea between 125 and 290 kilometres off the Yorkshire Coast), could lead to the creation of 10,000 jobs across the UK. Whilst the construction of turbines and ancillary equipment for Dogger Bank is likely to be undertaken from major ports elsewhere in the UK and Europe, there may be significant opportunities for support and supply chain services to be located within the Borough.
- 6.32 Over the last few years the Borough Council has been actively engaging with the developers of the Dogger Bank scheme (Forewind), who have identified Scarborough Business Park in particular as a key location for supply chain services. In addition, they have recognised the potential role of the port at Whitby, which is one of the closest ports to Dogger Bank and is well positioned provide small-scale support and maintenance services (hence the Dalby Offshore development at Endeavour Wharf).
- 6.33 While there is ultimately no compelling evidence to suggest that the offshore wind industry will have significant employment benefits for the Borough, if only a small percentage of the predicted overall job numbers can be secured it would provide a significant boost for the local economy.
- 6.34 Therefore, it is essential that a flexible approach to the provision of employment land is taken within the emerging Local Plan. This could mean providing a sufficient 'margin' of employment land that would allow uses related to the offshore wind industry to come forward as and when the market emerges, whilst also allowing for the development of other business uses.

## **Conclusion**

- 6.35 Having considered the outputs of the three techniques, it is considered that the labour demand technique (i.e. the Regional Econometric Model) provides the most comprehensive and robust assessment of future need for employment land in the Borough over the emerging Local Plan period. Nevertheless, in moving forward with the employment figures contained therein, recognition should be given to the potential impact of emerging sectors, whilst consultation with local companies could also be used to supplement the raw data.

## 7.0 CONSULTATION WITH LOCAL BUSINESSES AND STAKEHOLDERS

- 7.1 This part of the ELR seeks to build upon the demand and supply data revealed in the previous chapter by consulting with the business community and property / land agents as well as other stakeholders. It will highlight any discrepancies between the high level forecasts provided by the Regional Econometric Model (REM) and what is happening at the local level. The aim is to provide a detailed understanding of qualitative and quantitative need for employment land and to establish a robust dataset that can be used to derive a local target for employment growth and business development in Scarborough Borough.
- 7.2 *It should be noted that this consultation exercise was undertaken in spring 2014 to inform the production of the May 2014 Employment Land Review. This previous version of the ELR utilised figures from a REM forecast that was produced in March 2013, which showed a general decline in the manufacturing sector. Therefore, the focus of the consultation was on businesses operating within sectors that were shown to decline by that particular REM forecast.*

### Identifying Consultees

- 7.3 Rather than consulting with all businesses in the Borough, the consultation process will primarily focus on the larger organisations; those that are most likely to affect economic change, either through their expansion, contraction, closure or relocation. Where possible, consultation will also be undertaken with businesses that fall within the sectors that are predicted to either expand or contract over the coming years (see chapter 6).
- 7.4 An essential part of the process will be to engage with other stakeholders, including local land and property agents, the Local Enterprise Partnership<sup>15</sup>, North Yorkshire County Council, Scarborough Borough Council's Economic Development team and other neighbouring authorities.

### Local Business Community

- 7.5 In consulting with the local business community, questions will be focused around the quantitative and qualitative requirements for employment land and premises. Consultation will take the form of a questionnaire (see Appendix C) that will be sent to a wide selection of businesses. The topics covered by the questionnaire include:
- Satisfaction with current premises
  - Plans for expansion
  - Whether expansion would require relocation
  - Desired accommodation type and quality
  - Size of new unit / land
  - Desired location
  - Importance of specific factors to business operation and the identification of a new site / premises, including;
    - Proximity to the wider Strategic Road Network
    - Proximity to public transport hubs

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<sup>15</sup> 'York, North Yorkshire and East Riding Local Enterprise Partnership'



- Affordability of rent / purchase cost
- Quality of premises and surrounding area / environment
- Proximity to other businesses
- Obstacles to growing or maintaining businesses
- Any other comments

#### Summary of comments from the business community

7.6 The key findings and main issues raised through consultation with the business community include the following:

- The vast majority of businesses who replied to the questionnaire are either “very satisfied” or “satisfied” with their current premises. Those businesses who expressed dissatisfaction with their premises had issues with the size of the site in relation to their operational requirements.
- A number of businesses in the Borough are looking to expand. The majority of these businesses have room at their current site to expand in line with their aspirations. Nevertheless, some businesses will be looking for a new site in the future.
- For those businesses looking to relocate and expand, Scarborough Business Park is viewed as being their preferred location.
- Proximity to the wider Strategic Road Network is the most important factor to the operation of businesses and for the identification of new sites.
- The quality of premises and affordability of rent are the next most important factors for businesses, followed by proximity of public transport and then proximity to other businesses.
- Economic conditions are viewed as being one of the main obstacles to growth in the Borough.
- Business rates are considered to be too high for an area that needs to attract new businesses.
- The Borough’s relative geographic isolation and poor quality infrastructure is a limiting factor in being able to attract new businesses.

#### **Property and Land Agents**

7.7 Consultation with local property and land agents will be used to further supplement the supply and demand information revealed through consultation with the local business community. Agents have significant level of market knowledge, both in terms of what has been achieved in the past (rental values and purchase costs achieved in recent transactions for office, industrial and warehouse developments) and what could happen in the future (establishing market interest in vacant sites and identifying new demands that are likely to arise). Consultation with agents will take the form of telephone discussions and face-to-face meetings. The discussions will cover the following topics (not exclusively):

- Strength of the office / industrial / warehouse property market
- Size of properties in demand
- Type of location in demand
- Nature of demand (local businesses or inward investment)
- Key features of sites / premises demanded
- Impact of the proposed Potash mine on property market
- General impression of employment land / premises in the Borough
- Opinions on specific employment sites / locations

- Achieved values on recent sales / lets
- Re-use and redevelopment of vacant premises
- Obstacles to growth / relocation of existing businesses
- Other comments

### Summary of comments from agents

7.8 The key findings and main issues raised through consultation with agents include the following:

#### *Demand*

- There isn't much demand for office units, which means that rental figures are generally low
- Enquiries for warehousing and industrial units are down over recent years
- Agents are particularly struggling to let out larger units (3,000+ sq ft). There is more demand for smaller units (up to 2,000 sq ft)
- Business rates are stifling demand. In some cases rates exceed rental values
- Demand is mainly from local businesses rather than from businesses looking to come into the Borough
- The ability to attract external businesses (particularly industrial uses) is limited by the poor connectivity of the area and the A64
- Scarborough is the main area of demand for premises and land.
- There is a need for start-up units.
- The desired features of sites and premises are perceived to be; proximity to the wider Strategic Road Network, availability of parking and the quality of premises (high quality means low maintenance).
- The Borough needs a major industry to reignite business development. The Potash mine should provide this 'kick start' for the local economy. Demand should be split between Scarborough and Whitby. Cost and availability of land and premises will ultimately dictate where the majority of new businesses locate.

#### *Supply*

- Impression of supply is that the quality of premises is relatively poor and all the developable land is congregated in one expensive area.
- The original Scarborough Business Park has a good mix of uses and is the centre for industrial activity. Some large units have recently become vacant.
- Barry's Lane is not a strong market area in general. Feedback from prospective occupiers is that the road is a constraint, both in terms of road capacity (can be limited when the schools close) and the junction with Seamer Road. However, the new trade units closer to Seamer Road are doing well.
- Demand for units at Queen Margaret's Industrial Estate is 'not too bad'. The estate's proximity to the A64 (Seamer Road) makes it a viable location for businesses.
- Hunmanby Industrial Estate is a cheaper location than Scarborough, which elevates initial interest. However, its isolation is a negative for some businesses.
- The Gladman office development at Scarborough Business Park (extension) has achieved a good price (£9 per sq ft) in comparison to other areas, which is high for the Borough.

- Prices are generally quite low in comparison to neighbouring areas, where costs increase as you get closer to York.
- Units on Seamer Road achieve high prices. The unit that Howdens occupies achieved between £8-9 per sq ft.
- Vacant premises tend to stay on the market for a long time before being re-let. Smaller units tend to be re-let quicker than larger units.
- The majority of demand is for re-lets rather than for redevelopment. The majority of viable redevelopment opportunities have already come forward.
- The Borough is constrained by its physical geography, which limits the extent to which the area can attract and retain businesses. The A64 is one of the main reasons for this; it needs to be a dual-carriageway, but this won't happen.

### **Other Stakeholders**

- 7.9 A key part of the consultation process will be to engage with other stakeholders such as North Yorkshire County Council, the Local Enterprise Partnership and neighbouring authorities, all of which have a role to play in the economic future of the Borough.
- 7.10 The National Planning Policy Framework clearly states that local planning authorities should “*work with county and neighbouring authorities and with Local Enterprise Partnerships to prepare and maintain a robust evidence base to understand both existing needs and likely changes in the market*”. This is in the spirit of the Duty to Cooperate.
- 7.11 Consultation with these bodies will primarily be to understand economic links with neighbouring authorities, the extent to which proposals in these areas could impact upon the economic vision for Scarborough Borough and other planning matters.

### Summary of comments from other stakeholders

- 7.12 The key findings and main issues raised through consultation with other stakeholders include the following:

#### *York, North Yorkshire and East Riding Local Enterprise Partnership*

- The Borough has potential as a business location, particularly in terms of availability of workforce. Being able to unlock that potential is a significant challenge.
- The emergence of new sectors such as potash and offshore wind will play a key role.
- The likelihood of businesses locating to Scarborough (Borough) will increase if potash and offshore wind markets ‘take off’, as suppliers will look to move closer to their markets.
- Without these new markets the area will continue to struggle to attract new businesses, which predominantly will be looking for locations closer to motorways to enable distribution of goods.
- There needs to be a proactive approach to attracting businesses to the area. Efforts should be focussed on targeting specific businesses or suppliers, rather than touting the Borough as a location for everyone.

- Given the people / workforce resource, there should be a focus on the service sectors, i.e. call centres, offices, etc. that aren't constrained by geographical location / physical connectivity.
- Whitby Business Park (the proposed expansion) won't work without the potash and wind developments.

*North Yorkshire County Council*

- The main issues to securing economic and employment growth in the Borough relate to connectivity and skills availability.
- The relative geographic isolation of the Borough is exacerbated by the physical connections in and out of the area. In particular, the A64 could be seen as a barrier to attracting new businesses. Investment in the A64 could reduce travel times to the main centres of economic activity.
- The Borough needs to focus on capitalising on the opportunities presented by the emerging potash and off-shore wind industries. This includes improving the skill level of the local workforce.

*Scarborough Borough Council, Economic Development*

- The demand for new premises has remained stagnant since the onset of the economic downturn – with notable exceptions. However, future signs of demand are positive, with established businesses looking to expand and new businesses looking to locate to the Borough to capitalise on emerging markets.
- Scarborough and Whitby business parks are likely to be the focus for future demand, as these sites are located next to the main highway routes in and out of the towns.
- Quick and easy access to the transport network is at the top of the list for businesses when looking for new sites.
- Although this is not an issue that relates directly to planning, the skills agenda for providing a skilled workforce is an issue for employers. The Borough is working with local manufacturing based industries to provide a technical skills college to help bridge the skills gap.
- There are no physical constraints to delivering economic growth, we have a ready supply of high-quality employment land with access to high-speed fibre-optic broadband, the obstacles faced by businesses relate to access to financing, markets and a skilled workforce.
- The emerging off-shore wind and potash mining industries will make our business parks work, existing manufacturing businesses fit well with these markets and there will be significant opportunities to attract new businesses that will want to be located in close proximity to these dynamic, modern sectors.

*Ryedale District Council*

- In terms of levels of commuting between the 2 authorities, the flow from Scarborough into Ryedale is the highest flow into Ryedale. In terms of net flow, a slightly higher percentage of workers commute from Ryedale into Scarborough than vice-a-versa.
- The most important links with Ryedale appear to be with the western villages of Scarborough Borough.
- The main east to west transport (road and rail) routes from Scarborough run through Ryedale. It is in the interest of both authorities to promote

investment into the A64 and rail links to increase the ability of the respective areas to attract new businesses and new markets.

- Given the lack of significant or direct links between the economies of the two areas, it is unlikely that the approach you take in seeking to grow the economy of Scarborough Borough would conflict with the emerging Local Plan for Ryedale (outside of a new, large-scale allocation of employment land).

*East Riding District Council*

- As part of East Riding's Employment Land Review, consideration has been given to the cross-boundary relationship between the East Riding and Scarborough Borough. In line with the North Yorkshire and East Riding Local Economic Assessments, the ELR concludes the links between the two areas in terms of employment land are limited. As such, it is unlikely that there will be any conflict between the approaches that the two authorities will take in planning for future employment land provision.

*Redcar & Cleveland Borough Council*

- We don't consider there to be a significant relationship between the area's economies; certainly not to the extent that it would influence planning policy or the provision of employment land in the future.
- From an infrastructure and transport perspective, there is a possibility that the creation of further job opportunities in Scarborough Borough could reduce outward commuting to Redcar and Cleveland.

*North York Moors National Park Authority*

- In terms of cross-boundary issues, the primary area of concern relates to Whitby Business Park, where we are currently working together to provide an Area Action Plan to deliver new employment opportunities for the town and its surrounding hinterland.
- The proposed Potash Mine has the potential to generate significant 'spin off' employment opportunities. A large proportion of these opportunities will be located within Scarborough Borough.
- Scarborough Borough as a whole helps to provide employment opportunities for residents of the National Park. In particular, Scarborough Business Park is located in close proximity to the villages of East and West Ayton; parts of which fall within the National Park.

## 8.0 QUALITY OF EXISTING SUPPLY

- 8.1 Having established the overall amount of employment land within the Borough, this next part of the review provides a qualitative assessment of existing provision that in turn will be used to inform policy judgements on existing sites and premises.
- 8.2 Paragraph 161 of the National Planning Policy Framework states that reviews of land available for economic development should include a reappraisal of the suitability of previously allocated land. This is further emphasised by national planning practice guidance, which states that the re-appraisal should be informed by a range of factors including the suitability of land for different uses and by market signals, which will be useful in identifying the most appropriate use.
- 8.3 By assessing the quality of employment sites and premises their 'fitness for purpose', or 'prospect of take up', can be established. This assessment will be used to inform recommendations on which sites should be retained for employment use and those that could be released for other uses, e.g. housing. Sites that are identified for release will be factored into the future demand forecasts (see Chapter 7) to ensure that existing sites are replaced within the future employment land portfolio (see Chapter 8).
- 8.4 Although initial recommendations will be made as whether a site should be protected or released, the final recommendation on sites will be made in light of forecast demand and as part of the identification of a new portfolio of sites (Chapter 8). As with all recommendations set out within this ELR, the overall suitability, deliverability and sustainability of sites will ultimately be tested through the Local Plan itself.

## ASSESSMENT METHOD

- 8.5 Each employment cluster / site has been assessed against the same pre-determined criteria using a basic scoring method in order to allow for comparisons to be made. Sites can score between 1 (Poor) and 4 (Very Good) within each of the individual assessment criteria, with these scores being used as indicators of site quality rather than as part of a cumulative scoring method. Sites that score a 1 in any particular aspect may have potential for release pending other factors, e.g. whether or not the poor element can be addressed in order to retain the site in employment use. Equally, a site that scores high across key criteria should be retained, as this would represent a site that is able to respond to the needs of modern day businesses. The main criteria used in this review are presented below, with the full list of criteria used in the assessments available in Appendix A:
  - Physical and environmental criteria;
  - Strategic access;
  - Market conditions / Perception and demand;
  - Sequential test and brownfield / greenfield;
  - Site development constraints (undeveloped sites only); and
  - Accessibility.

- 8.6 The results of the assessment process are presented below, with the sites split into 3 categories where appropriate; clusters that are under 0.1 hectares in size and should be subject to criteria-based policy protection, those that are to be retained for employment uses, and those that may come under pressure for re-use and should be considered for release.

### **SITES UNDER 0.1 HECTARES**

- 8.7 Clusters that are smaller than 0.1 hectares in size have been assessed; however, recommendations as to whether or not they should be retained or released have not been made. Although these smaller clusters account for around half of the total clusters across the Borough (71 of 136 clusters), they only cover 2.48 hectares, which equates to around 1.5% of total employment land. As such it is more appropriate to adopt a collective approach to these clusters rather than an individual, cluster-by-cluster approach.
- 8.8 At present, all existing employment areas are safeguarded under Local Plan Policy I.4 and as such, their change of use shall not be permitted unless:
1. *It is clearly demonstrated that there is no reasonable prospect of economic re-use for industrial or business purposes; or*
  2. *There are substantial environmental, amenity or employment benefits.*
- 8.9 A similar criteria-based approach that gives protection to employment sites yet allows for redevelopment in certain situations would be suitable for clusters under 0.1 ha in size. With this approach it would be reasonable to expect some of these smaller clusters to be lost to other non-employment uses over the period of the Local Plan (up to 2032).
- 8.10 Many of these small clusters are located in and around the urban centres of Scarborough, Whitby and Filey, and can provide an important source of local employment. If these units are lost there may be little opportunity to introduce new industrial areas into existing built-up areas, moving such activity out of urban centres to peripheral estates. This could lead to an unbalance in provision and increase the need to travel in order to access employment. Therefore, it is important to ensure that if these smaller sites are lost to other uses; new sites in similar locations can be provided.
- 8.11 In order to do this an assumption of the amount of land likely to be lost should be made. Given that not all sites will lend themselves to redevelopment for more desirable uses, such as residential, it would be reasonable to anticipate the loss of 1 hectare of land (almost half).

### **SITES RECOMMENDED TO BE RETAINED**

- 8.12 In order to ensure that the employment market functions effectively and efficiently in the future, a mix of sites that are able to meet the requirements of modern day sites and premises should be available to occupiers and developers. A key part in this process is ensuring that the best quality employment sites are protected from redevelopment for non-employment uses through the plan making process. This would either be through retaining existing land allocations, securing new allocations, or by establishing a criteria-based safeguarding policy (see above).

8.13 For the most part the best quality (most able to meet business needs) employment land is situated within many of the Borough's purpose built business and industrial parks. These provide sites in accessible locations for a wide range of potential businesses. They are often separated from residential areas and are naturally suited to their present use with little potential for redevelopment.

8.14 As a result of the quality assessment those sites that are recommended for retention are identified in Table 8.1 below. In the case of the current Borough Local Plan (1999) allocations, where development has taken place on part of the site in question (marked \*), the area figure is equivalent to the remaining developable area. The Local Plan (1999) employment land allocations that are not included in Table 8.1 have since been developed. Where there are differences between the amount of land in the Local Plan (1999) and this ELR, the figure presented in the table below is taken directly from the GIS employment land database that has been created as part of this review.

**Table 8.1: Sites to be retained for employment use**

Code	Site / Cluster Name	Location	Land Use	Area (ha)	Comments
<b>Local Plan Allocations and Committed sites</b>					
	IN1: Scarborough Business Park 2, East of Burton Riggs	Scarborough	B1, B2, B8	5.71*	Remaining part of allocation without planning permission
	IN2: Scarborough Business Park 2, South of Eastfield Industrial Estate	Scarborough	B1, B2, B8	20.6*	Site has outline planning permission for mixed-use development
	IN3: Scarborough Business Park 3, South of Eastfield Industrial Estate	Scarborough	B1, B2, B8	16.72	Part of site has outline planning permission (part of IN2) (9.5 ha doesn't have permission)
	IN4: North of Burton Riggs, Scarborough Business Park	Scarborough		2.66*	1.48 ha occupied by former Building Society offices. 1.17 ha of land undeveloped.
	IN5: Land at Wareham Road, Scarborough Business Park	Scarborough	B1, B2, B8	0.48	
	IN6: Land at Salter Road, Scarborough Business Park	Scarborough	B1, B2, B8	0.66	
01A	IN7: Telephone Exchange, Northway	Scarborough	B1	0.39	
	Committed site: Land south of Plaxtons	Scarborough	B1, B2, B8	12.6	Site has outline planning permission for B1, B2 and B8 development (granted May '10)
	IN9: North-West of Stainsacre Industrial Estate	Whitby	B1	0.89	
FI20	IN11: Filey Workshops Former Yorkshire Water Depot	Filey	B1	0.15	
<b>Sub Total</b>				<b>60.86</b>	
<b>Existing Sites and Premises</b>					
CA08	West Pier	Scarborough	Mixed	0.60	
CAY1	Havers Hill, Eastfield	Scarborough	Mixed	8.81	
CE01	Roscoe Street	Scarborough	Mixed	0.54	
CE09	Sherwood Street and Belle Vue Street	Scarborough	Mixed	0.32	
CE30	Gladstone Lane	Scarborough	Mixed	0.13	



Code	Site / Cluster Name	Location	Land Use	Area (ha)	Comments
CE31	Gladstone Lane	Scarborough	Mixed	0.19	
CE33	Melrose Street / Dean Road	Scarborough	Mixed	2.56	
FA01	Barry's Lane	Scarborough	Mixed	5.22	
FA06	Spring Bank	Scarborough	Mixed	2.10	
NB11	Lower Clark Street / Durham Street	Scarborough	Mixed	0.49	
SE01	Scarborough Business Park (Existing)	Scarborough	Mixed	54.2	
SE02	Scarborough Business Park (Expansion)	Scarborough	Mixed	15.65	Only includes land that has been developed. Vacant land included as part of allocation.
SP01	Londesbrough Road	Scarborough	Mixed	0.79	
WC01	Woodend Creative Industries Centre	Scarborough	B1	0.17	
WE01	Queen Margaret's Road Industrial Estate	Scarborough	Mixed	5.58	
ST02	Larpool Industrial Estate	Whitby	Mixed	0.17	
ST04	California Road	Whitby	Mixed	0.32	
ST08	St Hilda's Business Centre	Whitby	B1		
WH01	Whitby Business Park, Cholmley Way	Whitby	Mixed	4.85	
WH02	Whitby Business Park, Fairfield Way	Whitby	Mixed	7.64	This site is located within the North York Moors National Park Authority area
WH03	Whitby Business Park, Enterprise Way	Whitby	Mixed	1.38	This site is located within the North York Moors National Park Authority area
WH04	Spring Hill	Whitby	Mixed	0.22	
WH05	Fish Market	Whitby	B8	0.35	
FI20	Filey Workshop Units	Filey	Mixed	0.70	
FI21	Clarence Drive	Filey	B2	1.02	
HU01	Bridlington Road	Hunmanby	Mixed	8.18	
LI01	Willymath Close	Burniston	Mixed	0.75	
BE01	Betton Farm, Racecourse Road	East Ayton	Mixed	0.18	
DE01	Barkers Lane	Snainton	Mixed	0.26	
034A	Farfield	Wykeham	Mixed	0.18	
034B	Wykeham Business Centre	Wykeham	B1	0.10	
ES01	Sneaton Lane	Ruswarp	Mixed	2.33	
			<b>Sub Total</b>	<b>125.4</b>	
			<b>GRAND TOTAL</b>	<b>186.3</b>	

## SITES RECOMMENDED TO BE RELEASED FOR OTHER USES

8.15 Over the period of the Local Plan (up to 2032) it is likely that a number of existing employment clusters will be lost to non-employment uses such as housing. Given that the best quality land will be protected, the majority of redevelopment will take place on poor quality sites, i.e. those that are unable to meet the requirements of modern day businesses. Examples of this could include sites that are less well connected to the transport network, premises that have become run-down and expensive to maintain in their present form, or sites that are surrounded by non-compatible uses (e.g. housing) or other sensitive receptors (sites of nature importance). Equally, they may also be existing land allocations where employment related development has failed to materialise for other reasons, i.e. issues relating to construction costs and scheme viability.

8.16 As a result of the quality assessment those sites that are recommended for release for the development of other uses are identified in Table 8.2 below. In order to ensure that any losses in employment land can be offset by new land provision / allocations, occupied sites (highlighted in yellow) that are likely to be lost to other uses should be taken into account in establishing a future land targets (see Chapter 7). As shown in the table below, in total 10.72 hectares of employment land has been identified and recommended for release, with approximately **5.4 hectares of land (highlighted in yellow) to be retained elsewhere within the employment land portfolio** (the amount of land to be retained, not the specific sites).

**Table 8.2: Sites to be released for other uses**

Code	Site / Cluster Name	Location	Land Use	Area (ha)	Comments
<b>Local Plan Allocations</b>					
04A	IN8: Rugby Ground, Scalby Road, Newby	Scarborough	B1 Vacant	1.51	Has been discussed as a possible location for the development of a health facility
			<b>Sub Total</b>	<b>1.51</b>	
<b>Existing Sites and Premises</b>					
CE01	Roscoe Street	Scarborough	Mixed	0.54	
CE27	Cleveland Road	Scarborough	Mixed	0.50	
CE33	Melrose Street (part of)	Scarborough	Mixed	0.65	
SP10	Commercial Street	Scarborough	Mixed	0.10	
ST03	Church Street	Whitby	Vacant	0.16	
ST04	California Road	Whitby	Mixed	0.32	Not a viable business location
WH01	Old Europower site, Whitby Business Park	Whitby	B2	1.00	Has been redeveloped as a supermarket
WH01	Garage site, Cholmley Way	Whitby	B2	0.50	Has been redeveloped as a petrol filling station
WH01	Next to Homebase	Whitby	Mixed	0.60	Identified for retail development within Whitby Business Park Area Action Plan
WH06	Council Yard, Stakesby Road	Whitby	Mixed	0.50	Identified as potential housing site within Housing Allocations (Preferred Options) DPD
WH06	Whitby Highways Depot, The Garth	Whitby	Vacant	0.50	Identified as potential housing site within Housing Allocations (Preferred Options) DPD
FI25	Old Laundrette, Laundry Road	Filey	Vacant	0.18	Potential for redevelopment for housing
FI18	Carlton Road (1)	Filey	Mixed	0.10	Potential to merge 2 sites for redevelopment purposes
FI19	Carlton Road (2)	Filey	B8	0.10	
GR01	TT Electronics	Gristhorpe	Vacant	2.99	Identified as potential housing site within Housing Allocations (Preferred Options) DPD
DE02	Viking Industrial Estate	Sawdon	Mixed	0.47	
			<b>Sub Total</b>	<b>9.18</b>	
			<b>Grand Total</b>	<b>10.72</b>	

## KEY FINDINGS AND RECOMMENDATIONS

8.17 The qualitative assessment of individual employment clusters against a pre-determined set of criteria has revealed that:

- A number of small sites (under 0.1 ha) totalling 1 hectare could be lost to other uses during the period

- 9 of the 10 remaining Local Plan allocations should be retained
- In total, approximately 187 hectares of land currently used or allocated for employment purposes should be retained
- Approximately 10.72 hectares of employment land could come under pressure for redevelopment and as such, should be released from employment use
- Of the 10.72 hectares identified above, around 5.4 hectares of land are currently occupied and as such, the quantum of land (not the specific sites) should be retained elsewhere within the employment land portfolio
- 5.4 hectares of land to be lost for other uses should be retained within the employment land portfolio

8.18 The final recommendation on which sites should be retained within the employment land portfolio will be made in light of future demand (Chapter 9). As such, sites that are recommended for retention within this part of the study could be removed, either in whole or in part, from the final portfolio of sites should there ultimately prove to be a lack of demand for employment land over the plan period. The overall suitability, deliverability and sustainability of sites will ultimately be tested through the Local Plan itself.

## 9.0 FUTURE EMPLOYMENT LAND REQUIREMENTS

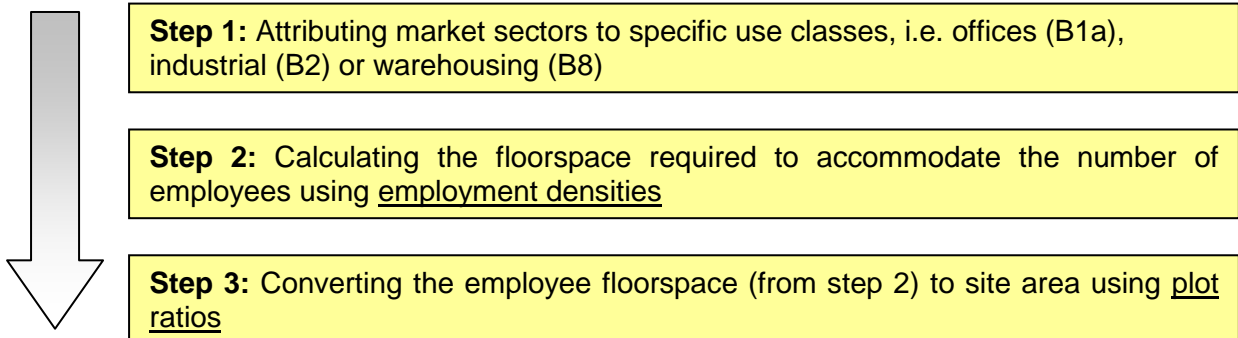
9.1 This section of the Employment Land Review seeks to establish the likely future quantitative requirement for employment land over the emerging Local Plan period (up to 2032) by bringing together the previously identified elements of demand, these being:

- economic projections from the Regional Econometric Model, which identified existing market sectors that could expand or contract (Chapter 6);
- the emergence of new sectors in the local economy, e.g. the potash mining and off-shore wind industries (Chapter 6);
- business specific demand identified through consultation, e.g. businesses that have plans for expansion or rationalisation in the future (Chapter 7); and
- making an allowance to compensate for the loss of existing employment sites and premises to other forms of development, e.g. housing (Chapter 8).

9.2 This will be done by translating job growth projections into land requirements. The overall amount of land required will then be considered against current supply, with recommendations as to how any shortfalls or surpluses can be met to be made in the subsequent chapter.

### Translating Jobs into Land Requirements

9.3 Having previously identified the number of jobs to be delivered, the next stage is to translate the job growth projections into employment land requirements. This will be done using the following step-by-step process, which is outlined within the National Planning Practice Guidance:



9.4 Employment densities refer to the amount of floorspace per employee, which varies by employment sector and land use. Similarly, a plot ratio, which refers to the capacity of land to accommodate floorspace, can vary by development type and location. It is expressed as the floorspace capacity of a hectare of land. For example a plot ratio of 1:4,000 indicates that each hectare can accommodate 4,000 square metres of floorspace. This can also be expressed as a percentage, in this case 40%.

- 9.5 This ELR will use the locally derived employment densities and plot ratios set out within the ‘Planning for Employment Land: Translating Jobs into Land’ report by Roger Tym & Partners, which was undertaken on behalf of Yorkshire Forward and planning authorities within the Yorkshire and Humber region. The recommended densities and ratios from this report are presented below:

Land Use	Density (m <sup>2</sup> )	Plot Ratio
<b>B1a: Offices</b>	16	0.35
<b>B1 b/c, B2: General Industrial</b>	67	0.35
<b>B8: Storage and Distribution</b>	67	0.35

- 9.6 It should be recognised that this method assumes that every job generates its own land requirement, which might not necessarily be the case on the ground. For example, smaller changes in job numbers (increase or decrease) may actually manifest themselves in an intensification or reduction in employment density, i.e. an increase or decrease in the number of employees per square metre of floorspace. However, this is an accepted method of calculating potential demand for employment land and unless otherwise stated, has been used throughout this ELR.

## INDICATORS OF FUTURE DEMAND

- 9.7 The section below provides a detailed breakdown of the employment land implications from each of the previously described indicators of future demand.

### Economic Projections

- 9.8 Chapter 6 of this Employment Land Review concluded that data from the Regional Econometric Model (REM) provides the most robust method of calculating potential future demand for employment land. The REM forecast identifies specific sectors that are predicted to either expand or contract over the plan period. Using the previously described method, the predicted change in jobs can be translated into change in employment land requirements. The implications for the expanding and contracting sectors are set out below.

#### Expanding Sectors

- 9.9 The sectors shown in the table below are those that fall within the B-Use classes and are forecast to grow over the plan period. The forecast demand for these sectors translates to approximately 21 hectares of employment land, comprising; 1.5 hectares of land for office (B1a) uses, 14.4 hectares for industrial (B1b/c + B2) uses and 5 hectares for storage and distribution (B8) uses.

Sector	Land Use Class	B-Use Jobs	Density (m <sup>2</sup> )	Plot Ratio	Land (ha)
<b>Administrative &amp; Support Service Activities</b>	B1a	110	16	0.35	+0.50
<b>Computing &amp; Information Services</b>	B1a	30	16	0.35	+0.14

<b>Food, Drink &amp; Tobacco</b>	B1 b/c, B2	360	67	0.35	+6.89
<b>Land Transport, Storage &amp; Post</b>	B8	160	67	0.35	+3.06
<b>Metal Products</b>	B1 b/c, B2	90	67	0.35	+1.72
<b>Other Manufacturing</b>	B1 b/c, B2	20	67	0.35	+0.38
<b>Professional Services</b>	B1a	120	16	0.35	+0.55
<b>Real Estate<sup>16</sup></b>	B1a	100*	16	0.35	+0.46
<b>Specialised Construction Activities<sup>17</sup></b>	B1 b/c, B2	200	67	0.35	+3.83
<b>Wholesale<sup>18</sup></b>	B8	100*	67	0.35	+1.91
<b>Wood &amp; Paper</b>	B1 b/c, B2	80	67	0.35	+1.53
<b>Grand Total</b>					<b>+20.97 ha</b>
<b>Offices (B1a)</b>					<b>+1.65 ha</b>
<b>Industrial (B1b/c + B2)</b>					<b>+14.35 ha</b>
<b>Storage and Distribution (B8)</b>					<b>+4.97 ha</b>

### Contracting Sectors

9.10 As shown in the table below, sectors that are forecast to decline by the REM translate to a reduction in demand of 7.7 hectares of employment land. The majority (6.5 hectares) of this land relates to industrial (B1b/c + B2) uses, with office (B1a) uses accounting for 1.2 hectares.

<b>Sector</b>	<b>Land Use Class</b>	<b>B-Use Jobs</b>	<b>Density (m<sup>2</sup>)</b>	<b>Plot Ratio</b>	<b>Land (ha)</b>
<b>Computer &amp; Electronic Products</b>	B1 b/c, B2	50	67	0.35	-0.96
<b>Finance</b>	B1a	20	16	0.35	-0.09
<b>Machinery &amp; Equipment</b>	B1 b/c, B2	10	67	0.35	-0.19
<b>Printing and Reproduction of Recorded Media</b>	B1 b/c, B2	160	67	0.35	-3.06
<b>Public Administration &amp; Defence</b>	B1a	240	16	0.35	-1.10
<b>Rubber, Plastic and Other Non-Metallic Mineral Products</b>	B1 b/c, B2	40	67	0.35	-0.77
<b>Textiles &amp; Clothing</b>	B1 b/c, B2	10	67	0.35	-0.19
<b>Transport Equipment</b>	B1 b/c, B2	70	67	0.35	-1.34

<sup>16</sup> Adjusted down from 410 FTE jobs in line with the findings of the "Econometric Forecasts and Job Growth Scenarios" paper

<sup>17</sup> SIC 2007 (Code 43) recognises that these activities are usually performed at the site of the construction, although parts of the job may be carried out in a special shop. Where the forecast shows an increase in 400 jobs in total, an assumption has been made that 50% of these jobs will result in a land take requirement.

<sup>18</sup> Adjusted down from 560 FTE jobs in line with the findings of the "Econometric Forecasts and Job Growth Scenarios" paper

<b>Grand Total</b>	<b>-7.7 ha</b>
<b>Offices (B1a)</b>	<b>-1.19 ha</b>
<b>Industrial (B1b/c + B2)</b>	<b>-6.51 ha</b>
<b>Storage and Distribution (B8)</b>	<b>N/A</b>

#### Net Change (Expanding vs. Contracting Sectors)

- 9.11 In comparing the expanding sectors against the contracting sectors it is apparent that there is positive demand for each of the B-Use classes, totalling approximately 13.3 hectares. This is demonstrated in the table below.

Land Use	Expanding	Contracting	Net Change
<b>B1a (Office)</b>	+1.65	-1.19	+0.46
<b>B1b/c and B2 (Industrial)</b>	+14.35	-6.51	+7.84
<b>B8 (Storage and Distribution)</b>	+4.97	0	+4.97
<b>Total</b>	<b>+20.97 ha</b>	<b>-7.7 ha</b>	<b>+13.27 ha</b>

- 9.12 The need to supplement the REM projections with local data has been previously established. Therefore, the figures above are the starting point for developing a local target; they will be offset against the emergence of new economic sectors and the growth aspirations of local businesses revealed through the consultation process.

### **New and Emerging Market Sectors**

- 9.13 Chapter 6 of this ELR also discussed the scale and nature of the potential impacts of the potash mine and the offshore wind industry on the Borough's economy. Given that they represent entirely new sectors for Scarborough Borough, the jobs they are predicted to create are not taken into account in the REM projections. The implications for employment land provision as a result of these proposed developments are presented below.

#### Potash Mine

- 9.14 As discussed in Chapter 6, the potash mine has the potential to create up to 1,000 jobs in the Borough over the course of its operation (taking account of construction jobs, direct, indirect and induced jobs). Although a large number of these jobs (455) will be based at the mine head and will have no implications for employment land provision, it is estimated that around 150 jobs could be created indirectly in support services. These services will require a business park / employment land location.
- 9.15 As demonstrated in the table below, by translating job creation into land requirements the indirect jobs generated by the mine could result in a requirement for 2.8 hectares of employment land. For illustrative purposes, the 150 jobs have been split evenly between industrial and storage and distribution land uses. This has no impact on the calculations as they use the same employment densities and plot ratios.

Land Use	B-Use Jobs	Density (m <sup>2</sup> )	Plot Ratio	Land (ha)
<b>B1b/c and B2 (Industrial)</b>	75	67	0.35	1.4

<b>B8 (Storage and Distribution)</b>	75	67	0.35	1.4
<b>Sub Total</b>				<b>2.8 ha</b>

9.16 While it could be argued that this is perhaps a pessimistic view of the potential localised indirect employment benefits of what is a massively important project, there is no immediately available evidence to suggest otherwise. Therefore, when identifying a supply of sites to meet anticipated demand, it is important that sufficient flexibility is built in so as not to suppress demand through a potential lack of suitable and available sites.

#### Offshore Wind Industry

9.17 As a direct result of the proposed Dalby Offshore development at Endeavour Wharf in Whitby, it is estimated that the offshore wind industry has the potential to generate approximately 150 jobs in support and supply chain services within Scarborough Borough. Again, when considered in the wider context of the potential impact of the Dogger Bank Offshore Wind Farm project, this is a conservative estimate of employment impact.

9.18 The table below demonstrates that these jobs translate to an employment land requirement of 2.8 hectares. The total number of jobs has been split (50:50) between industrial and storage and distribution uses, which has no impact on the overall land requirement as they use the same employment densities (67m<sup>2</sup> per employee) and plot ratios (0.35).

Land Use	B-Use Jobs	Density (m <sup>2</sup> )	Plot Ratio	Land (ha)
<b>B1b/c and B2 (Industrial)</b>	75	67	0.35	1.4
<b>B8 (Storage and Distribution)</b>	75	67	0.35	1.4
<b>Grand Total</b>				<b>2.8 ha</b>

#### **Meeting the Changing Needs of Local Businesses**

9.19 One of the main policy requirements of the NPPF is for local planning authorities to understand and meet the changing needs of local businesses, both in terms of the quantity and quality of employment land and premises. In addition to seeking to establish the needs of local businesses, the consultation exercise outlined in Chapter 7 was undertaken as a means of providing a 'reality check' for the REM projections for how the local economy might perform in the future.

9.20 *It should be noted that this consultation exercise was undertaken in spring 2014 to inform the production of the May 2014 Employment Land Review. This version of the ELR utilised figures from a version of the REM that was produced in March 2013, which showed a general decline in the manufacturing sector. Therefore, the focus of the consultation was on businesses operating within sectors that were shown to decline by that particular REM forecast.*

9.21 *In terms of this ELR update, only those responses that are still relevant have been considered. Further consultation with businesses in sectors that are shown to decline within the most recent REM forecast has not been undertaken. However, additional commentary has been provided for the*



*'Printing and Reproduction of Recorded Media', 'Public Administration & Defence' and 'Transport Equipment' sectors based on publicly available material.*

#### Metal Products (Manufacturing)

- 9.22 The Regional Econometric Model predicts a net change of +90 FTE jobs within the 'Metal Products' manufacturing sector by 2032; an increase from 440 jobs in 2011 to 520 jobs in 2031. This equates to a requirement for 1.7 hectares of employment land. This broadly correlates with the findings of the consultation process, whereby demand for around 4 hectares of land has been revealed in order to allow for the expansion of an existing businesses and the creation of up to 100 new jobs. Therefore, the demand identified through the REM forecast could/should be revised to the upper figure of 4 hectares.

Although the REM predicts that 80 could be created within the Metal Products sector by 2032, consultation with local businesses has revealed **demand for 4 hectares of land for industrial (B1b/c + B2) use**. The sectoral forecast should be updated accordingly, i.e. from 1.7 hectares to 4 hectares.

#### Computer & Electronic Products (Manufacturing)

- 9.23 While previous REM forecasts have shown significant levels of decline within this particular sector, the data used within this ELR (obtained January 2015) shows a considerably lower level of decline with a loss of 50 FTE jobs by 2032. As previously demonstrated, this would equate to a loss of around 1 hectare of employment land. Consultation has revealed that businesses operating within this sector hope to expand rather than contract over the coming years. Therefore, the REM projections for this sector should be disregarded as they do not accurately reflect local circumstances.

Whilst the REM predicted that 50 jobs will be lost within this sector by 2032, local consultation has revealed that businesses operating within this sector hope to expand rather than contract. However, such **expansion will not result in a requirement for additional employment land**.

#### Machinery & Equipment (Manufacturing)

- 9.24 Again, previous REM forecasts showed a much higher level of decline within this sector. The data used within this ELR estimates a loss of only 10 jobs over the forecast period, which equates to a loss of 0.2 hectares of employment land. Such a small change in employment levels would be unlikely to actually result in a loss of employment land.
- 9.25 This is further evidenced by consultation with a number of local businesses that are currently operating within this sector, including:

- Unison, Scarborough Business Park
- Hunpreco, Hunmanby Industrial Estate
- Deep Sea Electronics, Hunmanby Industrial Estate

- 9.26 UNISON is in the process of expanding having recently moved to a larger unit. They currently employ 45 people and plan to have an additional 10 employees within the next few years, with no requirement for additional land.
- 9.27 Hunpreco currently employ 100 people and indicated in their consultation response that they have plans to grow their business, providing 30 new jobs in the process. They also stated that this growth can be achieved on their existing site (or on land within their ownership) and as such, there is no requirement for additional employment land.
- 9.28 Deep Sea Electronics currently employ 120 people and have plans to create up to 60 new jobs as a result of business growth over the next 5 years. They have indicated that this growth can be achieved on their current site.

The REM predicts that 10 jobs could be lost within the Machinery & Equipment sector by the year 2032. Consultation has revealed that at least 3 local businesses within this sector have plans to grow within the near future, providing up to 100 new jobs. The businesses have indicated that this growth can be achieved on their current sites and as such, there is **no requirement for additional employment land**.

#### Printing and Reproduction of Recorded Media (Manufacturing)

- 9.29 The REM forecast for this sector shows a sharp reduction in jobs from 370 in 2011 to 280 in 2012 (a loss of 90 jobs in one year). From 2013 onwards there is a gradual decline in the sector, leading to an overall loss of 160 jobs by 2031 (at an average rate of 4 jobs per year), which translates to a potential loss of 3 hectares of land for industrial (B1b/c + B2) use.
- 9.30 The sharp fall in employment within the early part of the forecast period is perhaps reflective of the job losses experienced at Pindar in 2011. The company was brought out of administration in 2011 following its purchase by an external investor. While 190 jobs were retained at the new company (Pindar Scarborough Limited), 60 jobs were lost.
- 9.31 As the largest employer within the sector in the Borough, it is likely that any future changes in employment levels in the sector would be related to the company. However, given the recent publicised investment in new infrastructure (machinery) at the factory, there is no reason to assume significant changes during the short to medium term.

The REM predicts that up to 160 jobs could be lost within the Printing and Reproduction of Recorded Media sector by the year 2032. However, it is not considered that the loss of 60 jobs at what is now Pindar Scarborough Limited in 2011 would be compounded by further losses given recent investment at the plant. Therefore, the REM forecast is not considered to reflect local circumstances and **should not be taken into account** in planning for the future provision of employment land.

#### Transport Equipment (Manufacturing)

- 9.32 The January 2015 REM forecast shows a loss of 70 FTE jobs within the Transport Equipment sector over the forecast period. These losses are

expected to occur from 2016 onwards, with the sector showing growth between 2011 and 2015. The overall change in job numbers equates to a potential loss of around 1.4 hectares of land for storage and distribution (B8) use.

- 9.33 Similar to the Printing sector, the vast majority of existing jobs in the Transport Equipment sector are at one company; Plaxton Limited (the UK's largest coach builder) employs around 600 people at their factory at Scarborough Business Park. Around 50 new jobs were created at the company in 2014 as a result of the awarding of a 5-year contract to build low-emission buses. It should be noted that these jobs were accommodated within the footprint of the existing factory and did not result in any additional land requirement.
- 9.34 Given that any future reduction in job numbers within the sector would likely be experienced at Plaxton (due to its significance), it is unlikely that a similar reduction in workforce levels would reduce the land requirement. Therefore, in this instance, it is not considered that the potential loss of 70 jobs in this sector would translate to a loss of employment land.

The REM predicts that up to 70 jobs could be lost within the Transport Equipment sector by the year 2032. However, given that a similar increase in job numbers at Plaxton Limited has been accommodated within the footprint of its existing factory, it is **not considered that this would translate to a loss of employment land.**

#### Public Administration and Defence

- 9.35 The REM forecast shows a potential loss of 240 FTE jobs within the Public Administration and Defence sector over the plan period, which translates to a loss of 1.1 hectares of land for office (B1a) use.
- 9.36 The sector includes services such as the Borough Council, police service, fire service and the Government Communication Headquarters (GCHQ) building (off Racecourse Road). As previously stated in Chapter 6, the level of decline reflects the ongoing impact of central government policy, public sector reform, budget constraint and the introduction of new spending priorities, following the onset of economic recession in 2008 and the subsequent change(s) in central government.
- 9.37 With regard to the Borough Council, a reduction in employment levels over recent years has been as a product of 'efficiency' savings. While a continued reduction in staff numbers is likely, there is no immediate indication that the Council is looking to downsize or relocate its existing Town Hall premises. A reduction in demand for employment land would only occur in the event that such a decision is made.
- 9.38 Similarly, while there is the potential for a reduction in employment levels, a loss of land associated to other services would only be as a product of the closure of existing facilities. GCHQ has expanded over recent years, while any potential loss of police or fire facilities should be considered in the context of the additional pressures that will be placed upon these services by the increase in population that will be delivered within the emerging plan period. As indicated within the Council's Infrastructure Study, it is likely that these services will require new 'satellite' facilities in order to cope with the additional demand.

- 9.39 With the above in mind, it is not considered that the loss of jobs in this sector would translate to a loss of employment land.

The REM predicts that up to 240 jobs could be lost within the Public Administration and Defence sector by the year 2032. However, it is **not considered that this would translate to a loss of employment land.**

## Margins

### Land to be re-provided

- 9.40 In addition to the emerging markets and the needs of local businesses, an allowance must be made for the loss of existing employment sites for other uses. This allowance is based on the qualitative sites and premises assessments undertaken in Chapter 6, which identified poor quality sites that are likely to come under pressure for redevelopment during the Local Plan period. Using this method it was shown that **5.4 hectares of land should be retained** elsewhere within the employment land portfolio.

### Choice, Competition and Uncertainty

- 9.41 Further allowances for choice, competition and uncertainty should also be made. The most robust way to take account of these factors is to adopt an approach that ensures there is a rolling 5-year supply of readily available (unconstrained) employment land. Given that this is typically done through a Strategic Housing and Employment Land Availability Assessment (SHELAA) and relates to the supply of developable sites rather than the quantity of land, allowances for choice, competition and uncertainty will not be factored into the employment land forecasts within this Employment Land Review.
- 9.42 However, it is worth noting that should development come forward at a rate that is faster than anticipated, there could be a need to release more land than is predicted within the ELR. This would likely be facilitated through a review of the Development Plan, or through alternative policy measures.

## RECONCILING INDICATORS OF FUTURE DEMAND

- 9.43 The table below demonstrates that when the indicators of future demand are taken into account, there is demand for 34.5 hectares of employment land over the emerging plan period (2011-2032). This figure should be taken forward as the basis for identifying gaps in the existing employment land portfolio and to identify new sites, should they be required.

Demand Indicator	Total Land (ha)
REM growth sectors	+21.0
Indirect employment from potash mine	+2.8
Off-shore wind support and supply chain services	+2.8
Meeting the needs of local businesses	+2.5
Employment land lost to be re-provided	+5.4
<b>Total</b>	<b>+34.5 ha</b>



## 10.0 IDENTIFYING A NEW PORTFOLIO OF SITES

- 10.1 The next stage of the Employment Land Review is to look at where gaps might exist between the current supply of undeveloped sites and the level of future demand (see Chapter 9). Where there is an imbalance between demand and supply there may be a need to recommend the release of existing employment sites for the development of other uses (in addition to those already identified in Chapter 5). Equally, there may be a need for new employment sites to be identified.
- 10.2 Whilst the final judgements on new allocations will be made within emerging development plan, this Employment Land Review will identify and recommend potential broad locations for the new allocations.
- 10.3 Chapter 9 concluded that the future demand for employment land as a result of employment growth is equal to **34.5 hectares** over the period of the emerging development plan.

### Area-based employment land requirements

- 10.4 The first step in identifying a new portfolio of employment sites is to disaggregate the overall land requirement to an area-based land requirement. In doing so, it is essential that the distribution of development accords with the spatial strategy for the Borough; strengthening the role of settlements in line with the settlement hierarchy<sup>19</sup> as set out below:
- a. Scarborough Urban Area
  - b. Whitby
  - c. Filey
  - d. Service Villages: Burniston, East and West Ayton, Hunmanby, Seamer, Sleights and Snainton
  - e. Rural Villages: All other villages with defined development limits
- 10.5 The Spatial Strategy requires new development to be directed towards the Borough's main towns, with Scarborough Urban Area being the focus for the majority of development, followed by Whitby and Filey.
- 10.6 Nevertheless, it is also important that the distribution of employment development reflects and responds to the opportunities arising in the Borough, particularly in terms of the new emerging economic sectors (potash mining and off-shore wind energy generation) and the expansion of existing businesses. This ELR has previously demonstrated that the main areas of potential are around Scarborough, primarily due to its flexible land supply, and Whitby, due to its proximity to the emerging economic sectors. These two areas will play a complimentary (rather than competitive) role in seeking to capitalise on economic opportunities in the Borough.
- 10.7 This approach has been adopted in the Whitby Business Park Area Action Plan, which seeks to allocate roughly 10 hectares (net) of employment land for development. This level of allocation represents around 30% of the total demand for employment land for the Borough. The Action Plan concluded that,

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<sup>19</sup> Taken from the emerging Scarborough Borough Local Plan

in the context of a current lack of developable employment land, this level of new provision was required in order for the Business Park to be in a position to fully capitalise on the opportunities emerging within the potash and off-shore wind sectors.

10.8 Equally, it recognises that there is a limit in terms of the level of development that can be accommodated in Whitby due the area’s geographical, landscape and historical constraints. Therefore, any land to be provided at Scarborough will help to retain the potential economic and employment benefits of the emerging sectors within the Borough. It is considered that the approach for Whitby accords with the Spatial Strategy set out within the emerging Local Plan.

10.9 Where Scarborough and Whitby have significant potential for employment generating development, there are fewer opportunities to capitalise on emerging markets in Filey and indeed the southern part of the Borough. As such, any new employment land provision in this area would be speculative, insomuch that there is no immediate identifiable demand from developers / businesses. Nevertheless, it is essential that some employment land is provided as a means of delivering employment opportunities alongside housing development. It is proposed that, subject to the availability of developable sites, Filey should receive between 5%-10% of the total employment land requirement over the plan period. This approach is in keeping with the Spatial Strategy for Filey, which will also receive approximately 7% of housing over the same period.

10.10 The remaining 60%-65% of required employment land will be directed to the Scarborough Urban Area. Again, this broadly accords with the Spatial Strategy for the Borough, whereby the majority of development should be directed to the Scarborough Urban Area.

10.11 The recommended approach for the Borough’s Service Villages and Rural Villages is not to allocate any new employment land. Opportunities for development in these locations will be limited to those in existing business parks / industrial estates, ‘infill sites’ within settlements and diversification schemes. However, there may be opportunities to allow for the expansion of existing sites through an alternative policy mechanism.

10.12 In light of the above, the table below sets out the area based employment land requirements for the Borough that will be used as the basis for establishing a new portfolio of employment sites. The precise amount of land to be allocated within each settlement will be influenced by the size of available and suitable sites, hence the range in potential land requirements (for the Scarborough Urban Area and Filey).

Table 10.1: Area based employment land requirements

Land Use	Scarborough Urban Area	Whitby	Filey
<b>Required Employment Land</b>	20.7 ha - 22.4 ha	10.2 ha	3.4 ha - 1.7 ha

## Balancing Supply and Demand

10.13 The next step of the process is to identify any gaps between the current supply of vacant or undeveloped sites and the future demand for employment land. Chapter 5 identified all of the existing employment sites throughout the Borough that were either vacant, derelict or in the case of some Local Plan allocations, undeveloped. After removing sites smaller than 0.1 ha in size (just over 1 ha cumulatively), together with the sites identified for release in Chapter 8, around 53 hectares of employment land are currently available for development. The vast majority of vacant land is located within the Scarborough Urban Area, primarily at Scarborough Business Park.

10.14 Table 10.2 below presents a comparison between the current supply of vacant sites and the future demand for employment land on an area-by-area basis. Where there are significant differences between the current supply and future demand for employment land there may be a need for further investigation as to why the unbalance exists and how it can be addressed.

Table 10.2: Net difference between current supply and future demand

Land Use	Scarborough Urban Area	Whitby	Filey	Total
<b>Current Supply of Vacant Sites</b>	51.5	1.7	0.2	53.4
<b>Required Employment Land</b>	20.7 - 22.4	10.2	3.4 - 1.7	34.5
<b>Net Difference</b>	<b>+30.8 ha - +29.1 ha</b>	<b>-8.5 ha</b>	<b>-3 ha - -1.6 ha</b>	<b>+18.9 ha</b>

10.15 In seeking to identify new employment sites it is also important to consider where qualitative gaps may exist in current provision, i.e. does the current portfolio of sites reflect the requirements of those business sectors that are predicted to grow; in terms of location, accessibility, site size, environmental quality, etc.? The importance of these factors has been drawn out through discussions with local businesses, land and property agents and other stakeholders (see Chapter 7) and will be used to help identify a new portfolio of employment sites.

10.16 Consultation has revealed that Scarborough is the main area of demand for employment premises and land, with Scarborough Business Park being the preferred location for businesses that are looking to relocate and expand. Elsewhere in the Borough, businesses are shown to prefer an out-of-town location where they are not otherwise constrained by neighbouring uses.

10.17 The consultation process also showed that proximity to the wider Strategic Road Network is the most important factor for the operation of businesses and for the identification of new sites. Following this, businesses also place significant value on the quality of premises and the surrounding environment. The least important factors were shown to be proximity to public transport hubs and proximity to other businesses.

10.18 All of these factors indicate that businesses are looking for out-of-town, business park / industrial estate locations where they have ready access to the road network. For these reasons, in identifying a new portfolio of sites an



emphasis will be placed on retaining undeveloped land at existing business parks and, where necessary, expanding existing business parks.

### Scarborough Urban Area

10.19As demonstrated above, there is a significant disparity between the current supply of vacant sites and the future demand for employment land within the Scarborough Urban Area; a difference of approximately 30 hectares. The vast majority (43 hectares) of vacant employment land in the area is located at Scarborough Business Park. Given the level of vacant land there is a need to reassess the suitability of the existing Local Plan (1999) allocations and to make a judgement as to whether they should be taken forward in the emerging Local Plan. An assessment of the nature of employment land provision at the Business Park is presented below.

### Scarborough Business Park

10.20The Scarborough Borough Local Plan (1999) allocated approximately 52 hectares<sup>20</sup> of land for the outward expansion of the original Business Park, with a further 5.6 hectares allocated for internal / infill development. The Local Plan also identified sites with unimplemented planning permissions (committed sites) totalling approximately 15 hectares. The total amount of land made available for employment development through the Local Plan is presented in the table below, with the sites displayed in the map below.

Table 10.3: Existing Local Plan Allocations and Committed Sites

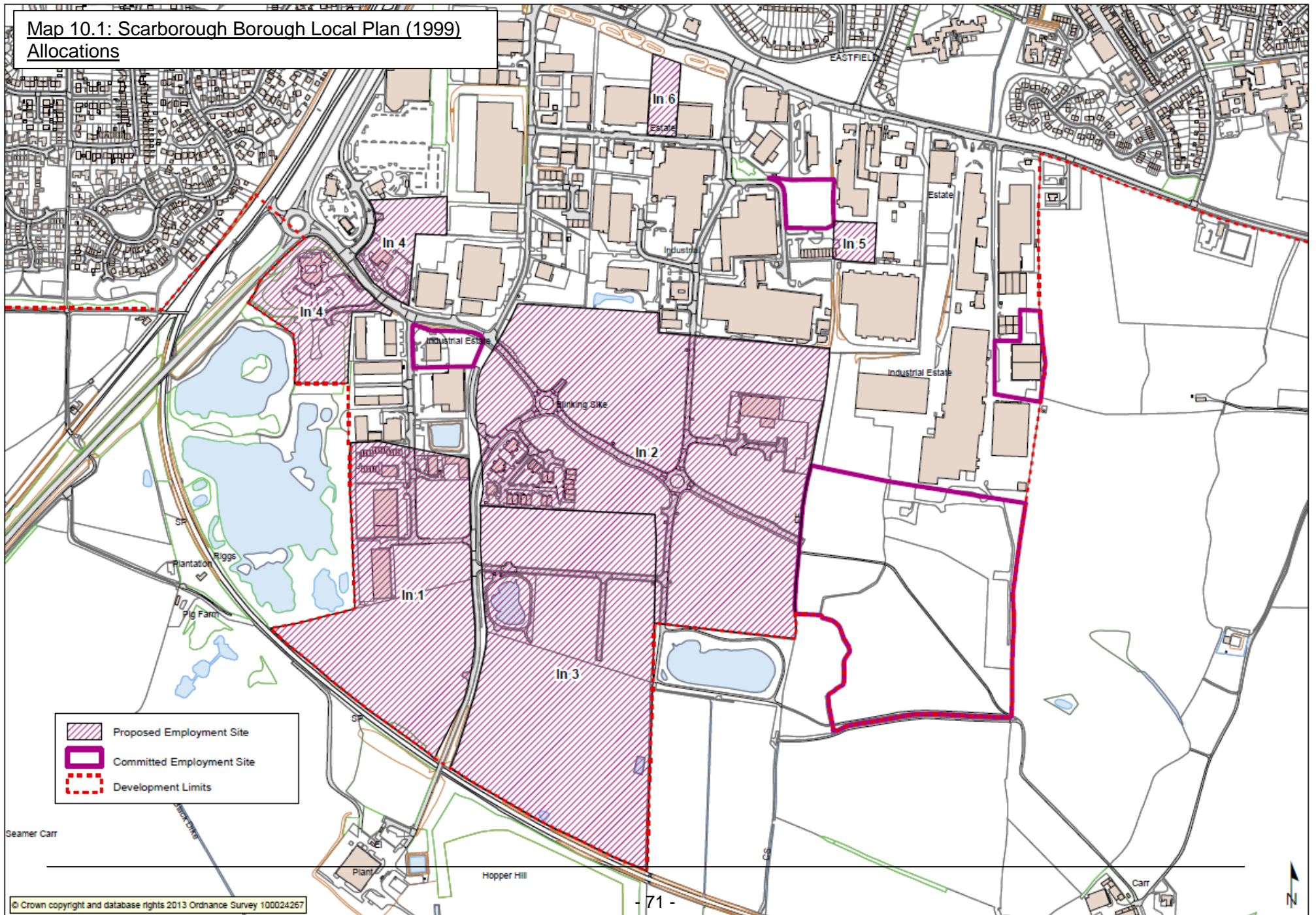
Scarborough Business Park Allocations	Hectares
<b>In1: East of Burton Riggs</b>	11.0
<b>In2: South of Eastfield Industrial Estate</b>	23.76
<b>In3: South of Eastfield Industrial Estate</b>	16.94
<b>In4: North of Burton Riggs</b>	4.47
<b>In5: Land at Wareham Road</b>	0.46
<b>In6: Land at Salter Road</b>	0.68
<b>Sub-Total</b>	<b>57.31</b>
<b>Committed Sites</b>	15
<b>Total</b>	<b>72.31</b>

10.21Moving forward to the next iteration of the Local Plan there is a question over whether this level of employment land is required for the period of the Plan. However, as discussed below, there are factors other than pure quantitative need that come in to play when considering the approach to be taken at the Business Park. These include;

- The planning history of the sites;
- Wider policy considerations;
- The limited options for future expansion beyond the Local Plan period (2032); and the resulting
- Long-term strategic importance/significance of the Business Park.

<sup>20</sup> Please note that the figures here are taken directly from the Scarborough Borough Local Plan (1999) and as such, they may not tally with the figures previously stated, i.e. those derived from the GIS Employment Land Database

Map 10.1: Scarborough Borough Local Plan (1999)  
Allocations



### *Planning History*

- 10.22 The starting point for assessing the suitability of the existing employment land allocations at Scarborough Business Park will be to identify which allocations have been developed, where planning permissions have been granted and where no form of planning permission currently exists.
- 10.23 The planning history of a site is a material consideration in the planning process; where a planning permission exists or has existed on a site, the principle of that type of development on that particular site has been established. This means that even if the site remained undeveloped for a number of years, the planning permission may be renewed if other material considerations have not altered the determination of the proposal.
- 10.24 At present, of the 52 hectares of employment land allocated for the outward expansion of the Business Park (allocations IN1, IN2 and IN3), approximately 37 hectares has either been developed in part (8 hectares) or has outline planning permission (29 hectares). The remaining parts of these sites (15 hectares) currently have no form of planning permission; 6 ha at allocation IN1 and 9 ha at allocation IN3.
- 10.25 Outline planning permission for the development of Local Plan allocation IN2 (24 ha) and part of IN3 (7.5 ha) was granted in 2006. The agreed masterplan for the site included land for industrial units, starter units, office units, car showrooms, ancillary retail units and restaurant and hotel facilities. Although this permission has not yet been fully implemented, owing to the economic downturn, all supporting services and infrastructure are in place and approximately 3 ha of land have been developed for employment use.
- 10.26 Whilst this land has outline planning permission, it is important to note that there is a time limit on the period during which any reserved matters applications can be submitted. Upon the expiration of this period in 2016, the outline planning permission will remain extant but cannot be implemented further as it will not be possible to submit further reserved matters. However, as this is a phased development the time limit can be extended by varying the relevant condition, which will ensure that land at Scarborough Business Park remains available for development in the long-term. An application was submitted by the landowner at the end of September 2015 to effectively seek an extension to the time limit for the implementation of the permission.
- 10.27 Given that the Council is likely to be receptive towards the renewal of the relevant condition (pending the resolution of any emerging issues), it is recommended that this area of land should be identified as a 'committed employment site'. This approach would reflect the fact that the suitability of the land for the development of employment uses has already been established; both through the original allocation within the 1999 Borough Local Plan and the subsequent planning permission.
- 10.28 Of the land that was allocated for the internal development of the Business Park (5.6 hectares in total), approximately 2.3 hectares remain undeveloped; comprising Local Plan allocations IN5, IN6 and part of IN4. None of these sites currently have planning permission; primarily due to their hidden location. Nevertheless, as discussed later in the ELR, these sites will remain as part of the employment land portfolio as they are unsuitable for other forms of

development, regardless as to whether they are allocated within the emerging Local Plan or not.

10.29 The 1999 Borough Local Plan identified 4 'committed' sites for employment development. Although these sites had unimplemented planning permissions at the time the 1999 plan was being written, it was thought that they would be delivered within a short timescale thereafter. As reflected on Map 10.2 below, two of the sites have been developed, while the other two remain undeveloped. The larger of the two undeveloped sites, which measures 13.5 hectares and is located to the south of Plaxton Park, has outline planning permission (having been renewed in August 2015). Therefore, this site should continue to be identified as a 'committed' site within the emerging Local Plan.

10.30 The remaining site, which measures 0.3 hectares, does not currently have planning permission and as such, can no longer be considered as a 'committed site'. Whilst this site can no longer be classed as part of the available employment land supply it is still within the defined Development Limits (Scarborough Borough Local Plan 1999), where the principle of development is generally accepted.

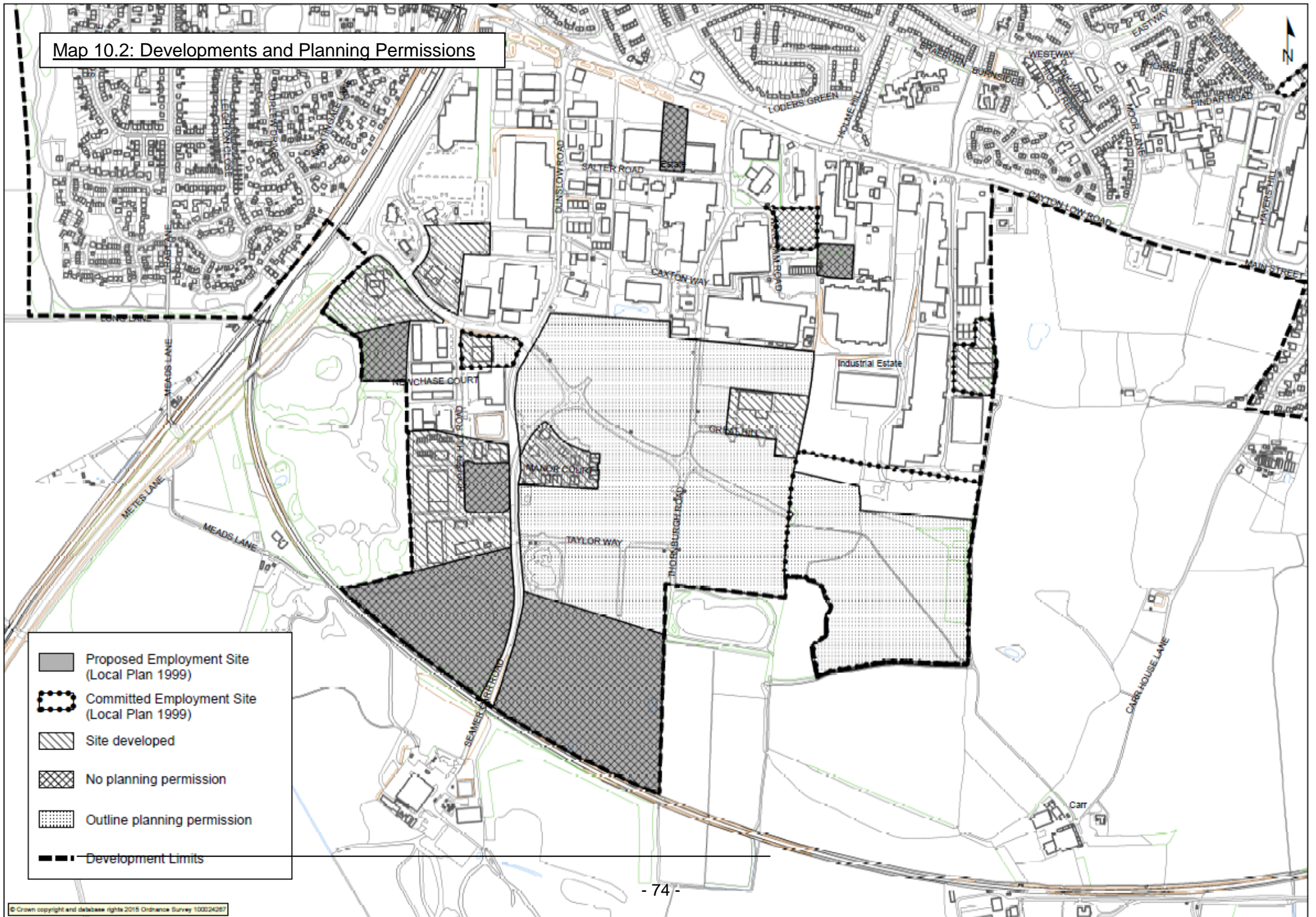
10.31 A detailed overview of developments and planning permissions on the existing allocations at Scarborough Business Park is presented in the table and map below:







Table 10.4: Overview of Developments and Planning Permissions

Scarborough Business Park Allocations	Hectares			
	Site Size	Developed	Planning Permission	No Planning Permission
<b>In1: East of Burton Riggs</b>	11.0	4.1	-	6.9
<b>In2: South of Eastfield Industrial Estate</b>	23.76	3	20.76	-
<b>In3: South of Eastfield Industrial Estate</b>	16.94	-	7.94	9
<b>In4: North of Burton Riggs</b>	4.47	3.27	-	1.2
<b>In5: Land at Wareham Road</b>	0.46	-	-	0.46
<b>In6: Land at Salter Road</b>	0.68	-	-	0.68
<b>Sub-Total</b>	<b>57.31</b>	<b>10.37</b>	<b>28.7</b>	<b>18.24</b>
<b>Committed Sites</b>	15	1	13.7	0.3
<b>TOTAL</b>	<b>72.31</b>	<b>11.37</b>	<b>42.4</b>	<b>18.54</b>



Map 10.2: Developments and Planning Permissions



-  Proposed Employment Site (Local Plan 1999)
-  Committed Employment Site (Local Plan 1999)
-  Site developed
-  No planning permission
-  Outline planning permission
-  Development Limits

### *Removal of Land without Planning Permission*

10.32 As demonstrated above, approximately 42 hectares<sup>21</sup> of land at Scarborough Business Park currently has planning permission for employment development, which is more than the (approximately) 22 hectares required in the Scarborough Urban Area over the plan period. Given that there is shown to be insufficient demand to justify (from a purely quantitative perspective) the continued allocation (or commitment) of the remaining 18.5 hectares of land without planning permission, the suitability of this land for employment development should be assessed. This assessment will be made in the context of planning policy considerations, with the final judgement on the sites to be made within the Local Plan itself.

### *Internal Sites*

10.33 Of the 18.5 hectares of land without planning permission, approximately 4 hectares have been previously allocated or committed for the internal development of the Business Park. This includes Local Plan allocations IN5, IN6, part of allocations IN1 and IN4, and one previously committed site adjacent to allocation IN5.

10.34 All of these sites are located inside the Development Limits<sup>22</sup> and will continue to be available for development, even if they were not taken forward as allocations within the emerging Local Plan. However, these sites are not suitable for all types of development; due to the nature of surrounding business uses they are only suitable for employment development. Therefore, if these sites were not allocated it would not reduce the supply of available employment land at the Business Park. In contrast, allocating the sites for employment development could provide additional certainty and increase the likelihood of them coming forward during the plan period.

### *Expansion Sites*

10.35 The vast majority of land without planning permission is split between 2 sites; 6.9 hectares at allocation IN1 and 9 hectares at allocation IN3. The development of these sites would facilitate the outward expansion of the existing Business Park.

10.36 The relevant parts of allocations IN1 and IN3 (the areas that have not already been developed and do not currently have planning permission) have been allocated for employment development since 1999 and since that time no planning applications for permanent use have been received by the Council. Whilst this might suggest a lack of market interest in these sites it does not preclude the possibility of interested parties coming forward with development proposals in the future. More recently, there appears to be significant market interest in bringing forward allocation IN1 for development in the short-term.

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<sup>21</sup> This is a 'gross' measurement of the whole site and includes land used for the internal road network, associated landscaping and drainage solutions. The actual amount of developable land (a 'net' measurement) will be lower.

<sup>22</sup> The principle of development is generally accepted inside the defined Development Limits. However, development proposals must still be able to meet other policy requirements set out within the development plan.

- 10.37 In a scenario where a planning application is received for the development of either (or both) of these sites prior to the adoption of the emerging Local Plan, such an application would have to be assessed against the current Local Plan policies. Under the current 1999 Local Plan, this application would have to be viewed favourably given their status as allocations.
- 10.38 Subsequently, should planning permission be granted prior to the submission<sup>23</sup> of the emerging Local Plan, these permissions would need to be reflected in the plan, i.e. the sites be identified as allocations and the Development Limits drawn around them accordingly. Whilst this would mean that the emerging Local Plan would allocate more employment than required when compared with anticipated future demand, such an approach would ensure continuity between the emerging Local Plan and existing planning permissions.
- 10.39 Nevertheless, should these sites not come forward in the short-term (prior to the submission of the Local Plan to central government), it is recommended that they should not be included as part of the employment land portfolio in the emerging Local Plan. This would reduce the over-supply of employment land by approximately 16 hectares.

#### *Suitability for the Development of Alternative Uses*

- 10.40 An alternative approach to reducing the overall amount of vacant employment land could be to re-evaluate acceptable forms of development at the Business Park and to allocate the land accordingly. However, the extent to which this could be done is dependent upon the overall suitability of the land for other forms of development when considered against planning policy (national and local planning policy).

#### *Housing Development*

- 10.41 In assessing the suitability of land at the Business Park for housing development, the key consideration relates to the compatibility between existing and prospective uses, and amenity issues arising from any conflict between the uses.
- 10.42 The majority of uses at Scarborough Business Park are of an industrial nature. Whilst there are a number of other uses, such as a supermarket, pub/restaurants, car showrooms and offices located within the Business Park, these uses are generally accepted as being compatible uses within an industrial setting. In contrast, residential development is not normally acceptable in areas that are predominantly comprised of large scale industrial uses. Locating such uses within close proximity to each other would give rise to significant amenity issues. Noise, smell, other emissions or pollutants and traffic movements associated with the industrial use could have a significant detrimental impact on the amenity of any future surrounding residents.
- 10.43 In conclusion, whilst good linkages between residential development and employment opportunities should be explored, this should not be to the detriment of the quality of living nor at the cost of placing restrictions on the type of business that can be located on the Business Park to ensure compatibility with residential development. As such, allowing housing

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<sup>23</sup> Submission of the Local Plan to Secretary of State for examination.

development elsewhere within the Business Park, or on land that is suitable for the future expansion of the Business Park, would not be an appropriate response to the need to reduce the existing over-supply of employment land.

#### *Retail and Leisure Development*

- 10.44 There is likely to be greater potential in making some of the land available for the development of other employment generating uses, such as retail or leisure development. However, within each of these use classifications, there are limitations as to what types of development can take place. The existing planning permission at the Business Park allows only a small amount of non B-use development that would be ancillary to the main industrial and office units.
- 10.45 In addition, national planning policy dictates that retail development (both convenience and comparison goods) should be directed towards town centres in the first instance. Only where more central sites are demonstrated to be unavailable, unsuitable or unviable, should edge-of-centre and subsequently out-of-centre development sites be assessed. Similarly, leisure-based uses such as cinemas and restaurants should also be directed towards town centres. Considering that the Business Park is at the very edge of the Scarborough Urban Area and approximately 5 kilometres from Scarborough town centre, it is unlikely that a case could be made to release a large amount of employment land for general retail use. Nevertheless, there may be individual cases where specific retail uses that favour an out-of-centre location may be acceptable, e.g. bulky goods stores.
- 10.46 As previously noted, a level of non B-use development that is ancillary to the operation of traditional employment uses at the Business Park is currently permitted. However, these uses have not come forward since planning permission was granted in 2006. Whilst this is in no small part due to the economic recession, whereby ancillary uses only tend to be developed once a critical mass of office and industrial businesses are in place, it also indicates that development in its widest context may not be viable at this time. Nevertheless, should the economy recover and development become viable, allowing serviced employment land to be developed for non B-uses, over and above what could be considered ancillary in nature, could prejudice the development of industrial businesses in the long term.

#### *The Strategic Role of Scarborough Business Park*

- 10.47 Whilst Scarborough Business Park is physically self-contained, its economic role within the Borough is of strategic importance and is something that should be protected and enhanced during the emerging plan period (up to the year 2032) and beyond.
- 10.48 The potash and off-shore wind sectors are predicted to be two of the main drivers of future demand in the Borough during the emerging plan period. However, although effort has been made to ensure that the employment benefits of these sectors are based on the most up-to-date evidence, there is no certainty over the rates at which the markets will emerge. Should the markets develop faster than anticipated, there could be a need to identify and release additional employment land for development within the lifespan of the emerging Local Plan.



- 10.49 As the principal town in the Borough, Scarborough and its wider urban area is the most appropriate location for identifying additional employment land. Equally, given its strategic role in the Borough's economy, Scarborough Business Park is the most appropriate and only suitable location for such provision. Although this ELR has previously recommended that the areas of land without planning permission should not be taken forward as allocations in the emerging Local Plan, the development potential of these sites for employment use has been previously established. Therefore, any search for additional employment land should start in these locations.
- 10.50 These sites will also play an important role in providing new land for employment development beyond the emerging plan period; helping to reinforce the strategic role of Scarborough Business Park in the local economy by continuing to capitalise on the legacy of the potash and off-shore wind energy sectors, which will last far beyond 2032.
- 10.51 With this in mind, the approach to employment land provision at Scarborough Business Park needs to be flexible enough to be able to accommodate needs that have not been directly anticipated and to allow for a rapid and effective response to changes in economic circumstances. A policy response that reflects this and allows for the outward expansion of the Business Park into unallocated land should be incorporated in the emerging Local Plan.

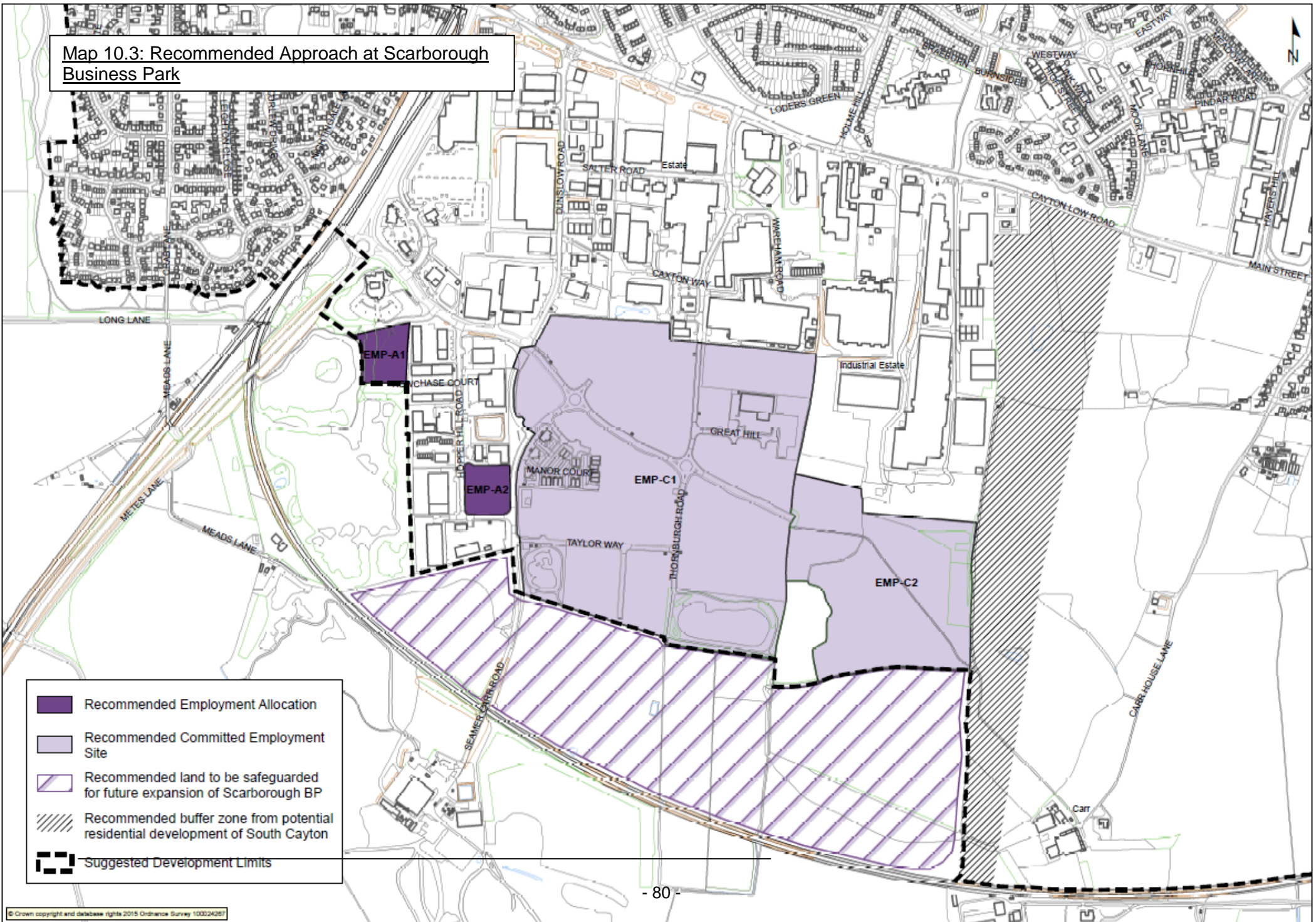
*Recommended Approach at Scarborough Business Park*

- 10.52 In light of the above considerations, a clear strategy for the future development of Scarborough Business Park needs to be established within the emerging Local Plan. Primarily, the **ELR recommends that this approach should reflect the nature of existing planning permissions; identifying sites that are 'committed' where planning permissions exist and allocating suitable sites within the development limits.**
- 10.53 Based on a net measurement of available sites, the emerging Local Plan would provide 41.72 hectares of developable employment land at Scarborough Business Park across 2 allocations and 2 committed site (see Map 10.3). However, it should be recognised that the larger of the committed sites (ref EMP-C1) has planning permission for a small amount of ancillary and complimentary non-B Class uses; the agreed masterplan for the site included approximately 4 hectares of land for such uses. Whilst this does not preclude the development of employment uses on the associated parcels of land, a more accurate picture is that approximately 38 hectares of employment land is available at Scarborough Business Park.
- 10.54 It is **also recommended that the areas of land that are currently allocated or have been previously committed for the outward expansion of the Business Park, but do not currently have planning permission for development, should not currently be taken forward as employment land allocations in the emerging Local Plan.** However, should any of these sites gain planning permission prior to the adoption of the emerging plan, these permissions would need to be reflected in the plan, i.e. the sites be identified as allocations and the Development Limits drawn around them accordingly.
- 10.55 These sites, together with land to the southeast of the Business Park, should be safeguarded for the expansion of Scarborough Business Park in order to

reinforce its strategic role in the local economy. The loss of this land for the development of other non-employment uses in the short-term would seriously undermine the long-term economic potential of the Borough and ultimately necessitate the identification of less sustainable employment land in the future.

10.56 **The recommended approach at Scarborough Business Park is demonstrated in Map 10.3 below.** This approach will be tested through the emerging Local Plan.

Map 10.3: Recommended Approach at Scarborough Business Park



- Recommended Employment Allocation
- Recommended Committed Employment Site
- Recommended land to be safeguarded for future expansion of Scarborough BP
- Recommended buffer zone from potential residential development of South Cayton
- Suggested Development Limits

## Whitby

- 10.57 Given Whitby's physical and environmental constraints, particularly within the central areas of the town, the area of search for new employment land is limited to extensions to Whitby Business Park. The Borough Council is currently producing a joint Area Action Plan (AAP) for the Business Park<sup>24</sup> together with the North York Moors National Park Authority. Once adopted, this document will provide the principal vehicle for employment land provision in Whitby.
- 10.58 The AAP seeks to elevate the prestige and market attractiveness of the Business Park by securing investment into transport, access and environmental improvements, thereby helping to attract new businesses to the town and reinforcing its role as a centre for employment in the north of the Borough. It allocates approximately 10 hectares (net<sup>25</sup>) of employment land for the development of new business and industrial uses. Funding has recently been secured from the Regional Growth Fund and from the Coastal Communities Fund to bring forward the infrastructure required to access these areas of land and also to deliver the wider environmental improvements within the Business Park.
- 10.59 The proposed expansion and enhancement of the Business Park is viewed as being essential if Whitby is to secure a proportion of the new jobs that will be indirectly created by the emerging potash and off-shore wind energy sectors, for which the town is geographically well-placed to capitalise upon (see Chapter 6).

## Filey

- 10.60 Table 10.1 shows that there is a requirement for between 1.7 hectares and 3.4 hectares of employment land in Filey over the plan period. Given the current lack of vacant employment premises and sites in the town, there is a clear need to allocate some land for business and industrial development.
- 10.61 Land to the northwest of the town (see map below) has been submitted to the Borough for consideration for housing development within the Housing Allocations DPD (Preferred Options) (November 2009). Although the majority of the land was recommended for dismissal as a potential housing allocation, it could be reconsidered for employment use within the Strategic Housing and Employment Land Availability Assessment (SHELAA).
- 10.62 The main area for concern with the site as a potential location for employment development would be the impact it would have on the appearance and character of what is the main approach road into Filey from the northern part of the Borough. This approach into Filey is characterised by open coastal

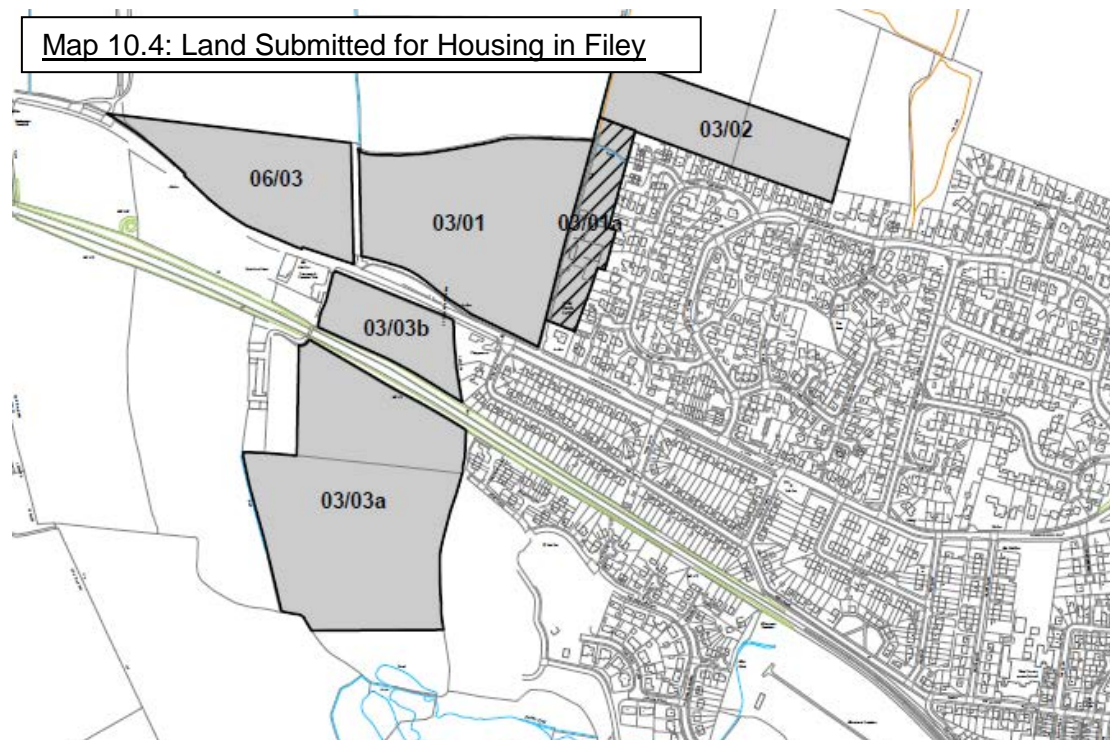
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<sup>24</sup> The Whitby Business Park Area Action Plan was subject to pre-submission consultation in November 2013, with the intention of submitting a final version of plan to the Secretary of State in January 2014. The AAP documents can be viewed at the following webpage: <http://www.scarborough.gov.uk/default.aspx?page=15119>

<sup>25</sup> The AAP allocates 13.4 hectares (gross) of employment land. The net measurement takes account of the proposed "retail zone" and supporting infrastructure (access roads) and therefore represents the amount of developable land.



landscape, leading into sub-urban residential development. Any form of development in this location would likely be visually intrusive and inappropriate.



10.63 If the future requirement for employment land cannot be met in Filey, then there may be potential to meet this need at Hunmanby Industrial Estate (see below). This approach would reflect the joint role between Filey and Hunmanby in providing services and facilities in the southern part of the Borough in accordance with emerging Local Plan policy.

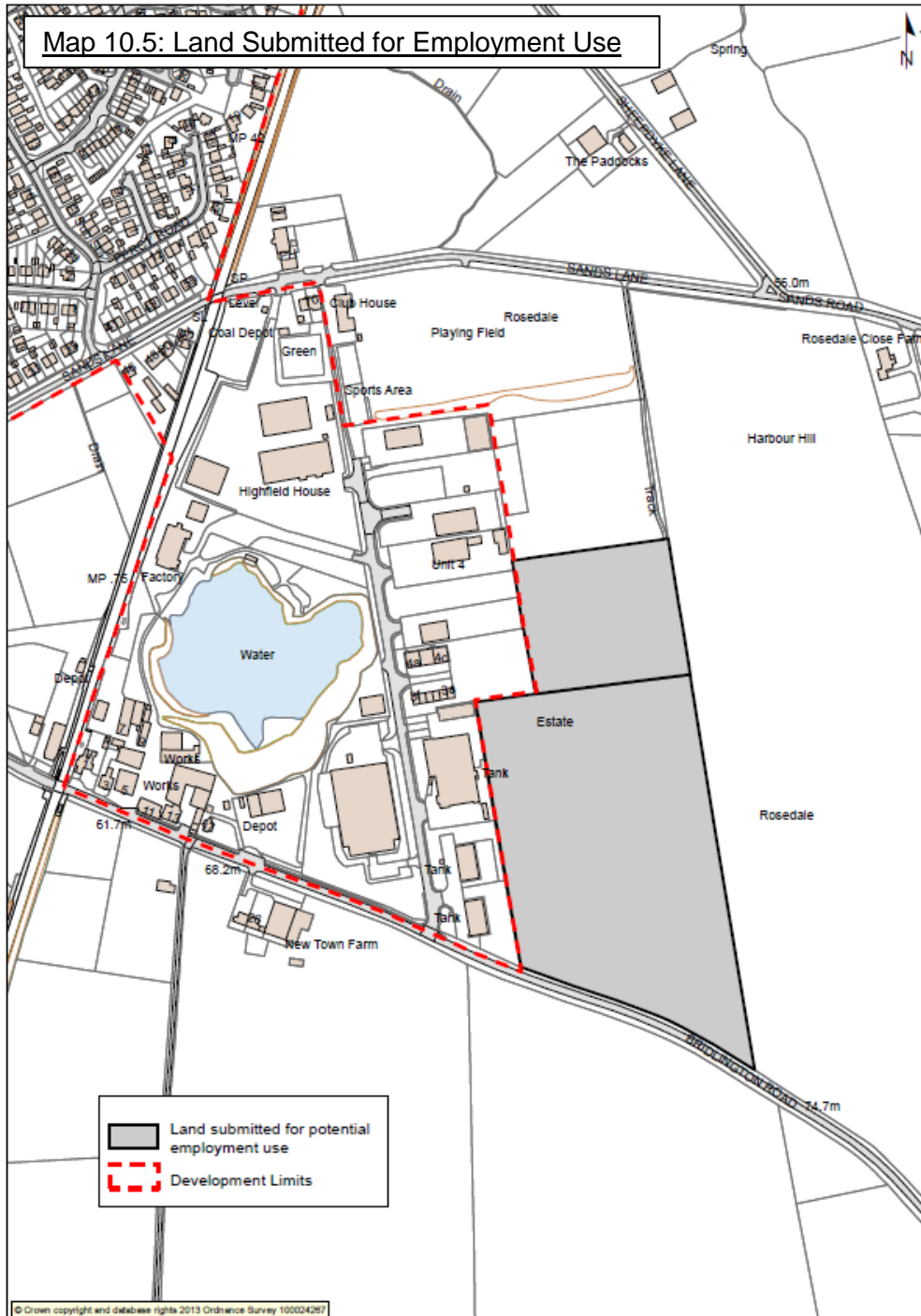
### **Hunmanby**

10.64 Hunmanby Industrial Estate is the main location for business and industrial development in the southern part of the Borough. The estate currently has 2 undeveloped areas of land totalling approximately 0.9 hectares. One of these sites is owned by Hunpreco, who have plans to expand their business into a 0.6 hectare site. The second undeveloped site is a thin strip of land measuring 0.27 hectares in size, which is located off the main internal access road.

10.65 The total amount of vacant land at the industrial estate is less than that required to meet the demand generated in Filey (1.6 to 3.2 hectares). As such, additional employment land needs to be identified. Approximately 7 hectares of land to the east of the existing industrial estate has been submitted to the Borough Council for consideration for allocation through the plan making process (see Map 10.5 below).

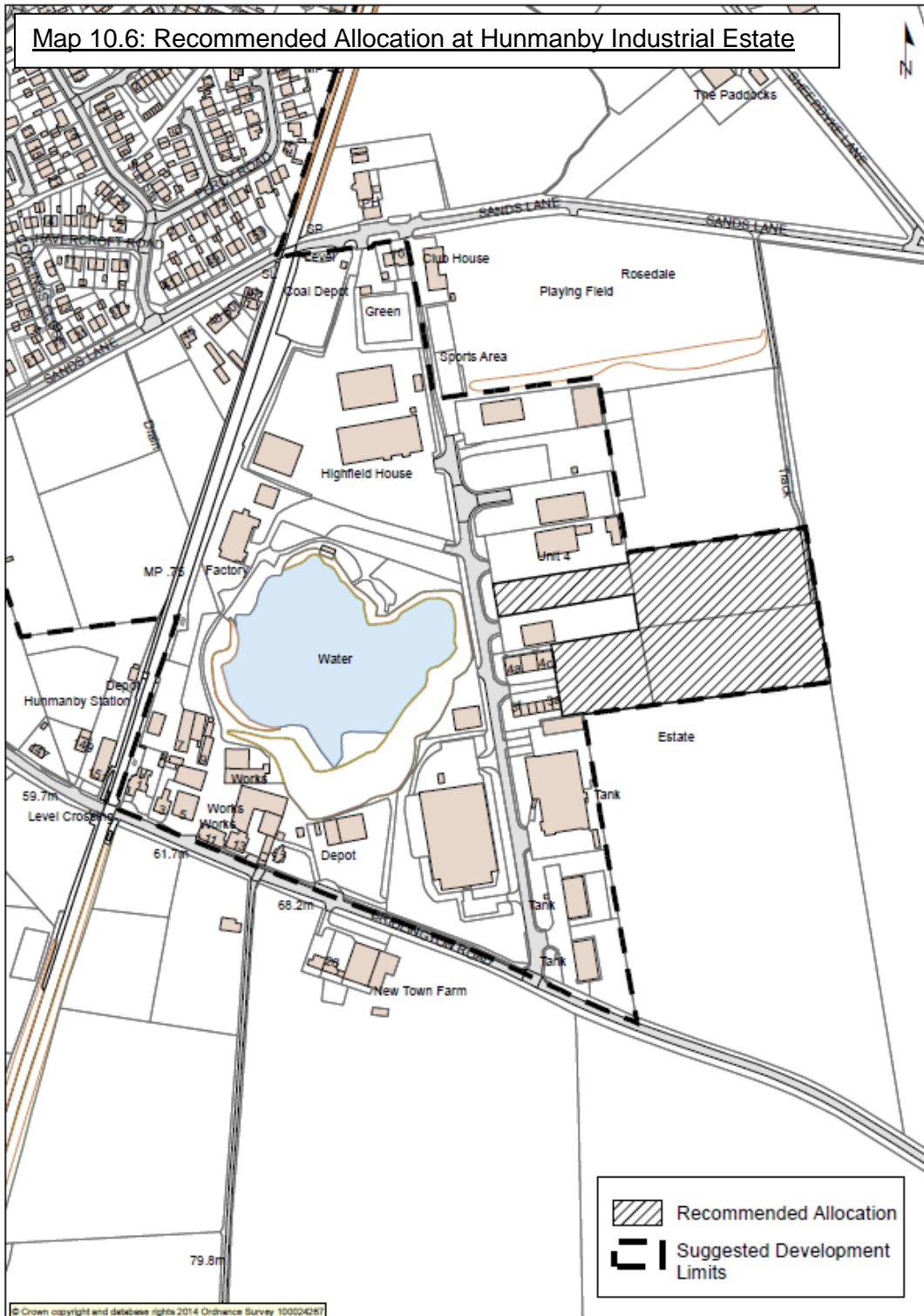
10.66 In consulting with local businesses and property agents, it is apparent that the demand for employment land at Hunmanby Industrial Estate is fairly limited, with most demand being from the expansion of existing businesses. Nevertheless, agents also recognise that the low cost of land in this location is

attractive to some businesses, particularly start-up businesses. With this in mind, the allocation of additional land would be done on a speculative basis and should not result in a significant over-supply of employment land that ultimately may not come forward for development during the plan period.



10.67 The northernmost parcel of land submitted measures 1.6 hectares and could be directly accessed via a link road to the main internal road to the west. Together with the existing undeveloped land, this new allocation would provide approximately 2.5 hectares of employment land. In developing this site, provision should be made to access the parcel of land to the south should

development come forward at a rate that is faster than anticipated. The recommended allocation is shown on the map below.



**APPENDICES**





**APPENDIX A: EMPLOYMENT LAND DEFINITION**

## APPENDIX A: DEVELOPMENT OF EMPLOYMENT LAND DEFINITION

*Note: Much of this Appendix has been lifted from 'Planning for Employment Land: Translating Jobs into Land', published by Roger Tym & Partners in 2010 on behalf of Yorkshire Forward.*

Whilst there are many different forms of employment generating development it is important to recognise that not all employment generating uses occupy what is traditionally known as employment space, or employment land. Many jobs (in most places more than half of all jobs) are based in other kinds of space, such as health and educational establishments, shops and leisure premises. From the sectors (industries and services) that make up the whole economy, the Employment Land Review needs to extract the B-Use sectors - those that fall within the B-Use Class of the Town and Country Planning (Use Classes) Order 1987 (as amended), those being:

Use Classes Order	Use / Description of Development
B1: Business	a) Offices, other than a use within Class A2 (Financial Services)
	b) Research and development of products or processes
	c) Light industry
B2: General Industrial	General industry: use for the carrying out of an industrial process other than one falling in class B1
B8: Storage & Distribution	Use for storage or distribution centre

Traditionally, this mapping of sectors into land uses has often been done on the basis of broad sector categories, assuming that factories are occupied by Manufacturing, warehouses by Wholesaling and offices by Finance and Business Services (FBS). Everyday observation shows that this considerably understates the range of activities that use employment space. For example, many industrial/warehouse units are occupied by construction related activities such as plumbers and electricians or services such as motor repairs; many warehouses are occupied by activities outside the wholesaling sector, such as postal and courier services; and many offices are occupied by activities outside the FBS sector, including public administration.

If these 'additional' B-Use activities are not taken into account, there is a risk that employment land will be under-provided in places where these activities are growing and over-provided in places where they are contracting. Accordingly, this report uses a finer-grained definition of the B-Use sectors developed for the Yorkshire and Humber Region by Roger Tym & Partners, which is based on the 2007 Standard Industrial Classification (SIC). The definition is presented in Table A1 below. It sets out all of the floorspace occupying activities that fall within the B-Use sectors.

Table A1: Sector to Space Matrix

Industrial Sectors	SIC (2007)	Activities
Manufacturing	15-33, 95	<ul style="list-style-type: none"> <li>All manufacturing</li> <li>Repair of computers and personal and household goods</li> </ul>
Some Construction	43.2, 43.3, 43.9,	<ul style="list-style-type: none"> <li>Electrical, plumbing and other construction installation activities</li> <li>Building completion and finishing</li> <li>Other specialised construction activities</li> </ul>
Motor Vehicle Activities	45.2, 45.4	<ul style="list-style-type: none"> <li>Maintenance and repair of motor vehicles</li> <li>Sale, maintenance and repair of motor cycles and related parts and</li> </ul>
Sewage and Refuse Disposal	37, 38	<ul style="list-style-type: none"> <li>Sewage</li> <li>Waste collection, treatment and disposal activities</li> </ul>
Employment Activities (part) <sup>27</sup>	78	
Warehousing Sectors	SIC (2007)	Activities
Wholesale	46	
Freight Transport by Road	49.41	
Removal services	49.42	
Storage and Warehousing	52.10	
Other Supporting Land Transport Activities	52.21	
Cargo Handling	52.24	
Post and Courier Activities	53	
Packaging Activities	82.92	
Employment Activities (part)	78	
Office Sectors	SIC (2007)	Activities
Publishing	58.1	
Motion Picture, Video and TV programme activities	59.11, 59.12, 59.13, 59.2	<ul style="list-style-type: none"> <li>Motion picture production activities</li> <li>Motion picture programme post production activities</li> <li>Motion picture distribution activities</li> <li>Sound recording and music publishing activities</li> </ul>
Programming and broadcasting activities	60	<ul style="list-style-type: none"> <li>Radio broadcasting</li> <li>TV programming and broadcasting activities</li> </ul>

<sup>27</sup> SIC 78 covers all workers employed through agencies. These workers operate in a wide range of activities throughout the economy. Therefore we allocate them across the whole economy, both to B and non-B sectors, in proportion to each sector's share of total employment.

Office Sectors continued		
Computer programming, consultancy and related activities	62	<ul style="list-style-type: none"> <li>▪ Computer programming activities</li> <li>▪ Computer consultancy</li> <li>▪ Computer facilities management activities</li> <li>▪ Other IT and computer activities</li> </ul>
Information Services	63	<ul style="list-style-type: none"> <li>▪ Data processing</li> <li>▪ Web portals</li> <li>▪ Other information service activities</li> </ul>
Financial & Insurance Activities	64, 65, 66	<ul style="list-style-type: none"> <li>▪ Financial services, except insurance and pension funding</li> <li>▪ Insurance, reinsurance and pension funding except compulsory social security</li> <li>▪ Activities auxiliary to financial services and insurance activities</li> </ul>
Real Estate Activities	68	
Legal and Accounting Activities	69	
Activities of head offices, management consultancy activities	70	
Architectural and engineering activities, technical testing and analysis	71	
Scientific R & D	72	
Advertising and market research	73	
Other professional, scientific and technical activities	74	<ul style="list-style-type: none"> <li>▪ Specialised design activities</li> <li>▪ Photographic activities</li> <li>▪ Translation and interpretation activities</li> <li>▪ Other professional, scientific and technical activities nec</li> </ul>
Renting and leasing activities	77.4	<ul style="list-style-type: none"> <li>▪ Leasing of intellectual property and similar products</li> </ul>
Employment activities (part)	78	<ul style="list-style-type: none"> <li>▪ Activities of employment placement agencies</li> <li>▪ Temporary employment agencies</li> <li>▪ Other human resource provision</li> </ul>
Security and investigation activities	80	
Office admin, office support and other business support activities	82.1, 82.2, 82.3, 82.91, 82.99	<ul style="list-style-type: none"> <li>▪ Office admin and support activities</li> <li>▪ Activities of call centres</li> <li>▪ Organisations of conventions and trade shows</li> <li>▪ Activities of collection agencies</li> <li>▪ Other business support service activities</li> </ul>
Administration of the State	84.1, 84.3	<ul style="list-style-type: none"> <li>▪ Administration of the State &amp; economic &amp; social policy of the community</li> <li>▪ Compulsory social security activities</li> </ul>

Source: RTP

**APPENDIX B: SITE CLUSTER APPRAISAL CRITERIA**



**APPENDIX B: SITE / CLUSTER APPRAISAL CRITERIA**

Baseline Information

- Site / Cluster Name
- Number of Sites / Premises
  - Occupied
  - Undeveloped / vacant / derelict
- Land-Use (e.g. Storage & Distribution)
- Total Site Area
  - Occupied Site / Premise Area (ha)
  - Undeveloped / vacant site / premise area

Site Quality

- Physical and Environmental Characteristics
  - Quality of existing portfolio and internal environment

<b>Criteria</b>	<b>Score</b>
Buildings and external areas are of very poor quality and condition / very restricted provision of parking, circulation and servicing / poor quality of surrounding environment	1
Buildings and external areas are of poor to moderate quality and condition / restricted provision of parking, circulation and servicing / quality of surrounding environment may limit the attractiveness of the site for certain users	2
Buildings and external areas are of reasonable quality and condition providing an average range of building type and size / adequate provision of parking, circulation and servicing / quality of surrounding environment unlikely to significantly limit the attractiveness of the site for most users	3
Buildings and external areas are of good quality and condition providing a good range of building type, size and tenure / good provision of parking, circulation and servicing / quality of surrounding environment will likely be a positive factor to attracting occupiers	4

- Quality of the wider environment

<b>Criteria</b>	<b>Score</b>
Poor quality of surrounding environment	1
Quality / nature of surrounding environment may limit the attractiveness of the site for certain users	2
Quality / nature of surrounding environment unlikely to significantly limit the attractiveness Quality of the external of the site for most users	3
Quality / nature of surrounding environment will be a positive factor to attracting occupiers	4

- Strategic Access
  - Ease of access to the Strategic Highway Network ('A-Roads')

Criteria	Score
Located more than 2 kilometres away from a motorway or major arterial route	1
Located 1 - 2 kilometres away from a motorway or major arterial route	2
Located less than 1 kilometre away from a motorway or major arterial route but not immediately adjacent	3
Located immediately adjacent to a motorway or major arterial route with easy accessibility to these routes	4

- Quality of local road access

Criteria	Score
Very narrow surrounding roads potentially unadopted / heavy congestion at most periods	1
Width of surrounding roads could create potential issues for HGV access / potential for heavy congestion at peak periods	2
Surrounding roads are relatively wide / likely to be limited congestion at peak periods	3
Surrounding roads are wide / no apparent issues of congestion	4

- Suitability of vehicular access

Criteria	Score
Significant site access (visibility) constraints / possible 'ransom' issues	1
Possible site access (visibility) constraints, including for larger commercial vehicles, which could constrain development	2
Likely to be only minimal site access (visibility constraints)	3
No apparent site access (visibility) constraints	4

- Market Conditions / Perception and Demand
  - Strength of local demand

Criteria	Score
Site has limited numbers of units filled, or none at all	1
Site has an equal amount of units that are in use and available	2
Site has limited numbers of available units	3
Site has no units available	4

- Marketing and enquiry interest

Criteria	Score
No evidence of active marketing, recent completions or development under construction at the time of the survey.	1
Evidence of limited marketing but low level of interest for employment uses indicated by agents / limited or no recent completions or development under construction at the time of the survey.	2
Evidence of active marketing with moderate levels of interest for employment uses indicated by agents / may be some recent completions or development under construction at the time of the survey.	3

Evidence of active marketing with high levels of interest for employment uses indicated by agents / good level of recent completions or development under construction at the time of the survey.	4
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Detailed Site Constraints

- Sequential Test and Brownfield / Greenfield
  - Urban, urban edge, outside urban, rural

Criteria	Score
Site is located in a rural location	1
The site is placed just outside of the urban area	2
The site is located on the urban edge	3
The site can be considered to be located within the urban area	4

- Previously developed in whole or part

Criteria	Score
Site has no signs of previous development/ Greenfield site	1
Site shows evidence of both Brownfield and Greenfield	2
The site is predominately Brownfield	3
The entire site is comprised of Brownfield	4

- Site Development Constraints (undeveloped sites only)
  - Access

Criteria	Score
No accessibility to site, and/or possibly difficulties in achieving connectivity in the future	1
Limited levels of accessibility to the site	2
Good connectivity to transport infrastructure and public services	3
Excellent access with connectivity to road, rail, and other transport networks and services	4

- Topography, size and shape

Criteria	Score
The site is located on an uneven plot of land/ is too small to provide any real development potential/ or is a space that would create difficulty in developing for business use	1
The site's topography is good but due to size and/or shape of the plot any development would most likely be small scale	2
Topography, size, and shape of the site are all adequate for possible development opportunities	3
The topography, size and shape of the site is more than adequate for providing a location for high levels of significant business development	4

- Utilities

Criteria	Score
The site has no connectivity to utilities and is located a fair distance from possible connection to utility services	1



The site has no connectivity to utility services, but is located close by to services meaning connectivity would be relatively easy	2
Has access to some utilities/ has connectivity to all services but are poor or average quality	3
Has access to all utilities with access to above average services (i.e. High speed broadband internet)	4

- On-site environmental constraints (nature conservation, trees, cultural heritage, landscape)

Criteria	Score
The site is home to a wide range of environmental assets/plants, trees, animals/scientifically important features/valuable cultural heritage elements	1
Some environmental assets are evident within the site that may contribute to the wider natural and cultural environment	2
The site provides a location of which currently shows no sign of any environmental assets, but shows some potential for the future. (evidence of young plants of which may create future local ecosystems, future cultural assets)	3
The site has no sign of any environmental value, and contributes little to nature, cultural heritage or aesthetical quality of its surroundings	4

- Contamination / land stability / on-site structures

Criteria	Score
Land is obviously contaminated with toxins/ Land is unstable and fragile/ Structures may be unsafe or made from hazardous materials (e.g. asbestos)	1
There is the potential that the land is contaminated/ Land could become unstable/ Structures would require inspection to determine safety	2
The land appears to be free from any contamination/ Stability of the land seems secure/ All structures appear safe and of good quality	3
Contamination is not an issue for the site/ the land is highly stable/ There are either no structures or the structures evident are brand new	4

- Amenity of adjacent occupiers

Criteria	Score
There are no adjacent occupants or business networks evident	1
Some adjacent occupants are evident with little sign of association	2
There are a number of adjacent and surrounding occupants with possible business networks	3
The area is full of occupants with a clear business connectivity and networks	4

- Accessibility
  - Workforce catchment

Criteria	Score
The site is not located close to any workforce catchment area	1
A small local community makes up the workforce catchment area	2

There is a community of which has the ability to provide a workforce for a number of businesses	3
A large community is in close proximity to the site, providing an holistic workforce to work at all levels of positions	4

- Access by public transport

Criteria	Score
There are no nearby bus stops or railway stations	1
A limited public transport service serves the site/ There is a service provided relatively close to the site	2
There is a regular public transport service to the site	3
Multiple public transport services provide the site with a constant public transport service through a number of services.	4

- Land Ownership Constraints

- Number of freehold owners (is the site in multiple-ownership?)

Criteria	Score
The site has multiple levels of freehold ownership with an array of different leases	1
The site has multiple levels of freehold ownership	2
The site has a low number of individual freehold ownership	3
The site has an individual freehold ownership	4

**APPENDIX C: COPY OF BUSINESS QUESTIONNAIRE**



## APPENDIX C: COPY OF BUSINESS QUESTIONNAIRE

<b>Name of business</b>	
<b>Business sector</b>	
<b>Location of current premises</b>	
<b>Size of current premises (sqm)</b>	

### 1. How satisfied are you with your current premises?

Very satisfied

Satisfied

Unsatisfied

Very unsatisfied

If you stated that you are either 'Unsatisfied' or 'Very Unsatisfied' with your current premises, please explain why:

### 2. Do you have plans to grow / expand your business?

Yes (within the next 5 years)

Yes (within 5 to 10 years)

No (the business will stay the same)

No (the business is likely to contract)

Please explain your answer:

*If you answered 'Yes', please proceed to question 3*  
*If you answered 'No', please proceed to question number 8*

### 3. Will the growth of your business require relocation to an alternative premises / site?

Yes, the whole business will be relocated

Yes, but the existing site will be retained (new site will be additional)

No (expansion can be achieved on current site)

### 4. What type of accommodation will you be looking for?

Office  Industrial unit

Warehouse  Land

### 5. What quality of premises are you looking for?

Modern / new build

Moderate

Basic / budget premises

**6. What size of unit / site will you be looking for?**

0-100 sqm  101-200 sqm  201-500 sqm   
501-1000 sqm  1001-2000 sqm  2001-5000 sqm

Larger (please specify)   
Land area / site size (hectares)

**7. What location will you be looking for?**

a. Geographic location

Scarborough   
Whitby   
Filey   
Hunmanby   
Other (please specify)

b. Location type

Town centre   
Edge of town   
Out of town / rural

c. Do you have a preferred location for your business? If so, please state where (e.g. Whitby Business Park):

**8. How important are the following factors to the operation of your business and / or to the identification of a new site/premises?**

a. Proximity to the wider Strategic Road Network (e.g. A64, A171)

Very important   
Important   
Not Important

b. Proximity to public transport hubs (e.g. bus stops, train stations)

Very important   
Important   
Not Important

c. Affordability of rent / purchase cost

Very important   
Important   
Not Important

d. Quality of premises and surrounding area / environment

Very important   
Important   
Not Important

e. Proximity to other businesses

Very important	<input type="checkbox"/>
Important	<input type="checkbox"/>
Not Important	<input type="checkbox"/>

**9. Are there any obstacles to growing or maintaining your business?**

*(e.g. lack of sufficient and suitable property / land, housing, infrastructure, viability or planning issues)*

**10. Do you have any other comments regarding the provision of employment premises / land in Scarborough Borough?**

**Thank you for completing the questionnaire.**

**APPENDIX D: SITE ASSESSMENT RESULTS**



APPENDIX D: SITE ASSESSMENT RESULTS

Baseline Information				Site Quality									Detailed Site Constraints									
Site / Cluster Name	Number of Sites / Premises		Land Use	Total Site Area (sqm)		Physical and Environmental Characteristics		Strategic Access			Market Conditions / Perception and Demand		Sequential Test and Brownfield / Greenfield		Site Development Constraints (undeveloped land only)						Accessibility	
	Occupied	Undev / vacant / derelict		Occupied site / premise	Undev / vacant / derelict	Buildings and internal env.	Wider env.	Access to Strategic Highway Network	Local road access	Suitability of access	Strength of demand	Interest	Sequential location	Previously developed	Access	Topography	Utilities	Env.	Contamination	Amenity	Workforce catchment	Public transport
001A	1	0	B8	3971	0	3	3	4	3	4	4	1	4	4	3	3	4	4	3	2	4	3
004A	0	1	V	0	15064	3	3	4	3	3	1	4	3	4	3	4	3	4	3	2	4	3
027A	1	0	B1	2857	0	4	3	3	3	3	4	4	4	4	3	3	3	4	3	2	4	3
029A	1	0	B1	214	0	3	1	3	2	2	4	2	2	4	3	1	3	4	3	2	4	3
030A	1	0	A1	1515	0	3	3	4	3	4	4	3	3	4	3	3	3	4	3	3	4	2
033A	1	0	B1	228	0	3	3	3	3	2	4	3	4	4	3	3	3	3	3	3	4	4
034A	12	1	Mixed	1770	77	4	4	4	4	4	3	3	1	3	3	3	3	3	3	2	2	2
034B	7	0	B1	942	0	4	4	3	2	4	4	4	1	3	3	3	3	2	3	3	2	2
034C	1	0	A1	56	0	3	4	3	2	4	4	1	1	4	3	2	3	2	3	3	2	2
034D	1	0	B2	34	0	3	4	3	2	4	4	1	1	4	3	2	3	2	3	3	2	2
036A	3	1	Mixed	2516	101	3	4	2	2	3	1	2	1	4	2	2	3	2	3	3	2	2
039A	0	1	V	0	87	2	4	3	3	3	1	1	1	4	2	2	2	2	3	3	2	2
BE001	8	2	Mixed	1638	196	3	4	4	3	3	1	3	1	4	2	3	3	3	3	3	3	2
CA001	1	0	B8	594	0	2	2	3	3	2	4	1	4	4	3	3	3	4	3	2	4	3
CA002	1	0	B8	57	0	1	2	3	3	2	4	1	4	4	3	2	2	4	3	2	4	3
CA003	1	0	B1	163	0	3	2	3	3	2	4	1	4	4	3	2	3	4	3	2	4	3
CA007	3	0	A1	689	0	3	2	3	3	3	4	4	4	4	3	3	3	4	3	3	4	3
CA008	22	4	Mixed	5458	861	3	4	2	2	3	3	2	4	4	3	3	3	4	3	3	4	3
Cay001	5	1	Mixed	75886	12189	3	2	4	4	4	3	2	2	4	3	3	3	4	2	2	4	3
CE001	7	0	Mixed	5377	0	2	2	3	3	3	4	1	4	4	3	3	3	4	3	3	4	3
CE002	2	0	B2	289	0	2	2	3	3	3	4	1	4	4	3	2	3	4	3	3	4	3
CE003	1	0	B2	201	0	2	2	3	3	3	4	1	4	4	3	2	3	4	3	3	4	3
CE004	1	0	B2	77	0	2	2	3	3	3	4	1	4	4	3	2	3	4	3	3	4	3
CE007	1	0	B1	129	0	2	2	3	3	3	4	1	4	4	3	1	2	4	3	1	4	3
CE008	1	0	A1	124	0	3	2	3	3	3	4	1	4	4	3	1	3	4	3	2	4	3
CE009	7	0	Mixed	3177	0	3	2	3	3	3	4	1	4	4	3	3	3	4	3	3	4	3
CE010	1	0	B8	2353	0	4	3	4	3	4	4	3	4	4	3	3	3	4	3	2	4	3
CE011	1	0	A1	335	0	3	2	3	3	3	4	1	4	4	3	2	3	4	3	2	4	3
CE012	1	0	B8	122	0	2	2	3	2	2	4	1	4	4	2	2	3	4	3	2	4	3
CE013	1	0	D1	184	0	3	2	3	3	2	4	2	4	4	3	2	3	4	3	2	4	3
CE014	1	0	B2	184	0	2	2	3	2	2	4	1	4	4	3	2	3	4	3	2	4	3
CE016	1	0	B1	1826	0	3	2	3	2	2	4	1	4	4	3	3	3	4	3	2	4	3
CE017	2	0	B8	326	0	2	2	3	2	2	4	1	4	4	3	2	3	4	3	2	4	3
CE018	1	0	B8	494	0	2	2	3	2	2	4	1	4	4	3	2	3	4	3	2	4	3
CE019	1	0	B1	76	0	3	2	3	2	2	4	1	4	4	3	2	3	4	3	2	4	3



Baseline Information					Site Quality								Detailed Site Constraints									
Site / Cluster Name	Number of Sites / Premises		Land Use	Total Site Area (ha)		Physical and Environmental Characteristics		Strategic Access			Market Conditions / Perception and Demand		Sequential Test and Brownfield / Greenfield		Site Development Constraints (undeveloped land only)						Accessibility	
	Occupied	Undev / vacant / derelict		Occupied site / premise	Undev / vacant / derelict	Buildings and internal env.	Wider env.	Access to Strategic Highway Network	Local road access	Suitability of access	Strength of demand	Interest	Sequential location	Previously developed	Access	Topography	Utilities	Env.	Contamination	Amenity	Workforce catchment	Public transport
CE020	2	0	B1	200	0	3	2	3	2	2	4	4	4	4	3	2	3	4	3	2	4	3
CE022	2	0	B8	489	0	1	2	3	2	1	4	1	4	4	2	1	2	4	3	2	4	3
CE025	1	1	V	168	142	2	2	3	3	3	2	2	4	4	2	2	3	4	3	2	4	3
CE026	1	0	A1	313	0	3	2	3	3	3	4	1	4	4	3	2	3	4	3	2	4	3
CE027	8	0	Mixed	4584	0	2	2	3	2	2	4	1	4	4	2	3	3	4	3	3	4	3
CE029	1	1	Mixed	524	257	2	2	3	2	2	2	1	4	4	2	2	3	4	3	2	4	3
CE030	3	1	Mixed	836	497	2	2	3	2	2	3	1	4	4	2	2	3	4	3	2	4	3
CE031	6	0	Mixed	1908	0	2	2	3	2	2	4	1	4	4	2	2	3	4	3	2	4	3
CE032	2	1	Mixed	575	107	3	2	3	2	2	3	3	4	4	2	2	3	4	3	2	4	3
CE033	14	1	Mixed	24864	736	3	2	4	3	3	3	3	4	4	3	3	3	4	3	3	4	3
DE001	5	0	Mixed	2559	0	3	4	3	2	2	4	1	1	4	2	2	3	3	3	3	2	2
DE002	3	0	Mixed	4395	0	3	4	2	2	2	4	1	1	4	2	2	3	3	3	2	2	1
ES001	13	1	Mixed	23190	118	2	4	2	2	3	3	1	1	3	3	2	3	3	2	2	2	2
FA001	21	2	Mixed	48097	4151	3	2	4	2	2	3	2	4	4	3	3	3	4	3	3	4	3
FA002	9	0	Mixed	32426	0	3	3	4	2	4	4	2	3	4	3	3	3	4	3	3	4	3
FA004	1	0	C3	4198	0	4	2	3	3	3	4	4	3	4	3	3	3	4	3	2	4	3
FA005	0	1	V	0	275	1	2	3	2	2	1	1	4	4	3	2	2	4	3	2	4	3
FA006	10	0	Mixed	20880	0	3	2	3	2	2	4	1	4	4	3	3	3	4	3	3	4	3
FA011	4	0	Mixed	1804	0	2	2	4	3	3	4	1	4	4	3	3	3	4	3	2	4	3
FI001	1	0	B2	579	0	2	2	4	3	2	4	2	4	4	3	2	3	4	3	2	4	3
FI002	2	0	Mixed	798	0	2	2	4	2	2	4	1	4	4	3	1	2	4	2	2	4	3
FI003	3	1	Mixed	874	1756	2	2	4	2	2	1	2	4	4	3	3	2	2	2	2	4	3
FI004	1	0	B2	296	0	2	2	4	2	2	4	1	4	4	3	1	2	4	2	2	4	3
FI006	1	0	B8	250	0	3	3	4	2	2	4	1	4	4	3	2	3	4	3	3	4	3
FI009	0	1	V	0	293	2	3	3	2	2	3	3	4	4	3	3	2	3	3	3	4	3
FI011	1	3	Mixed	79	314	2	2	3	1	2	1	1	4	4	2	2	3	3	2	1	4	3
FI012	1	0	B8	316	0	3	3	3	2	4	4	1	4	4	3	3	3	2	3	3	4	3
FI013	1	0	B2	323	0	1	2	3	1	2	4	1	4	4	2	2	2	4	2	1	4	3
FI017	1	0	D1	489	0	3	3	4	3	4	4	4	4	4	3	2	3	4	3	2	4	3
FI018	2	0	Mixed	879	0	2	3	4	3	3	4	1	4	4	3	3	2	4	3	2	4	3
FI019	1	0	B8	1064	0	3	2	4	3	3	4	1	4	4	3	3	3	4	3	2	4	3
FI020	6	4	Mixed	5119	1875	3	3	4	3	3	2	2	4	4	4	3	3	4	3	3	4	4
FI021	3	0	B2	10177	0	3	3	4	3	4	4	1	4	4	3	3	3	4	3	3	4	3

Baseline Information				Site Quality									Detailed Site Constraints									
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GR001	0	1	V	0	29878	2	4	4	4	4	1	1	1	3	2	4	3	4	3	1	2	2
HU001	21	10	Mixed	67243	14538	3	3	3	3	4	3	3	1	3	3	4	3	4	3	3	3	4
LI001	7	3	Mixed	3822	3631	3	4	4	3	4	3	2	1	3	3	3	3	3	3	3	3	2
NB001	1	0	B8	97	0	2	2	3	2	2	4	1	4	4	3	1	3	4	3	2	4	2
NB002	0	1	V	0	663	2	2	3	2	2	1	1	4	4	3	1	3	4	3	2	4	2
NB004	2	0	Mixed	973	0	2	2	3	2	2	4	1	4	4	3	2	3	4	3	2	4	2
NB005	1	0	A1	54	0	2	2	3	3	2	4	1	4	4	3	2	3	4	3	2	4	2
NB006	1	0	B8	74	0	2	2	3	3	2	4	1	4	4	3	2	3	4	3	2	4	2
NB007	4	0	Mixed	494	0	3	3	3	3	2	4	2	4	4	3	3	3	2	3	3	4	2
NB008	2	0	Sui Generis	78	0	2	3	3	3	2	4	1	4	4	3	2	3	2	3	3	4	2
NB009	4	0	Mixed	238	0	2	3	3	3	2	4	1	4	4	3	2	3	2	3	3	4	2
NB010	5	0	Mixed	212	0	2	3	3	3	2	4	1	4	4	3	2	3	2	3	3	4	2
NB011	13	0	Mixed	4855	0	3	2	3	3	3	4	1	4	4	3	3	3	2	3	3	4	2
RA002	0	1	V	0	169	1	2	3	2	2	1	2	4	4	3	2	3	4	3	2	4	3
RA003	1	0	B2	56	0	2	2	3	2	2	4	1	4	4	3	2	3	4	3	2	4	3
SE001	102	15	Mixed	480990	60915	3	3	4	3	4	3	2	2	4	4	3	4	4	3	4	4	3
SE002	5	20	Mixed	15652	559145	4	4	4	4	4	1	3	2	2	4	4	4	3	4	3	4	2
SP001	4	1	Mixed	5029	2903	3	3	3	3	3	3	2	4	4	3	3	3	3	3	3	4	2
SP002	1	0	B2	95	0	2	2	4	2	2	4	1	4	4	3	1	3	4	3	2	4	3
SP003	1	0	B2	393	0	2	2	4	2	2	4	1	4	4	3	2	3	4	3	2	4	3
SP005	2	0	D1	199	0	3	2	4	2	2	4	1	4	4	3	2	3	4	3	3	4	3
SP007	1	0	B1	813	0	2	2	4	2	2	4	1	4	4	2	2	3	4	3	3	4	3
SP010	2	1	Mixed	949	61	2	2	3	2	2	3	1	4	4	3	2	3	4	3	2	4	2
SP011	1	0	B8	108	0	2	2	3	2	2	4	1	4	4	3	1	3	4	3	1	4	2
SP012	1	0	B2	230	0	2	2	3	2	2	4	1	4	4	2	1	3	4	3	2	4	2
SP013	1	0	B8	50	0	2	2	3	2	2	4	1	4	4	2	1	2	4	3	2	4	2
SP014	2	0	B2	237	0	2	2	3	2	2	4	1	4	4	2	1	3	4	3	2	4	2
SP015	2	0	B8	218	0	2	2	3	2	2	4	1	4	4	2	1	3	4	3	2	4	2
SP016	2	0	B8	358	0	2	2	3	2	2	4	1	4	4	2	1	3	4	3	2	4	2
ST002	8	7	Mixed	946	705	3	3	4	2	2	2	2	3	4	3	3	3	4	3	3	4	3
ST003	0	1	V	0	1649	1	4	3	2	2	1	1	4	4	2	1	2	3	2	2	4	3
ST004	2	1	Mixed	2296	885	1	4	3	2	2	2	1	3	3	2	2	2	2	1	1	4	3
ST005	1	0	B2	553	0	2	4	2	2	2	4	1	4	4	2	2	2	2	3	3	4	3

Baseline Information				Site Quality									Detailed Site Constraints									
Site / Cluster Name	Number of Sites / Premises		Land Use	Total Site Area (ha)		Physical and Environmental Characteristics		Strategic Access			Market Conditions / Perception and Demand		Sequential Test and Brownfield / Greenfield		Site Development Constraints (undeveloped land only)						Accessibility	
	Occupied	Undev / vacant / derelict		Occupied site / premise	Undev / vacant / derelict	Buildings and internal env.	Wider env.	Access to Strategic Highway Network	Local road access	Suitability of access	Strength of demand	Interest	Sequential location	Previously developed	Access	Topography	Utilities	Env.	Contamination	Amenity	Workforce catchment	Public transport
ST006	1	1	Mixed	517	515	3	4	3	2	2	2	2	4	4	2	2	3	2	3	1	4	3
ST007	1	0	B2	3077	0	3	4	3	3	3	4	1	4	4	3	3	3	3	3	3	4	3
ST008	37	6	Mixed	4442	0	4	4	3	2	2	3	2	4	4	3	3	3	3	3	4	4	3
ST010	1	0	A1	5519	0	3	4	3	3	3	4	1	4	4	3	3	3	3	3	3	4	3
ST011	2	0	Mixed	11378	0	1	4	3	3	3	4	1	4	4	4	4	3	3	3	3	4	3
ST012	11	0	Mixed	561	0	3	4	3	1	1	4	1	4	4	2	2	3	1	3	3	4	3
WE001	24	0	Mixed	53218	2622	3	4	3	2	3	4	1	3	4	3	3	3	4	3	2	4	2
WH001	10	0	Mixed	39618	8859	2	3	4	3	4	4	3	2	4	3	3	3	4	2	3	4	3
WH002	18	3	Mixed	64574	11795	3	2	4	3	4	3	2	2	4	3	3	3	4	3	3	4	3
WH003	7	6	Mixed	7350	6470	3	3	4	3	4	2	3	2	4	3	3	3	4	3	3	4	3
WH004	3	1	Mixed	1448	702	3	3	3	2	2	3	1	4	4	3	3	3	4	3	3	4	3
WH005	2	0	B8	3476	0	3	4	3	2	2	4	1	4	4	3	2	3	1	3	4	4	3
WH006	2	2	Mixed	14740	5267	1	3	3	2	2	1	2	4	4	2	3	3	4	2	1	4	3
WC001	51	6	Mixed	1697	169	4	4	3	3	3	3	3	4	4	3	3	4	2	4	4	4	3

**APPENDIX E: ECONOMIC CLUSTERS – KEY FOR ASSESSMENT RESULTS**

## APPENDIX E: ECONOMIC CLUSTERS: KEY FOR ASSESSMENT RESULTS

<b>001A</b>	Telephone Exchange (In7)
<b>004A</b>	Old Rugby Club (In8)
<b>027A</b>	Yorkshire Coast Homes
<b>029A</b>	Eastfield Link Centre
<b>030A</b>	Topp Tiles, Seamer Road
<b>033A</b>	Customer First, SBC
<b>034A</b>	Farfield Wykeham
<b>034B</b>	Wykeham Business Centre
<b>034C</b>	Gun and Tackle shop, Wykeham
<b>034D</b>	Workshop, Wykeham
<b>036A</b>	Bridge Farm Seamer
<b>038A</b>	Dale Farm, Bartindale Road
<b>039A</b>	Methodist Church, Muston
<b>BE001</b>	Betton Farm, Racecourse Road
<b>CA001</b>	Sussex Street
<b>CA002</b>	Sussex Street
<b>CA003</b>	Sussex Street
<b>CA007</b>	Tesco Express, Castle Road
<b>CA008</b>	West Pier
<b>CAY001</b>	Havers Hill, Eastfield
<b>CE001</b>	Roscoe Street
<b>CE002</b>	Roscoe Street
<b>CE003</b>	Roscoe Street
<b>CE004</b>	Roscoe Street
<b>CE005</b>	Norwood Place
<b>CE006</b>	Mill Street
<b>CE007</b>	Morgan Street
<b>CE008</b>	Sherwood Street, Funeral Directors
<b>CE009</b>	Sherwood Street and Belle Vue Street
<b>CE010</b>	Brook Street, Jewsons
<b>CE011</b>	Cambridge Street
<b>CE012</b>	Nelson Street
<b>CE013</b>	Nelson Street, Nursery
<b>CE014</b>	Hoxton Road
<b>CE015</b>	Nelson Street
<b>CE016</b>	Vine Street, Auction House
<b>CE017</b>	Vine Street
<b>CE018</b>	Clifton Street
<b>CE019</b>	Clifton Street
<b>CE020</b>	Melton Units, Melrose Street
<b>CE021</b>	Hoxton Road
<b>CE022</b>	Units between Hoxton Road and Nelson Street
<b>CE023</b>	Nelson Street
<b>CE024</b>	Nelson Street
<b>CE025</b>	Prospect Road
<b>CE026</b>	Corner of Prospect Road and Trafalgar Street West
<b>CE027</b>	Cleveland Road
<b>CE028</b>	Caledonia Street
<b>CE029</b>	Rothbury Street/ Gladstone Lane
<b>CE030</b>	Gladstone Lane

<b>CE031</b>	Gladstone Lane
<b>CE032</b>	Gladstone Lane
<b>CE033</b>	Melrose Street/ Dean Road site
<b>DE001</b>	Barkers Lane, Snainton
<b>DE002</b>	Viking Industrial Estate, Sawdon
<b>ES001</b>	Sneaton Lane, Ruswarp
<b>FA001</b>	Barry's Lane
<b>FA002</b>	Seamer Road
<b>FA003</b>	Ewart Street
<b>FA004</b>	Mount View Avenue
<b>FA005</b>	Mount View Avenue
<b>FA006</b>	Spring Bank
<b>FA007</b>	Spring Bank
<b>FA008</b>	Spring Bank
<b>FA009</b>	Springhill Road
<b>FA010</b>	Seamer Road
<b>FA011</b>	Depot Lane
<b>FA012</b>	Washbeck Close
<b>FI001</b>	Scarborough Road, Filey
<b>FI002</b>	West Road, Filey
<b>FI003</b>	Laundry Road, Filey
<b>FI004</b>	Scarborough Road, Filey
<b>FI005</b>	Mitford Street, Filey
<b>FI006</b>	Mitford Street, Filey
<b>FI007</b>	Mitford Place, Filey
<b>FI008</b>	Clifford Street
<b>FI009</b>	Behind the Crown Hotel site, Filey
<b>FI010</b>	Mariner's Terrace, Filey
<b>FI011</b>	Clayhouse Yard, Filey
<b>FI012</b>	The rear of Filey Post Office
<b>FI013</b>	Chapel Street, Filey
<b>FI014</b>	Chapel Street, Filey
<b>FI015</b>	Union Street, Filey
<b>FI016</b>	Chapel Street, Filey
<b>FI017</b>	Station Avenue, Filey
<b>FI018</b>	Carlton Road (1)
<b>FI019</b>	Carlton Road (2)
<b>FI020</b>	Filey Workshop Units
<b>FI021</b>	Clarence Drive, Filey
<b>FI022</b>	South Crescent, Filey
<b>FI023</b>	Brooklands, Filey
<b>FI024</b>	South Crescent, Filey
<b>GR001</b>	Filey Road, Gristhorpe
<b>HU001</b>	Bridlington Road, Hunmanby
<b>LI001</b>	Willymath Close, Burniston
<b>NB001</b>	Vincent Street
<b>NB002</b>	Vincent Street
<b>NB003</b>	Marlborough Street
<b>NB004</b>	Marlborough Street
<b>NB005</b>	North Marine Road
<b>NB006</b>	Clark Street
<b>NB007</b>	Durham Place
<b>NB008</b>	Durham Place

<b>NB009</b>	Durham Place
<b>NB010</b>	Durham Place
<b>NB011</b>	Lower Clark Street/ Durham Street
<b>RA002</b>	Greenfield Road
<b>RA003</b>	Greenfield Road
<b>RA004</b>	Greenfield Road
<b>SE001</b>	Scarborough Business Park
<b>SE002</b>	Scarborough Business Park (Expansion)
<b>SP001</b>	Londesbrough Road
<b>SP002</b>	Commercial Street
<b>SP003</b>	Commercial Street
<b>SP004</b>	Thompson Court off Falsgrave Road
<b>SP005</b>	St Johns Road
<b>SP006</b>	St Johns Road
<b>SP007</b>	St Johns Road
<b>SP009</b>	Sitwell Street
<b>SP010</b>	Commercial Street
<b>SP011</b>	Wykeham Street
<b>SP012</b>	Hampton Road
<b>SP013</b>	Hampton Road
<b>SP014</b>	Hampton Road
<b>SP015</b>	Hampton Road
<b>SP016</b>	Hampton Road
<b>ST002</b>	Larpool Industrial Estate, Whitby
<b>ST003</b>	Church Street, Whitby
<b>ST004</b>	California Road, Whitby
<b>ST005</b>	Spital Bridge, Whitby
<b>ST006</b>	Spital Bridge, Whitby
<b>ST007</b>	Church Street, Whitby
<b>ST008</b>	St Hilda's Business Centre, Whitby
<b>ST010</b>	Langbourne Road, Whitby
<b>ST011</b>	Endeavour Wharf, Whitby
<b>ST012</b>	Sandgate, Whitby
<b>WC001</b>	Woodend Creative Workspace
<b>WE001</b>	Queen Margaret's Road Industrial Estate
<b>WH001</b>	Whitby Business Park, Cholmley Way
<b>WH002</b>	Whitby Business Park, Fairfield Way
<b>WH003</b>	Whitby Business Park, Enterprise Way
<b>WH004</b>	Spring Hill, Whitby
<b>WH005</b>	Fish Market, Whitby
<b>WH006</b>	Stakesby Road, Whitby

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