



GL Hearn

Part of Capita Real Estate

Economic Development Need Assessment Part 1

Bassetlaw District Council

Final Report

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Site Assessment

Quality Standards Control

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This document must only be treated as a draft unless it has been signed by the Originators and approved by a Business or Associate Director.

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Limitations

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1 EXECUTIVE SUMMARY

1.1 Bassetlaw District Council commissioned GL Hearn to produce an Economic Development Needs Assessment. This comprises three parts being:

- Part 1 Needs Assessment: the supply demand balance of the district's employment needs
- Part 2 Growth Assessment: potential directions and options for growth in the district
- Part 3 Economic growth from a Garden Village development: employment land needs arising from a new settlement

1.2 This executive summary draws together the key messages from the three elements of work.

Part 1: Needs Assessment

1.3 Part 1 (this report) examines:

- The functional economic market area
- Undertakes a commercial market assessment and business survey
- Includes an assessment of the district's employment land sites
- Considers future land requirements and the balance with available sites

1.4 Bassetlaw sits between a number of larger dominant centres – Sheffield, Rotherham, and Doncaster to the north-west, Nottingham to the south, Chesterfield to the west, and Lincoln to the east. The evidence suggests that different parts of Bassetlaw district are influenced by all of these centres, but none of them exert a dominant influence over the district as a whole.

1.5 The commuting evidence shows that different parts of the district have strong flows in different directions beyond the district boundary. For example, Worksop and the western side of the district relate more strongly with Sheffield, Rotherham, and Chesterfield. Conversely, the A1(M) provides strong links north and south – particularly to Doncaster. Finally, the rural north east part of the district has strong links with Gainsborough close to the district boundary in Lincolnshire.

1.6 Within the district the following key sub areas are identified:

- **Worksop market** has a high level of services and good transport infrastructure. The area is the key work destination concentrating 38% of the total employment of the District (over 19,000 jobs¹). Half of all the office services across the district are concentrated in Worksop. Worksop dominates economically and it constitutes the key employment hub, particularly for the west parts of the District.
- **Retford** is the second distinctive submarket with also good accessibility and infrastructure. The area concentrates 7,800 jobs (15% of the Districts total) and it is considered the

¹ This includes the following MSOA: Bassetlaw 006, Bassetlaw 009, Bassetlaw 012, Bassetlaw 013 and Bassetlaw 016.

second economic hub of the District, concentrating flows from the central and east part of Bassetlaw.

- *Harworth & Bircotes (A1M) cluster* can also be considered as a distinctive market concentrating 4,000 jobs (8%) and a good amount of commuting flows. Manufacturing together with Business administration and support are the key sectors of the area concentrating 700 and 600 jobs respectively. The area has good accessibility as it is connected to A1M through Blyth Junction.
- *Rural* comprises the remaining areas including 39% of jobs being the balance outside of those above. A significant portion fall either directly adjacent to urban areas (notably Worksop / Manton Wood Business Park) and south of Retford comprising 5,800 jobs of which 2,000 in health assumed to be at Rampton Hospital.

- 1.7 The commercial assessment indicates Bassetlaw has a limited office market however the industrial market demonstrates strength in a number of aspects. The total stock is above average compared to other more rural authorities in the sub region and has shown 16% growth over the last 15 years, outperforming regional and county benchmarks. Industrial activity in the district is focussed around Worksop. The A1M is considered an emerging or longer term market with commitments at Harworth subject to securing occupiers.
- 1.8 Future employment needs consider completions trends as well as forecasts from Oxford Economics, Cambridge Econometrics and Experian. Given the strength of performance in the last decade or more in transport and manufacturing sectors, uplift scenarios have been applied to the baseline forecasts that are considered to more accurately reflect the district's performance. A preferred scenario anticipated jobs growth of 3,400 to 2035. This is translated to a need of 63 ha taking into account a flexible margin and mitigating for future losses. Considering past employment trends and current commitments there may be potential for growth above, this subject to monitoring.
- 1.9 An economic led housing need is identified in conjunction with the preferred scenario being of 390 dwellings per annum.
- 1.10 Over 1,000 hectares of assessed sites provide a spectrum of existing development, future commitments and potential further areas of development. Recommendations are made for site protection and consideration. Of note there are committed but (partially) undeveloped sites at Symmetry Park for 20ha, South of Snape Lane for 76ha (2017), both Gateford Common (30,000 sqm B1) and Shireoaks Common 15ha as part of mixed use and Manton Wood Extension of 25ha. These sites are able to meet and exceed the projected needs of the district and should be monitored as they progress.

Part 2: Growth Assessment

- 1.11 Part 2 (separate report) examines a range of growth scenarios for the district that have been developed in conjunction with the Local Plan options scenario analysis. The options considered are:
- Option 1: Current strategy, focus growth at largest settlements
 - Option 2: Functional geography hierarchy, targets for each settlement
 - Option 3: A1 corridor growth around existing settlements
 - Option 4: New settlements / expanded rural growth
 - Option 5: Large scale urban extensions
 - Option 6: Hybrid of above
 - Option 7: Equitable growth, growth proportionate to settlement size
 - Option 8: Parallel strategies, growth on a role specific basis alongside equitable growth, Neighbourhood Plan growth and large scale sustainable development.
- 1.12 Each option is considered in terms of the ability to meet employment land requirements, facilitate growth and respond to market conditions. Key points in relation to a Sustainability Appraisal are included.
- 1.13 Option 6 (hybrid) is ranked as the highest performing option. The Hybrid Option incorporates a number of key commercial property market components considered to be:
- Growth at the key settlements
 - Urban extensions at Worksop / Retford
 - Employment allocations at major new residential sites / settlements – *with any new settlement assumed as having A1 proximity*
 - Supported growth in rural locations
- 1.14 This Option is anticipated to drive the highest economic growth scenario by maximising the leverage of the district's potential in all localities.
- 1.15 At the key settlements of Worksop, Retford and Harworth, achievable sites are identified for potential employment delivery. These are considered to suitably fulfil settlement growth requirements.
- 1.16 Growth at new settlements is considered to have a more positive capacity for employment growth as long as there is connectivity and strong proximity to the A1. A complementary approach to employment allocations and housing to accommodate a local workforce maximises this market potential.
- 1.17 A market led and ad hoc response to rural employment needs enables realistic growth in these locations proportionate to their local dynamics.

Part 3: Economic growth from a Garden Village development

- 1.18 Part 3 (separate report) considers the employment land needs arising from a new settlement. The settlement is principally assumed as 1,000 dwellings but with scope for up to 5,000. The principle sites as assessed in Part 1 are north (Gamston Airport) and south (Bevercotes Colliery) of Elkesley.
- 1.19 Benchmarks for ratio of dwellings to employment land are taken from a number of existing smaller settlements in the district as well as in other parts of the country (based on previous studies). It is noted that Bassetlaw has higher levels of employment land ratio than are typical, due to historic performance and industrial make up. Around 100 sqm per dwelling or more is considered appropriate.
- 1.20 The ability of this ratio to be achieved is tempered by existing capacity in the location, proximity to the network (notable A1), competing sites and phasing. On balance any initial allocation associated with a new settlement, assuming strong network access, is indicated as around 10ha with potential to rise in the longer time.
- 1.21 It is considered unlikely that a garden village will act as a catalyst for a major inward investment attracting higher value sectors not typically represented in the FEMA. However there should be potential to create an entrepreneurially orientated settlement that can stimulate local business growth and productivity, particularly if public or other investment can support this.
- 1.22 The scale of employment land considered should make the location sustainable in economic terms and the food and drink manufacturing sector may be a cluster to develop for higher productivity and improvements to technology.

2 NEEDS ASSESMENT INTRODUCTION

2.1 Bassetlaw District Council commissioned GL Hearn to produce an Economic Development Needs Assessment for the District. This Part 1 of the Assessment encompasses:

- Analysis of data to define the functional economic market area.
- A commercial property market assessment.
- Engagement with property market stakeholders.
- A survey of local businesses.
- An assessment of future employment land needs drawing on economic forecasts and past employment land take up trends.
- An assessment of employment land supply via audit of the district's current and potential future sites.

2.2 This report concludes by drawing together the analysis to consider the overall balance of employment land requirements in the district considering the overall supply and need.

3 DEFINING THE FUNCTIONAL ECONOMIC MARKET AREA

3.1 According to Planning Practice Guidance (PPG) the geography of commercial property markets should be thought of as the requirements of the market in terms of the location of premises, and the spatial factors used in analysing supply and demand.

3.2 It is also possible to relate a FEMA with business activity i.e. an area within which there is a degree of common identity, and within which businesses compete and cooperate. This reflects the understanding that businesses (i.e. employment activity - factory, offices, research and development centres and warehouses) tend to locate using locational criteria such as proximity to infrastructure, urban areas and markets. This usually corresponds with an area with a visibly defined commercial property market – being an area with mutual locational characteristics and within which business premises can be situated, and within which new developments will compete against existing property to secure tenants/occupiers.

FEMA Guidance

3.3 Since patterns of economic activity vary from place to place, there is no standard approach to defining a functional economic market area (FEMA), however, the PPG suggests that it is possible to define them taking account of factors including:

- The extent of any Local Enterprise Partnership within the area;
- travel to work areas;
- housing market areas;
- flow of goods, services and information within the local economy;
- service market for consumers;
- administrative area;
- catchment areas of facilities providing cultural and social well-being; and
- transport network.

3.4 While some of these factors have been analysed using quantitative data there is no robust information available which can be used on a consistent basis to consider supply chains. We will address, through our analysis, issues associated with different sectors/ market segments.

3.5 The analysis of housing market areas and commuting should be considered as the key input to defining the FEMA, as it reflects relationships between where people live and work.

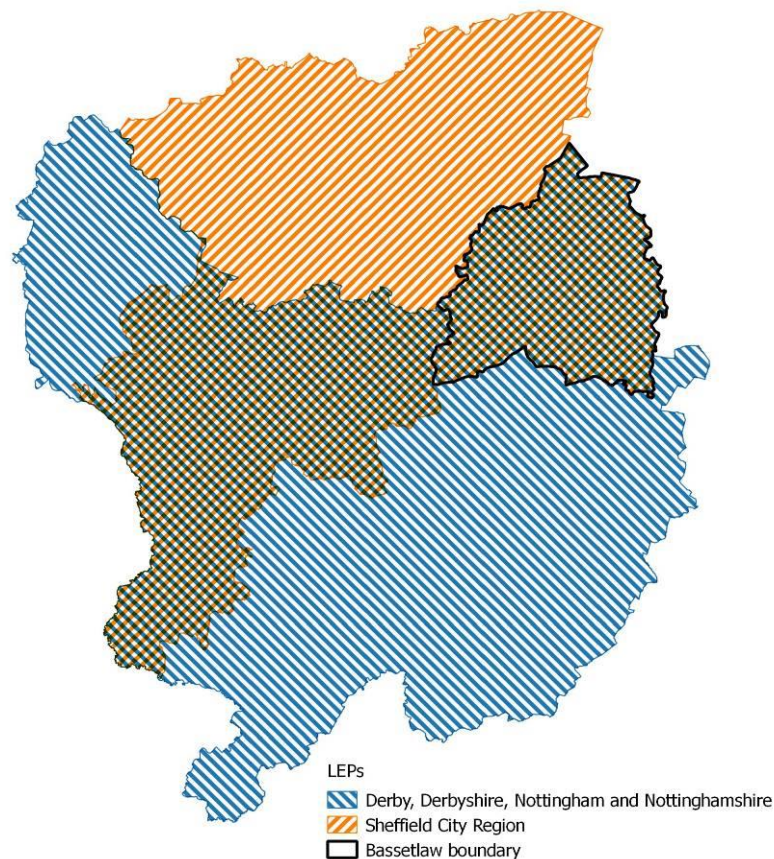
3.6 The flow of goods and services is difficult to specifically quantify on a robust basis, given available datasets. We have however reviewed the other factors when seeking to define FEMA. These are set out in the sections below.

- 3.7 At this point it should be mentioned that the revised Planning Practice Guidance (PPG2) published for consultation between March and May 2018 does not set out in detail any guidance with regards to the FEMA definition. Therefore we sought to adopt the current PPG's approach as presented above.

Local Enterprise Partnerships

- 3.8 Bassetlaw falls within the boundaries of two Local Enterprise Partnerships, namely the Sheffield City Region LEP and the Derby, Derbyshire, Nottingham, Nottinghamshire LEP (D2N2).
- 3.9 The Sheffield City Region comprises Bassetlaw together with Sheffield, Doncaster, Barnsley, Derbyshire Dales, North East Derbyshire, Chesterfield and Bolsover
- 3.10 The northern part of the D2N2 area overlaps with Sheffield City Region, with Bassetlaw, Bolsover, Chesterfield, Derbyshire Dales and North East Derbyshire covered by both LEP areas. The rest of D2N2 authorities include Derby City, Nottingham City, Amber Valley, Ashfield, Broxtowe Borough, Erewash Borough, Gedling Borough, High Peak Borough, Mansfield, Newark & Sherwood, Rushcliffe Borough, South Derbyshire, Derbyshire County and Nottinghamshire County.

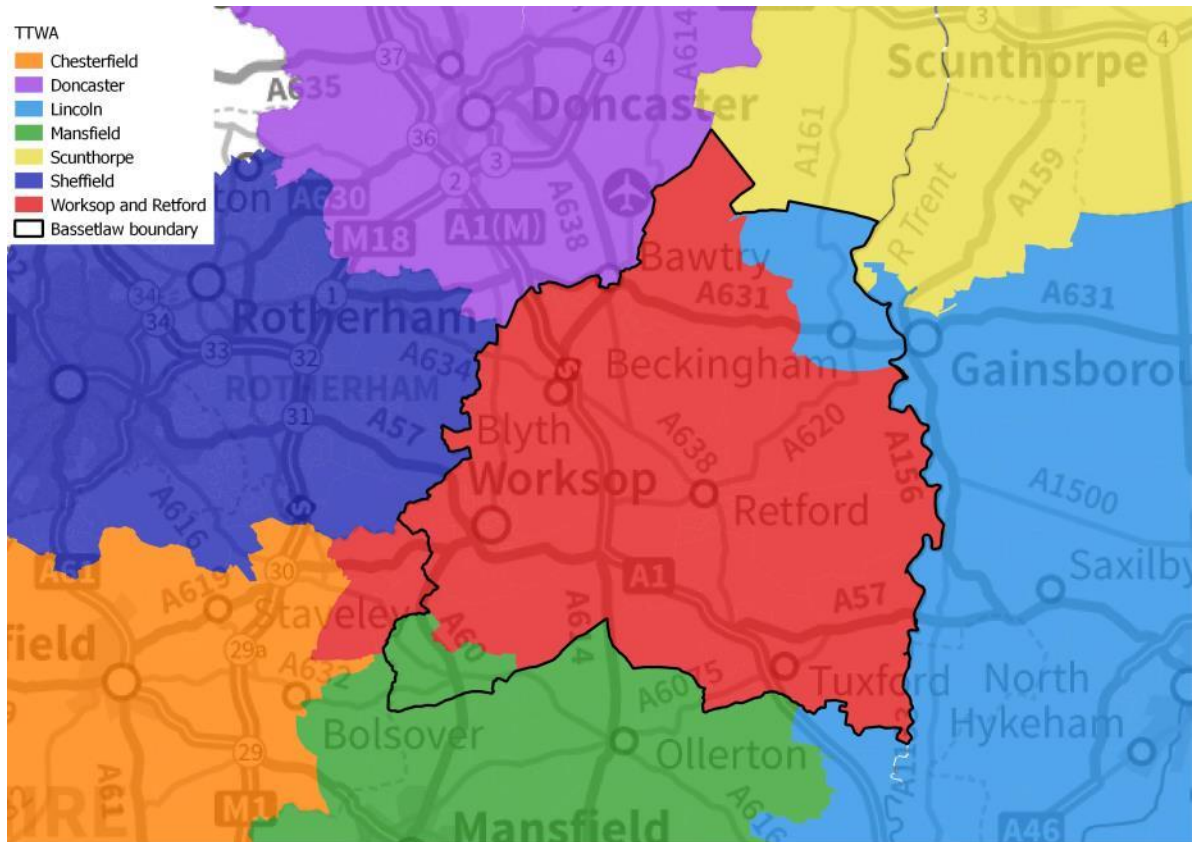
Figure 1: **Local Enterprise Partnership Areas**



Commuting Flows and Travel to Work Areas

- 3.11 The analysis of the commuting flows in this section provides key input to the functional economic market area's definition. We have sought to consider commuting dynamics taking account of the Office for National Statistics definition of Travel to Work Areas (TTWAs), together with more detailed interrogation of commuting dynamics locally.
- 3.12 The TTWAs aim to identify self-contained labour market areas in which the majority of commuting occurs within the boundary of the area. It should however be recognised that in practice, it is not possible to divide the UK into entirely separate labour market areas as commuting patterns are too diffuse.
- 3.13 The TTWAs have been developed as approximations to self-contained labour markets, i.e. areas where most people both live and work. As such they are based on a statistical analysis rather than administrative boundaries. There are two types of self-containment that are analysed: the residents self-containment which is the percentage (%) of employed residents who work locally and; jobs self-containment which is the percentage (%) of local jobs taken by local residents.
- 3.14 The criteria for defining TTWAs were that at least 75% of the area's resident workforce works in the area and at least 75% of people who work in the area also live in the area in most instances. The area must also have had a working population of at least 3,500 people. However, for areas where the working population is in excess of 25,000 people, self-containment rates as low as 66.66% were accepted. The TTWA covering Bassetlaw are illustrated in Figure 2 below.
- 3.15 As illustrated Bassetlaw falls within 3 TTWA boundaries (using 2011 Census data, published in 2015). Although the vast majority in both population and land mass of the study area falls within the Worksop and Retford TTWA there are the following two exceptions:
- A small part in the south west including Holbeck, Holbeck Woodhouse and Cuckney settlements fall within the Mansfield TTWA; and
 - A part in North East Bassetlaw covering Beckingham and Misterton falls within Lincoln TTWA.

Figure 2: **Travel to Work Areas (2011)**



Source: ONS, 2015

- 3.16 The table below presents the self-containment percentages of all the travel to work areas covering Bassetlaw and surrounding areas. This shows that the Worksop and Retford TTWA has a low self-containment rate with a 66.8% resident self-containment and a 69.6% workplace self-containment. This is lower than all surrounding areas which range between 70-85% for both types of self-containment.
- 3.17 Comparing the TTWA self-containment figures nationally shows that the Worksop and Retford TTWA ranks 225th out of 228 TTWAs nationwide for resident self-containment and 218th out of 228 TTWAs for workplace self-containment (1 being the highest rate and 228 being the lowest).

Table 1: Self-containment in travel to work areas

TTWA	Residents self-containment (% employed residents who work locally)	Jobs self-containment (% local jobs taken by local residents)
Sheffield	84.2	85.0
Lincoln	82.1	83.9
Scunthorpe	78.5	85.3
Doncaster	75.8	79.3
Chesterfield	71.3	74.3
Mansfield	70.7	70.6
Worksop and Retford	66.8	69.6

Source: 2011 Census ONS

3.18 Although these are statistically robust definitions of travel to work areas, they are difficult to use for HMA definitions as they cut across local authority boundaries. We have therefore sought to consider the self-containment rates for the individual local authorities.

3.19 The table below shows the self-containment percentages for Bassetlaw in a local authority level based on Census 2011 location of usual residence and place of work.

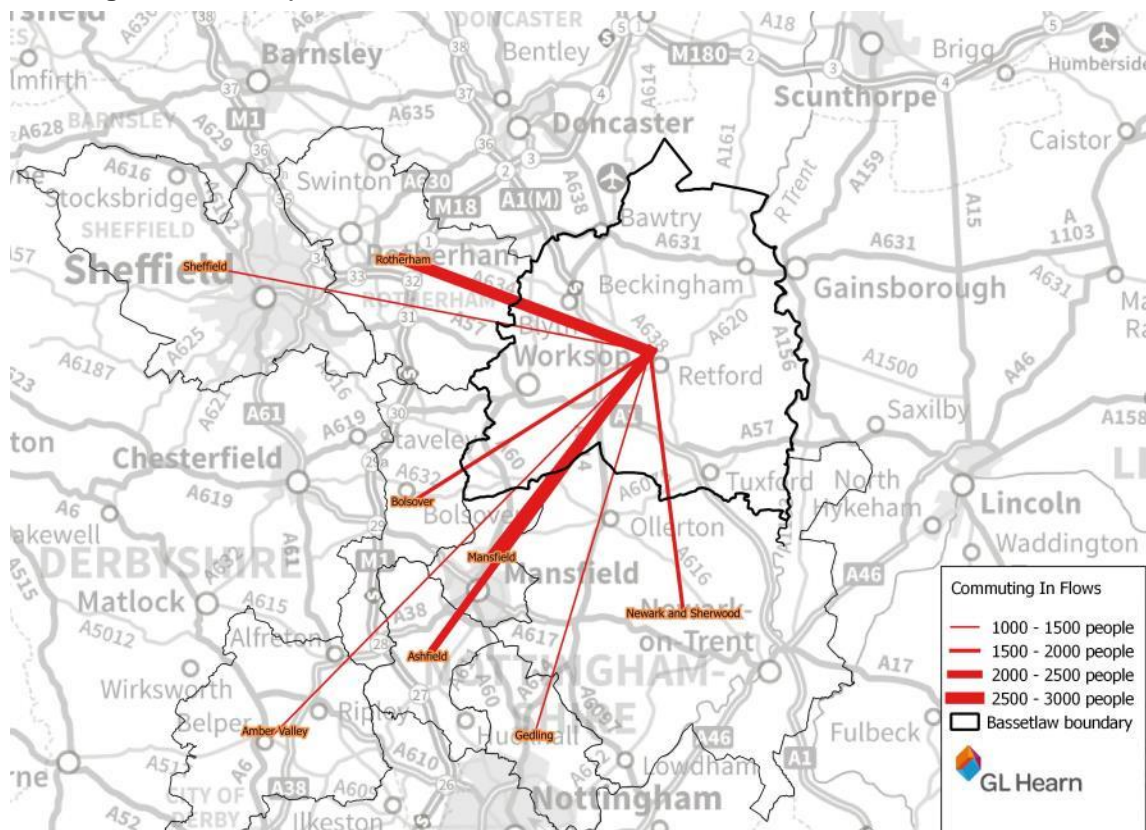
Table 2: Self-containment in local authority (Bassetlaw)

Local Authority	Residents self-containment (% employed residents who work locally)	Jobs self-containment (% local jobs taken by local residents)
Bassetlaw	61.0	58.0

Source: 2011 Census ONS

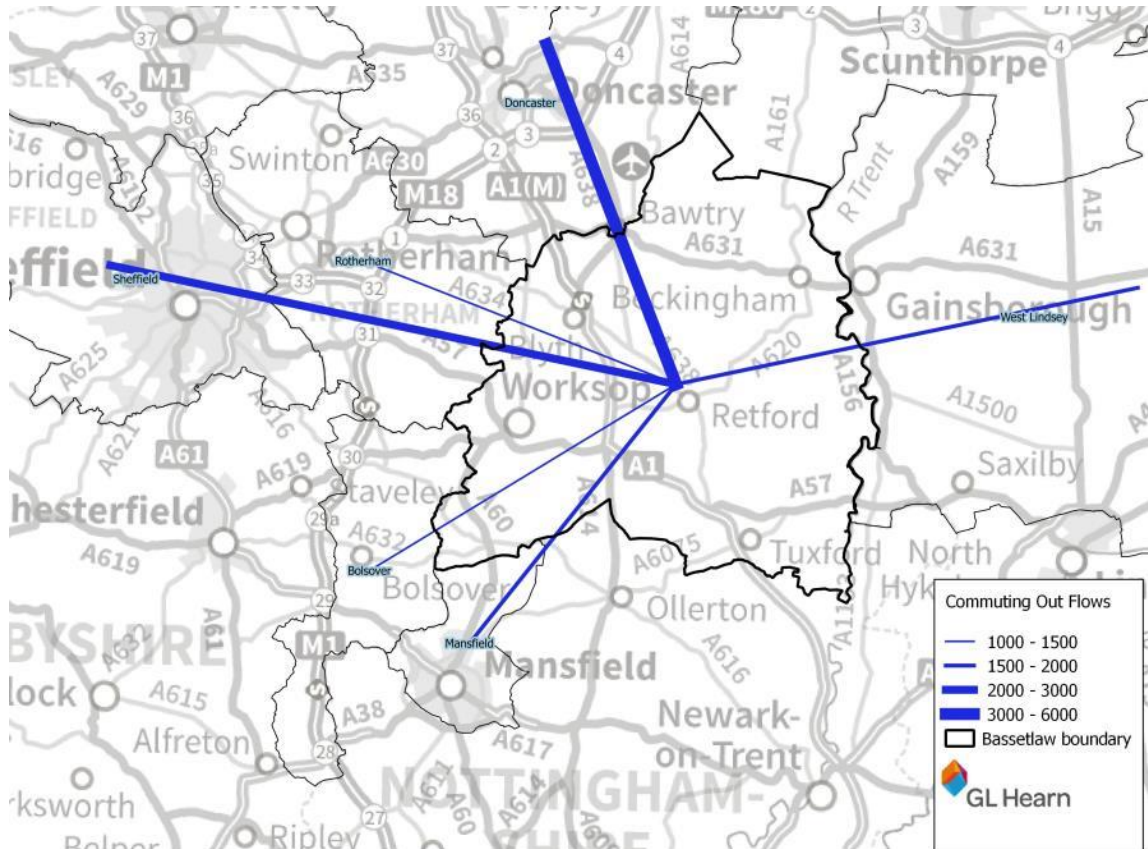
3.20 We have next sought to undertake further analysis considering the 2011 Census commuting patterns derived by location of usual residence and place of work. The figure below presents the in-flows to Bassetlaw (over 1,000 people) or in other words it shows the location of residence of Bassetlaw's workforce (excluding self-contained flows). Figure 3 presents out-flows from Bassetlaw (over 1,000 people) or in other words the location of workplace of Bassetlaw residents (excluding self-contained flows).

Figure 3: Location of residence of Bassetlaw workforce – In- flows (excl those living and working in Bassetlaw)



Source: 2011 Census ONS – edited by GL Hearn

Figure 4: **Location of workplace of Bassetlaw residents – out-flows (excl those living and working in Bassetlaw)**



Source: 2011 Census ONS– edited by GL Hearn

- 3.21 There are strong links with Mansfield, Rotherham, Ashfield, Bolsover and Newark and Sherwood where over 1,500 people commute daily from each of these areas to work in Bassetlaw. In addition, Bassetlaw residents travel daily to work (apart from areas within Bassetlaw) to Doncaster (4,500 people), Sheffield (3,000 people), Mansfield (1,800 people) and West Lindsey (1,500 people).
- 3.22 As a result, there are strong economic links with the surrounding authorities and particularly Doncaster, Mansfield, Rotherham and Sheffield. The analysis suggests the need for further investigation of the commuting links between Bassetlaw and the neighbouring local authorities in Derbyshire, Nottinghamshire, and South Yorkshire.
- 3.23 The self-containment rates of local authorities in these three neighbouring counties are shown below. This shows a large range of self-containment rates with the general trend seeing higher rates in the large population and employment centres with the lowest rates in areas immediately surrounding the large centres indicating a commuter-belt type relationship.

- 3.24 Bassetlaw's self-containment rate sits in the middle of the range suggesting that it is neither a major commuter destination (such as Doncaster or Sheffield) nor does it see major out-commuting to a neighbouring city (such as the local authorities surrounding Derby or Nottingham).

Table 3: Local Authority Self-Containment Rates

Local Authority	County	Resident Self-Containment	Workplace Self-Containment
Sheffield	South Yorkshire	77.7%	71.6%
Doncaster	South Yorkshire	71.1%	75.1%
Derby	Derbyshire	69.3%	61.8%
Nottingham	Nottinghamshire	63.6%	42.8%
Bassetlaw	Nottinghamshire	61.1%	62.3%
Chesterfield	Derbyshire	57.5%	52.3%
Barnsley	South Yorkshire	56.9%	74.2%
Rotherham	South Yorkshire	55.0%	59.2%
Derbyshire Dales	Derbyshire	54.3%	51.7%
High Peak	Derbyshire	52.6%	71.6%
Newark and Sherwood	Nottinghamshire	52.4%	56.9%
Amber Valley	Derbyshire	47.5%	51.9%
Mansfield	Nottinghamshire	43.7%	53.0%
Ashfield	Nottinghamshire	41.0%	42.9%
Erewash	Derbyshire	39.0%	52.2%
Rushcliffe	Nottinghamshire	32.0%	40.5%
Bolsover	Derbyshire	30.3%	36.7%
South Derbyshire	Derbyshire	29.0%	44.6%
Broxtowe	Nottinghamshire	26.3%	38.4%
Gedling	Nottinghamshire	26.6%	44.4%
North East Derbyshire	Derbyshire	25.3%	42.0%

Source: 2011 Census

- 3.25 Clearly, many of the local authorities in the table above see strong commuting into neighbouring urban centres. Therefore the tables below group the local authorities by County and provides the self-containment rates for these areas, at a County level the self-containment rates are noticeably higher than for the individual local authorities. The figure in the first table exclude Bassetlaw while the figures in the second table show the self-containment rates once Bassetlaw is included.

Table 4: Self-Containment by County – Excluding Bassetlaw

	Resident Self-Containment	Workplace Self-Containment
South Yorkshire	84.6%	87.3%
Nottinghamshire (excl. Bassetlaw)	80.5%	81.3%
Derbyshire	70.6%	79.0%

Source: GLH Analysis of 2011 Census data

Table 5: Self-Containment by County – Including Bassetlaw

	Resident Self-Containment	Workplace Self-Containment
South Yorkshire	85.0%	87.7%

Nottinghamshire	80.3%	81.2%
Derbyshire	70.6%	78.3%

Source: GLH Analysis of 2011 Census data

- 3.26 The analysis shows that South Yorkshire's self-containment rate is already relatively high (for both resident and workplace figures). However, including movements to and from Bassetlaw sees both measures of self-containment increase. This is particularly due to the relatively strong commuting flows between Bassetlaw and Doncaster and Rotherham, and some flows to Sheffield.
- 3.27 Conversely, the analysis shows that for the rest of Nottingham and Derbyshire, by including Bassetlaw the self-containment rates for these areas falls. This reflects the fact that while there are strong links between Bassetlaw and its neighbouring authorities there are weaker links between Bassetlaw and the rest of the counties. Equally, Bassetlaw's strong links with other areas reduces the overall self-containment rate.

Housing Market Areas

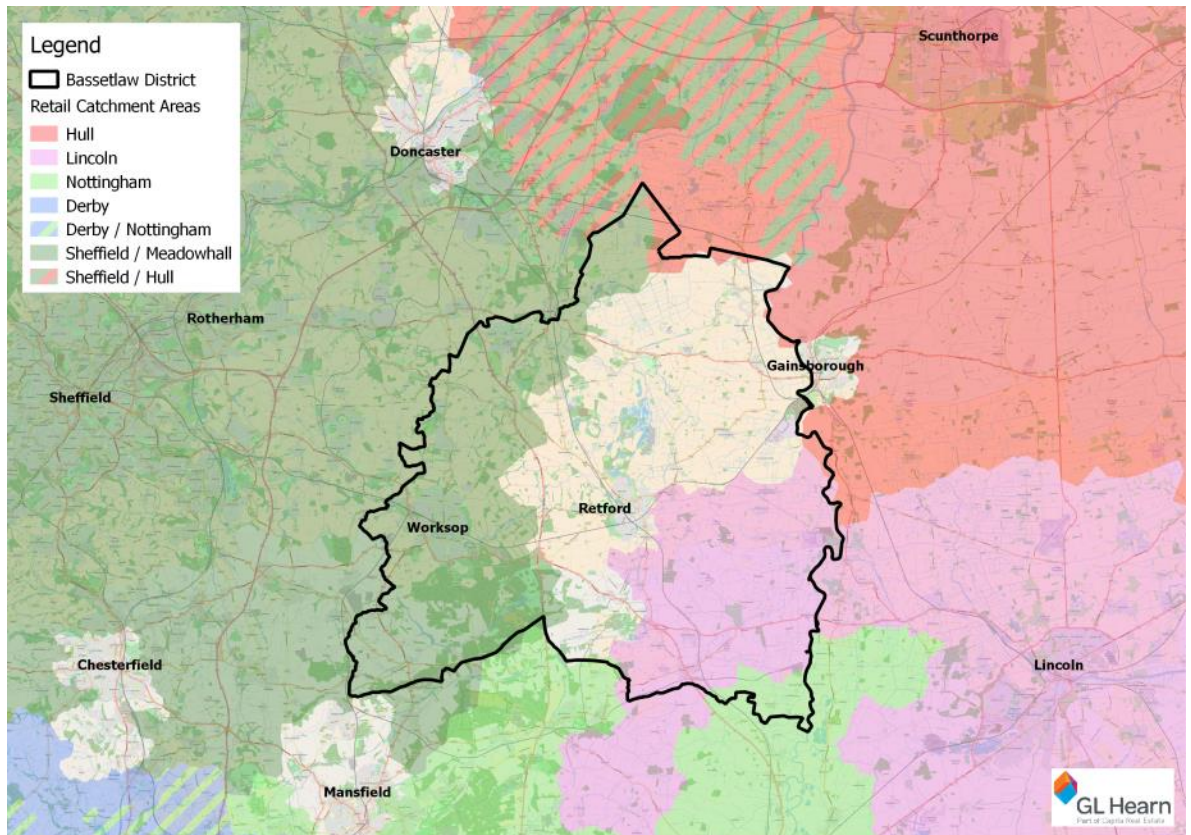
- 3.28 In 2005, a report for the East Midlands Regional Assembly and the Regional Housing Board identified the North Derbyshire and Bassetlaw Housing Market Area covering the authorities of North East Derbyshire, Chesterfield, Bolsover and Bassetlaw. It was recognised that these four authorities face many similar issues and are joined by the common factor that their housing markets are all influenced by the major urban areas of Sheffield and Rotherham, within the Sheffield City Region.
- 3.29 Research undertaken for CLG and published in 2010 defined a three-tier geography of housing markets across England. This includes northern Derbyshire and northern Nottinghamshire within a strategic housing market area which correlates broadly with the Sheffield City Region, although the southern parts of Bolsover and North East Derbyshire District (including South Normanton and Clay Cross) are included within the Derby Housing Market Area; whilst Shirebrook and its immediate surroundings are included within a Nottingham-focused housing market; and some very eastern wards in Bassetlaw are identified as part of a Lincoln-focused market. The research then defines more local housing markets. Most of the four authorities fall within the following three markets:
- Chesterfield HMA – covering Chesterfield, the rural western part of North East Derbyshire, Bolsover and Barlborough;
 - Worksop HMA – which includes Worksop, Clowne and Carlton in Lindrick, and is largely confined within the Bassetlaw and Bolsover District boundaries;
 - Retford HMA – which falls largely within Bassetlaw District with the exception of the area around Beckingham and Misterton.

- 3.30 GL Hearn prepared the Strategic Housing Market Assessment of the area since 2013. The SHMA has considered more recent data on commuting, migration, house prices, and housing market dynamics.
- 3.31 Overall the SHMA showed that in economic terms (e.g. commuting flows) there are strong relationships between the North Derbyshire and Bassetlaw HMA and the larger economic centres to the north, such as Sheffield, Rotherham and Doncaster.
- 3.32 However, in terms of household movement and house price differentials, much of this is more localised, and has become increasingly so since 2007. The SHMA concludes that the migration evidence and market characteristics in particular suggest a HMA covering North East Derbyshire, Chesterfield, Bolsover and Bassetlaw.

Retail, leisure and social services

- 3.33 To assess the retail provision we have adopted a high level approach to identify the major retail centres of the wider area. To do this we have drawn upon the Harper Dennis Hobbs Retail Centre Reports (2014).
- 3.34 The report identified the UK's top 50 retail centres by total retail spend and identifies catchment areas for each of these. In the areas surrounding Bassetlaw there are 6 major retail centres, these are: Nottingham, Derby, Hull, Meadowhall, Sheffield City Centre, and Lincoln.
- 3.35 The map below shows the catchment areas for these centres, as defined in the Harper Dennis Hobbs report. This shows that Bassetlaw is split with the western part of the district including Worksop falling within the Sheffield and Meadowhall catchments. The rural south eastern part of the district falls within the Lincoln catchment area. While the middle of the district, including Retford and Gainsborough, does not fall within any of the major cities' catchments.

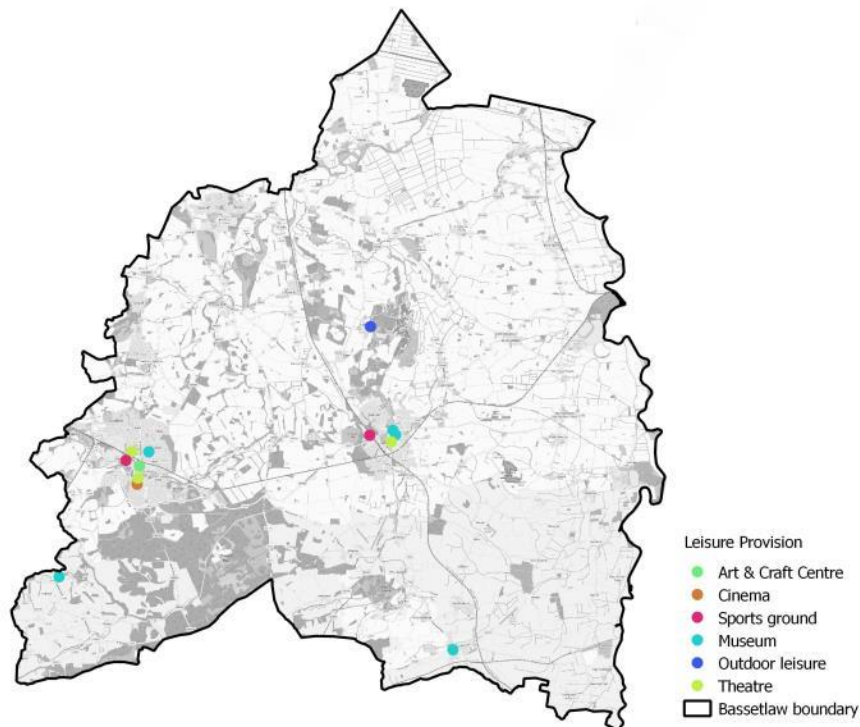
Figure 5: **Bassetlaw Retail Catchments**



Source: GLH analysis of Harper Dennis Hobbs data

- 3.36 In terms of gauging cultural provision we have sought to identify the following leisure services in relation to the Bassetlaw area:
- Museums;
 - Cinemas;
 - Theatres; and
 - Other leisure facilities including outdoor leisure, art centres, football fields, etc.
- 3.37 As illustrated below the main leisure facilities are concentrated in Worksop and Retford. This illustrates the primacy of these urban areas within the study area.

Figure 6: **Leisure Provision**



Source: *GL Hearn, 2018*

- 3.38 We have also sought to analyse the key social facilities. There are three Hospitals across the district including Bassetlaw District General Hospital, Retford Hospital and Rampton Hospital. Similarly Nottinghamshire Police Constabulary and Nottinghamshire Fire and Rescue Service cover the study area.

Transport network

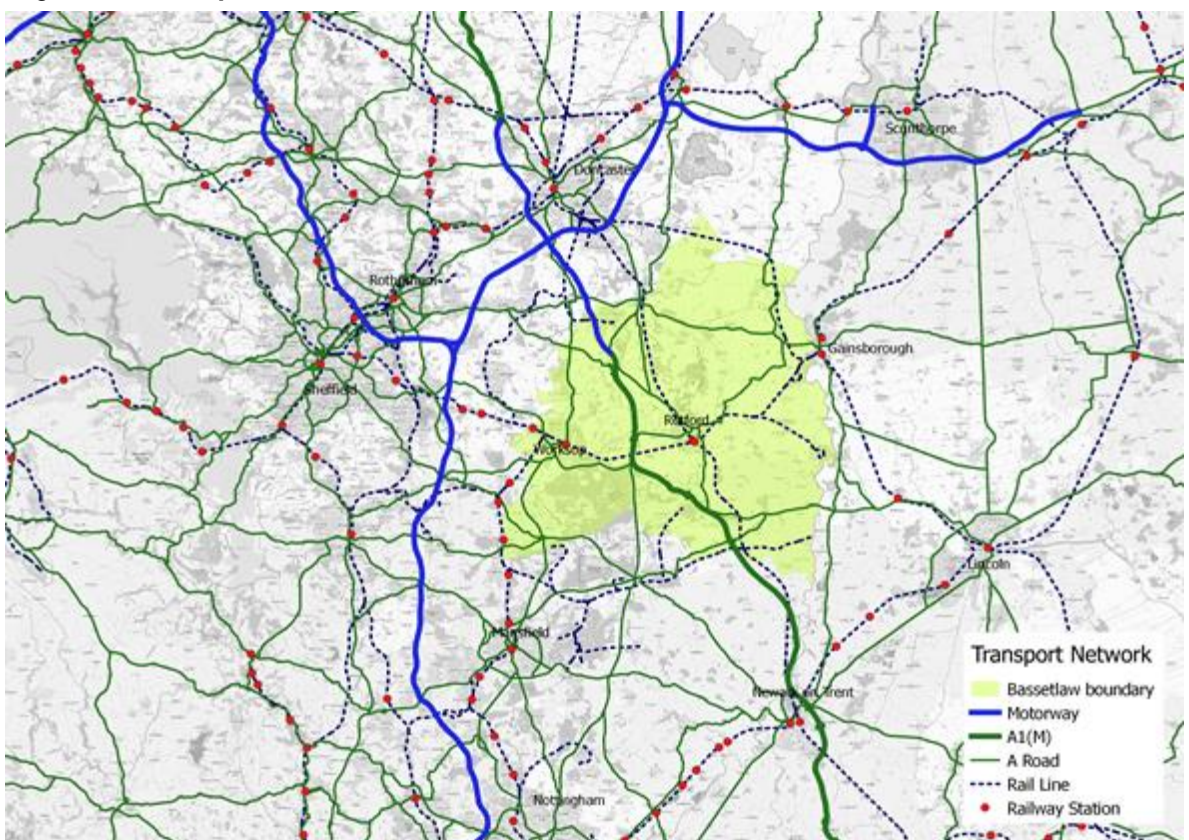
- 3.39 The transport infrastructure directly influences the commuting patterns and the access to goods and services. In addition, new transport investment will influence the local and wider economy by providing new jobs, minimising transport costs, encouraging economies of agglomeration and increasing the attractiveness of investment in the wider area.

Road Network

- 3.40 In terms of highways accessibility, the area connects well to its surroundings as well as the rest of the country via the A1(M). This provides good flows north to south across the district and links to the national motorway network at Junction 35 – approximately 5 miles to the north of the district. In terms of travel times, there is a 10 minute drive time from Junction 34 (Blyth) to Junction 35 (M18), and a 20 minute drive time from Worksop.

- 3.41 The good road travel times to UK markets make the western part of study area and an attractive location for the distribution sector. However, while the A1(M) corridor runs through the district, the M1 motorway corridor runs just outside of the district's western boundary.
- 3.42 The eastern part of the study area is less well connected. However there is in general a good coverage of A roads across Bassetlaw. In terms of road network Worksop, Blyth and Tuxford are the settlements that served the most while the rest of the study area including Retford is also served by A roads.

Figure 7: **Transport Infrastructure**



Source: ONS – edited by GL Hearn

Rail

- 3.43 Two key rail routes cross the District. The rail line from Sheffield to Lincoln crosses the area with stops in both Worksop and Retford. This provides an hourly train service.
- 3.44 In addition, the East Coast Main Line runs north-south and in Retford. This is the key rail line between London King's Cross and Edinburgh and provides links to Doncaster and York to the north. Trains run every 20 minutes during peak hours and in general the service can be characterised as good. The average time to Doncaster is 13 minutes from Retford; to London is an hour and thirty minutes; to York is 35 minutes; and to Leeds is 50 minutes.

- 3.45 It should be noted that Doncaster Sheffield and Mansfield can all be reached from the study area via train within 30 minutes. This explains the strong economic interrelationships with those areas. Rotherham however does not have as good a rail connection however it is connected with Worksop through the road network (A57/M1).

Bus

- 3.46 Rural Bassetlaw's bus services are sufficient. Most areas have an hourly service running from Doncaster to Worksop (via Harworth) and Retford, and there is a service from Gainsborough to Retford.

Studies from Neighbouring Areas

North East Derbyshire and Chesterfield

- 3.47 The Employment Land Review Update (North East Derbyshire District Council, August 2017) identifies the District's economic relationship and commuting patterns with neighbouring authorities, namely Sheffield and particularly Chesterfield, and notes that the District will need to co-operate with neighbouring authorities over the Plan period to ensure that the needs of businesses and commuting residents are being effectively met.
- 3.48 The study concludes that North East Derbyshire in isolation cannot be said to represent a TTWA and therefore it is unlikely to be a FEMA in isolation. It finds that the combined authorities of North East Derbyshire and Chesterfield have an employment market that is self-contained and which could be broadly acceptable as a TTWA (particularly given the broadly rural nature of North East Derbyshire in particular).

Nottinghamshire

- 3.49 The Employment Land Forecasting Study (NLP, July 2015) assesses the Housing Market Areas (HMAs) and FEMAs within Nottinghamshire. It identifies two HMAs: a 'Core HMA' comprising the local authorities of Broxtowe, Erewash, Gedling, Nottingham, and Rushcliffe; and an 'Outer HMA' comprising Ashfield, Mansfield, and Newark and Sherwood.
- 3.50 The analysis indicates that none of the Nottinghamshire districts in isolation could be said to be a TTWA in themselves. However, it concludes that the Core HMA forms a distinct self-contained FEMA, and although applying the FEMA tests for the three Outer HMA districts is slightly less clear cut, although on the basis of the assessment an argument can be made that the Outer HMA is self-contained, albeit there are strong links between Hucknall (within the administrative boundaries of Ashfield/Outer HMA) and the Core HMA and as such could be viewed as being located within that FEMA.

- 3.51 The study notes that the Outer Nottingham HMA districts also have relatively strong linkages with the neighbouring districts of Bassetlaw, Bolsover and Amber Valley.

Sheffield and Rotherham

- 3.52 The Sheffield & Rotherham Joint Employment Land Review (NLP, October 2015) notes that Sheffield and Rotherham form part of the wider Sheffield City Region and share borders with Barnsley to the North, Bassetlaw and Doncaster to the East, North East Derbyshire, Bolsover and the Derbyshire Dales to the South and High Peak to the West. The travel to work patterns reflect this wider geography, with linkages evident between South Yorkshire and the East Midlands.
- 3.53 However, it concludes that commuting links are strongest between the two local authority areas of Sheffield and Rotherham. As a result, Sheffield and Rotherham are recognised as one single economic entity.

Doncaster

- 3.54 The Doncaster Employment Land Need Assessment 2015 (Doncaster Borough Council, 2015) assesses a range of data to determine the FEMA. Five key themes were examined: labour market self-containment, HMA boundaries, administrative boundaries, service market for consumers, and transport network. The study concludes that the first three of these themes supports Doncaster being its own standalone FEMA, while the latter two themes do not. On balance, the assessment concludes that Doncaster can be defined as a standalone FEMA.

Lincolnshire

- 3.55 The Central Lincolnshire Economic Needs Assessment (Ekosgen and Turley, June 2015) identifies a Central Lincolnshire FEMA comprising Lincoln, North Kesteven, and West Lindsey. The FEMA, focussed around Lincoln which is the largest settlement and main retail and service centre, has high levels of labour force containment and similar economic characteristics. There are strong market links between the three authorities.
- 3.56 The assessment identifies the Central Lincolnshire FEMA lying within a wider Greater Lincolnshire economic market area. This wider areas covers the Lincolnshire LEP area comprising all the local authorities in the county.

Summary

- 3.57 This section has summarised the FEMA definitions in Employment Land Reviews for the areas which neighbour Bassetlaw. None of these studies identify FEMAs which include Bassetlaw.

- 3.58 The FEMAs are, unsurprisingly, generally focussed around the larger settlements as these operate as the major centres of employment, labour supply, and services. Collectively, they identify FEMAs focussed on Chesterfield, Nottingham, Sheffield and Rotherham, Doncaster, and Lincoln.
- 3.59 The majority of studies reference strong links between the different FEMAs and neighbouring areas, including Bassetlaw. Links with Bassetlaw are particularly referenced in relation to the NE Derbyshire and Chesterfield, Outer Nottingham, and Sheffield and Rotherham FEMAs.

FEMA Conclusions

- 3.60 Drawing the FEMA analysis together, it is clear that Bassetlaw sits between a number of larger dominant centres – Sheffield, Rotherham, and Doncaster to the north-west, Nottingham to the south, Chesterfield to the west, and Lincoln to the east. The evidence suggests that different parts of Bassetlaw district are influenced by all of these centres, but none of them exert a dominant influence over the district as a whole. As such, Bassetlaw is not included within the FEMA definition in any of these neighbouring areas' employment land reviews.
- 3.61 The multiple influences over the district's commercial market is highlighted by the LEP definitions. The district is covered by both the Sheffield City Region and D2N2 LEP areas, although in each instance it is relatively peripheral to the rest of LEP areas.
- 3.62 The Travel to Work Area definitions from ONS show that Bassetlaw falls within the Worksop and Retford TTWA which is broadly coterminous with the district boundary. However, the self-containment of the TTWA is particularly low – at 66.8% (residents) and 69.6% (workplace) self-containment.
- 3.63 The commuting evidence shows that different parts of the district have strong flows in different directions beyond the district boundary. For example, Worksop and the western side of the district relate more strongly with Sheffield, Rotherham, and Chesterfield. Conversely, the A1(M) provides strong links north and south – particularly to Doncaster. Finally, the rural north east part of the district has strong links with Gainsborough close to the district boundary in Lincolnshire.
- 3.64 Overall, consideration of the commuting self-containment of neighbouring areas including and excluding Bassetlaw shows that there are strongest links with South Yorkshire – potentially due to the weight of the districts population being located within the west of the district. This would suggest potentially including the district within a wider FEMA covering the Sheffield City Region LEP area. However, the evidence for the City Region authorities shows the City Region itself divided into separate FEMAs.

- 3.65 Similarly, there are strong links with the other northern Nottinghamshire authorities and the north east Derbyshire authorities. However, these authorities experience stronger linkages with the larger centres of Nottingham and Chesterfield respectively. However, the evidence does not particularly support including Bassetlaw within a wider FEMA focussed around these centres.
- 3.66 Overall, the analysis neither supports a stand-alone Bassetlaw FEMA, nor does it clearly identify a strong single centre of influence over Bassetlaw. The data instead suggests an area with multiple diffuse influences and linkages acting with differing strengths on different parts of the district.
- 3.67 While we consider that Bassetlaw does not sit definitively within a single market area, it is appropriate to take a pragmatic approach which considers the multiple linkages and influences on the district's economy. The District will therefore need to consider these influences and co-operate with neighbouring authorities over the Plan period to ensure that the needs of businesses and commuting residents are being effectively met through the Local Plan.

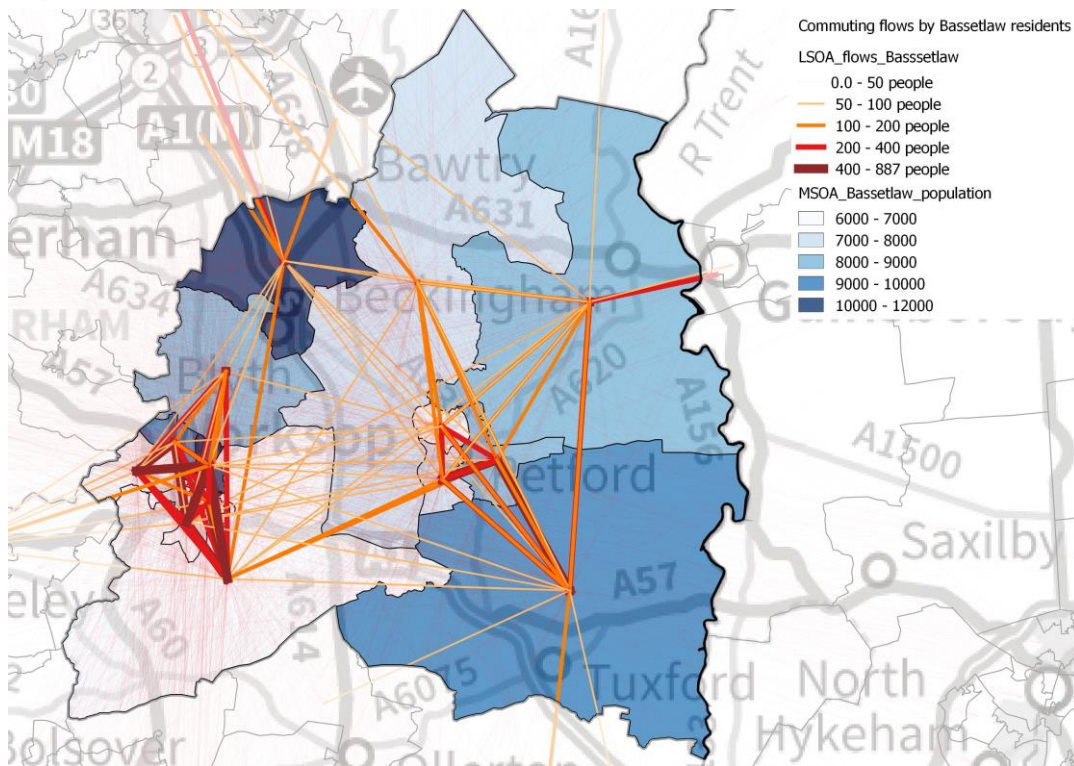
Defining the local submarkets

- 3.68 This section identifies the different sub-markets across the District. The approach is based on:
- Existing hierarchy and economic relationships
 - Commuting flows in local level and
 - Population and socio-economic characteristics
- 3.69 The Initial Draft Bassetlaw Plan, which was consulted between October and December 2016, presented Bassetlaw's Spatial Hierarchy. In particular Strategic Proposal 1: Bassetlaw's Spatial Hierarchy categorised the settlements including:
- Worksop and surrounding settlements: Worksop is the main sub-regional centre as the primary town which concentrates the majority of employment activity, infrastructure and services for the District. The area is well connected through both the road and rail network.
 - Retford and surrounding settlements: Retford is the second largest centre. The town is an important infrastructure and service centre providing services to central and eastern rural parts of the district.
 - Harworth & Bircotes at north is the third largest settlement and acts as the service centre for the north rural parts.
 - All the rest of the settlements are rural.
- 3.70 We also reviewed the Bassetlaw Rural Settlement Study (2016) prepared to inform the settlement clusters within the emerging Local Plan. Key findings suggest that Carlton-in-Lindrick, Tuxford, Hodsock Misterton and Blyth have a good level of primary service provision.
- 3.71 Carlton-in-Lindrick has also an employment area with distribution warehouses however its proximity to Worksop (less than 2 miles) makes it more sensible to aggregate the area to the Worksop sub-

area. There are two employment areas in Tuxford, however there is not enough concentration in this location to be considered as a different sub-area in its own right.

- 3.72 Hodsock and Blyth are in close proximity to Carlton and Harworth respectively and it is considered sensible for them to be included as part of the larger clusters. Finally Minsterton together with some surrounding settlements form the north east cluster. However this cluster has no significant economic weight or strong transport links and for these reasons is not considered as a distinctive sub-market.
- 3.73 We have also analysed the commuting flows at the local level. The Figure overleaf shows the influence that Worksop and Retford have across the District. These two towns concentrate the majority of commuter flows from the local residents of Bassetlaw.
- 3.74 The analysis of the flows provides a strong justification to argue that Worksop dominates economically and it constitutes the key employment hub, particularly for the west parts of the District.
- 3.75 Retford has a smaller influence, however its dominance spreads across the central and east parts of the District. There are also strong relationships between Retford and Tuxford and these are the main reason why we considered the wider area as one sub-market in terms of economic activity.
- 3.76 The Harworth & Bircotes cluster shows stronger links with areas outside of the District and particularly Doncaster which is in less than 20 minutes drive from the sub-area.

Figure 8: Commuting flows – Super output areas middle level (with population)



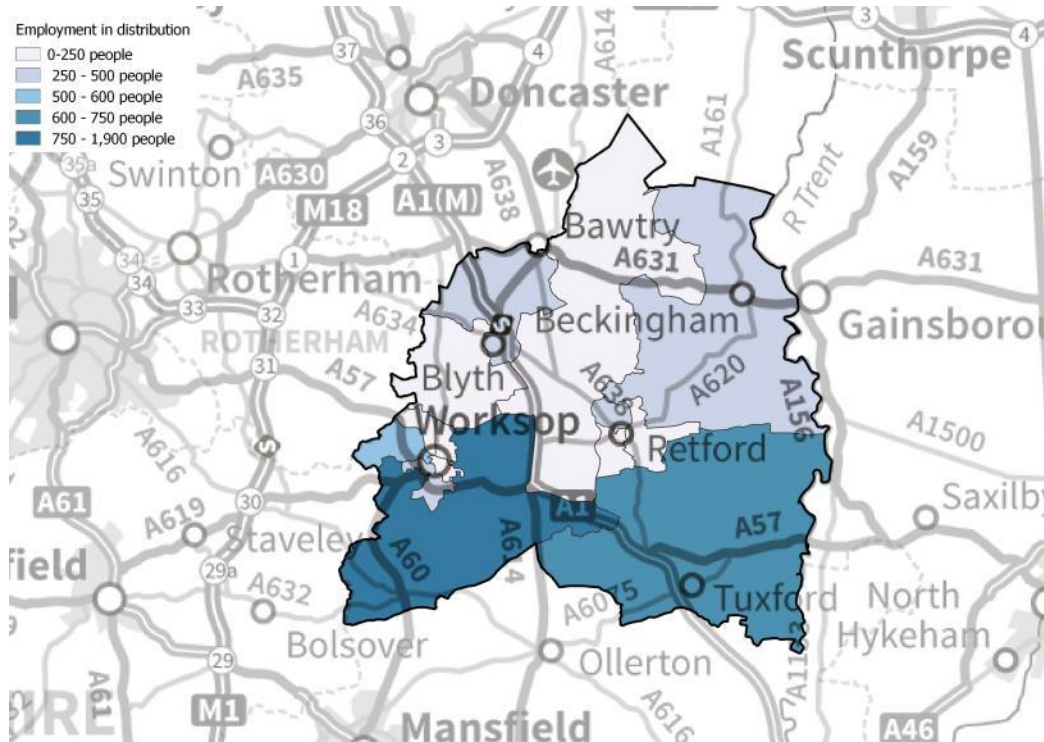
Source: ONS Census 2011 – edited by GL Hearn

Flow of goods, services and information within the local economy

- 3.77 GL Hearn has included analysis on the geographical distribution of key employment sectors in the study area in order to better understand service centres for different market segments and typologies.
- 3.78 Figure 10 demonstrates the concentration of employment in the Distribution sector, which includes wholesale, and transport & storage sectors. Generally, distribution in the study area is above the national average reflecting in the good accessibility levels of the area and the East Midlands as a whole. Overall the distribution employment totals 5,500 jobs representing 11% of the District's employment.
- 3.79 As shown in the map, there is a concentration of employment in distribution south of Worksop. This relates mainly to Wilko Distribution Centre, B&Q Distribution Centre and Mantonwood Business Park that all are located at A57.
- 3.80 There is also some significant concentration around Tuxford. This is mainly related to Walkers Industrial Estate that concentrates the warehouses of JTF Mega discount, Griffiths Logistics, Walkers and Son (Hauliers)Ltd, Studweldpro and so on.

- 3.81 Finally there is some concentration of distribution jobs in the east part of Worksop town where the majority of the area's business parks are concentrated.

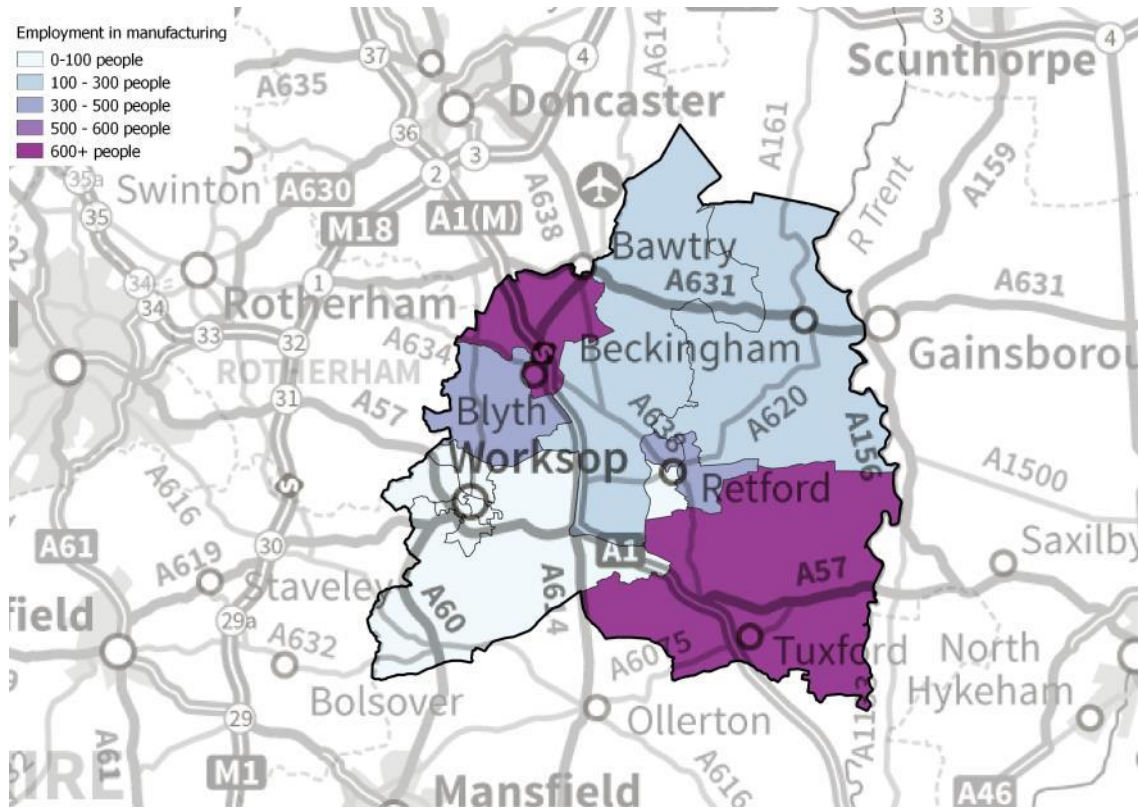
Figure 9: **No. of employees in Distribution Sector by MSOA (2016)**



Source: BRES (2016)

- 3.82 Generally manufacturing in the study area also performs strongly against both the regional and national averages. Manufacturing employment in Bassetlaw totals around 9,000 representing 18% of the employment.
- 3.83 As shown in Figure 11, manufacturing employment within the study area is concentrated in the east of Retford mainly due to the Cottam Power Station. In addition, there is a concentration of manufacturing in Harworth due to the Brunel Industrial Estate and the newly developed Harworth Industrial Estate. Finally the area around Carlton (and particularly Carlton in Lindrick Estate) together with Retford also concentrates a proportion of manufacturing activity.

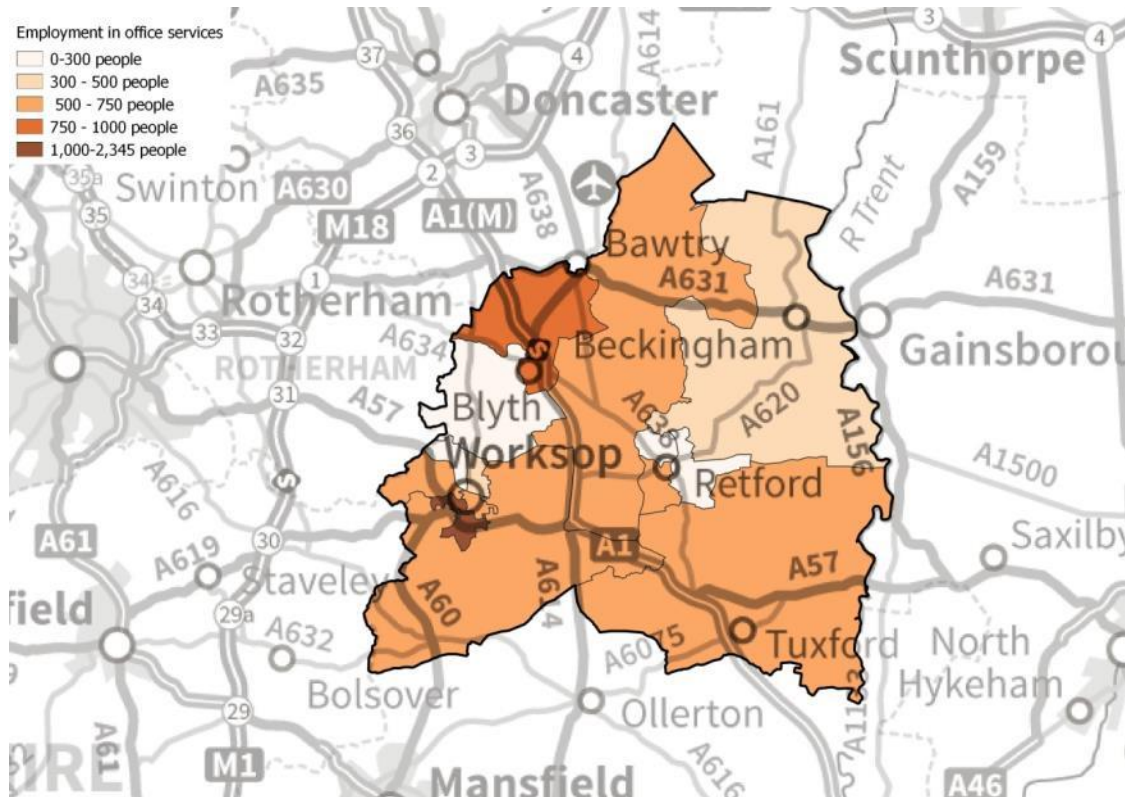
Figure 10: **No. of employees in Manufacturing Sector by MSOA (2015)**



Source: BRES (2016)

- 3.84 In terms of Office related industries, including Information & communications, Financial & Insurance, Professional, scientific & technical, Business administration and support and Public administration, the highest concentration of employment is within Worksop town centre.
- 3.85 It should be noted that in contrast to distribution and manufacturing, the office sector is not performing as strongly in Bassetlaw with the average representation being below those of the East Midlands and England & Wales' equivalents. A total of 7,900 people are employed within the office sectors across Bassetlaw with 2,400 (30%) being concentrated in Worksop Town Centre wider area. This is the key area of office activity. The second highest concentration is in Harworth, but this relates to just 780 jobs.

Figure 11: No. of employees in Office related Industries by MSOA (2016)



Source: BRES (2016)

Submarkets Conclusions

3.86 We have assessed herein the market characteristics and economic relationships in a local level. The analysis of the existing hierarchy of the different settlements together with the commuting flows and the employment distribution suggest that there is currently a clear distinction of the following key subareas:

- **Worksop market** has a high level of services and good transport infrastructure. The area is the key work destination concentrating 38% of the total employment of the District (over 19,000 jobs²). Half of all the office services across the district are concentrated in Worksop. In addition, 64% of all the District's retail jobs are located within Worksop together with 45% of health services and 40% of jobs in education. In addition, 2,000 people work in manufacturing representing 24% of all the manufacturing jobs in the district. This is also reflected in the commuting flows analysis which reveals that Worksop dominates economically and it constitutes the key employment hub, particularly for the west parts of the District.

² This includes the following MSOA: Bassetlaw 006, Bassetlaw 009, Bassetlaw 012, Bassetlaw 013 and Bassetlaw 016.

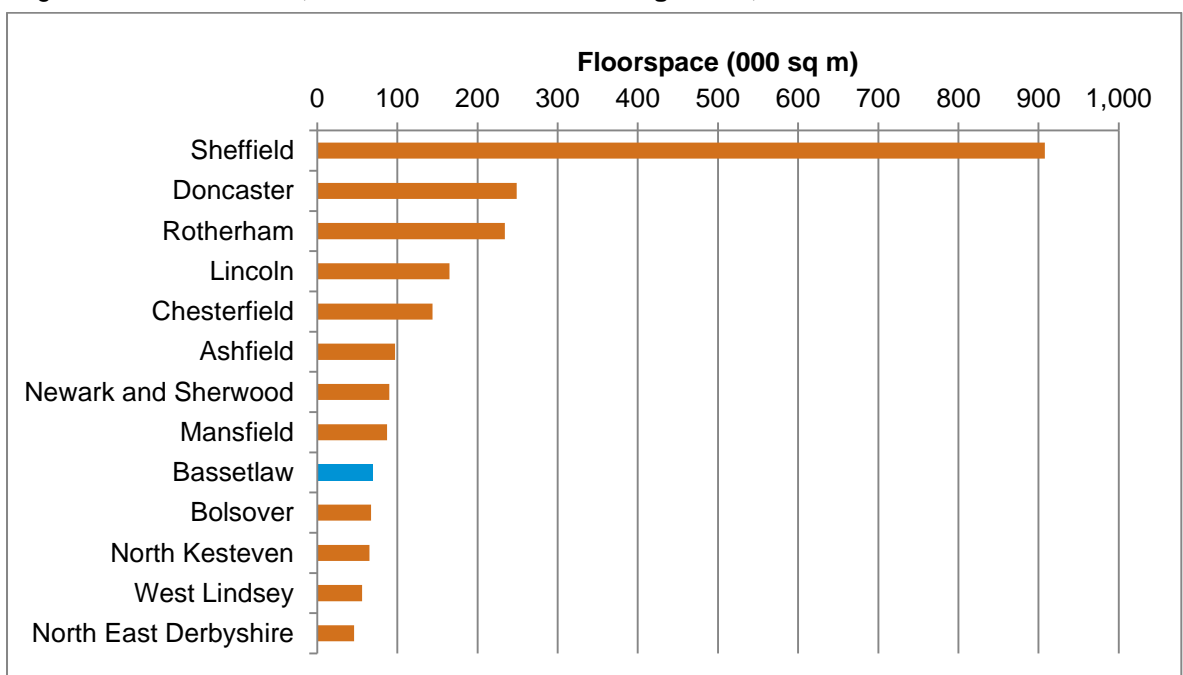
- *Retford* is the second distinctive submarket with also good accessibility and infrastructure. The area concentrates 7,800 jobs (15% of the Districts total) and it is considered the second economic hub of the District, concentrating flows from the central and east part of Bassetlaw. Retail, Health, Manufacturing, Education and Accommodation are the sectors with the highest representation in the area. Compared to the district there is also a high representation of Arts & recreational and Finance & insurance jobs both representing 21% across the total sectoral jobs in Bassetlaw.
- *Harworth & Bircotes (A1M) cluster* can also be considered as a distinctive market concentrating 4,000 jobs (8%) and a good amount of commuting flows. Manufacturing together with Business administration and support are the key sectors of the area concentrating 700 and 600 jobs respectively. The area has good accessibility as it is connected to A1M through Blyth Junction.
- *Rural* comprises the remaining areas including 39% of jobs being the balance outside of those above. The two greatest concentrations are super outputs areas E02005848 being south of Worksop including A57 employment areas, totalling 7,530 jobs of which 5,000 are in manufacturing or transport. This is considered best clustered to the Worksop market. Super output area E02005849 is south of Retford comprising 5,800 jobs of which 2,000 in health assumed to be at Rampton Hospital.

4 COMMERCIAL MARKET ASSESSMENT

4.1 As set out in the previous section Bassetlaw sits on the edge of a number of commercial market areas. The analysis in this section covers Bassetlaw and the neighbouring local authorities within the surrounding commercial market areas including the South Yorkshire; north east Derbyshire; northern Nottinghamshire; and Central Lincolnshire. This analysis aims to assess the Bassetlaw market within its geographical and commercial context.

4.2 The latest data from the Valuation Office Agency (VOA) shows that Bassetlaw has approximately 69,000 sq m of office floorspace. This represents a relatively low quantum of office stock, when compared to neighbouring areas. This largely reflects the rural nature and relative size of the settlements within each local authority – Sheffield has by far the largest quantum of office stock (908,000 sq m), with Doncaster, Rotherham, Lincoln, and Chesterfield all having between 100,000-250,000 sq m of office floorspace.

Figure 12: **Office Stock, Bassetlaw and Surrounding Areas, 2015-16**



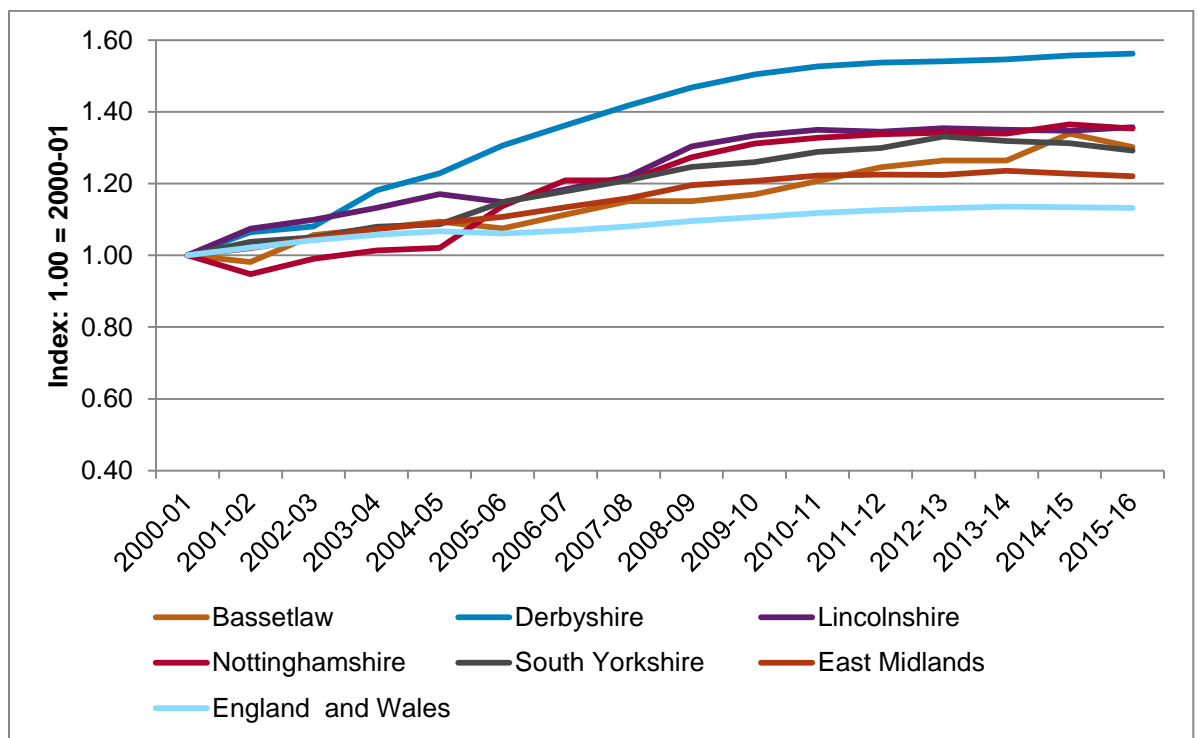
Source: GLH analysis of VOA data

4.3 Over the past 15 years Bassetlaw's office stock has seen steady growth from 53,000 sq m in 2000-01 to 69,000 sq m in 2015-16. This represents a 30% growth over this period and an annual growth rate of 1.7% per annum.

4.4 The figure below shows the relative growth of the office stock in Bassetlaw compared to wider geographical areas. This shows that all of the counties of Derbyshire, Lincolnshire, Nottinghamshire, and South Yorkshire have seen growth in office stock higher than the national and regional

averages. In terms of growth rate, Bassetlaw sits towards the lower end of these four counties – with a similar growth rate to South Yorkshire - but also has seen a growth rate above the East Midlands (1.3% per annum) and England and Wales (0.8% per annum).

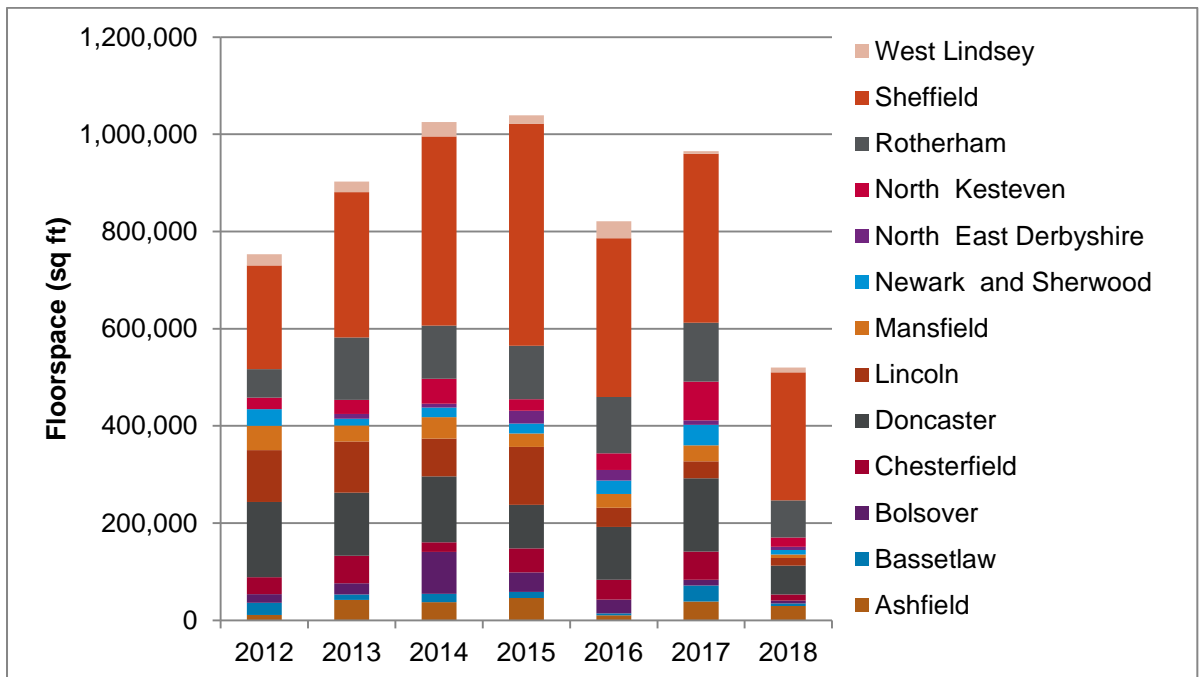
Figure 13: **Office Stock Trend, Bassetlaw and Surrounding Areas, 2000-16**



Source: GLH analysis of VOA data

- 4.5 The figure below shows the take-up of office space in Bassetlaw and surrounding areas since 2012. This shows a trend in the take-up of office space which shows an increase from 2012-2014, reflecting the continued return to growth following the previous recession. This reflects the trend seen nationally. This growth continued until 2014 since when growth has broadly levelled off. Data for 2018 covers the first half of the year. Extrapolating the figures to cover a full year shows a total take-up of 104,000 sq ft - the highest total of the years shown.

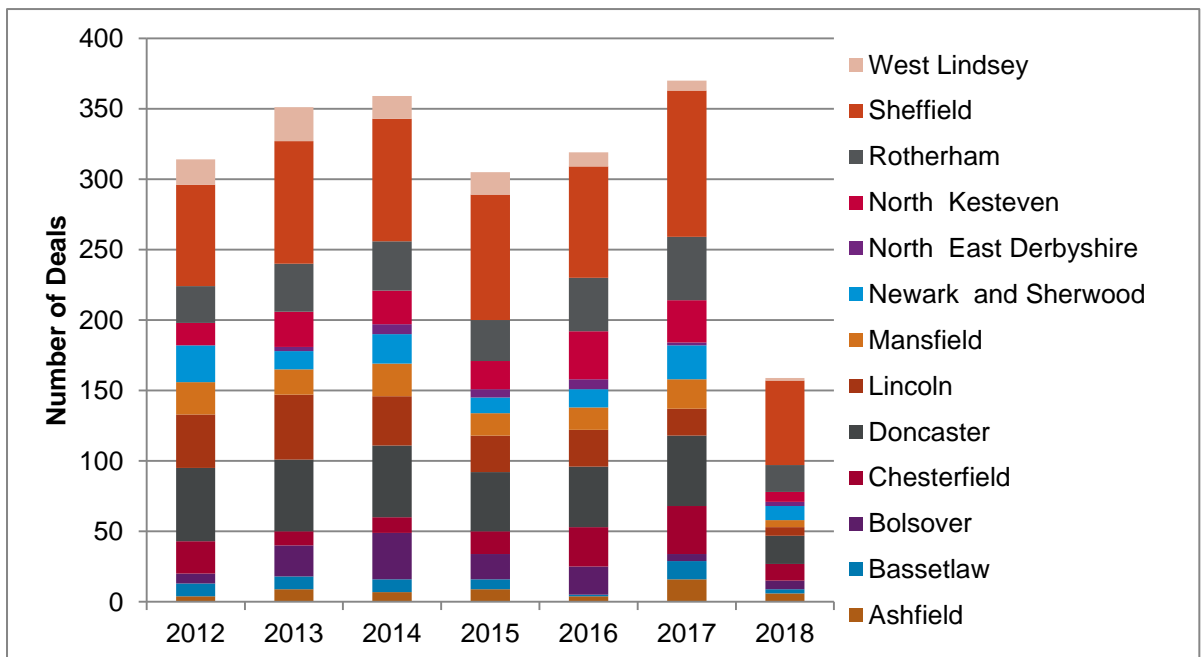
Figure 14: **Office Take-Up, Bassetlaw and Surrounding Areas, 2012-18**



Source: GLH analysis of CoStar data (2018 mid year)

- 4.6 The data below shows the same data sorted by number of individual deals. This shows the number of deals ranges between 300 and 370 per annum – and an annual average of 336 deals per annum. The 2018 half year data suggests that total deals for 2018 are likely to be within this range.

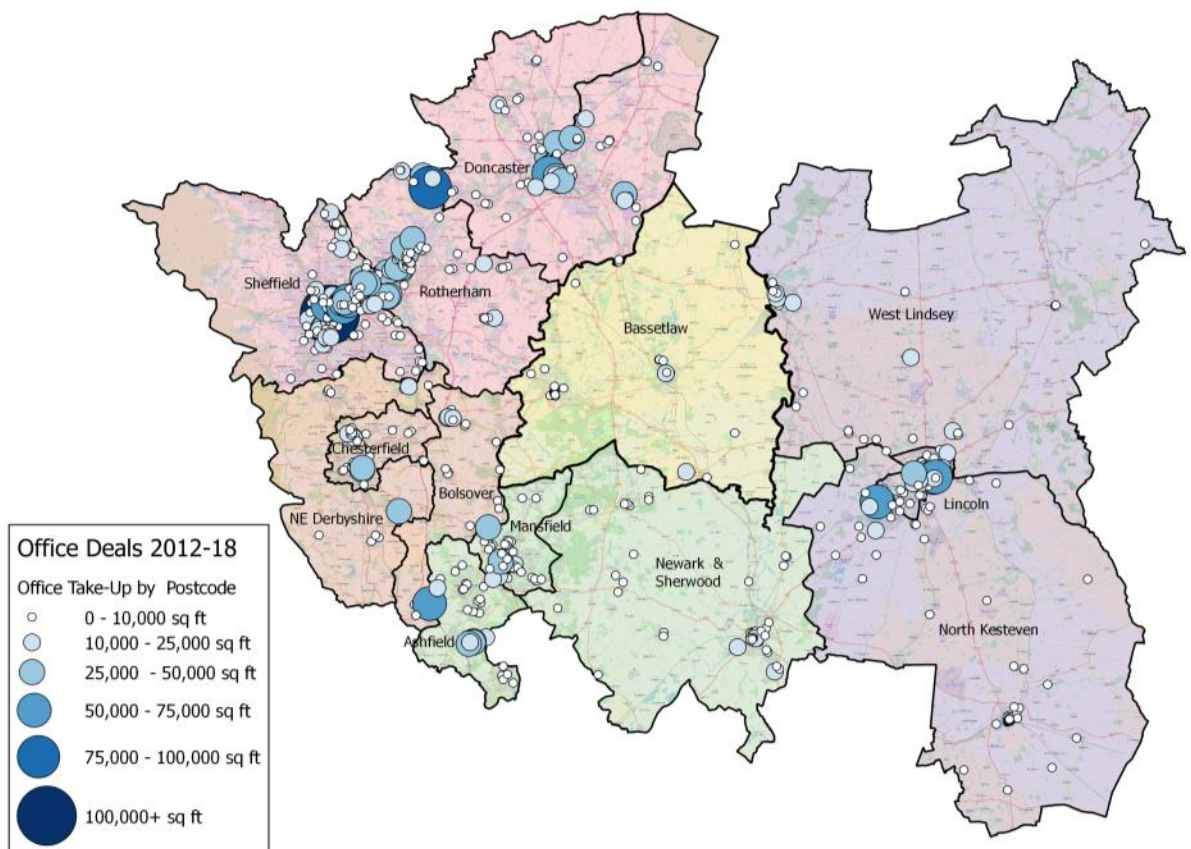
Figure 15: **Office Take-Up by Number of Deals, 2012-18**



Source: GLH analysis of CoStar data (2018 mid year)

- 4.7 The figure below shows the office take-up across Bassetlaw and surrounding areas mapped by total take-up per postcode. The size of circle (with a larger circle indicating a greater total quantum of floorspace) depicts the total space taken within a postcode over the period, and so each circle can represent multiple deals.
- 4.8 The map shows the areas of greatest activity for office uses across the area and clearly shows the focus of activity in Sheffield / Rotherham, and also shows high levels of activity in Doncaster and Lincoln and to a lesser extent in Mansfield, Ashfield, and Chesterfield. Within Bassetlaw there has been relatively little office activity over this period. This reflects the low quantum of office stock in the district.

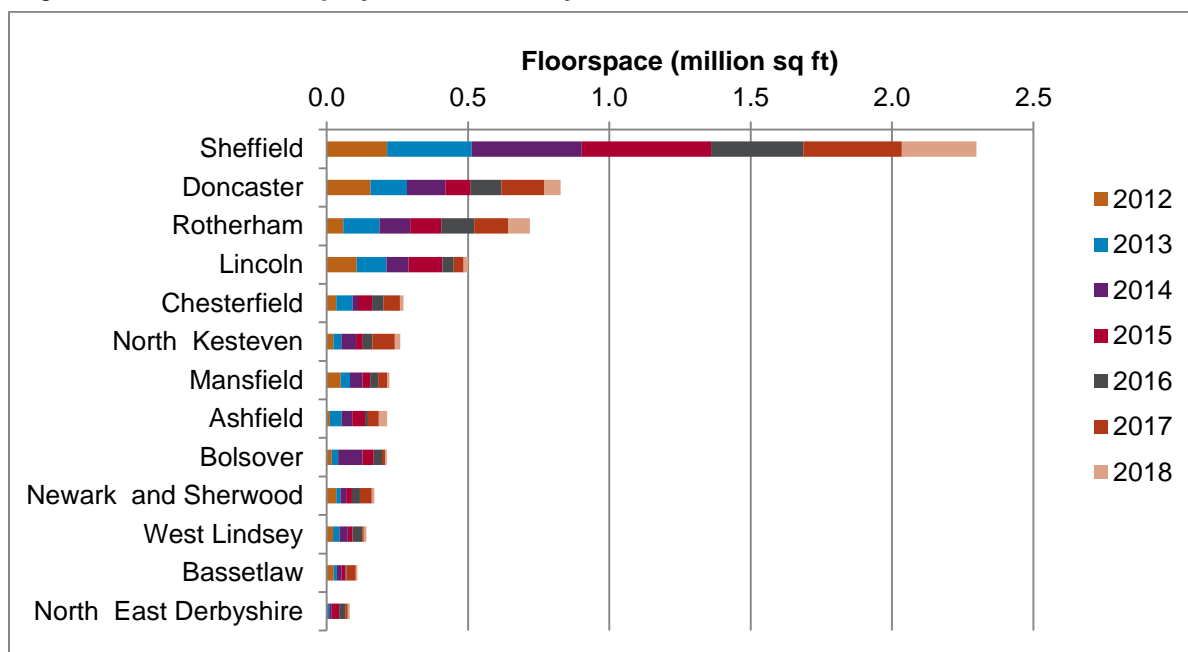
Figure 16: **Office Deals, Bassetlaw and Surrounding Areas, 2012-18**



Source: GLH analysis of CoStar data

The office take-up data is shown by local authority in the figure below. This shows that since 2012 Bassetlaw has seen the second lowest quantum of office space take-up of the authorities. Over this period there has been 108,800 sq ft of office space taken up in the district – equivalent to 16,700 sq ft per annum. By way of comparison, Bassetlaw has seen a similar scale of take-up as North East Derbyshire (12,500 sq ft per annum) and West Lindsey (21,600 sq ft) and is among the lowest of the authorities in the area.

Figure 17: Office Take-Up by Local Authority, 2012-18



Source: GLH analysis of CoStar data

- 4.9 The table below sets out the breakdown of take-up by size band. This shows that in Bassetlaw deals are concentrated in the low-mid range of the market: 90% of deals were for units between 500-5,000 sq ft. 41% of deals were for units between 1,000-2,000 sq ft while a further 31% of deals were for units between 2,000-5,000 sq ft – these proportions are higher for Bassetlaw than in any other authority. Conversely, there has been a notably lower proportion of deals for units under 500 sq ft (6%) and units over 5,000 sq ft (4%).

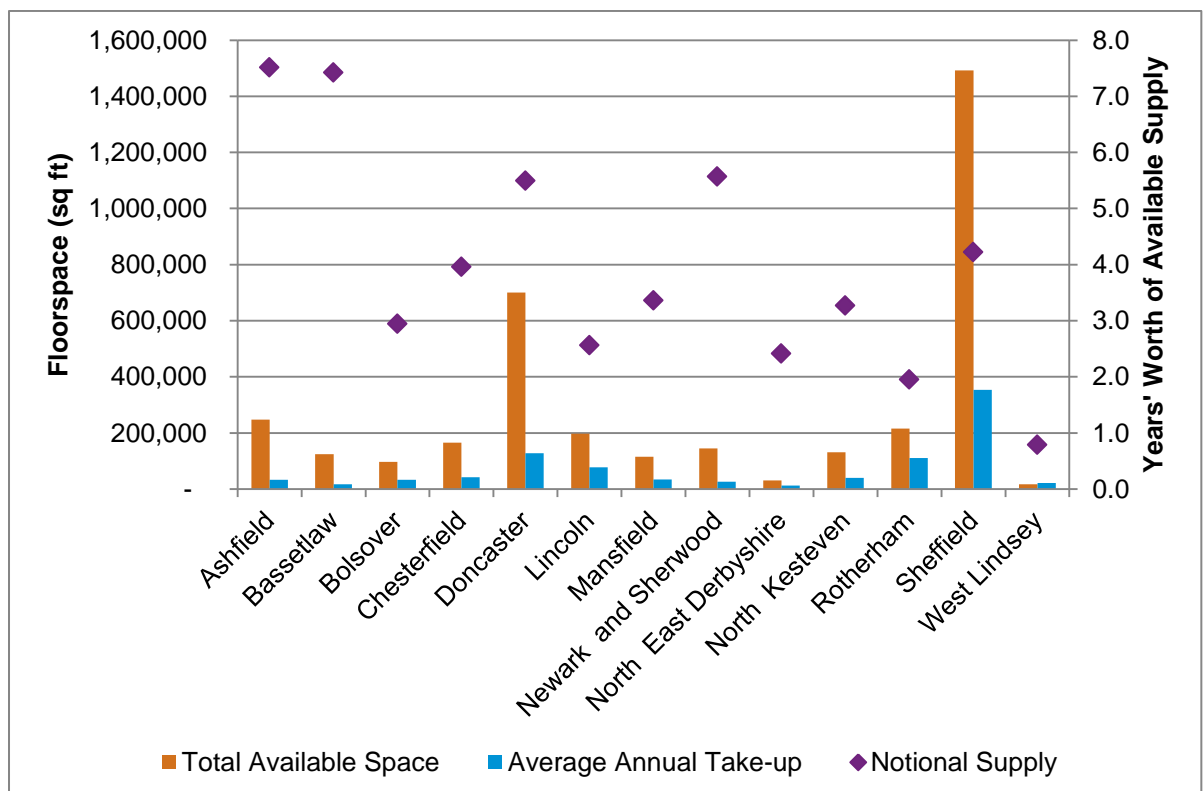
Table 6: Office Take-Up by Size Band, 2012-18

	Ashfield	Bassetlaw	Bolsover	Chesterfield	Doncaster	Lincoln	Mansfield	Newark and Sherwood	North East Derbyshire	North Kesteven	Rotherham	Sheffield	West Lindsey
0-500 sq ft	4%	6%	21%	22%	13%	30%	20%	30%	36%	31%	23%	13%	48%
500-1,000 sq ft	12%	18%	32%	22%	17%	16%	25%	28%	18%	27%	22%	16%	16%
1,000-2,000 sq ft	40%	41%	22%	32%	31%	18%	23%	20%	7%	18%	17%	23%	12%
2,000-5,000 sq ft	18%	31%	17%	19%	26%	24%	25%	19%	18%	16%	24%	26%	17%
5,000-10,000 sq ft	19%	0%	6%	2%	11%	6%	4%	2%	18%	6%	8%	13%	4%
10,000-20,000 sq ft	0%	4%	1%	2%	1%	4%	2%	1%	4%	3%	4%	6%	2%
20,000+ sq ft	7%	0%	1%	2%	1%	3%	1%	0%	0%	0%	3%	3%	0%

Source: GLH analysis of CoStar data

- 4.9 The figure below provides data for the total existing office space which is currently being advertised as available on the CoStar database. This provides an indicative 'point in time' snapshot of availability across the area. Across all of the authorities there is 3.68 million sq ft of available office space, with the greatest quantum of available space in Sheffield (1.49 million sq ft) and Doncaster (700,000 sq ft).
- 4.9 In Bassetlaw there is a total of 124,000 sq ft of available office floorspace. By way of comparison, Bassetlaw has a similar quantum of availability as Mansfield (115,000 sq ft) and North Kesteven (131,000 sq ft).
- 4.10 The figure also includes the average annual take-up figure for each authority. By combining these we are able to estimate an indicative notional supply which shows the number of years' worth of available supply in each local authority area. In Bassetlaw the available office supply is equivalent to 7.4 years' worth of take-up. This reflects a relatively high level of office supply compared to take-up trends, and is the second highest such figure of all the authorities in the area (Ashfield is higher at 7.5 years). By comparison, the average notional supply figure for Bassetlaw and surrounding authorities is equivalent to 4.0 years' worth of take-up.

Figure 18: **Availability vs Take-Up, Bassetlaw and Surrounding Authorities**

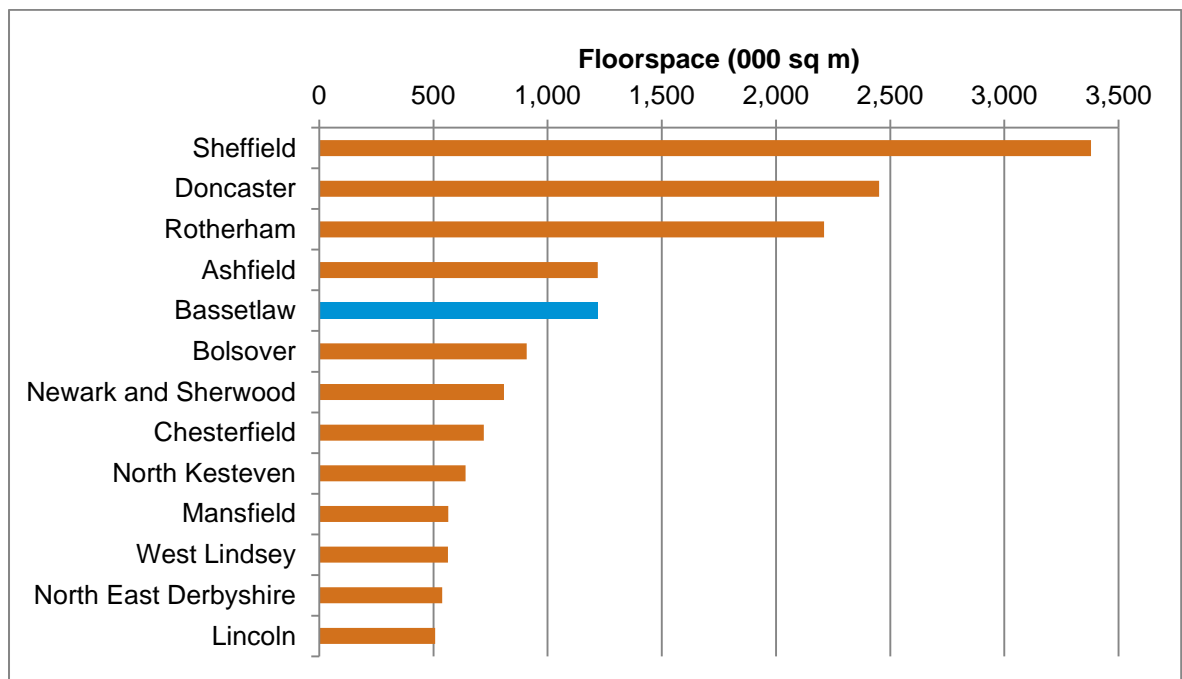


Source: GLH analysis of CoStar data

Industrial

- 4.11 The total industrial (including manufacturing and warehouse) floorspace in Bassetlaw and the surrounding authorities is shown in the figure below. The most recent VOA data shows that there is approximately 1.2million sq m of industrial stock in Bassetlaw. This ranks the district 5th out of the authorities and is very similar to the quantum of industrial floorspace in Ashfield.

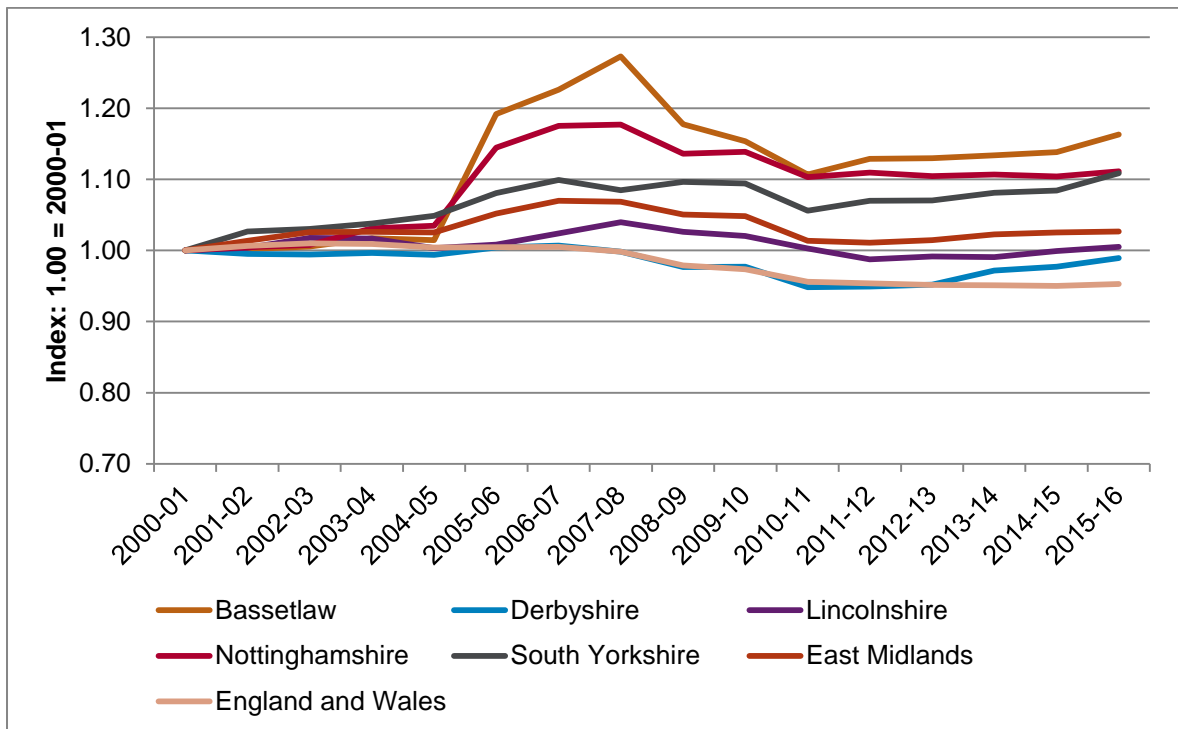
Figure 19: **Industrial Stock, Bassetlaw and Surrounding Areas, 2015-16**



Source: GLH analysis of VOA data

- 4.12 The figure below shows the relative growth of industrial stock in Bassetlaw and the surrounding authorities since 2000. In Bassetlaw the industrial stock has grown from 1.05million sq m in 2000/01 to 1.2million sq m by 2015/16. This represents a growth of 16% over this period and an average annual growth rate of 0.9% per annum.
- 4.13 As shown in the figure below the growth in industrial stock in Bassetlaw has been stronger than any of the counties, the regional, or national figures. Of these wider areas, Nottinghamshire and South Yorkshire have seen the biggest growth in stock, both at 11%. To provide context, across England and Wales industrial stock has seen a decline of 5% over this period.

Figure 20: Industrial Stock, Bassetlaw and Surrounding Areas, 2000-16

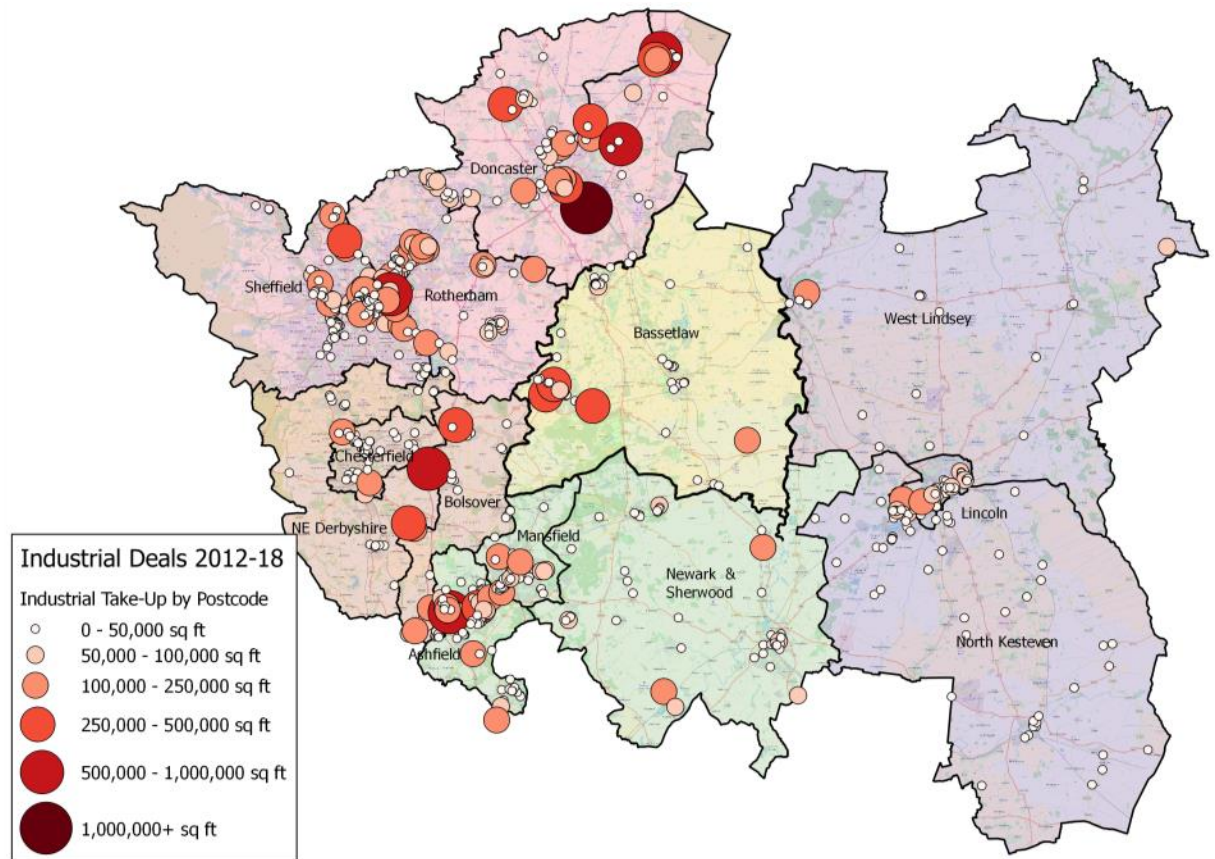


Source: GLH analysis of VOA data

- 4.14 The map below shows the industrial deals in Bassetlaw and surrounding areas since 2012 aggregated by postcode. As with the similar map for office deals, each circle represents a single postcode area and can represent multiple deals within this time. The larger circles represent a greater quantum of total stock taken within each postcode.
- 4.15 The figure highlights the much higher level of industrial activity in the eastern part of the area – South Yorkshire, north east Derbyshire, and Ashfield and Mansfield in Nottinghamshire. The data shows the highest levels of activity – in terms of number of deals – is in the larger commercial centres. However, the influence of the motorway network is also evident with a string of more concentrated areas of activity particularly along the M1.
- 4.16 Conversely, the eastern half of the area sees considerably lower industrial activity, with activity mostly focussed on a number of smaller deals in Lincoln.
- 4.17 Bassetlaw sits between these two areas. The industrial activity in the district is focussed around Worksop where there are several industrial areas which have seen continued industrial take-up throughout the period. This reflects the trends in industrial take-up seen in similar sized settlements such as Mansfield. However, the district falls outside the main M1 corridor with the distance from the M1 limiting the attractiveness of the district for the larger national-scale distribution and

industrial uses. Beyond Worksop, industrial activity in the district is focussed at smaller scale sites in Retford and Harworth.

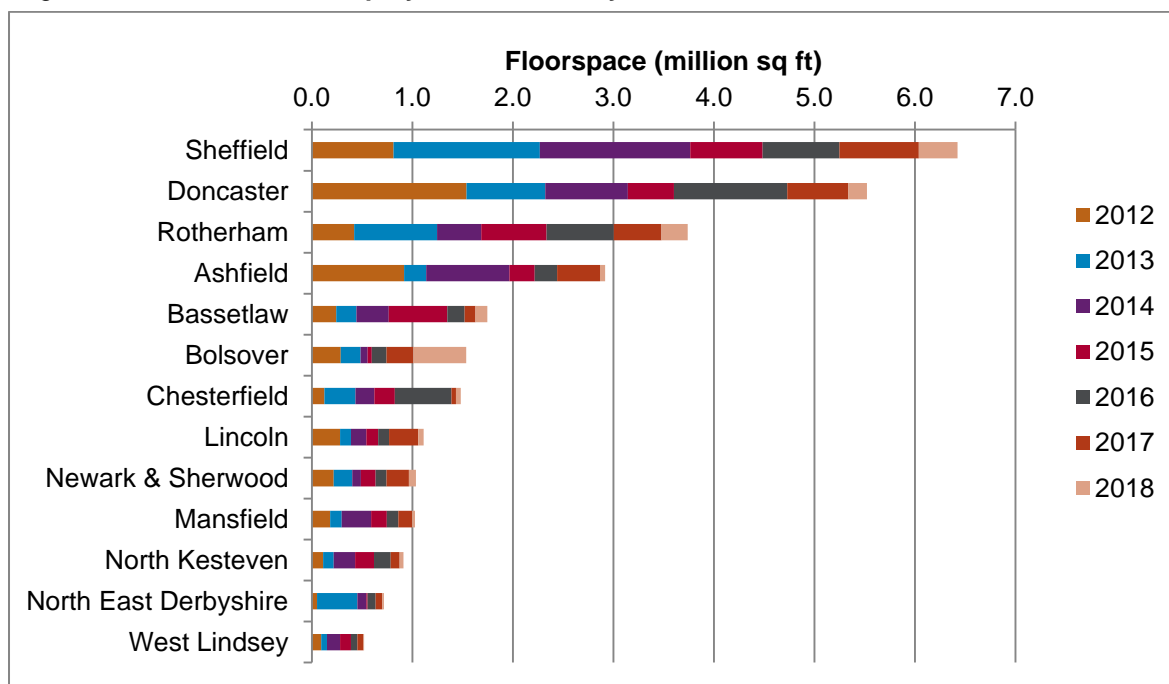
Figure 21: **Industrial Deals, Bassetlaw and Surrounding Authorities, 2012-18**



Source: GLH analysis of CoStar data

- 4.18 The figure below shows the take-up data in Bassetlaw and each of the surrounding local authorities by year. As with the office market, the majority of activity is focussed in South Yorkshire. Sheffield has seen the greatest quantum of take-up however the city is less dominant in terms of industrial take-up than for office uses. As with office space, Doncaster and Rotherham have seen the second and third highest level of industrial activity.
- 4.19 Over the 2012-18 period Bassetlaw has seen a total take-up of 1,750,000 sq ft of industrial floorspace – equivalent to an annual average take-up of 269,000 sq ft per annum. The district has seen the fifth most industrial activity across the local authorities over this period.

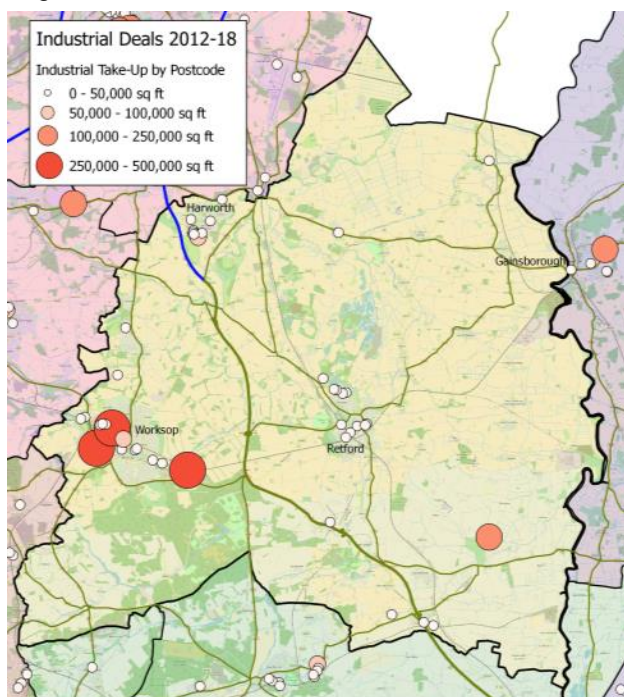
Figure 22: Industrial Take-Up by Local Authority, 2012-18



Source: GLH analysis of CoStar data

- 4.20 There have been a number of particularly large deals in Worksop including at Manton Road Business Park where Wilkos and B&Q have large distribution centres; a number of units at High Grounds Road including the large distribution unit currently occupied by Kammac; and the Cerealto distribution centre on Claylands Avenue.
- 4.21 Beyond Worksop industrial activity has been more limited focussed around a number of smaller deals in Retford, Harworth, and East Drayton. There has also been a similar level of activity in Gainsborough just beyond the district's eastern boundary.

Figure 23: Industrial Deals, Bassetlaw District, 2012-18



Source: GLH analysis of CoStar data

- 4.22 The table below sets out the breakdown of take-up by size band. This shows that in Bassetlaw deals are concentrated in the low-mid range of the market: 59% of deals were for units between 1,000-5,000 sq ft. This was the case for the majority of authorities. The data does show that Bassetlaw has seen a slightly higher proportion of deals in the 20,000-50,000 sq ft range with 10% of deals within this range compared to 5% across all authorities. There is also a greater proportion of units over 100,000 sq ft (4%) than anywhere else with only Doncaster and Sheffield seeing more deals in this size band.

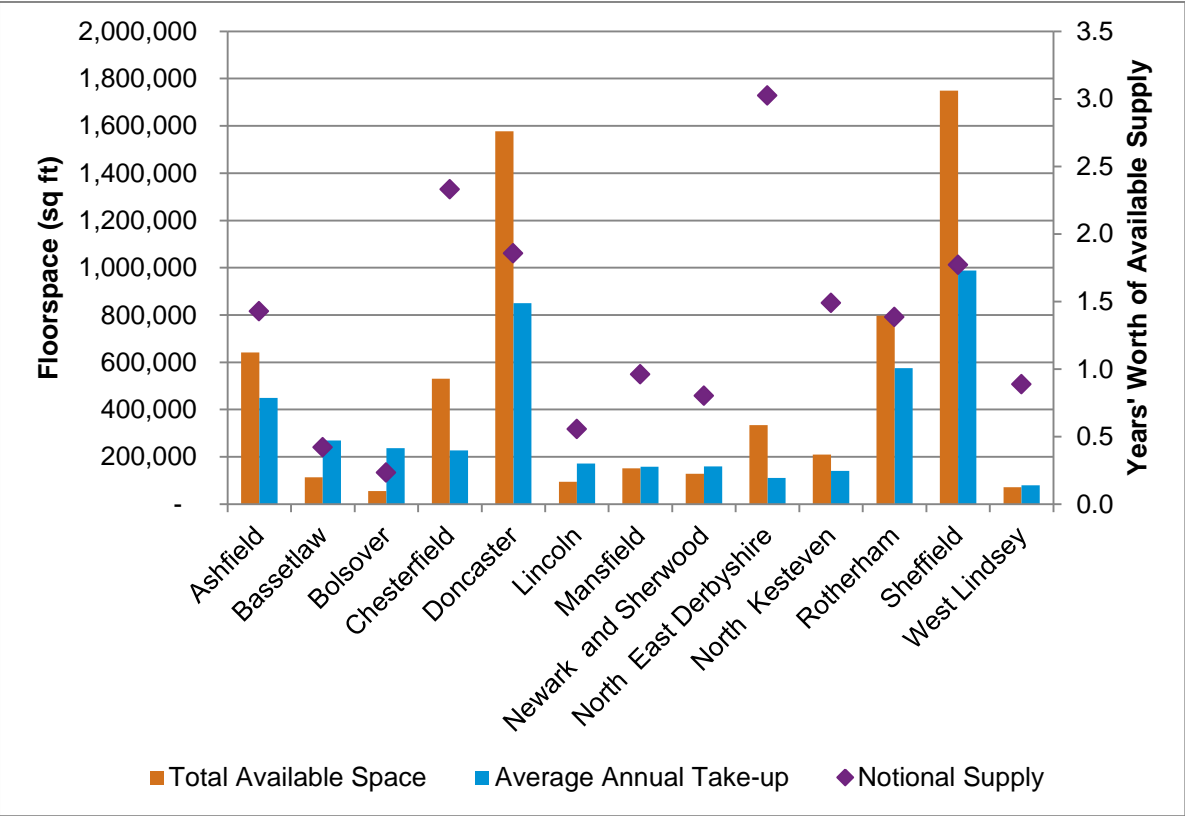
Table 7: Industrial Take-Up by Size Band, 2012-18

	Ashfield	Bassetlaw	Bolsover	Chesterfield	Doncaster	Lincoln	Mansfield	Newark & Sherwood	North East Derbyshire	North Kesteven	Rotherham	Sheffield	West Lindsey
0-500 sq ft	4%	1%	5%	8%	4%	12%	10%	3%	2%	5%	2%	2%	0%
500-1,000 sq ft	2%	9%	32%	14%	12%	11%	9%	18%	13%	24%	11%	13%	15%
1,000-2,000 sq ft	19%	30%	12%	24%	21%	24%	21%	26%	18%	34%	18%	20%	15%
2,000-5,000 sq ft	24%	29%	24%	19%	27%	33%	27%	34%	40%	23%	32%	27%	43%
5,000-10,000 sq ft	19%	8%	9%	16%	15%	11%	17%	11%	12%	7%	16%	21%	15%
10,000-20,000 sq ft	14%	8%	4%	11%	11%	4%	10%	4%	10%	6%	12%	9%	5%
20,000-50,000 sq ft	14%	10%	8%	5%	4%	5%	5%	2%	2%	1%	6%	6%	7%
50,000-100,000 sq ft	2%	2%	5%	1%	2%	0%	1%	2%	1%	0%	2%	2%	1%
100,000+ sq ft	3%	4%	2%	2%	3%	0%	0%	0%	1%	0%	1%	1%	0%

Source: GLH analysis of CoStar data

- 4.23 The figure below sets out the quantum of existing industrial floorspace which is currently being advertised as available on the CoStar database. This provides an indicative ‘point in time’ snapshot of availability across the area.
- 4.24 This shows that the current availability in Bassetlaw is 113,000 sq ft. This reflects a low level of industrial supply compared to take-up trends, and is considerably less than areas such as Ashfield and Chesterfield where there is 640,000 sq ft and 530,000 sq ft of available industrial space respectively.
- 4.25 The figure also includes the average annual take-up figure for each authority. By combining these we are able to estimate an indicative notional supply which shows the number of years’ worth of available supply in each local authority area. In Bassetlaw the available industrial supply is equivalent to just 0.4 years’ worth of take-up. This reflects a tight industrial supply situation in the district. A number of the neighbouring authorities also have a tight industrial supply position with four others showing a notional supply of less than years’ worth supply – and this is particularly the case for the more rural authorities. Across the study area, the average notional supply figure is equivalent to 1.5 years’ worth of take-up.

Figure 24: **Availability vs Take-Up, Bassetlaw and Surrounding Authorities**



Source: GLH analysis of CoStar data

Summary of Commercial Property Market

- 4.26 Bassetlaw has a limited office market. The quantum of office in the district has grown by 30% in the last 15 years which is above the regional trend but slightly below local country averages. Deals are concentrated in the low-mid range of the market with 90% of deals for units between 500-5,000 sq ft. Office stock availability is comparable with neighbouring authorities and is relatively high in terms of the average annual take up.
- 4.27 The industrial market in Bassetlaw demonstrates strength in a number of aspects. The total stock is above average compared to other more rural authorities in the sub region and has shown 16% growth over the last 15 years, outperforming regional and county benchmarks. Industrial activity in the district is focussed around Worksop with smaller scale industrial activity at sites in Retford and Harworth. The district falls outside the main M1 corridor which historically has limited the attractiveness for the larger distribution uses.
- 4.28 There have been a number of larger deals in Worksop including at Manton Road Business Park where Wilkos and B&Q have large distribution centres. Data indicates that 59% of deals are for units between 1,000-5,000 sq ft, a typical profile of adjacent more rural authorities. However Bassetlaw has seen a slightly higher proportion of deals in the 20,000-50,000 sq ft range. Availability is at 113,000 sq ft. which is considerably less than areas such as Ashfield and Chesterfield and equivalent to just 0.4 years' worth of take-up.

5 STAKEHOLDER ENGAGEMENT

5.1 To develop an understanding of the local property market, a series of local property agents were engaged with on the key topics of

- Drivers of demand
- Occupiers
- Gaps in the market
- Areas of highest/Lowest demand
- Rents by use
- What can be done to accelerate growth
- Risks and opportunities

5.2 GL Hearn spoke with:

- William Wall of Banks and Long
- Jason Barnsdale of Barnsdale
- Paul White - Brown and Co
- Ben Flint – Fisher German (Doncaster)

Office

5.3 Demand for office space is sparse. For example there is no A1 office market. Any demand which does arise will be to serve the local market. That said there has been some slight increase in office demand in Retford. In the last 18 months there have been 4 deals in when previously it would be 1 a year.

5.4 There is a lack of availability apart from a large office in Retford town centre which has been vacant for some time. Due to the relative lack of demand rents have stagnated over the last 5 years. One business park in Retford does see good demand for service offices and is fully let.

5.5 While there is probably a good balance at the minute, there might be an issue if the market keeps improving at the same pace and there is no supply. For example there are no office park developments and no plans to develop any within Worksop.

Industrial

5.6 As an industrial location the A1 corridor is still unproven, DB Symmetry has a 50 ha development at J34 Blyth J34 opposite the service station. They have sold on some land to a local occupier (Smarts Coaches) and another to Euro garages for an extension to the services station (coffee company and McDonalds Restaurant are the likely occupier).

- 5.7 However the large part of the scheme is a speculative development of a 140,000 sq ft warehouse. There are currently three agents promoting the development but it is yet to let. This is the first speculative development for a decade.
- 5.8 The last development was around 2007 when Gazeley built a large warehouse at Claylands Avenue and then sold it to a fund. However as the market crashed it took a long time for it to be let but was eventually let to a Spanish/Portuguese food company (Cerealto) after sitting vacant for 6 -8 years.
- 5.9 However you do not have to venture too far out of the district to notice an upsurge in speculative development. Particularly around Doncaster which has included the Verdi speculative development. Although Doncaster benefits from adjacent population and rail head.
- 5.10 The agents did note an undersupply of freehold industrial premises with yard space. Particularly that in the region of 2,500 -10,000 sq ft.
- 5.11 **Retford**
- 5.12 There is only a single commercial allocation at Retford and this is part of a mixed used development being promoted by Trinity Hospital. This includes 30 acres of employment land which according to agents would equate to around 5 years worth of demand. The site does not however have adequate access to the A1. As such the site would only satisfy local demand for light industrial uses due to it proposed adjacent uses.
- 5.13 In contrast there is nothing to the south of the town which is closer to the A1 and could present some development opportunities to meet the strategic demand for distribution around that area. Albeit this might be after the DB symmetry site is occupied.
- 5.14 Retford is a little bit more affluent than Worksop which impacts retail demand which may in turn increase demand for storage space but not notably so.

Worksop

- 5.15 There are a couple of larger allocations for industrial uses in Worksop, for example the Network Spaces opportunity opposite Wilkinson's on the A57. This is currently being marketed for a Design and Build opportunities. At the north end of Worksop at Shireoaks, Fisher German is promoting a site which Hallam Land achieved planning permission for.
- 5.16 Worksop is renowned for its food production industry (2 sisters, Premier Foods, etc) and there is particular demand for space for occupiers supplying the larger food production companies in town.

However there is very little available stock in either Worksop or Retford. This suggests there is some buoyancy in the industrial market.

- 5.17 There is not considered to be demand for super sheds in the area but there is demand for sub-hub (100,000 - 200,000 sq ft). Worksop as a central location between the M1 and the A1 is a particularly attractive location for that type of property.
- 5.18 There is demand for smaller industrial units in the town. In particular for incubator units in the region of 2,000 sq ft. There is also a shortage of premises in the 5,000 - 15,000 sq ft range particularly "move on" industrial space.

Land and Rental Values

- 5.19 In terms of land values the allocated gross 200 acres (140 acres net) at Harworth is owned and promoted by a local family is hoping to achieve in the region of £30m. The Shireoaks development being promoted by Fisher German is hoping achieve £250,000 per acre for a 30 acre site
- 5.20 Rents have increased slightly in the last 12 months but more notably the marketing times have reduced. There is no significant Rent differences across the district although there are difference by size. This also affects the length of time premises spend on the market.
- Very Small 500 - 1000 sq ft – Spot rents £150 per week
 - Small industrial – £6.25 per sqft- On market for 3-6 months
 - Medium – £5.75 – £6.00 per sqft - On market for -6-12 months
 - Big – £5.25- £5.50 – Unproven on DB symmetry
 - Offices – New - £10-£12 – Could be on market for some time.
- 5.21 DB Symmetry are quoting £5.50 per sq ft at Harworth. However this could be achieved if the right occupier appeared. For example it is lower than that being asked at the Verdi scheme in Doncaster.
- 5.22 Build costs in the area are around £80 - £85 for a typical industrial build. The spec of which would ideally have 6.5 metre eaves with nice external panelling with roller door, three toilets (male, female disabled), small ground floor office and open kitchenette. There is no demand for premium industrial space in the district.
- 5.23 Around ten years ago there was a speculative build of some basic office space (1500- 2000 sq ft offices). However this took some time to let. As a result developers have been wary of trying to deliver additional stock.
- 5.24 As a result of build costs and a lack of demand there may be a need for some state intervention in the delivery of additional commercial office sites.

- 5.25 The agents did not identify any issues with congestion or staffing. One did highlight that the links between Retford and the A1 were not perfect (Single carriageways)

Investment

- 5.26 Yields are in line with expectations for the region. Warehouses in Retford (10-15,000 sq ft) can achieve anything between 6% and
- 5.27 7.5%. One was sold at the higher end on a sale and lease back to a medium company with a net worth of £1-2 million but not a blue chip company.
- 5.28 Investors not wedded to the area and they have seen investors from Birmingham, London and even foreign (South African) Investments. The lack of investment property elsewhere has resulted in investors expanding their areas of search.
- 5.29 They can even achieve a slightly higher rental yield in Worksop than in Doncaster due to increased competition more availability of stock in Doncaster.

Summary

- 5.30 There are two/three distinct markets in Bassetlaw depending on the use. For office and industrial there is the Worksop and Retford markets and on the industrial distribution side there is a separate A1 Corridor market.
- 5.31 Particularly for the industrial market there is high demand and short supply. This has resulted in an increase in rents and shorter marketing period with longer leases of 5-10 years when three years was more typical. Although for larger properties of +5,000 sq ft then there could be longer leases.
- 5.32 The most in demand properties are smaller units of less than 2,000 sq ft. Occupiers are typically local industrial uses upgrading their space or workshop (or in some cases moving out of home-working). There have also been a couple of national occupiers looking for a regional base. These are primarily final mile distributors.
- 5.33 There has been some increase in demand resulting from overspill of the nearby cities of Sheffield and Nottingham as well as Doncaster. Doncaster has done well recently and while not quite at saturation point it is limited in terms of how large it can grow employment wise. The overspill typically manifests itself in e-commerce properties. These still service the major cities and wider sub-region
- 5.34 Most agents agree that this will continue although a downturn related to Brexit does pose a risk to the market.

6 BUSINESS SURVEY

- 6.1 A survey of businesses in Bassetlaw has been undertaken in order to better understand the business structure and business needs of companies located in the borough. The business survey was undertaken in August 2018 by GL Hearn with Bassetlaw District Council. The business survey comprised sixteen multiple choice questions and one open question. The full list of questions is included in Appendix A of this report.
- 6.2 The survey comprised an online survey link sent to over 800 businesses in the area. In total 60 business survey responses were received.
- 6.3 Question 1 in the survey (see Appendix A) asked respondents to state the nature of their business. To begin the analysis, each business/organisation response was assigned a Standard Industrial Classification (SIC) code from SIC 2007 data.

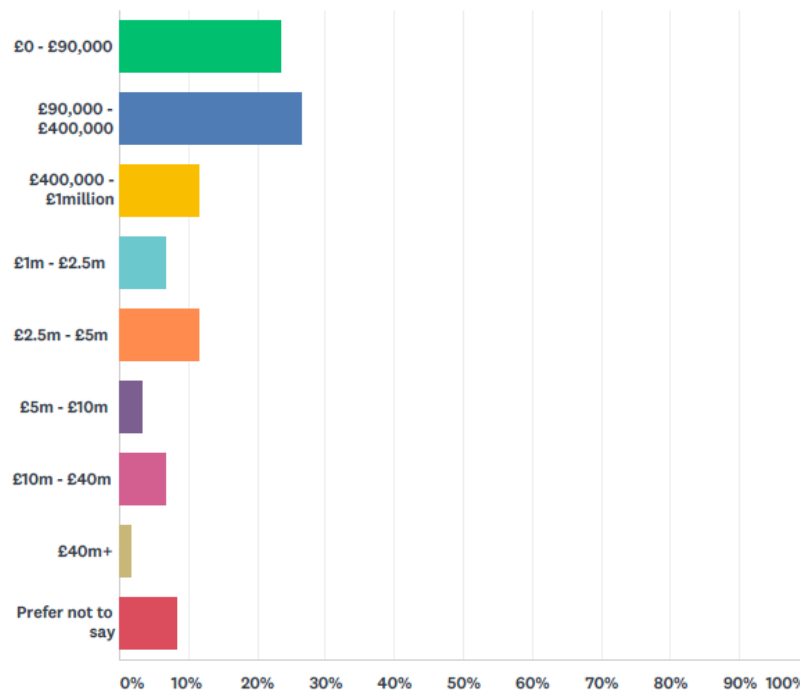
Types of Respondents

- 6.4 A total of 42 respondents (70%) owned businesses falling under Use Class B (including manufacturing, distribution and general office uses). The most common Class B use was office (Use Class B1) (18 respondents), followed by manufacturing (7 respondents) and distribution (6 respondents).
- 6.5 Whilst B Class uses was the largest sector represented, 12 respondents (20%) owned/leased properties falling within Use Class A (including general retail, bank, bar and restaurant uses), and 5 respondents (8.3%) owned properties falling within Use Class D (including education and leisure uses).

Business Activity and Profile

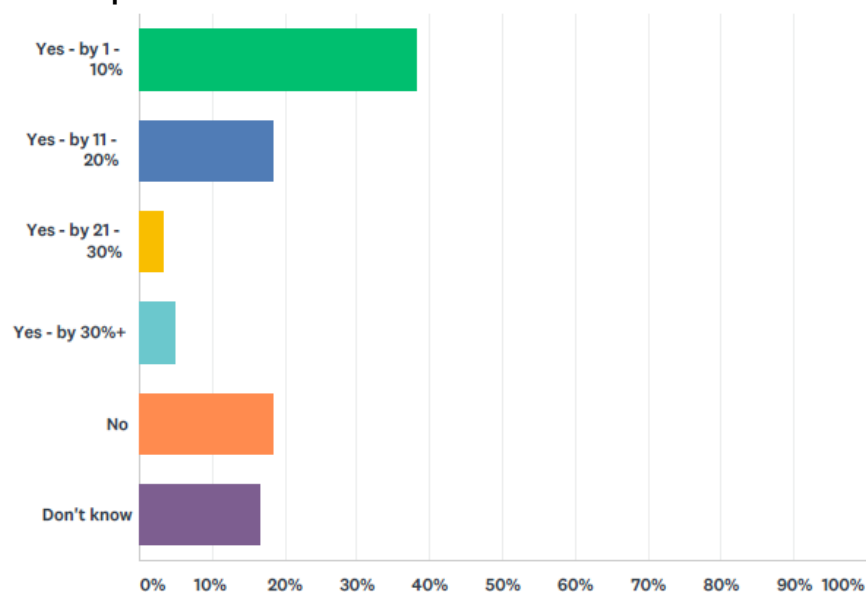
- 6.6 In terms of **turnover**, 23.33% respondents had a turnover of between £0 and £90,000; 26.7% of businesses turnover between £90,000 and £400,000; 11.7% turnover between £400,000 and £1 million; 6.7% turnover between £1 million and £2.5 million; 11.7% turnover between £2.5 million and £5 million; 3.3% turnover between £5 million and £10 million; 6.67% turnover between £10 million and £40 million; and 1.67% had a turnover of over £40 million. 8.33% of businesses did not disclose their approximate annual turnover.

Figure 25: **Approximate turnover (current)**



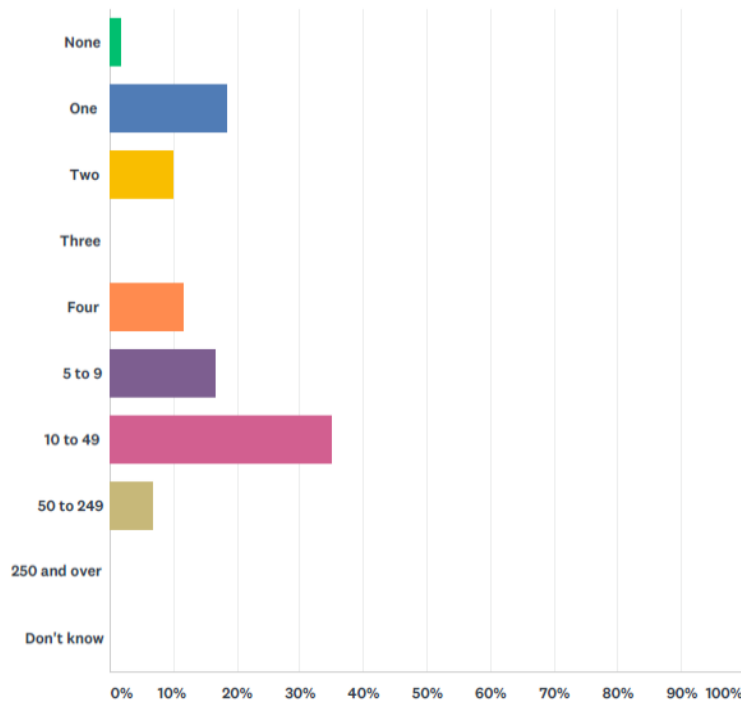
6.7 In terms of **future turnover**, 65% respondents expected to increase turnover over the next two years; 18.3% did not expect to increase turnover and 16.7% did not know whether their turnover would increase. Of the 39 businesses that expected to increase their turnover over the next two years, 58.97% expected to increase by 1-10%; 28.2% expected to increase by 11-20%; 5.12% expected to increase by 21-30%; and 7.69% expected to increase by more than 30%.

Figure 26: **Expected Future Turnover**



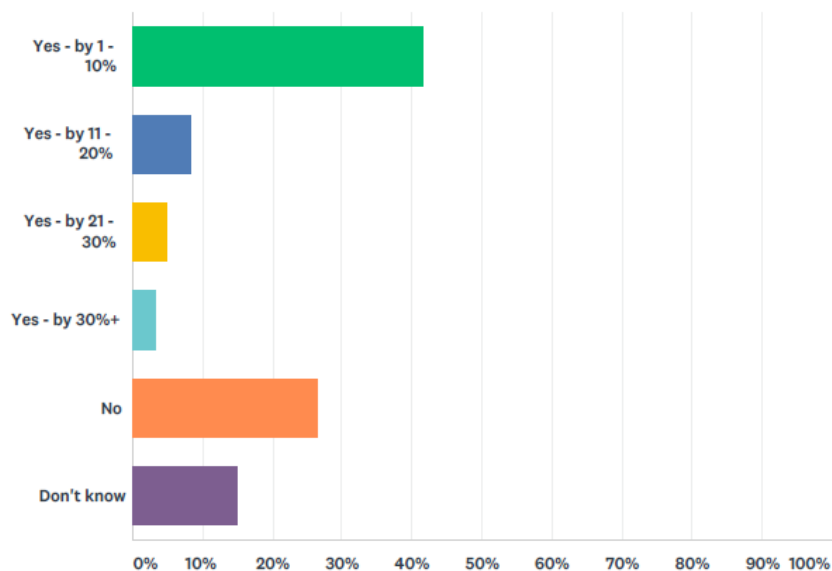
- 6.8 In terms of **employment**, 35% of the responding businesses in the borough have between 10 and 49 employees on site; 18.33% have 1 employee; 16.7% have 5 to 9 employees; 11.7% have 4 employees; 10% have 2 employees; 6.8% have 50 to 249 employees; and 1.7% has no employees. No businesses employed over 250 employees.

Figure 27: **Number of employees**



- 6.9 Whilst 26.7% of businesses do not expect to **grow their workforce** within the next two years, 41.6% anticipate a growth of between 1% and 10%. A further 8.3% of businesses expect a growth of between 11% and 20%; 5% expect a growth of between 21% and 30%; and 3.3% expect a growth of more than 30%. A total of 15% of businesses do not know whether they will increase their staff numbers over the next two years.

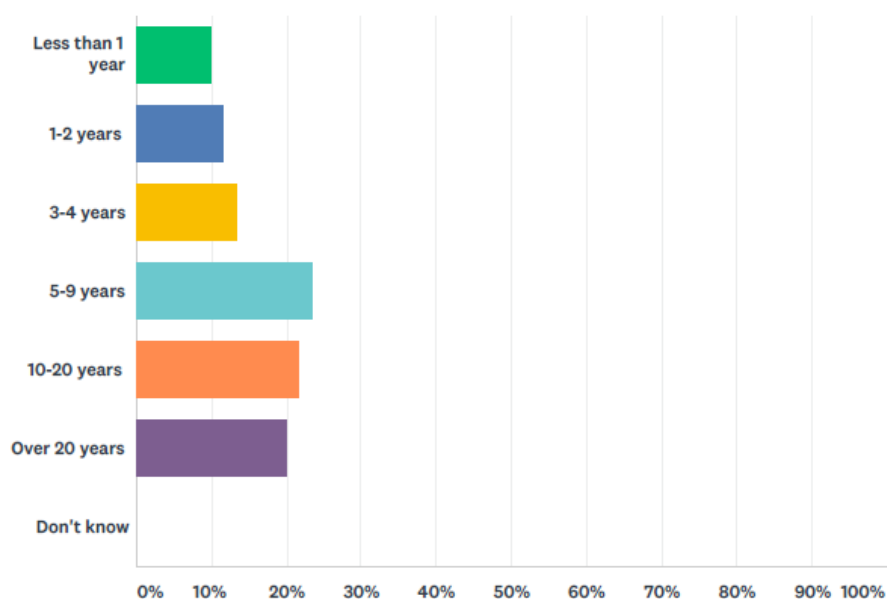
Figure 28: **Expected growth in employment (next two years)**



Premises

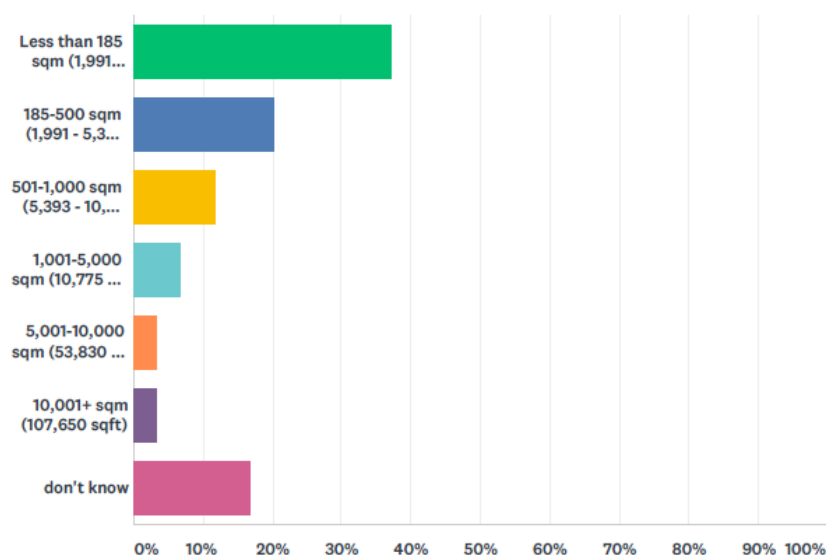
- 6.10 In terms of **how long each respondent had been trading at their current location**, 10% stated less than one year; 11.7% stated 1-2 years; 13.3% stated 3-4 years; 23.3% stated 5-9 years; 21.7% stated 10-20 years; and 20% stated over 20 years.

Figure 29: **Length of trading at current premises**



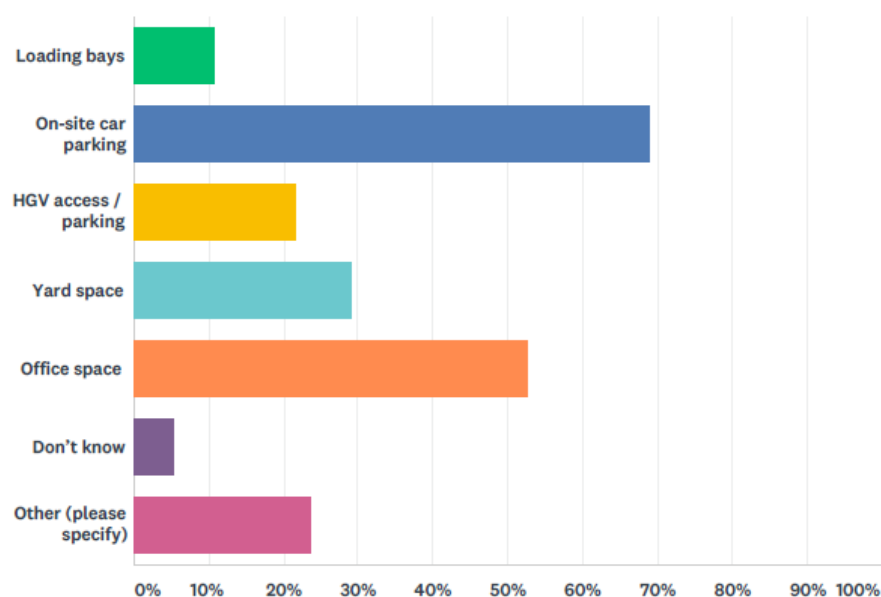
- 6.11 In terms of **size of premise**, 37.3% out of 59 claim that their premise measures less than 185 sqm, and 20.3% claimed that their premise measured between 185 and 500 sqm. Of those 59 respondents, only 2 (3.4%) claimed that their premises was over 10,001 sqm.

Figure 30: **Size of premises**



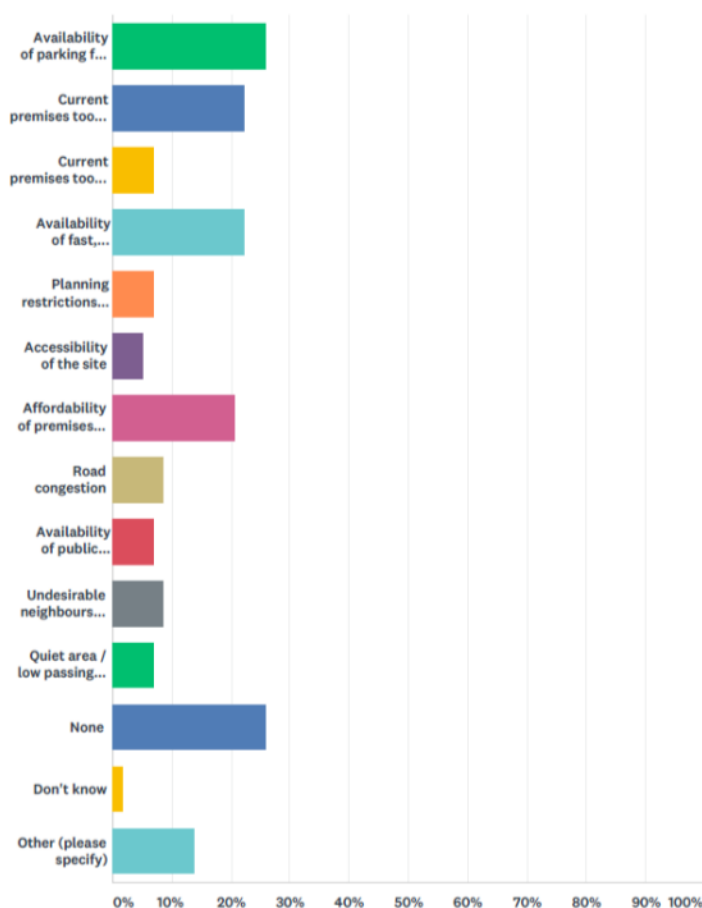
- 6.12 With regards to **other space requirements**, 69.1% of respondents required on-site car parking; 52.7% required office space; 29.1% required yard space; 21.8% required HGV access; and 10.9% required loading bays.

Figure 31: **Existing premises – other space requirements**



- 6.13 When asked whether **their current premises was adequate for their business needs**, 35% of respondents stated that their premises met current needs only, and 45% stated that their premises met current and foreseeable future need. 15% of respondents stated that their premises do not meet current needs (although they do plan to remain), and 5% stated that their premises do not meet current needs and therefore they may look to relocate.
- 6.14 When considering **factors of their current site and location that might restrict their business operation**, 25.9% of respondents believed they faced no restrictions. However, 25.9% felt restricted by a lack of available parking for staff, visitors and customers; 22.4% felt that their site was too small; 22.4% stated that they lacked fast, reliable and superfast broadband; and 20.7% commented that they were restricted by the affordability of their premises.

Figure 32: **Factors restricting the operation of businesses**

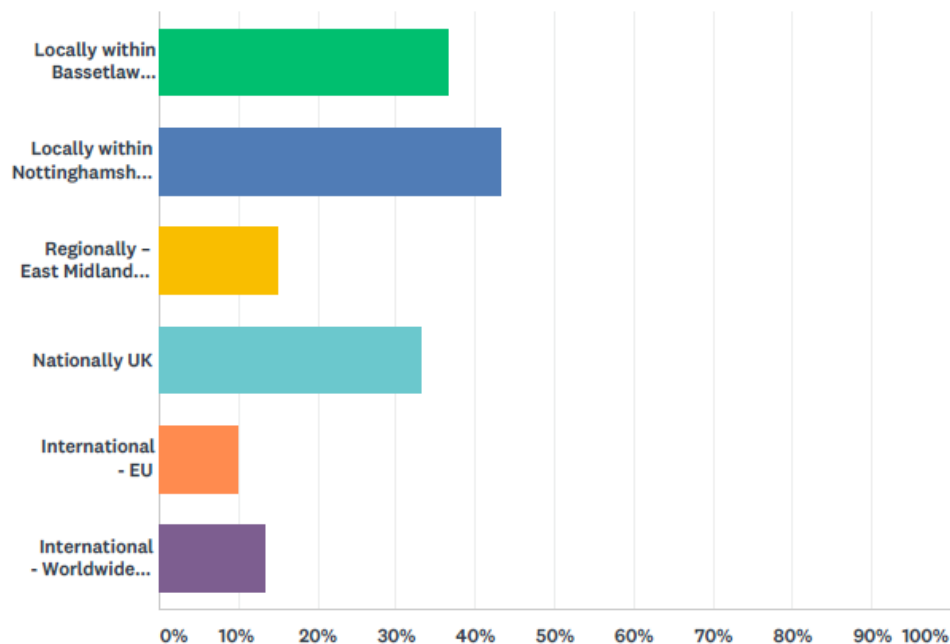


Location of Customers and Clients

- 6.15 In terms of the **location of their customers and clients**, 43.3% of 60 stated that their customers/clients are located locally within Nottinghamshire, Derbyshire, Lincolnshire and South Yorkshire. An additional 36.7% stated that customers/clients come from within Bassetlaw itself.

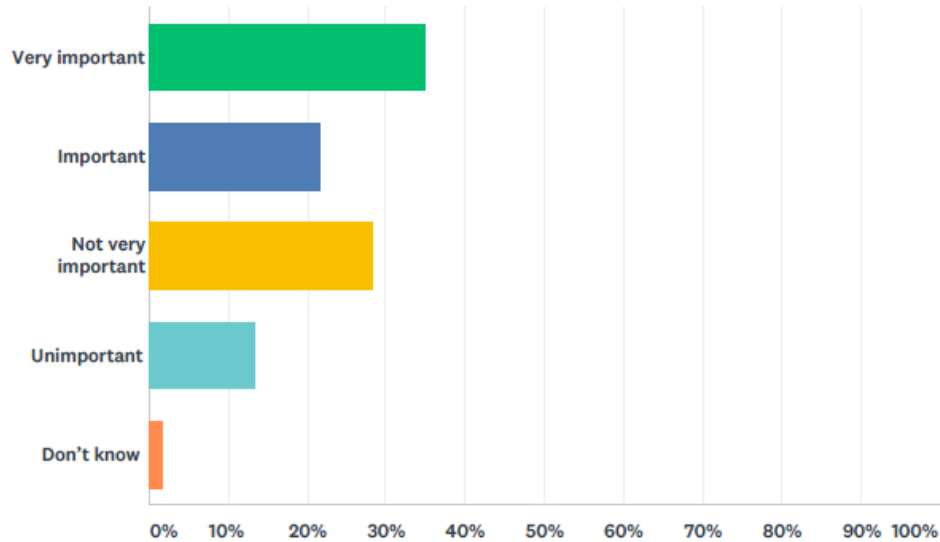
33.3% stated that customers/clients come from across the UK; 15% stated that customers/clients come from the East Midlands/Yorkshire; 10% stated that their customers/clients come from the EU; and 13.3% stated that their clients/customers come from outside of the EU.

Figure 33: **Location of customers and clients**



- 6.16 When asked whether it is **important for businesses to be located in close proximity to customers/clients**, 35% thought it was very important, and 21.7% thought it was important. A total of 28.3% of 60 stated that it was not very important, and 13.3% stated it was unimportant for them to be located in close proximity to their customers/clients. 1.7% did not know whether it was important.

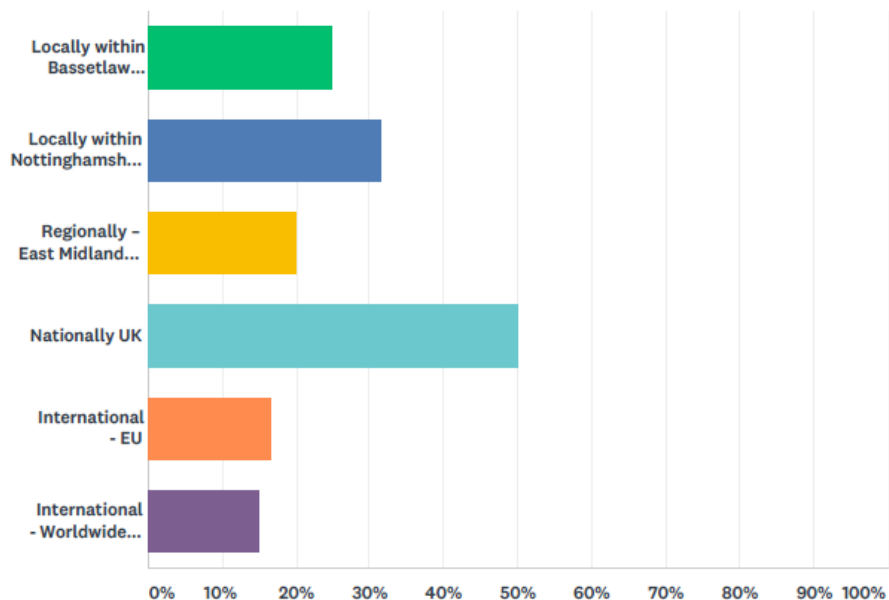
Figure 34: Importance of being located in close proximity to customers and clients



Supply Chains

- 6.17 There is a fairly even **distribution of supply chains** for local businesses, with local, regional and international suppliers operating in Bassetlaw.

Figure 35: Location of suppliers



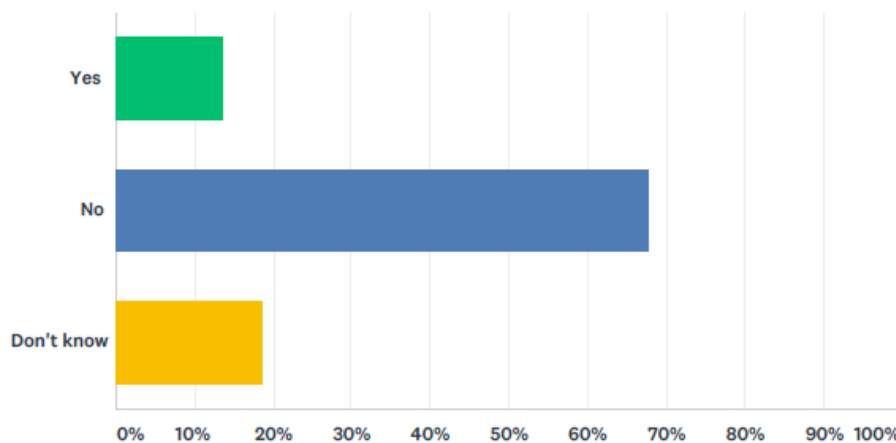
- 6.18 25% of respondents have suppliers located within the Bassetlaw District; 31.6% have suppliers located locally within Nottinghamshire, Derbyshire, Lincolnshire and South Yorkshire; 20% have suppliers located regionally in the East Midlands and Yorkshire; and 50% have suppliers located nationally in the UK. 31.6% of respondents stated that their suppliers are located outside of the UK (16.7% inside the EU, and 15% outside of the EU).

- 6.19 When asked whether it is **important for businesses to be located in close proximity to suppliers**, 15% said it was very important; 21.7% said it was important; 35% said it was not very important; and 28.3% said it was unimportant.

Relocation

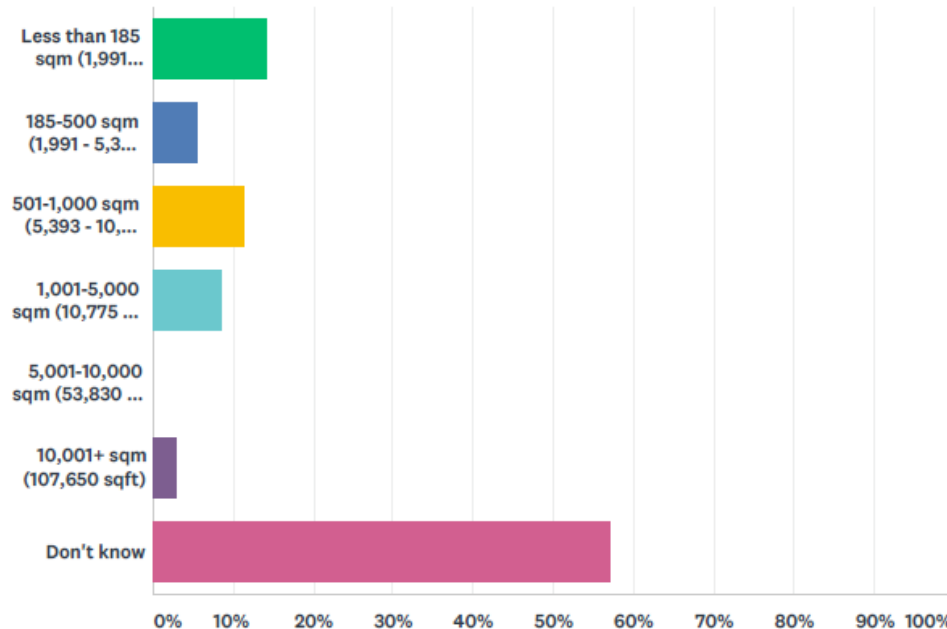
- 6.20 In terms of whether respondents planned to **relocate** their business in the next two years, 67.8% stated that they had no plans to relocate, while 18.6% were unsure as to whether they would relocate in the foreseeable future. A total of 13.6% of respondents are looking to relocate in the next two years.

Figure 36: **Businesses looking to relocate in the next 2 years**



- 6.21 When asked to describe their **preferred premises**, and the size of their ideal unit, 14.3% responded less than 185 sqm; 5.7% responded 185-500 sqm; 11.4% responded 501-1,000 sqm; 8.6% responded 1,001-5,000 sqm; 2.9% responded 5,001-10,000 sqm and 2.9% responded 10,001+ sqm. A total of 57.1% of respondents didn't know what size of unit they would be looking for, which reflects the high percentage of respondents that confirmed they were not looking to relocate

Figure 37: **Size of units preferred premises**



- 6.22 The most influential factor in businesses **selecting new premises** was the rental or purchase cost (54.6%), followed by the size, quality and configuration of a unit (45.5%) and the availability of car parking (43.2%). Other important factors include: access to superfast/ultrafast broadband (38.6%), image of location (34.1%), proximity to current location (34.1%), Ability to retain current staff and management (31.8%) space to expand / intensify if required (27.3%), lease length (25%), Access to the strategic road network (22.7%), proximity to existing customers (13.6%), future recruitment needs (13.4%), access to public transport (6.8%), proximity to suppliers (2.3%).

Growth Potential / Plans

- 6.23 When asked whether they expect to expand in the near 1-2 years, 58.3% of 60 respondents claimed that they expect an increase in staff numbers. 65% of respondents also expect to increase their turnover over the next 2 years.

Summary of Survey

- 6.24 Key messages from the business survey are reported below and reflect the opinions of those responding to the survey which will not be wholly representative of the district as a whole:
- There were 60 respondents with the majority (70%) occupying B class accommodation.
 - Businesses tend to turnover under £1m however some larger businesses responded. The majority of businesses expect to increase their turnover in the coming years.
 - The majority of businesses surveyed employ under 50 staff and most expect to increase their employment in the coming years.

- Most businesses have been in their existing premises for at least 5 years. The majority occupy accommodation under 1,000 sqm. Key space requirements are around parking, office space, yard space HGV access / parking. Around 80% of businesses find their accommodation suitable for current needs but only half think they can meet future need. Key challenges of existing premises are around parking, size, broadband and cost.
- Clients and customers are primarily related in the East Midlands counties however there are national and international businesses. Just over half identify it as important to be located near to customers and clients. Suppliers are distributed locally, nationally and internationally. Around one third of businesses identify it as important to be located near to suppliers.
- Around 14% of businesses expect to relocate in the next two years. Most businesses are typically unsure about future accommodation size requirements and those that expect to move have a spread of size requirements. A range of factors are influential in businesses selecting a new premises including: the rental or purchase cost; the size, quality and configuration of a unit; the availability of car parking; access to broadband; image of location; proximity to current location; ability to retain current staff and management; and space to expand / intensify if required.

7 EMPLOYMENT LAND NEEDS

- 7.1 In this section we consider the demand for employment land and floorspace over the Plan period 2019-2034. The section considers requirements for employment land in the B1, B2 and B8 use classes. The analysis considers 'demand' for employment land and therefore does not take account of any supply-side factors such as existing employment designations or commitments – these are considered in Section 6.
- 7.2 This report considers a range of scenarios for estimating future employment land requirements in Bassetlaw. The scenarios considered are:
- Labour demand scenarios based on econometric forecasts supplied by Cambridge Econometrics (CE), Oxford Economics (OE), and Experian; and
 - Past completions trend of employment floorspace.
- 7.3 There are relative benefits of each approach. Econometric forecasts take account of differences in expected economic performance moving forward relative to the past, overall and in regard to the sectoral composition of growth. However, a detailed model is required to relate net forecasts to use classes and to estimate gross floorspace and land requirements.
- 7.4 In contrast, past take-up is based on actual delivery of employment development; but does not take account of any differences in future economic performance relative to the past. It is also potentially influenced by past land supply policies.
- 7.5 The labour supply approach, not explicitly included, has the benefit of aligning with the District's housing delivery and therefore provides the employment space needed to support the future growth in the local labour force. However, these factors are less directly linked to the performance of the local economy which is reflected more directly in the other two approaches. The 2017 Housing OAN Update drew OAN conclusions based on the OE baseline forecast which aligned very closely to the demographic-based housing need and as such this scenario is considered to represent a realistic labour supply scenario which is therefore not modelled separately.
- 7.6 This section considers these approaches together, along with the commercial property market assessment and business survey in the previous sections, in order to identify a realistic assessment of the future employment land requirements for the District.

Labour Demand Scenario

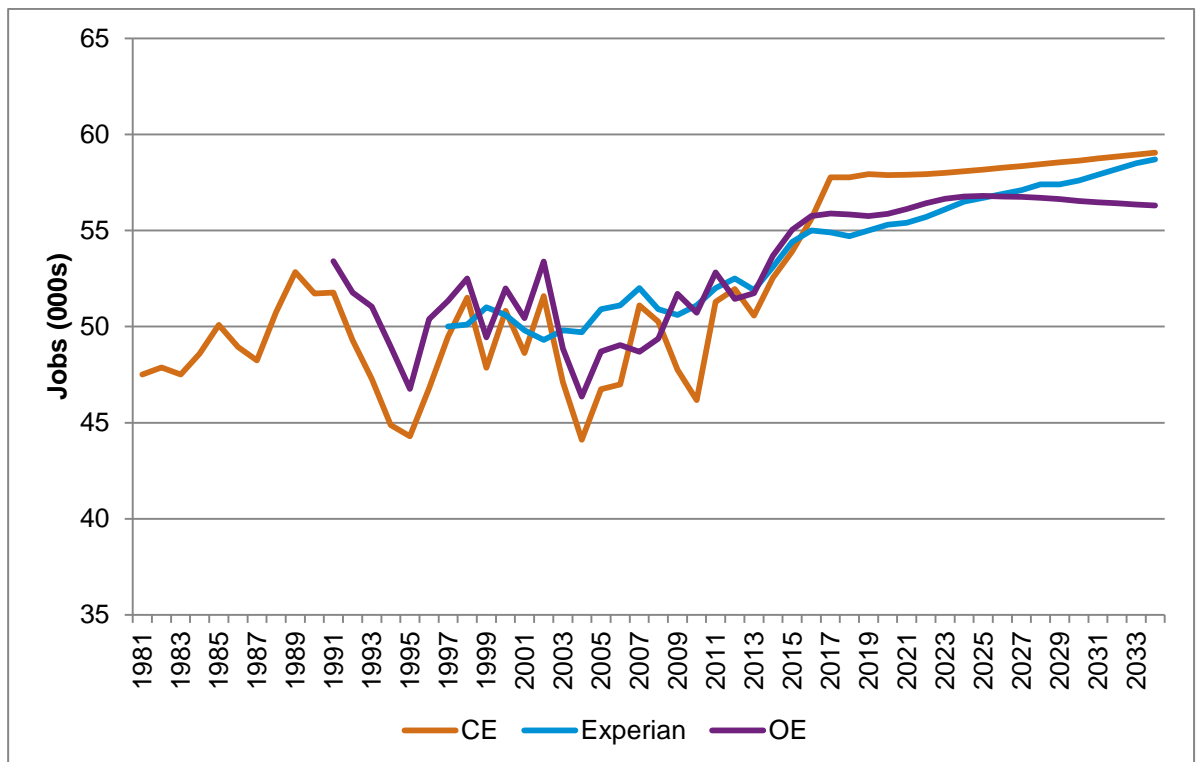
- 7.7 The starting point for the labour demand scenarios is the jobs growth forecasts from CE, OE, and Experian. The econometric modelling takes a 'top-down' approach to produce forecasts at a regional and national level. The forecasting houses then produce macroeconomic forecasts which forecasts, amongst other things, aggregate employment growth at a local authority level by

disaggregating the regional/national growth based on the sectoral structure of each local authority area. This ensures the forecasts are consistent at all geographic levels.

Jobs Growth

- 7.8 The three forecasting houses provide historic jobs growth trends dating back over different periods, and provide forecasts of future jobs growth to 2034. The base date of all forecasts is 2017. In other words, this is the year when the figures change from historic figures to future forecast data. The data prior to 2017 incorporates a mix of recorded historic data and backcasts from the basedate figures. This is done to ensure internal consistency within each forecast, however it does mean the different forecasts do differ in terms of their historic trend data.

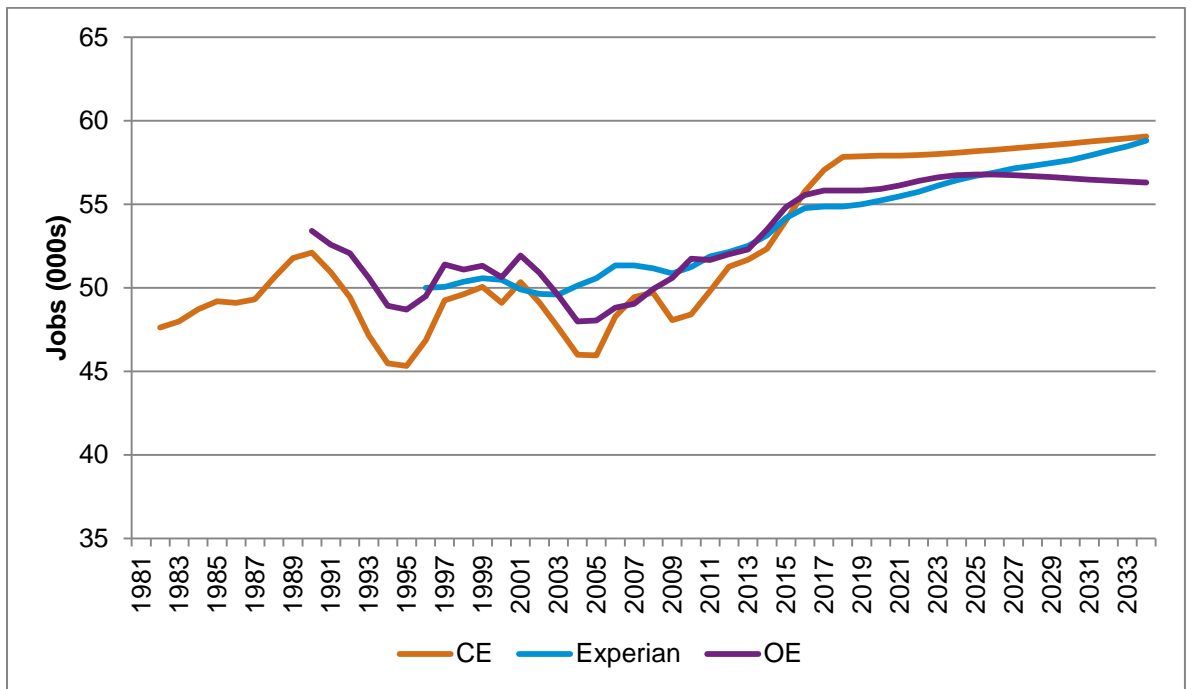
Figure 38: **Total Employment, Bassetlaw, 1981-2035**



Source: CE, Experian, OE

- 7.9 There is significant volatility in the historic data. Therefore, comparing growth over a specific period in each forecast is difficult as a single year can make a significant difference to the figure. Therefore we have based our analysis on a 3 year rolling average of each of the forecasts, as shown in the figure below.
- 7.10 This shows a clear trend of a decline in jobs numbers in the District in the early 1990s reaching a low in 1995. This was followed by a cycle of growth and decline with another trough in 2004. This has been followed by a period of sustained growth from 2004 to the present.

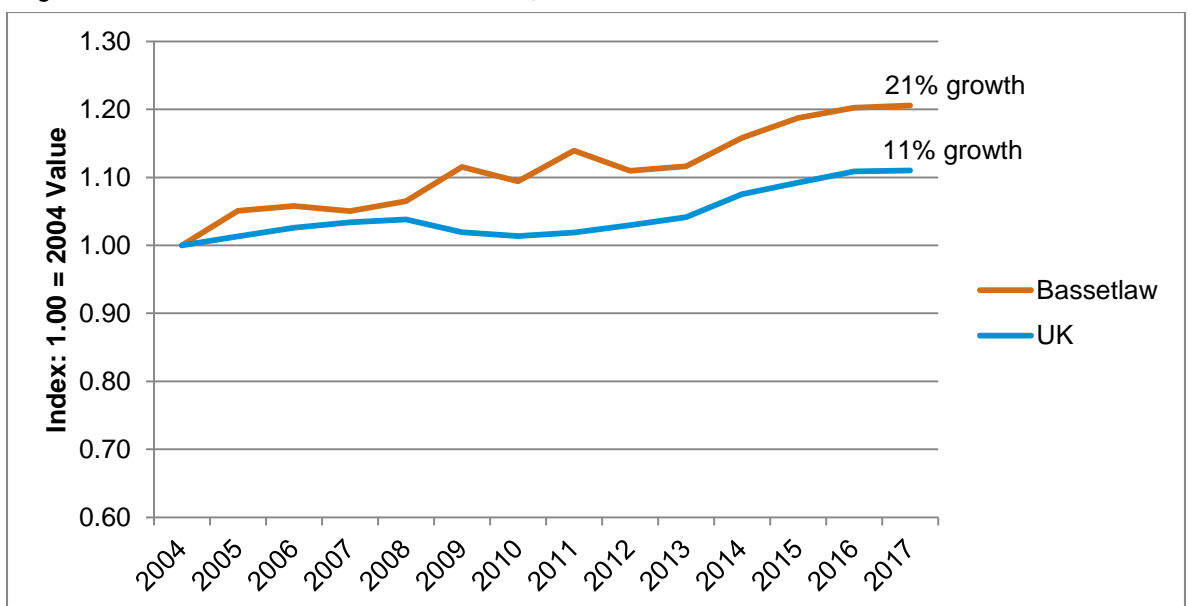
Figure 39: **Total Employment – 3 Year Rolling Average, Bassetlaw, 1981-2035**



Source: GL Hearn analysis of CE, Experian, OE data

- 7.11 The CE forecast shows a drop in the jobs numbers following the international economic downturn in 2008, however this is not reflected in the other forecasts. While nationally this was followed by a period of recession which continued until 2012, this does not appear to have impacted on jobs growth in Bassetlaw which has continued strongly over this period.

Figure 40: **Jobs Growth Bassetlaw vs UK, 2004-17**



Source: GL Hearn analysis of OE data

- 7.12 Overall, there is a significant range in the total jobs growth over this period:
- CE shows a growth of 1,400 jobs;
 - Experian shows a growth of 4,500 jobs; and
 - OE shows a growth of 400 jobs.
- 7.13 This difference is partly due to differences in the forecast jobs number at the starting point in 2018. CE shows a jobs figure of 57,800 jobs in 2018 with a relatively low level of growth to 59,200 jobs by 2035. Conversely, Experian shows a total of 54,700 jobs in 2018 but a much stronger growth over the period to 2035 when the forecast shows 59,200 jobs – equal to the CE figure.
- 7.14 The OE forecast shows a total of 55,800 jobs in 2018 and sees this slowly increasing to 2025 before declining over the latter part of the period. By 2035 the total jobs is only 56,200 – much lower than shown in the other forecasts. This pattern of growth and decline reflects OE's modelling assumptions regarding Brexit. As a result of Brexit OE expect to see falling levels of in-migration to Bassetlaw over the forecast period. In 2025 we expect to see migration levels bottom out around 200. These lower levels of migration than Bassetlaw has typically experienced historically contribute to its falling working age population. A falling working age population in Bassetlaw means a fall in its labour supply and therefore growth in its employment level.
- 7.15 Moreover, the forecasts are inconsistent in terms of the current jobs total in the District. In order to assess the reasons for this we have considered the amount of recent jobs growth as recorded in the annual Business Register and Employment Survey (BRES). This shows that over the period 2009-16 (the period covered by BRES) BRES has recorded a growth of 4,200 jobs. This is broadly in-line with the Experian and OE growth figures. However, the CE is considerably higher. This suggests the strong growth to 2017 shown in the CE forecast is likely to overestimate total jobs.

Table 8: Jobs Growth 2009-16 – Comparison of Forecasts and BRES

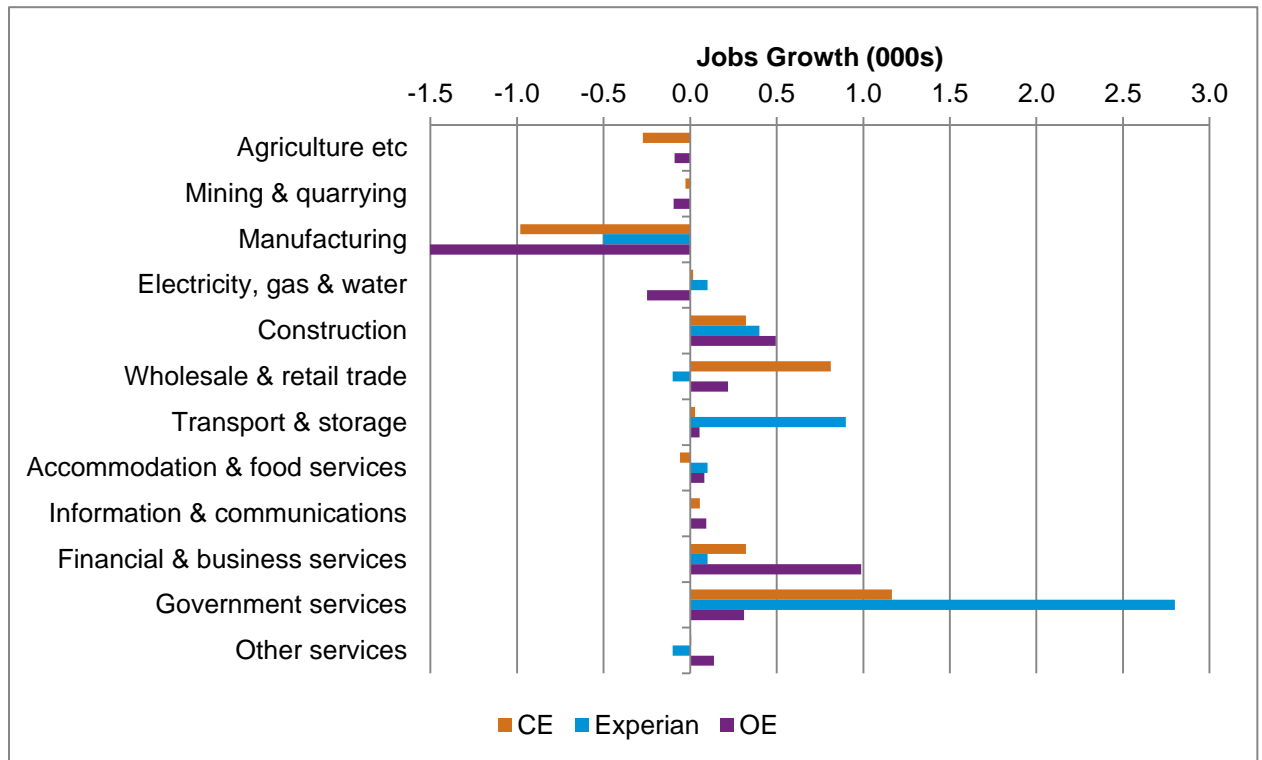
	Growth 2009-16
CE	7,800
Experian	4,400
OE	4,000
BRES	4,200

Source: CE, Experian, OE, and BRES

- 7.16 The breakdown of jobs growth per sector is shown in the figure below. This again highlights some major differences between the forecasts. However, there are some common trends:
- All forecasts show a major decline in manufacturing jobs, with OE being particularly strong and cancelling out other gains;
 - All forecasts show a major growth in the government services sector (public sector) with Experian being particularly strong and likely to over estimate;
 - All forecasts show a growth in the construction and financial and business services sectors;
 - For the wholesale and retail trade and transport and storage sectors the forecasts are split on future growth, however across the two sectors all forecasts show a net growth;

- All forecasts show little change in accommodation and food services, IT and communications, and other sectors.

Figure 41: **Forecast Net Jobs Growth in Bassetlaw, 2018-2035**



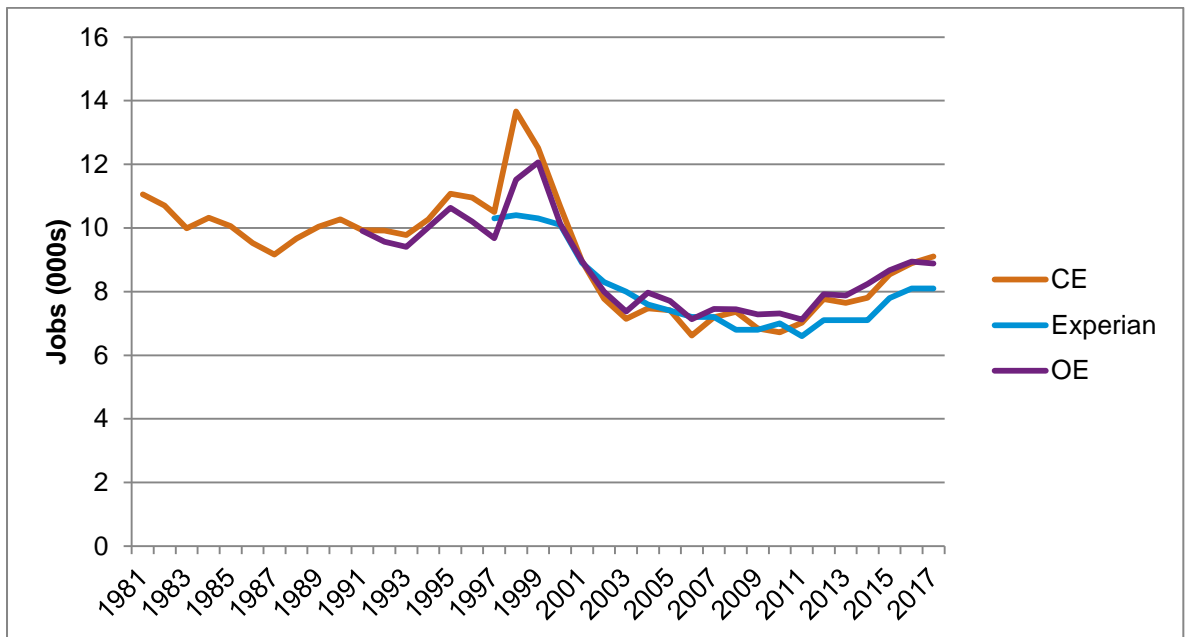
Source: Cambridge Econometrics, Oxford Economics, Experian

7.17 Next we have interrogated a number of sectors identified in the previous analysis as being potential growth sectors and the extent to which this is picked out in the forecasts. This identified two sectors to which we have developed some sensitivity scenarios:

- Manufacturing
- Transport and Storage

7.18 The historic trend in manufacturing jobs shows that there was a clear long-term decline which culminated in a large downturn in the late 1990s / early 2000s. However since the mid-2000s the sector has 'turned a corner' and seen an arrest in the decline and since 2011 there has been steady year on year growth.

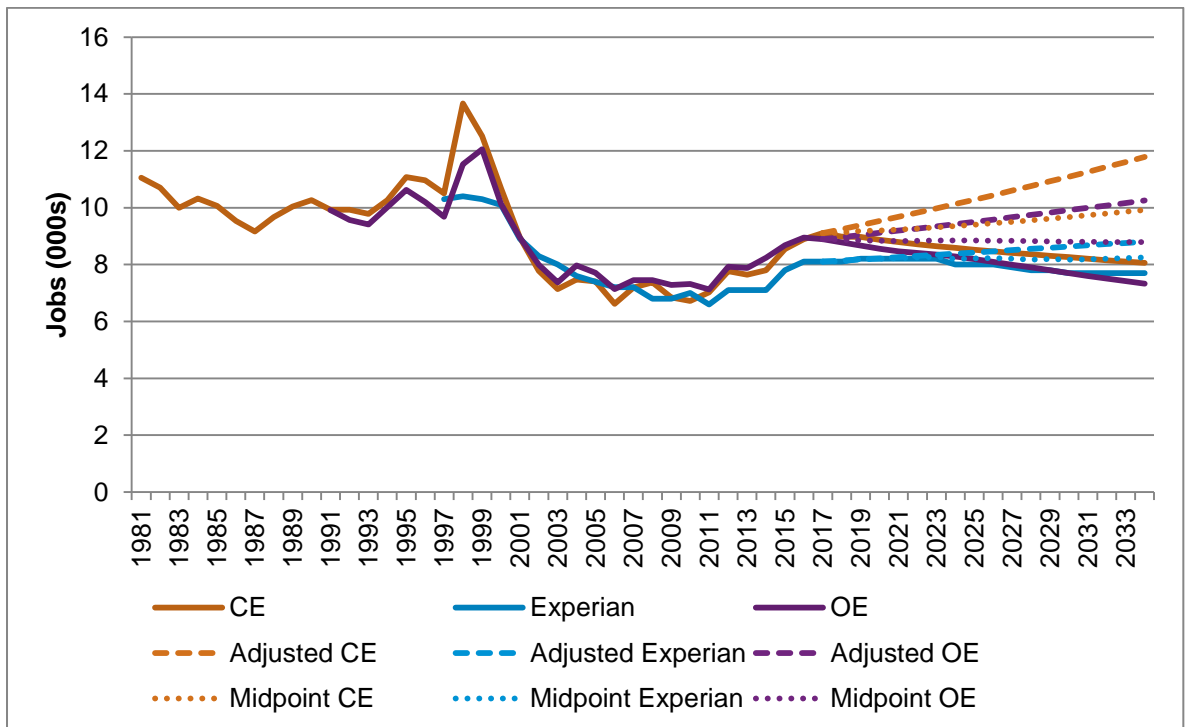
Figure 42: **Manufacturing Jobs, 1981-2017**



Source: CE, Experian, OE

- 7.19 We have therefore developed a range of sensitivity scenarios which consider the growth rate over this more recent period. These projections apply the average annual growth rate, as shown in each forecast, for the sector over the period from 2004-2017 and project this forward to 2035. In all three forecasts this shows a positive growth for the manufacturing sector compared to the negative growth shown in the forecasts. These scenarios provide a more optimistic projection of future sectoral performance based on more recent performance. However they do not reflect any structural changes to the economy taking regard of macro-economic factors – most notably issues relating to Brexit.
- 7.20 A third set of scenarios based on the mid-point between the forecast and the projections was also considered. The mid-point figures sit between the two scenarios recognising the structural implications of the econometric forecasts but also with a greater emphasis on recent strong growth in the manufacturing sector.

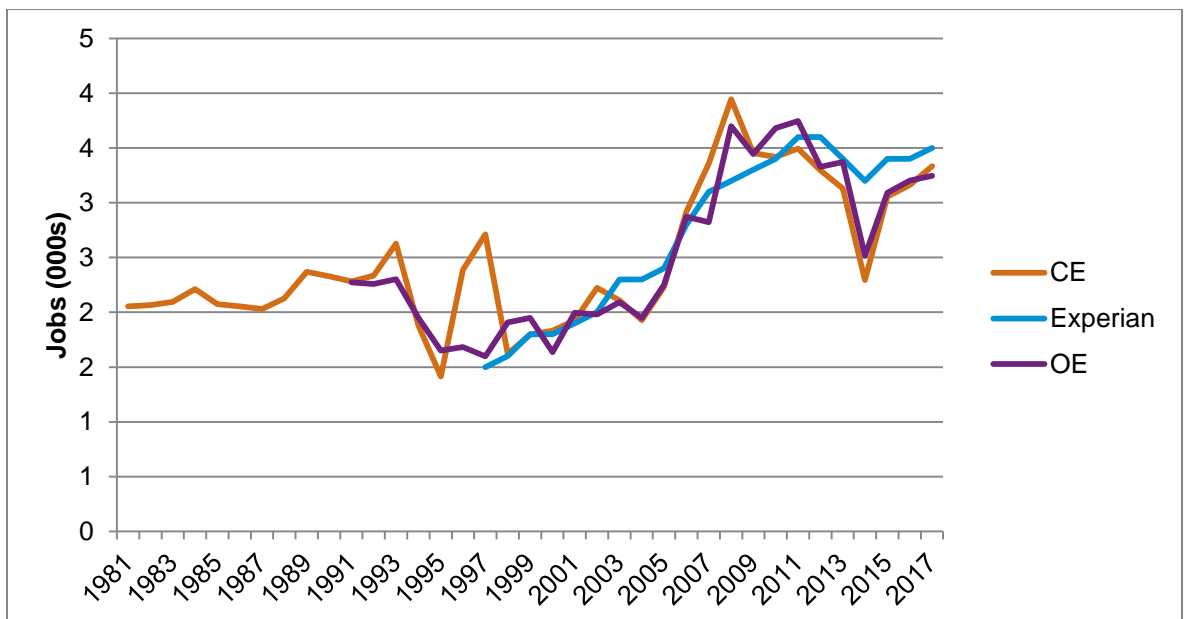
Figure 43: **Manufacturing Sensitivity Scenarios**



Source: Cambridge Econometrics, Oxford Economics, Experian, GL Hearn interpretation

- 7.21 The historic trend in the transport and storage sector is shown in the figure below. This sector has seen strong growth over the period since 2004-2009 followed by a period levelling off. The OE and CE figures show a sharp decline in 2014 although this is immediately rectified by 2015 suggesting a potential aberration in the data for this single year.

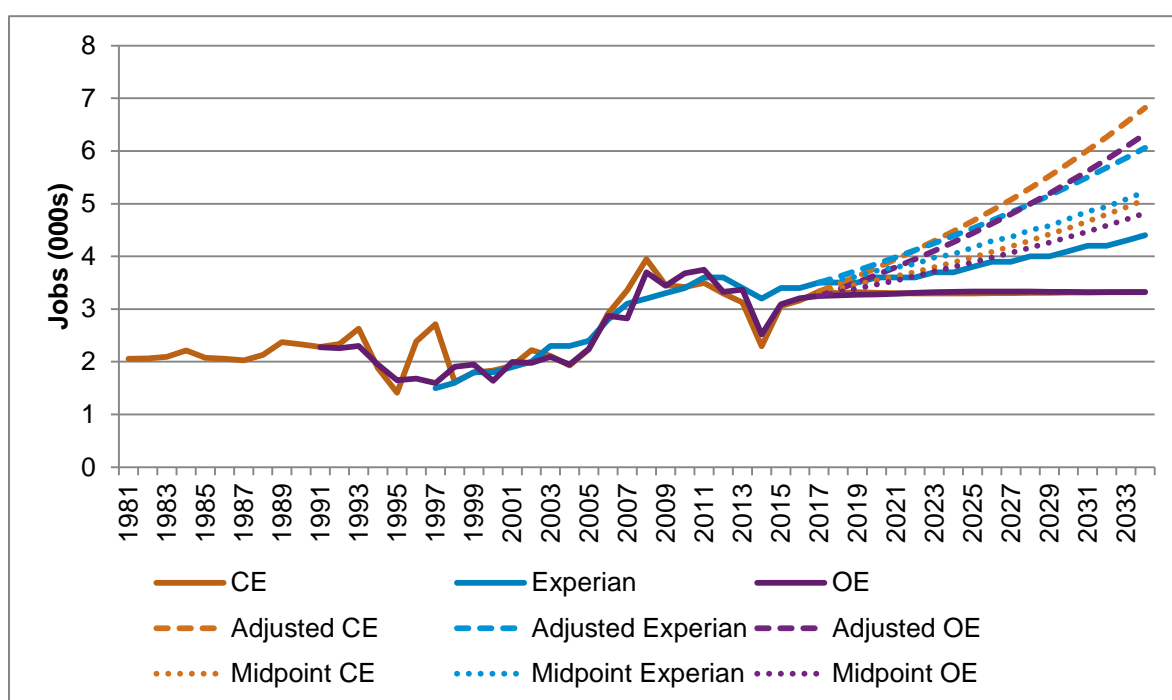
Figure 44: **Transport and Storage Jobs, 1981-2017**



Source: Cambridge Econometrics, Oxford Economics, Experian, GL Hearn interpretation

- 7.22 We have taken a similar approach to the manufacturing sector to prepare sensitivities for the transport and storage sector. These are based on projecting forward the growth rate for the 2004-17 period and again taking a mid-point between these and the forecasts.

Figure 45: **Transport and Storage Sensitivity Scenarios**



Source: Cambridge Econometrics, Oxford Economics, Experian, GL Hearn interpretation

- 7.23 Table below summarises the outcomes of the modelling work with commentary. The OE forecasts are considered to provide the most balanced reflection of the District's economy once uplifts are included to the transport and manufacturing sectors, which align with recent performance in the labour market and commercial property data. It is recognised that stronger performance in the transport and distribution sectors would lead to greater jobs demand.

Table 9: Employment summary of modelled scenarios

Scenario	Jobs (2018-35)	Comments
Baseline – Experian	4,500	Jobs driven by governments services c2,800 – considered over estimate
Baseline - CE	1,400	CE 2018 jobs starting point considered to distort figures
Baseline – OE	400	Jobs suppressed by manufacturing losses c1,200 – doesn't parallel with recent local trends
High growth –	7,400	Very strong uplifts to manufacturing and

Experian		transport, public sector remains over estimated
High growth - CE	8,700	CE 2018 jobs starting point considered to distort figures
High growth – OE	6,500	Very strong uplifts to manufacturing and transport
Midpoint growth – Experian	5,900	Uplifts to manufacturing and transport but public sector remains over estimated
Midpoint growth - CE	5,000	CE 2018 jobs starting point considered to distort figures
Midpoint growth – OE	3,400	More balanced estimate of key sectors – uplifts to manufacturing and transport

Source: Cambridge Econometrics, Oxford Economics, Experian, GL Hearn interpretation

Translating Sectors to Use Classes

7.24 GL Hearn has considered the proportion of employment in each of these sectors which is likely to take place in:

- Office or R&D floorspace (Use Classes B1a and B1b);
- Light industrial floorspace (Use Class B1c) and general industrial floorspace (Use Class B2); and
- Warehouse / distribution floorspace (Use Class B8).

7.25 We have calibrated our standard model, which relates sectors and use classes for the Bassetlaw economy, through interrogation of the composition of employment in key sectors³ from BRES and data from the business survey. This is used to derive the following forecasts of net growth in FTE employment by use class over the Plan period⁴.

Employment Densities and Plot Ratio

7.26 To these figures we have applied standard employment densities taking account of the *HCA Employment Densities Guide: 3rd Edition* (Bilfinger GVA and the Homes and Communities Agency, 2015). We have converted figures to provide employment densities for gross external floor areas on the following basis:

- General Offices (B1a): The 2015 Employment Densities Guide provides a range of plot ratios for B1a uses – broken down by sub-sector. The sub-sectors are Corporate; Professional Services; Public Sector; Technology, Media, and Telecoms; Financial and Insurance; and Call Centres. These have employment ratios ranging from 8-13 sq m (NIA) per FTE employee. We have assumed that the gross external area of buildings is on average 20% higher than the net internal area;
- Research and Development Offices (B1b): The 2015 Employment Densities Guide includes employment densities for research and development (B1b) uses (unlike the 2010 guide). The

³ Analysis of sectoral jobs was undertaken at 4-digit SIC (Standard Industrial Classification) which provides a detailed sub-sectoral breakdown of jobs in each sector to level to identify the primary line(s) of business within each sector.

⁴ The Experian forecast provides outputs for FTE whereas the CE and OE forecasts provide outputs for total jobs only, with FTE derived using data from BRES. For consistency, we have used the FTE figures for Experian derived using the same BRES data.

guide sets out that the sector can be considered to be split into two key directions; an innovation and science focussed direction which is associated with the knowledge economy and life sciences activity, and a more traditional industrial focussed direction which fits alongside manufacturing. An average of 60 sq m GEA per FTE employee has been assumed, assuming that the gross external area of buildings is on average 20% higher than the net internal area;

- Light Industrial (B1c): An average of 49.4 sq m GEA per employee, assuming that the gross external area of buildings is on average 5% higher than the net internal area;
- General Industrial (B2): An average of 37.8 sq m GEA per employee, assuming that the gross external area of buildings is on average 5% higher than the gross internal area;
- Warehouse/ Distribution (B8): An average of 70 sq m GEA per employee. This is at the lower end of the range of employment densities for B8 activities, reflecting the lower proportion of large scale and high bay warehousing in the district.

7.27 Applying these employment densities to the econometric forecasts of net growth in jobs in B-class activities, we have derived forecasts for net changes in employment floorspace over the 2019-2034 period. To calculate the land requirements to support these net changes, we have applied the following plot ratios⁵:

- For B1a/b office and R&D uses we have assumed floorspace will comprise 35% of site area;
- For B1c and B2 industrial uses we have assumed this figure is 40%;
- For B8 warehouse / distribution floorspace we have assumed 50%.

7.28 This generates the following requirement for net additional employment land to support the employment growth forecasts:

Table 10: Net Economic Forecast Employment Land Requirements, 2018-35 (ha)

Use Class	CE	OE	Experian
B1a	0.5	0.8	0.6
B1b	0.0	0.0	0.0
B1c	0.4	0.1	-0.1
B2	-3.4	-5.1	-1.2
B8	-0.3	0.6	3.2
Total	-2.8	-3.7	2.5

Source: Cambridge Econometrics, Oxford Economics, Experian, GL Hearn interpretation

7.29 In identifying how much land to designate as employment sites, we consider that it would be prudent to include a 'margin' to provide for some flexibility, recognising:

- The potential error margin associated with the forecasting process;
- To provide a choice of sites to facilitate competition in the property market;
- To provide flexibility to allow for any delays in individual sites coming forward;
- And to recognise that there is likely to be a level of development of employment-related non-B Class uses (e.g. waste, recycling facilities).

⁵ Informed by the Employment Land Reviews – Guidance Note, A Report to the Office of the Deputy Prime Minister from Environmental Resources Management (December 2004).

- 7.30 To quantify this we have calculated a 2-year margin based on past employment land take-up (gross). In our experience a 2-year margin provides a reasonable level of additional flexibility to sufficiently address the above considerations.
- 7.31 It is of note that the margin provides a considerable driver of need compared to the labour demand baseline highlighting the difference in past trends and baseline projected performance.

Table 11: Economic Forecast Employment Land Requirements, 2018-35 (ha) inc. margin

Use Class	CE	OE	Experian	Margin
B1a	1.0	1.3	1.1	0.5
B1b	1.2	1.2	1.2	1.2
B1c	1.7	1.4	1.2	1.3
B2	2.8	1.1	5.0	6.2
B8	12.6	13.5	16.0	12.9
Total	19.3	18.4	24.5	22.1

Source: Cambridge Econometrics, Oxford Economics, Experian, GL Hearn interpretation

- 7.32 The following tables show the employment land requirements for the sensitivity scenarios discussed previously: the scenarios based on the projected performance from the 2004-17 period for manufacturing and transport; and the mid-point of these.

**Table 12: Projected Employment Land Requirements, 2018-35 (ha) inc. margin
(Manufacturing & Transport Trend for 2004-17 period)**

Use Class	CE	OE	Experian
B1a	1.2	1.5	1.2
B1b	1.5	1.4	1.3
B1c	2.1	1.7	1.3
B2	18.9	12.2	9.5
B8	25.3	22.7	21.1
Total	49.1	39.5	34.4

Source: Cambridge Econometrics, Oxford Economics, Experian, GL Hearn interpretation

**Table 13: Mid-Point Employment Land Requirements, 2018-35 (ha) inc. margin
(mid-point of Forecast and Manufacturing & Transport Trend for 2004-17 period)**

Use Class	CE	OE	Experian
B1a	1.1	1.4	1.1
B1b	1.4	1.3	1.3
B1c	1.9	1.5	1.3
B2	10.9	6.7	7.3
B8	19.0	18.1	18.6
Total	34.2	29.0	29.5

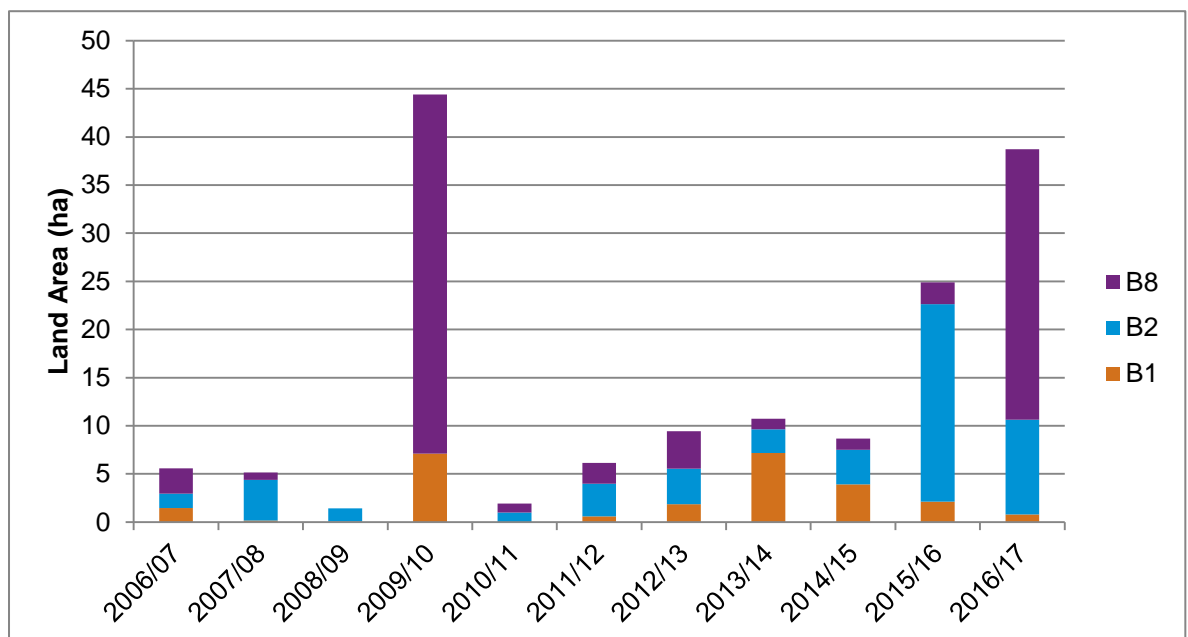
Source: Cambridge Econometrics, Oxford Economics, Experian, GL Hearn interpretation

- 7.33 It should be noted that these forecasts exclude replacement demand which is considered in more detail below.

Completions Trend Scenario

- 7.34 An alternative modelling approach has been taken based on the historic trend of completions of employment premises in Bassetlaw and projecting these forward. This is based on monitoring data recorded by Bassetlaw District Council over the 10 year period since 2006/07. Completions data for this period are shown in Figure 27, broken down by class of employment use.

Figure 46: **Gross Employment Completions, 2006/07-2016/17**



Source: Bassetlaw District Council

- 7.35 Two particularly large completions during this time:
- 2009/10: Steetley Colliery
 - 2016/17: Hive Storage, Retford
- 7.36 These are driven by the redevelopment of large sites. It is questionable whether this is representative of the type of growth seen over the Plan period. This is an issue of supply and policy choices taken by the Council with regard to site allocations.

Net Change

- 7.37 Finally consideration has been given to the net change in employment land. This takes into account losses in sites that have occurred, resulting in the need for alternatives to be brought forward to meet demand. Bassetlaw Council has supplied a list of losses over the last 15 years amounting to 59.0 ha (net) or around 5.9ha per annum or almost half of the completions trend. Losses have primarily been to mixed use residential development with some retail, including a combination of brownfield sites and employment allocations. At brownfield sites it is likely that non employment

uses are more financially viable in ensuring redevelopment is brought forward and at greenfield sites pressures for residential need have led to alternative uses other than planned. Mixed use brownfield redevelopments include Firbeck Colliery and Vesuvius Works former brickworks both of which were not operational – albeit that Seetley Colliery development indicates that large brownfield sites do form an important part of supply.

- 7.38 There is an argument that not all losses of employment land should be replaced or reflected in increased gross land requirement. This would be on the basis that some older sites are less likely to meet future needs and are of a historic scale and type, rather than the amounts of land needed in future. However it is likely that other sites are likely to be lost by 2035, reducing choice within the market and reflecting that many of the completions do take place on existing brownfield sites. On balance 50% of losses or 2.0 ha per annum are expected to require replacement and this should be considered on top of the net forecasts for labour demand, plus margin. The replacement demand is split between B8:B2 floorspace.

Completions Trends

- 7.39 Overall we have developed two completions trend scenarios for annual and project Plan period requirements:
- A projection based on all completions including these large single site developments; and
 - A projection based on the completions trend excluding these outliers.
- 7.40 The outputs of these scenarios, in terms of employment land take, are shown in the table below.

Table 14: Completions Trend Scenario – Forecast Land Requirements, 2018-2035

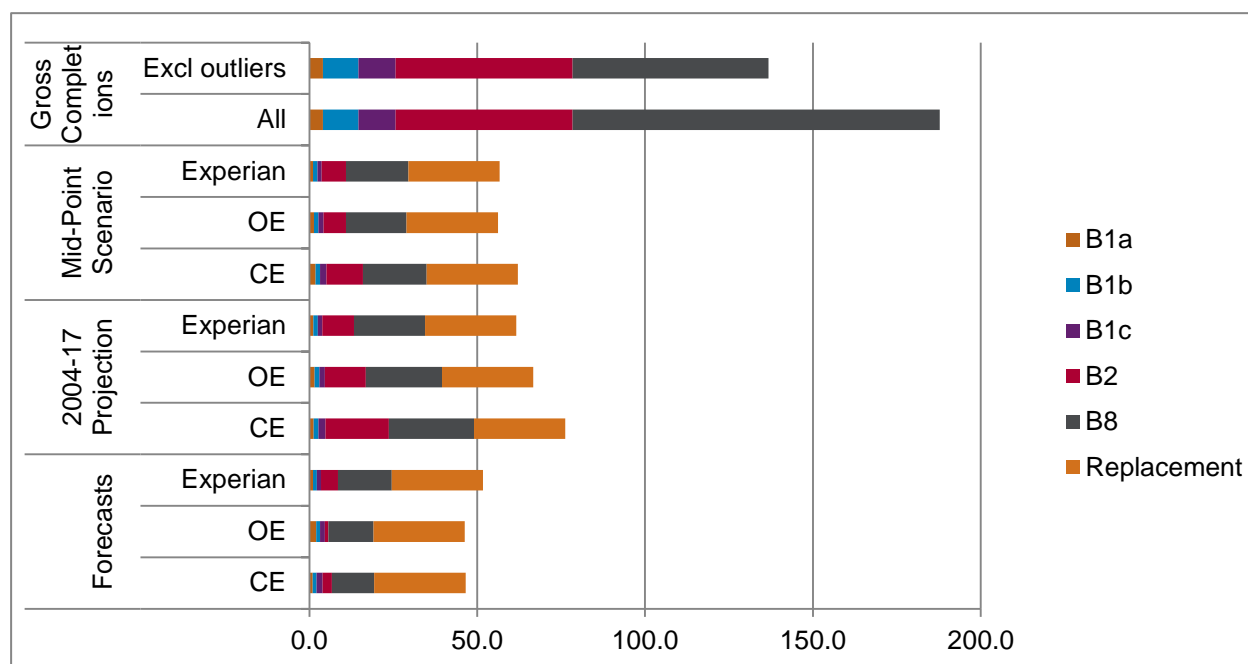
	Gross Completions (Annual)	Excluding Outliers (Annual)	Gross Completions Projected	Excluding Outliers Projected	Historic Losses (Annual)
B1a	0.2	0.2	4.1	4.1	-
B1b	0.6	0.6	10.6	10.6	-
B1c	0.6	0.6	11.0	11.0	-
B2	3.1	3.1	52.8	52.8	-
B8	6.4	3.4	109.4	58.3	-
Total	11.0	8.0	187.8	136.8	5.9

Source: Bassetlaw District Council, GL Hearn

Future Employment Land Requirements – Summary of Scenarios

- 7.41 This section has considered different approaches to estimating future demand for employment land in Bassetlaw. The resulting levels of quantitative need are shown below.

Figure 47: **Comparison of Employment Land Demand Scenarios, 2018-2035 (ha)**



Source: GL Hearn

7.42 A summary of total need is set out below.

Table 15: Forecast Land Requirements, 2018-2035 (ha)

		Baseline	+ Flexible Margin	+ Replacement	= Total
Completions	All	187.8	n/a	n/a	187.8
	Exc Outliers	136.8	n/a	n/a	136.8
Baseline Forecasts	Experian	2.5	22.1	34.0	58.6
	CE	-2.8			53.3
	OE	-3.7			52.4
2004-17 Trend	Experian	12.3			68.4
	CE	27.0			83.1
	OE	17.4			73.5
Baseline / Trend Mid-Point	Experian	7.4			63.5
	CE	12.1			68.2
	OE	6.9			63.0

Source: GL Hearn

7.43 This identifies a large range in potential future need. The Oxford Economics midpoint has been identified as the expected future economic scenario. Therefore the future requirement is **63.0 ha** but recognising this could rise with strong performance in distribution and transport sectors particularly. This is less than completions trend as a proportion of completions take place on existing brownfield sites as redevelopment occurs. Monitoring of performance will be required to assess take up against allocations including the balance of losses and replacement need. Given the strength of

commitments in the district and potential distribution market, a positive approach to development may enable a higher level growth which should be monitored.

8 ECONOMIC LED HOUSING NEED

8.1 Jobs growth in Bassetlaw will generate a need for an increased labour supply to meet increasing employment demand. In turn this will lead to a need for new homes to accommodate the new population.

8.2 The previous section of this report identified a range of future scenarios for job growth. These have been translated into changes in resident labour supply and households. The following assumptions have been made through the process:

- Base population from the 2016-based subnational population projections (SNPP)
- Projections run from 2018 to 2035
- Population data for 2017 fixed by reference to 2017 mid-year population estimates (MYE)
- Population to 2018 derived from assumptions in the 2016-based SNPP rolled forward from 2017 MYE base
- Household Representative Rates (HRRs) from the 2014-based subnational household projections (SNHP) – sensitivities run using 2016-based figures and a part-return to trend method (not presented below)
- Vacancy rate of 3% to convert households into dwellings
- Office for Budget Responsibility (OBR) economic activity rates (adjusted for local situation in Bassetlaw (from 2011 Census data) – July 2018 Fiscal Sustainability Report figures
- Commuting ratio from the 2011 Census (ratio of 1.018 – implying a small level of net out-commuting)
- Double jobbing ratio from the Annual Population Survey (APS) – ratio of 0.960 used
- Assume no changes to unemployment from 2018 onwards

8.3 As a result of the above the following housing needs are identified:

Table 16: Scenarios for employment, labour, households and dwellings 2018-2035

Scenario	Jobs	Change in resident labour-supply	Households 2018	Households 2035	Change in households	Per annum	Dwellings per annum
Baseline – Experian	4,500	1,368	50,270	55,354	5,084	299	308
Baseline - CE	1,400	4,397	50,270	57,456	7,187	423	435
Baseline – OE	400	391	50,270	54,675	4,406	259	267
High growth – Experian	7,400	8,502	50,270	60,306	10,036	590	608
High growth - CE	8,700	7,231	50,270	59,423	9,154	538	555
High growth – OE	6,500	6,352	50,270	58,813	8,543	503	518

Midpoint growth – Experian	5,900	4,886	50,270	57,796	7,526	443	456
Midpoint growth - CE	5,000	5,766	50,270	58,406	8,137	479	493
Midpoint growth – OE	3,400	3,323	50,270	56,711	6,441	379	390

Source: Justin Gardener Consulting, GL Hearn

- 8.4 This identifies a large range in potential future housing need. The Oxford Economics midpoint has been identified as the expected future economic scenario. Therefore the housing need to support this economic scenario is 390 dwellings per annum.

9 ASSESSMENT OF EMPLOYMENT LAND SUPPLY

- 9.1 This section of the report provides a review of the existing and potential employment land in Bassetlaw District. The employment sites subject to assessment were provided by Bassetlaw District Council, and include the main employment locations within the district. Site surveys were undertaken by GL Hearn in July 2018 using a site assessment proforma, which draws on best practice guidance and the PPG. The site assessments addressed:
- The nature and intensity of use of the employment site;
 - Road access, including access by HGVs and servicing of existing businesses;
 - Access to local services/amenities for employees;
 - Physical constraints to the development and use of this site;
 - Nature of any bad neighbour or adjacency issues;
 - The age and quality of existing buildings; and
 - Public transport accessibility and adequacy of parking provision.
- 9.2 A general description of each employment site was prepared. The site survey included specific consideration of the quality of sites and floorspace and their future suitability to meet market demand.
- 9.3 We have reviewed the development potential of sites, the potential for intensification of use and potential for extension of existing sites. Vacant land and floorspace on existing sites has been recorded. Where development opportunities were identified, information was collected regarding the potential availability of land for development, market attractiveness of the site, and any known constraints (including infrastructure) which might impact upon the deliverability of development.
- 9.4 The assessments come with the caveat that neither a detailed investigation of land ownership and lease structures nor detailed development appraisals to assess viability at a site-specific level (in the absence of a development scheme) have been undertaken to inform conclusions on developability. GL Hearn advises that the Council liaise with landowners and developers to consider these issues in detail to inform any future site allocations.
- 9.5 The full site assessment report is provided in appendix A which provides a write up, analysis and conclusion on each of the 74 sites considered. A summary of the assessments and conclusions is included here.
- 9.6 The appended diagrams identify the locations of the key sites considered for Worksop, Retford, Harworth and the A1M Corridor South. Given the sporadic locations for the Rural East / West areas maps have not been provided.
- 9.7 The sites assessments process identified 23 sites in the district which are considered to provide high quality employment land and premises which we recommend should be protected for employment use (including key strategic employment sites, important employment sites and local

employment sites). At these sites, proposals for non-employment related development should be resisted.

- 9.8 Of these 22 sites, 6 sites are considered to be Key Employment Sites – Claylands Avenue, Manton Colliery, Manton Wood East and West, Sandy Lane Estate and Symmetry Park. These are the most important sites for employment uses in the district and should be retained as such. Employment uses at these sites should be protected and development for alternative uses should be resisted.
- 9.9 8 sites are considered to be important employment sites – Shireoaks Triangle, Highgrounds Industrial Estate, Retford Road West, Explore Steetley, Randall Way, Blyth Road West, Blyth Road East and Ollerton Road East and West. These are good quality employment sites and there should be a presumption of retention for continued employment uses. However, it is recognised that some operational flexibility may be required.
- 9.10 There are 8 sites that are considered to be smaller local sites, which meet local needs and the needs of smaller scale businesses. For these sites, it is recommended that there should be a presumption in favour of retention, as to ensure that the needs of local businesses are met.
- 9.11 There are 46 sites which we consider should not be included within the Council's employment land supply. This is by virtue of their suitability (i.e. size, location, current use) and deliverability (i.e. the amount of investment required to bring a site forward).
- 9.12 There are 8 sites that have the potential to be developed to provide employment uses, should the need arise. This includes Gateford Common East and West, Bellmoor, Trinity Farm Land & Trinity Barn Fields, Shireoaks Common (with planning), Firbeck Colliery/Lawn Road, Manton Wood Extension, Land off A57 and South of Snape Lane.
- 9.13 The table below outlines the sites which have been assessed through this Economic Development Needs Assessment, the available land for development and the recommended additional supply. In total these sites covered approximately 1,364 hectares of which 841 hectares is vacant.

Table 17: List of Existing and Potential Employment Sites Reviewed

Area	Site no.	Site Name	Site Area	Site Status	Vacant Area	Planning Permission	Policy Recommendation	Comments	Use Classes
Workshop	1.	Claylands Avenue	63.4	Developed employment site, with vacant land	2.38	No	Key Strategic Employment Site	Good accessibility, well-established site with national companies	B1-B2-B8
	2.	Gateford Common East and West	17.2	Greenfield	17.2	Yes	Potential employment site	Good accessibility, permission for 10ha residential with 30,000 sqm B1	B1-B2-B8
	3.	Shireoaks Triangle	10.3	Fully developed employment site	0	No	Important Employment Site	Good accessibility, well-functioning site	B1-B2-B8
	3.a ⁶	Shireoaks Common	26.6	Greenfield	26.6	Yes	Potential employment site	Permission for 15.4 ha employment and 175 dwellings	B1-B2-B8
	4.	Sandy Lane Industrial Estate	41.2	Planning permission for employment use	0	Yes	Key Strategic Employment Site	Extant permission for a mix of Town Centre uses (up to 24,070 sq m of B Class)	B1-B2-B8
	5.	Highgrounds Industrial Estate	15.11	Fully developed employment site	0	No	Important Employment Site	Good accessibility, well-functioning site	B1-B2-B8
	6.	Eastgate North	6.5	Fully developed employment site	0	No	Local Employment Site	Standard local employment area located in central Workshop	B1-B2-B8
	7.	Eastgate South	2.3	Developed employment site, with vacant land	0.18	No	Not included in supply	Low quality employment accommodation located in central Workshop	B2-B8

⁶ Site considered after site assessments processes

Area	Site no.	Site Name	Site Area	Site Status	Vacant Area	Planning Permission	Policy Recommendation	Comments	Use Classes
	8.	Canal Road North and South	6.5	Fully developed employment site	0	No	Not included in supply	The northern area is a single-occupier site of a poor quality	B1-B2-B8
	9.	Retford Road East	2	Developed employment site, with vacant land	0.49	No	Not included in supply	Mixed-use area	B1-B2-B8
	10.	Retford Road West	4.3	Developed employment site, with vacant land	1.7	No	Important Employment Site	Good accessibility, well-functioning site	B1-B2-B8
	11.	Manton Colliery	35.2	Fully developed employment site	0	No	Key Strategic Employment Site	Well-functioning single-occupier site	B8
	12.	Manton Wood East and West	58	Fully developed employment site	0	No	Key Strategic Employment Site	Good accessibility, large site in close proximity to employment uses	B1-B2-B8
	12.a ⁷	Manton Wood Extension	25ha	Greenfield	25ha	Yes	Potential employment site	Permission for new employment and distribution development	B1-B2-B8
	13.	Land off A57	188.5	Greenfield	188.5	No	Potential employment site	Good accessibility, located in close proximity to Manton Wood East and West	B1-B2-B8
	14.	Explore Steetley	48.9	Fully developed employment site	0	Yes	Important Employment Site	Good access, well-functioning single-occupier site	B1-B2
Retford	15.	Randall Way	11.4	Developed employment site, with vacant land	1.22	No	Important Employment Site	Well-functioning employment site that has received significant investment over recent years	B1-B2-B8

⁷ Site considered after site assessments processes

Area	Site no.	Site Name	Site Area	Site Status	Vacant Area	Planning Permission	Policy Recommendation	Comments	Use Classes
	16.	Hallcroft Industrial Estate	10.2	Fully developed employment site	0	No	Local Employment Site	Well-functioning local employment site	B2-B8
	17.	North of Sewage Works	2.6	Greenfield	2.6	No	Not included in supply	Commercially unattractive location and setting	
	18.	Bellmoor, Trinity Farm Land & Trinity Barn Fields	23.3	Greenfield	23.3	No	Potential employment site	Allocated site. Good access, some existing dwelling houses	B1c-B2-B8
	19.	Babworth Road		Removed					
	20.	Albert Road North		Removed					
	21.	Thrumpton Road South		Removed					
	22.	Thrumpton Goods Yard	2.1	Fully developed employment site	0	No	Local Employment Site	Well-established site with good levels of accessibility	B2-B8
	23.	Thrumpton Lane	2.6	Fully developed employment site	0	Yes (Use Class B2, B1, A1, and A3)	Local Employment Site	Recently redeveloped employment site in a good condition, with good levels of accessibility	B2-B8
	24.	West Carr Industrial Estate	12.4	Developed employment site, with vacant land	2.3	No	Not included in supply	Poor quality units in an area with poor accessibility (due to surrounding railway lines)	B2-B8
	25.	Bridon Wire Works	7.3	Planning permission for non-employment	0	No	Not included in supply	Currently being redeveloped for housing	C3

Area	Site no.	Site Name	Site Area	Site Status	Vacant Area	Planning Permission	Policy Recommendation	Comments	Use Classes
				use					
	26.	Montagu House, London Road		Removed					
	27.	Land south of the common, Ordsall	10.6	Greenfield	10.6	No	Not included in supply	Poor access, not a commercially attractive location	
	28.	North of Grove Road	6.6	Greenfield	6.6	No	Not included in supply	Not a commercially attractive location	
Harworth	29.	Blyth Road West	22.3	Developed employment site, with vacant land	0	No	Important Employment Site	Good level of accessibility, well-functioning site	B2-B8
	30.	Blyth Road South	8	Developed employment and housing site	0	Yes (94 residential units on half of the site)	Not included in supply	Currently being redeveloped for housing	C3
	31.	Blyth Road East	12.1	Developed employment site, with vacant land	5.4	No	Important Employment Site	Well-functioning employment site that has received significant investment over recent years	B1c-B2-B8
	32.	Symmetry Park, Harworth Road	20.7	Planning permission for employment use	20.7	Yes (76,095 sq m employment uses)	Key Strategic Employment Site	Allocated site. Large site, very good accessibility and extant planning permission for employment use	B1c-B2-B8
	33.	South of Snape Lane	76.5	Greenfield	76.5	Yes (235,000 sq m of B1(c), B2 and B8 floorspace)	Potential employment site	Large site, very good accessibility and extant planning permission for employment use	B1c-B2-B8
	34.	Snape Lane	41.3	Greenfield	0	No	Not included in	Unlikely to be demand to bring forward	

Area	Site no.	Site Name	Site Area	Site Status	Vacant Area	Planning Permission	Policy Recommendation	Comments	Use Classes
							supply	considering surrounding developments	
	35.	Snape Road	0.9	Greenfield	0.9	No	Not included in supply	Small woodlands area	
	36.	Main Street	24	Greenfield	24	No	Not included in supply	Poor accessibility	
	37.	Plumtree Estate & Bawtry Road	38.9	Greenfield	38.9	No	Not included in supply	Demand will be met elsewhere in Harworth	
A1 Corridor South	38.	Gamston Airport North	12.9	Greenfield	3	No	Local Employment Site	Well-established site with good levels of accessibility	B2-B8
	39.	Gamston Airport South	3.8	Brownfield	3.8	No	Not included in supply	Accessible location, but the site would need significant investment to be brought into use	B2-B8
	40.	The Bungalow, Jockey Lane	3.5	Fully developed employment site	0	No	Not included in supply	Small, well-functioning single-occupier site	B2-B8
	41.	Markham Moor Roundabout	17.4	Fully developed non-employment site	0	No	Not included in supply	Good level of accessibility, however, site comprises a mix of very small sites which are not commercially attractive	B2-B8
	42.	South of Markham Moor	15.9	Greenfield	15.9	No	Not included in supply	Good level of accessibility, however, some distance from nearby labour supply	
	43.	Great North Road	12.2	Greenfield	12.2	No	Not included in supply	Good level of accessibility, however, some distance from nearby labour supply	
	44.	East of Markham Moor	8.5	Greenfield	8.5	No	Not included in supply	Good level of accessibility, however, some distance from nearby labour supply	
	45.	Ollerton Road West & East	19.3	Fully developed employment site	0	No	Important Employment Site	Good quality industrial space	B1-B2-B8

Area	Site no.	Site Name	Site Area	Site Status	Vacant Area	Planning Permission	Policy Recommendation	Comments	Use Classes
	46.	Ashvale Road	2.7	Fully developed employment site	0	No	Local Employment Site	Well-functioning site	B2-B8
	47.	Lodge Lane	8.6	Fully developed employment site	0	No	Local Employment Site	Well-functioning site	B2-B8
	48.	Eastfield Nurseries, Darlton Road	2.3	Planning permission for non-employment use	2.3	Yes (Camping site)	Not included in supply	Small site, narrow access, extant planning permission for non-employment use	
	49.	Markham Road	1.7	Fully developed non-employment site	0	No	Not included in supply	Not a commercially attractive location, and the site comprises a single dwelling house	
Rural West	50.	Welbeck Colliery, Budby Road	29.6	Brownfield	35.2	No	Not included in supply	Rural area, and any future development would require extensive remediation work	B1-B2-B8
	51.	Holme House Farm, Owday Lane	20.3	Greenfield	20.3	No	Not included in supply	Poor level of accessibility	
	52.	Firbeck Colliery/Lawn Road	24.3	Developed employment site, with vacant land	7.76	No	Potential employment site	Reasonable level of accessibility, and some good quality industrial units	B2
	53.	Harrison Drive		Removed					
	54.	Hundred Acre Lane	2	Greenfield	0	No	Not included in supply	Rural location	B1-B2-B8
	55.	Misson	4.8	Developed employment	1.92	No	Not included in supply	Allocated site. Not a commercially attractive location, and bringing this site forward would	B2-B8

Area	Site no.	Site Name	Site Area	Site Status	Vacant Area	Planning Permission	Policy Recommendation	Comments	Use Classes
				site, with vacant land				require significant investment	
	56.	Station Road	2.2	Greenfield	2.2	No	Not included in supply	Poor accessibility	
	57.	Access Road	11	Fully developed employment site	0	No	Not included in supply	Local employment site of a reasonable quality, mostly used as open storage	B2-B8
	58.	Bridge Bungalow	2.4	Fully developed non-employment site	0	No	Not included in supply	Residential area, and site comprises a single dwelling house	C3
	59.	Old Blyth Road		Removed					
Rural East	60.	South of Ashdown Way	4.9	Greenfield	4.9	No	Not included in supply	Residential area with very poor access through residential streets	C3
	61.	Fox Covert Lane	4.4	Greenfield	4.4	No	Not included in supply	Poor accessibility	
	62.	Old Misterton Works	5.3	Fully developed employment site	0	No	Local Employment Site	Well-functioning local employment site	B2-B8
	63.	Beckingham Ship Yard	8.5	Fully developed employment site	0	No	Not included in supply	Dual occupier site - development opportunities depend on the current occupiers	B2-B8
	64.	Top Pasture Lane	2.5	Greenfield	2.5	No	Not included in supply	Poor accessibility	
	65.	North of Sturton Village	42.1	Greenfield	42.1	No	Not included in supply	Not in a commercially attractive location	

Area	Site no.	Site Name	Site Area	Site Status	Vacant Area	Planning Permission	Policy Recommendation	Comments	Use Classes
	66.	RBM Clarborough Hill	1	Fully developed employment site	0	No	Not included in supply	Small, well-functioning single-occupier site	B2-B8
	67.	Headon Camp	4	Fully developed employment site	0	No	Not included in supply	Rural location, poor quality units	B2-B8
	68.	Treswell Road	14.3	Greenfield	14.3	No	Not included in supply	Not in a commercially attractive location	
	69.	Retford Road	26.1	Greenfield	26.1	No	Not included in supply	Not in a commercially attractive location	
	70.	High Marnham Power Station	158.9	Greenfield and Brownfield	158.9	No	Not included in supply	Not in a commercially attractive location	B2-B8
	71.	Lound Hall	2	Fully developed non-employment site	0	No	Not included in supply	Poor accessibility	
	72.	Lincoln Road		Removed					
			1364.2			841.4			

10 RESIDUAL EMPLOYMENT LAND REQUIREMENT

- 10.1 This section summarises the key findings of the report in order to consider the overall demand supply balance of employment land in the district.

Conclusions by employment use class – baseline and scenarios

- 10.2 This report considers a range of scenarios for estimating future employment land requirements in Bassetlaw. The scenarios considered are:
- Labour demand scenarios based on econometric forecasts supplied by Cambridge Econometrics (CE), Oxford Economics (OE), and Experian; and
 - Past completions trend of employment floorspace.
- 10.3 There is a significant range in the total jobs growth provided by the baseline forecasts over the future Plan period:
- CE shows a growth of 1,400 jobs;
 - Experian shows a growth of 4,500 jobs; and
 - OE shows a growth of 400 jobs.
- 10.4 GL Hearn interrogated the performance of the Bassetlaw economy and identified sectors where it is considered that recent performance justifies considering an adjusted scenario to the baseline forecasts, notably being in manufacturing and transport & storage. The adjusted projections apply the average annual growth rate for these sectors over the period from 2004-2017 and project this forward to 2035, resulting in a higher employment and land use requirement than the baseline forecasts. To provide a balance, the midpoint between the adjusted sectors and baseline forecasts was considered.
- 10.5 In addition to the forecast baseline, a margin has been added to ensure flexibility, with a further allowance made for losses of land based on past trends. These have been compared with past completions trends. The forecast figures result in a large range in potential future need. The Oxford Economics midpoint labour scenario has been identified as the preferred expected future economic scenario based on labour demand. This identifies a large range in potential future need. The Oxford Economics midpoint has been identified as the expected future economic scenario. This has been calculated as a future requirement of **63.0 ha** with higher need under scenarios subject to strong performance in transport and distribution. This is less than completions trend as a proportion of completions take place on existing brownfield sites as redevelopment occurs. Completions trends (excluding outliers) point to a requirement of up to 136.8 ha. Constraints and losses of existing active or inactive brownfield sites should be monitored to ensure that market choice is maintained, taking into account the higher completions trend than the forecast need. Given the strength of

commitments in the district and potential of the distribution market, a positive approach to development may enable a higher level growth which should be monitored.

Assessed supply - prospects of delivery of allocations and commitments across the district

- 10.6 There are a number of major greenfield commitments in the district for industrial development – including at Symmetry Park for 20ha (permitted in 2013 with further permissions granted), South of Snape Lane for 76ha (2017), both Gateford Common (30,000 sqm B1) and Shireoaks Common 15ha as part of mixed use and Manton Wood Extension of 25ha. Combined these amount to some 142 ha.
- 10.7 The Snape Lane site is a considerable area sitting adjacent to the Harworth Industrial Estate and Harworth Business Park area which has continued to grow and incorporates typically higher quality units albeit with some vacancy. Expansion land of upwards of 5 ha remains available centrally. Snape Lane is considered a long term prospect taking into account the relatively slow performance of Symmetry Park in take up terms.
- 10.8 The completion of a large speculative unit of 150,000 sqft is anticipated for autumn 2018 at Symmetry Park which has the prominent access and frontage to the A1M. Notwithstanding the progress at Symmetry Park which demonstrates confidence in the market, the opportunity has been extensively marketed by agents without securing an occupier profile to date and indeed as taken time to progress to construction. Ultimately this indicates that the Harworth area large scale distribution market remains relatively untested. There is an expectation that Symmetry Park will come forward over the Plan period and Snape Lane in due course however there are threats to this level of growth including the effect of Brexit on the economy.
- 10.9 These two schemes in isolation make a very significant contribution to the district's supply. They should be considered as meeting a sub-regional level of demand which is attributable to the A1M and in particular spilling over from the Doncaster market / M18 interchange but are subject to an increase in market performance and demand.
- 10.10 At Worksop there are a number of significant commitments at Shireoaks, Manton Wood and Gateford Common as well as a potential future site at Land of A57 (188.5ha). Sites west of Worksop could support a more local market which has been identified for smaller scale units through the business survey and property market engagement and review. Gateford Common's considerable office permission is at some odds with the local market indicators and should be monitored.

- 10.11 Manton Wood logically extends the existing successful employment area. Whereas Land off A57 is a major scale site with proximity to the A1 albeit with potential environmental constraints on delivery and maximising the plot area. It is not anticipated that the site will progress in the short term given other opportunities in the district.
- 10.12 At Retford, Trinity Farm Land & Trinity Barn Fields forms the major opportunity for future development albeit that this considered a longer term requirement when the existing expansion at Trinity Park Industrial Estate is complete. Part of the site's allocation would be considered suitable.
- 10.13 Elsewhere in the district the Firbeck Colliery/Lawn Road has vacant brownfield land adjacent to the existing industrial estate. There may be remediation costs which make the site's development prohibitive and necessitate a flexible approach to enable its delivery.
- 10.14 The Misson site allocation at a relatively rural location is considered unlikely to come forward given its limited access potential and distance from the strategic network. It may be suitable to remove this from the site allocations.

Quantitative and qualitative balance and gaps in employment land provision

- 10.15 The existing employment sites, commitments and potential employment sites identify a quantum of supply in excess of that identified through the forecast needs analysis. A number of considerations need to be taken into account in this regard. In the first instance it is apparent that the A1M market in the north of the district is emerging and looks to serve a sub regional market for distribution and industrial land that may exceed historic completions (or reflect a higher rate of completions incorporating outliers).
- 10.16 Away from Harworth, it is important to ensure a balance of local employment supply that enables economic growth around the district most notably at Worksop and Retford. At Worksop there are opportunities at both the west and east of the settlement. Finally, consideration should be given to existing employment sites for employment land that take into account local environmental constraints as well as mixed use development opportunities.