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For and on behalf of
Dartmoor National Park Authority

EMPLOYMENT LAND REVIEW

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1.0 INTRODUCTION

- 1.1 In September 2017 Dartmoor National Park Authority (DNPA) appointed DLP Planning (DLP) to undertake their Employment Land Review (ELR). The ELR is intended to inform policies relating to employment within the emerging Local Plan.
- 1.2 DNPA are currently in the process of reviewing their Local Plan, which once adopted will replace their existing Core Strategy¹ (adopted April 2008) and Development Management and Delivery Document² (adopted July 2013).
- 1.3 Through the evidence preparation to support the emerging new Local Plan, DNPA are looking to strategically assess the supply and demand of employment land across the National Park. The new Local Plan will look to build on the Core Strategic Aims as set out in the Core Strategy with the intention to promote a strong and diverse economy which protects and conserves this important landscape and associated wildlife.
- 1.4 This Employment Land Review will be used in conjunction with the Greater Exeter Economic Development Needs Assessment³ (EDNA) to inform specific employment policies in the new Local Plan. In summary the Greater Exeter EDNA suggests a potential growth of around 2,200 net additional jobs in Dartmoor over a 25-year period; which could require between 4 - 5 hectares of new employment land up to 2040.
- 1.5 The review provides a detailed analysis of existing employment sites in the National Park to ensure the Authority has a comprehensive understanding of the current quality and quantity of sites and where appropriate future provision could be delivered.
- 1.6 To undertake the review DLP have built upon the data collated through DNPA's previously collated evidence studies both the earlier 2007 and 2012 Employment Land Reviews, the 2014 Business Survey⁴, the 2015 Economic Prospectus⁵ and Dartmoor's Employment Sector Outlooks⁶.

¹ Dartmoor National Park Authority (2008) [Local Development Framework Core Strategy DPD](#)

² Dartmoor National Park Authority (2013) [Development Management and Delivery Document](#)

³ HJA (2017) Greater Exeter Economic Development Needs Assessment

⁴ DR (2014) [DR Business Survey South Hams, Teignbridge and West Devon](#)

⁵ Dartmoor & Exmoor National Parks (2015) [Economic Prospectus](#)

⁶ SERIO (2013) [Dartmoor's Employment Sector Outlooks](#)

2.0 POLICY CONTEXT

2.1 This section sets out the national and local policy context within which DNPA's employment evidence sits. The National Planning Policy Framework, the purposes of the National Park as set out in the Environment Act 1995 and local economic development and planning policies set out in the Core Strategy and Development Management and Delivery Document have been set out and implications summarised.

National Planning Policy Framework

2.2 The National Planning Policy Framework⁷ (NPPF) was published in March 2012 and sets out the Governments Planning Policies for England. The NPPF forms the overarching set of principles and parameters to which the review should comply.

2.3 Paragraph 19 of the NPPF states that:

- *“The government is committed to ensuring that the planning system does everything it can to support sustainable economic growth. Planning should operate to encourage and not act as an impediment to sustainable growth. Therefore significant weight should be placed on the need to support economic growth through the planning system”.*

2.4 Paragraph 20 goes on to state that:

- *“To help achieve economic growth, local planning authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century”.*

2.5 Paragraph 21 of the NPPF sets out that Local Planning Authorities should:

- *“Set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth;*
- *Set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;*
- *Support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors*

⁷ DCLG (2012) [National Planning Policy Framework](#)

likely to relocate in their area. Policies should be flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances; and

- *Plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries”.*

2.6 Paragraph 22 is also important in this regards and states:

“Planning policies should avoid the long-term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose. Land allocations should be regularly reviewed. Where there is no reasonable prospect of a site being used for the allocated employment use, applications for alternative uses of land or buildings should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities”.

2.7 Finally paragraph 28 seeks to support prosperous rural economies and states:

- *“Planning policies should support economic growth in rural areas in order to create jobs and prosperity by taking a positive approach to sustainable new development. To promote a strong rural economy, local and neighbourhood plans should:*
- *support the sustainable growth and expansion of all types of business and enterprise in rural areas, both through conversion of existing buildings and well designed new buildings*
- *promote the development and diversification of agricultural and other land-based rural businesses*
- *support sustainable rural tourism and leisure developments that benefit businesses in rural areas, communities and visitors, and which respect the character of the countryside. This should include supporting the provision and expansion of tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centres*
- *promote the retention and development of local services and community facilities*

in villages, such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship”.

The Environment Act 1995

2.8 The aims and purposes of National Parks are laid out by law. The 1949 National Parks and Access to the Countryside Act, was a law made by parliament that set out what our National Parks would be like. The Environment Act 1995 revised the original legislation and set out two statutory purposes for national parks in England and Wales:

- Conserve and enhance the natural beauty, wildlife and cultural heritage
- Promote opportunities for the understanding and enjoyment of the special qualities of national parks by the public.

2.9 When National Parks carry out these purposes they also have the duty to:

- Seek to foster the economic and social well-being of local communities within the National Parks.

DNPA Core Strategy DPD 2008

2.10 The Core Strategic Aim of the Core Strategy in relation to employment is;

“To assist in the provision of local employment and business opportunities, particularly in the Local Centres, and in the diversification of the rural economy in ways that are beneficial to the National Park and its community”.

2.11 Paragraph 5.12.1 of the Core Strategy’s chapter on Sustainable economic growth including tourism states;

“In order to maintain the economic health of communities within Dartmoor in the most sustainable way, employment development should generally take place within or adjoining the Local Centres or Rural Settlements. However, some employment development that has an essential need to be located in suitable places in the countryside will help support the local economy”.

2.12 Core Strategy Policy COR18 sets out how DNPA seek to achieve its strategic employment aims:

“Local employment and business opportunities will be sustained by the provision of new employment sites within and adjoining the Local Centres where there is

evidence that demand cannot be met by existing or permitted sites.

In Local Centres and the Rural Settlements, the following types of local employment and business development are appropriate:

(i) provision for the controlled expansion and development of existing businesses;

(ii) support for small scale development needed to facilitate the establishment of office, light industrial, service and creative industries and home-based enterprises, including live-work units.

Outside the classified settlements, local employment and business opportunities will be sustained by:

(a) support for small scale development needed to facilitate the growth of small office and home-based enterprises;

(b) provision for the small-scale expansion and development of existing businesses and sites;

(c) support for development to assist the agricultural and forestry sectors and other rural enterprises with strong links to the cultural heritage of Dartmoor;

(d) support for farm diversification initiatives;

(e) support for appropriate sustainable tourism and small scale recreation enterprises that are based on the intrinsic qualities of the Dartmoor National Park”.

“In all cases, full consideration should be given to the use of existing buildings, particularly traditional buildings. The presumption will be that existing employment sites and premises will be retained for economic uses and proposals for the redevelopment of existing employment sites and premises for non-employment uses will be carefully assessed to ensure that the needs of business and industry in the National Park would not be harmed by such change of use”.

DNPA Development Management and Delivery DPD 2013

2.13 Policy DMD34: Agricultural, forestry and rural business-related development states:

“Agricultural, forestry and other rural enterprise related non-residential development will be permitted where the proposal complies with the following criteria:

(i) there is a demonstrable need that is proportionate to the use of the land;

(ii) it relates well to local landscape features and other building groups;

(iii) it is located and oriented with respect to local topography so as to reduce intrusive effects;

(iv) it demonstrates a scale and form that is well related to its function;

(v) it will not cause unacceptable harm to biodiversity, geodiversity and archaeological and cultural heritage assets, natural drainage or soil stability;

(vi) efficient use is made of existing buildings;

(vii) existing non-traditional structures made redundant by the proposed development are removed.

A condition will be attached to any permission for a new building requiring it to be removed if it becomes redundant for its original purpose and there is no other acceptable use. Power and telephone cables supplying the development should be placed underground”.

2.14 Core Strategy Policy DMD35: Farm diversification states:

“Planning permission will be granted for development to support farm diversification enterprises where the proposal complies with the following criteria:

(i) it is located on the farm holding or on land directly associated with the operation of the farm and is intended to support the farm enterprise;

(ii) it is consistent in its scale and environmental impact with the character and appearance of the area;

(iii) it is based on the scope to add value to the agricultural output of the holding and/or the commercial opportunities offered by the farm's buildings, or environmental qualities or cultural heritage assets.

Traditional buildings should be used in preference to other types of structures. To ensure that any development remains ancillary and tied to the farm enterprise, planning agreements will be used or conditions will be imposed'.

Policy Summary

- 2.15 The NPPF planning policy requirements on employment issues are clear, Local Planning Authorities should establish an economic vision and strategy which positively and proactively encourages sustainable economic growth. The key issue for the National Park is to balance economic growth with the statutory purposes of the National Park designation, specifically the requirement to conserve and enhance the natural beauty, wildlife and cultural heritage of Dartmoor.
- 2.16 The NPPF requires the Authority to plan positively to support existing businesses, plan for new businesses with a sufficiently flexible policy, set out site criteria and identify strategic sites to match the established economic vision/strategy. These should all be addressed through the emerging Dartmoor National Park Authority Local Plan. The key issues for the Authority to consider are:
- The extent of economic potential and how this could be accommodated; and
 - What are the implications for the wider purposes of the National Park.
- 2.17 By considering these issues the Authority will ensure that only sustainable economic growth is planned and supported. It is clear that existing adopted planning policy seeks to reflect this balance by protecting employment sites and assisting in the provision and diversification of economic growth that is beneficial to the National Park. The Core Strategy Development Plan Document (DPD) 2008 seeks to focus growth to more sustainable/accessible locations within the National Park i.e. Local Centres and Rural Settlements, but there appears to be the flexibility required by the NPPF in both Core Strategy and Development Management and Delivery Document to support economic growth across the National Park, if it is considered appropriate and justifiable.

3.0 METHODOLOGY

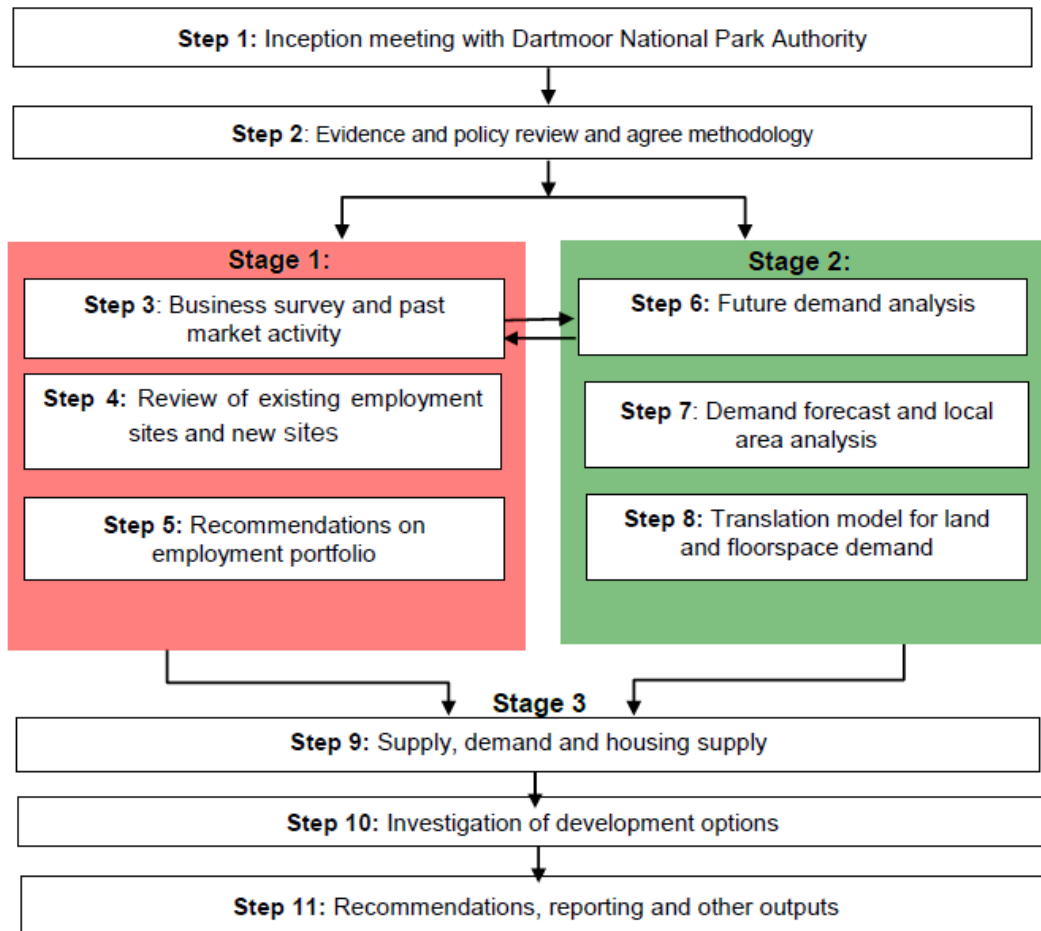
3.1 The main purpose of the Employment Land Review is to strategically assess the demand for and supply of employment land across the National Park. The review will therefore:

- Assess the quantity and quality of existing employment land across the National Park;
- Identify recent patterns of employment land supply and loss;
- Provide analysis on current and potential future business requirements, taking into consideration:
 - a) Market intelligence, trends, signals and relevant research;
 - b) The likely demands of relevant business types for floorspace;
 - c) the views of those involved with economic growth and premises where appropriate;
 - d) An assessment of the suitability of existing (including vacant) and any proposed employment space and its ability to meet future demand.

3.2 The methodological approach to Employment Land Reviews has reflected the latest National Planning Practice Guidance (NPPG) on Housing and Economic Needs Assessments.

3.3 The diagram overleaf illustrates the general approach and is followed by brief details of each step undertaken within each main stage.

Fig 1: Employment Land Review General Approach



Step 1: Inception meeting

- 3.4 The review commenced with an inception meeting to discuss objectives, the work programme and evidence which would be utilised. The inception meeting set out to cover the approach based on the method set out in original proposal and provided the opportunity to meet the project lead and discuss the nuances of the work and how this review fits within the Authority's Local Plan programme.

Step 2: Evidence and policy review and agreed methodology

- 3.5 The Authority has already produced or been involved in the production of a number of valuable employment studies used to inform both the adopted and emerging Local Plan. These include the Economic Prospectus for Dartmoor and Exmoor National Parks⁸, Dartmoor Employment Sector Outlooks⁹, Employment Land Reviews of 2007 and 2012

⁸ Dartmoor & Exmoor National Parks (2015) [Economic Prospectus](#)

⁹ SERIO (2013) [Dartmoor's Employment Sector Outlooks](#)

and the Business Survey 2015¹⁰. Through this review of evidence the review collated the relevant data and used this to build a comprehensive understanding of local requirements and options for delivery. When assessing the evidence, a targeted approach was taken to ensure the appropriate data analysis directly informed the reports assumptions and outputs and that the contextual information only plays a supporting role to this review.

- 3.6 A variety of evidence sources were considered including existing information on employment levels, Census 2011 travel to work data, past employment development activity and analysis of employment development permissions/completions.

Stage 1 (includes Steps 3, 4 and 5)

Step 3: Business Survey and past market activity

- 3.7 The step involved reviewing the 2015 Devon Renaissance (DR) Business Survey and undertaking further consultation with stakeholders. The Business Survey and consultation were utilised to help establish specific business needs, past market activity and barriers to preventing growth.
- 3.8 At this step direct consultation (email exchanges and telephone interviews) were undertaken by contacting commercial agents active in the area, Local Authority economic development officers, members of strategic business bodies and a small cross section of local employers representing key sectors. A list of those contacted is available in **Appendix B**.
- 3.9 Through this primary and secondary data analysis the Employment Land Review sought to consider the quantity and location of the current supply and obtain a greater understanding of local market activity.

Step 4: Review of existing employment sites and new sites

- 3.10 The purpose of Step 4 was to assess existing employment sites. The National Park has a wide variety of employment sites and it was necessary to update the past assessments to confirm the continued suitability of those locations/ premises for future employment uses.

¹⁰ DR (2014) [DR Business Survey South Hams, Teignbridge and West Devon](#)

3.11 Prior to undertaking the employment site assessments, a site proforma, set of site characteristics and list of sites were agreed with the Authority. This allowed for a consistent approach when undertaking the review, ensuring each site was assessed in terms of size, quality, surrounding uses, access, parking, location, image and vacancy etc. These site assessments built upon the information previously recorded in the 2007 and 2012 Employment Land Reviews. Site Proformas for each site are available to view in **Appendix C**.

3.12 The review of existing sites included:

- Those previously reviewed through the 2007 and 2012 Employment Land Reviews
- Future employment expansion opportunities
- New sites coming through the Authority's Call for Sites and Issues consultation
- Sites with extant permission

3.13 Sites were reviewed to consider whether they were still fit for purpose and whether based on a more detailed understanding / local knowledge they should be retained for employment generating uses.

Step 5: Recommendations on employment portfolio

3.14 Building upon the site assessments, the outcome of this step provides the Authority with initial recommendations on each of the agreed sites to inform future policy. These include identifying the suitability of each site for employment uses and recommending whether they should be protected as such through planning policy or whether there could be potential to release certain sites for other more appropriate uses. It should be noted that as evidence the Employment Land Review does not constitute policy, a decision on whether information and recommendations on sites are incorporated into the policies of the emerging Local Plan ultimately need to be made by the Authority.

Stage 2 (includes Steps 6, 7 and 8)

Step 6: Future demand analysis

3.15 Step 6 comprises a high-level analysis of available future employment demand evidence. The outcome of this step was to provide a commentary on current and future

employment demand which would then in turn inform our view on the economic issues affecting the National Park Authority.

Step 7: Demand forecast and local area analysis

- 3.16 Dartmoor National Park Authority has access to strategic employment forecasts as part of the Greater Exeter Strategic Plan. This step involved scrutinising the associated modelling to gain an understanding of this forecasting and local area analysis. Through the assessment of this evidence the review set out to provide a simple sense check to ensure the modelling represented a robust basis on which to proceed.

Step 8: Translation model for land and floorspace demand

- 3.17 At this step the review analysed the translation of employment demand forecasts to ensure that local considerations were taken into place and help the new Local plan consider job growth and floorspace requirements.

Stage 3 (includes Steps 9, 10 and 11)

Step 9: Employment supply and demand (considered against housing supply)

- 3.18 Step 9 involved clearly setting out the equation between employment supply and demand in Dartmoor National Park. The step considered unimplemented permissions, the merits of potential distribution strategies and provides recommendations on sites and policy to inform the emerging Local plan. This step also involved considering the balance of homes to jobs in the locality to provide a sense check on the overall relationship between housing and employment.

Step 10: Investigation of development options

- 3.19 Following the consideration of supply and demand it is important to consider how potential employment sites could be delivered, what are the barriers to delivery and what could the Authority do to overcome these issues.

Step 11: Reporting

- 3.20 Step 11 is the reporting element of the Employment Land Review. Draft Reports were provided prior to a Final Report being issued to Dartmoor National Park Authority.

4.0 STEP 2 EVIDENCE REVIEW

4.1 Step 2 of the Employment Land Review sought to set out a general understanding of the existing employment supply position in Dartmoor National Park through a review of available evidence. This section sets out a summary of existing evidence and an overview of the issues identified in terms of business function, development and growth.

Economic Overview

4.2 It is important to note that Dartmoor National Park Authority is not a defined authority for statistical purposes, therefore the availability of statistical information for the DNPA area is relatively limited or requires a series of assumptions to apportion data sets. On this basis it is considered important to set out the nature of employment across the National Park and the following paragraphs provide a broad economic overview to help provide context.

4.3 Dartmoor has a diverse economy, alongside traditional agriculture and tourism it is also home to a strong creative sector and a growing number of IT and technical businesses. It has a large proportion of small businesses, with high levels of home-based businesses and self-employment. More than half of employed people living on Dartmoor work within professional and skilled trade occupations or at managerial level.

4.4 Agriculture, forestry, tourism and recreation account for around a third of employment and a quarter of turnover in the National Park and with strong links to National Park purposes, the Authority works closely with these sectors to support sustainable growth. These sectors have high levels of part-time, seasonal and minimum wage jobs.

4.5 Farming, forestry and land management is fundamental to the economy of Dartmoor and its landscape. Over 90% of the land within the National Park boundary is used for farming. Land management provides significant employment opportunities in the area. Contractors, surveyors, land agents, machinery operators, bookkeepers, farm managers, foresters, technology developers and vets are just some of the many jobs that are supported by the agricultural sector.

4.6 Tourism creates jobs for local people and income for the local economy. There are 2.3 million visitors a year to the National Park worth £120 million to the local economy. Tourism helps to preserve rural services like buses, village shops and post offices and increases demand for local food and crafts.

Dartmoor National Park Demographic Forecasts 2016¹¹

- 4.7 When considering potential employment growth, it is important to consider demographic trends. The Dartmoor National Park Demographic forecast was published in 2016 and sets out useful information covering demographic forecasts of population, household and housing growth for the 2015-2035 plan period.
- 4.8 The forecasts set out 2014 mid-year population estimates suggest approximately 34,000 people live within the boundary of Dartmoor National Park. The National Parks larger settlements as set out in the Core Strategy include Ashburton, Buckfastleigh, Chagford, Horrabridge, Moretonhampstead, Princetown, South Brent and Yelverton. The population has remained relatively stable between 2001 to 2014, however the demographic forecasts do indicate an ageing population. Between 2001 to 2014 the proportion of those aged 65+ living in the National Park increased from 20% to 26%. When considering the overall population profile the median age of residents in 2014 was 50 (significantly higher than the median average for England which is 40).
- 4.9 The demographic forecasts also include a section on travel to work commuting flows. According to the 2011 Census there were 16,670 workers aged between 16 to 74 living within Dartmoor National Park and 13,394 people aged 16 to 74 working within the Park. As such this results in an overall imbalance highlighted in the forecasts as “*net out-commute, at a ratio of 1.24*” (Edge Analytics, 2016). **Table 1** below specifically highlights commuting ratios across a selection of Authorities.

Table 1 2011 Travel to Work Statistics

	Workers	Workplace-based Employment	Commuting Ratio
Dartmoor National Park	16,670	13,394	1.24
Mid Devon	38,508	30,336	1.27
South Hams	39,999	43,423	0.92
Teignbridge	58,962	50,060	1.18
West Devon	25,241	21,566	1.17

Source: Edge Analytics Demographic Forecasts Table 4 (2001 and 2011 Census)

¹¹ Edge analytics (2016) Dartmoor National Park Demographic Forecasts

- 4.10 Of the 13,394 people working in the national park, 63% also live in the national park, and 22% commute in from the rest of South Hams, Teignbridge, West Devon and Mid Devon.

Fig 2: Dartmoor National Park Travel to Work Dynamics



Source: Edge Analytics Demographic Forecasts 2016 Figure 1 (2011 Census)

Dartmoor and the Wider Greater Exeter Area and Plymouth Sub Region

- 4.11 The Business Register and Employment Survey (BRES) shows total employment over time across the authorities which cover Dartmoor National Park. We have also included Plymouth and Exeter in this analysis to provide strategic context. Given the National Park is spread over three authorities, it can be difficult to establish a specific picture for the Park itself, due to the lack of available statistical information for the ELR area.
- 4.12 **Table 2** shows that employment (jobs) has generally been improving across the Authority areas since the recessionary years of 2009 / 2010 (which shouldn't be considered indicative of longer term employment trends). Statistical code of practice requires the information to be rounded to the nearest 1,000 and therefore figures provide a general view on employment (jobs) levels in each authority. It should also be noted that the figures exclude agriculture as this is not recorded accurately in the BRES data.

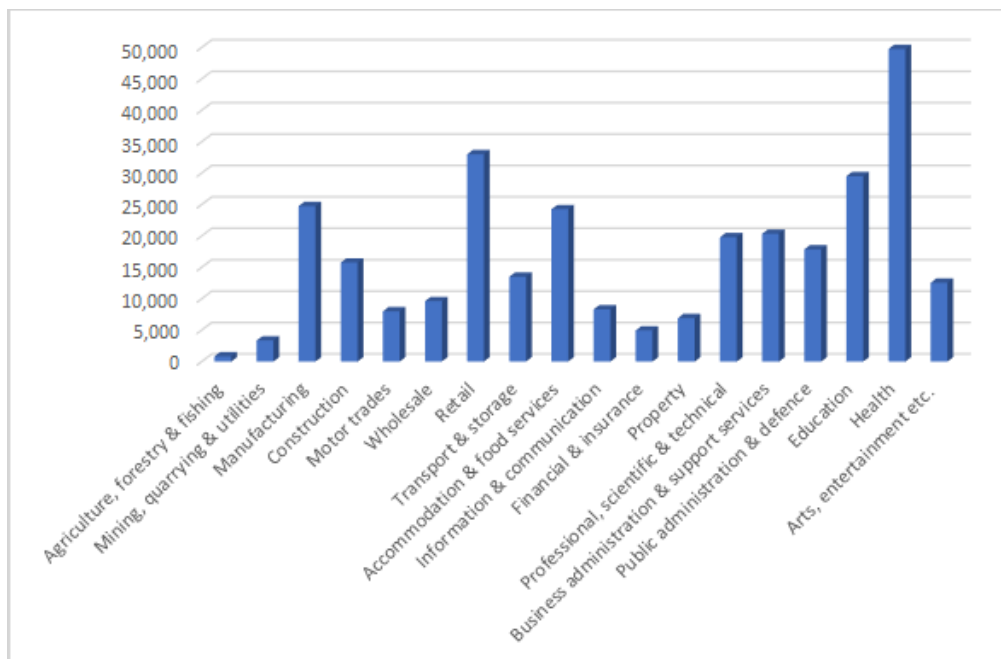
Table 2 Total Employment Change 2009-2015

	2009	2010	2011	2012	2013	2014	2015	Change 2009-2015	Change 2010-2015
Exeter	96,000	94,000	84,000	85,000	89,000	91,000	92,000	-4,000	-2,000
Plymouth	110,000	106,000	106,000	108,000	109,000	110,000	110,000	0	4,000
South Hams	36,000	36,000	36,000	35,000	35,000	36,000	37,000	1,000	1,000
Teignbridge	46,000	45,000	46,000	44,000	45,000	47,000	47,000	1,000	2,000
West Devon	18,000	18,000	17,000	17,000	17,000	17,000	17,000	-1,000	-1,000
Total	306,000	299,000	289,000	289,000	295,000	301,000	303,000	-3,000	4,000

Source: Business Register and Employment Survey (excluding units registered for PAYE only)
These figures exclude farm agriculture (SIC subclass 01000).
Figures rounded to the nearest 1,000

4.13 The graph below has also been produced using information from Nomis. This sets out the broad sectors of industry in which people are employed in the Devon authorities. This information does highlight a level of reliance on public sector employment within health (49,750) and education (29,500), but also key private sector industries such as manufacturing (24,750), retail (33,000) and accommodation & food services (24,250).

Fig 3: Sector Employment 2015 - Plymouth & South West Devon Authorities Combined: Inc. Exeter, Plymouth, South Hams, Teignbridge, West Devon



Source: Business Register and Employment Survey (excluding units registered for PAYE only) : open access
ONS Crown Copyright Reserved [from Nomis on 13 November 2017]
* These figures exclude farm agriculture (SIC subclass 01000).

4.14 **Table 3** below indicates the economic activity among 16-64 year olds across the Devon authorities. This ranges across the authorities from 74% in Exeter to 83% in West Devon. The average across the areas is 79%, broadly similar to the national average of 78%.

Table 3 Economic Activity among 16 - 64 years old 2017

	Economic activity rate - aged 16-64		Unemployment rate - aged 16-64	
	No.	Rate %	No.	Rate %
Exeter	63,300	74	3,700	5.9
Plymouth	136,100	80	7,600	5.6
South Hams	37,200	80	!	!
Teignbridge	58,000	79	1,500	2.6
West Devon	25,300	83	!	!
Total	319,800	79	13,700	4.3

Source: Annual Population Survey

Please note that totals do not add due to rounding and disclosure issues.

! Estimate and confidence interval not available since the group sample size is zero or disclosive (0-2) or group sample size is small (3-9)

20/07/2016 Data has been reweighted in line with the latest ONS estimates

4.15 Information from the Business Register and Employment Survey (BRES) for Dartmoor National Park has been used to broadly identify the existing location of particular employment sectors in the area. Data from 2016 was examined on a Lower Super Output Area (LSOA) basis without proportionally reducing employment in some LSOA to reflect the National Park's actual boundaries. Figures have been rounded to ensure confidentiality of businesses in line with national statistics guidelines¹².

4.16 The level of employment (jobs) for the following sectors are set out in Table 4 overleaf:

- A: Agriculture, forestry and fishing;
- B: Mining and quarrying;
- C: Manufacturing;
- D: Electricity, gas, steam and air conditioning supply (excluded due to no jobs);
- E: Water supply; sewerage, waste management and remediation activities;
- F: Construction;
- G: Wholesale and retail trade; repair of motor vehicles and motorcycles;
- H: Transportation and storage;
- I: Accommodation and food service activities;

¹² UK Statistics Authority. 2009 [Code of Practice](#)

- J: Information and communication;
- K: Financial and insurance activities;
- L: Real estate activities;
- M: Professional, scientific and technical activities;
- N: Administrative and support service activities;
- O: Public administration and defence; compulsory social security;
- P: Education;
- Q: Human health and social work activities;
- R: Arts, entertainment and recreation;
- S: Other service activities.

Table 4 Employment Distribution by Sector for DNPA and environs 2016

2011 super output area - lower layer	A	B	C	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	Total
E01020145 : South Hams 001B	0*	30	600	0	175	75	150	125	10	0	20	75	10	800	20	150	10	10	2,260
E01020148 : South Hams 002A	10*	50	0	0	20	10	0	0	15	0	10	50	5	0	20	0	10	10	210
E01020157 : South Hams 002B	10*	0	175	5	50	400	10	150	20	0	50	40	75	0	175	100	10	15	1,285
E01020160 : South Hams 002C	0*	0	75	0	100	45	50	100	5	0	0	75	10	0	50	25	15	35	585
E01020176 : South Hams 002D	0*	0	30	0	25	50	0	45	10	0	10	10	15	0	30	50	0	5	280
E01020177 : South Hams 002E	0*	0	10	0	50	25	0	0	0	0	5	0	0	0	0	50	0	0	140
E01020329 : West Devon 002C	20*	0	0	0	30	20	10	250	15	0	40	5	175	10	0	75	10	0	660
E01020318 : West Devon 003A	0*	0	0	0	0	125	0	175	20	0	50	25	20	10	30	35	0	15	505
E01020319 : West Devon 003B	0*	0	15	20	50	75	5	150	15	0	10	25	30	0	0	0	5	50	450
E01020323 : West Devon 003C	0*	0	20	0	5	30	5	200	0	0	0	20	25	300	45	50	0	50	750
E01020339 : West Devon 003D	0*	0	10	10	100	50	10	75	5	0	0	75	5	0	75	30	10	20	475
E01020317 : West Devon 006A	0*	10	10	0	20	40	0	125	5	10	0	20	0	10	30	25	0	0	305
E01020324 : West Devon 006B	0*	0	0	10	5	30	40	100	25	0	0	25	5	0	20	100	10	0	370
E01020341 : West Devon 006C	0*	0	0	0	35	5	0	45	0	0	0	10	10	0	0	75	0	10	190
E01020342 : West Devon 006D	10*	0	0	0	10	15	0	10	0	0	0	20	5	0	40	50	0	0	160
E01020315 : West Devon 007C	0*	0	20	0	5	100	0	100	0	10	15	5	0	0	40	150	0	75	520

2011 super output area - lower layer	A	B	C	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	Total
E01020316 : West Devon 007D	0*	0	0	0	50	50	0	100	0	50	15	10	30	0	20	35	20	25	405
E01020274 : Teignbridge 001D	0*	0	40	0	15	30	10	100	35	0	10	30	10	0	20	10	15	10	335
E01020205 : Teignbridge 003A	0*	0	0	0	25	30	0	75	15	0	5	30	35	5	10	50	100	25	405
E01020258 : Teignbridge 003B	0*	0	30	0	45	75	50	100	15	0	10	15	5	10	30	75	15	10	485
E01020259 : Teignbridge 003C	0*	0	5	0	10	10	0	250	0	0	100	10	10	0	45	20	75	10	545
E01020273 : Teignbridge 003D	0*	0	0	0	5	35	10	45	10	0	10	15	15	0	30	30	0	0	205
E01020237 : Teignbridge 007D	0*	0	0	0	50	5	10	125	20	0	0	10	40	0	75	0	0	0	335
E01020195 : Teignbridge 017A	0*	150	25	0	100	75	0	50	75	10	0	25	125	100	300	100	0	0	1,135
E01020196 : Teignbridge 017B	0*	0	50	0	10	125	0	100	0	0	20	30	25	10	75	150	0	15	610
E01020197 : Teignbridge 017C	0*	0	10	0	25	200	0	100	125	10	0	20	50	0	30	125	0	10	705
E01020198 : Teignbridge 017D	10*	0	125	0	20	125	0	25	0	10	0	50	5	0	0	0	0	25	395
E01020199 : Teignbridge 017E	0*	0	5	0	50	30	15	35	5	0	100	20	20	10	50	75	10	0	425
Total	75*	250	1,250	45	1,250	2,000	400	3,000	450	125	450	700	800	1,250	1,250	1,750	300	450	15,795

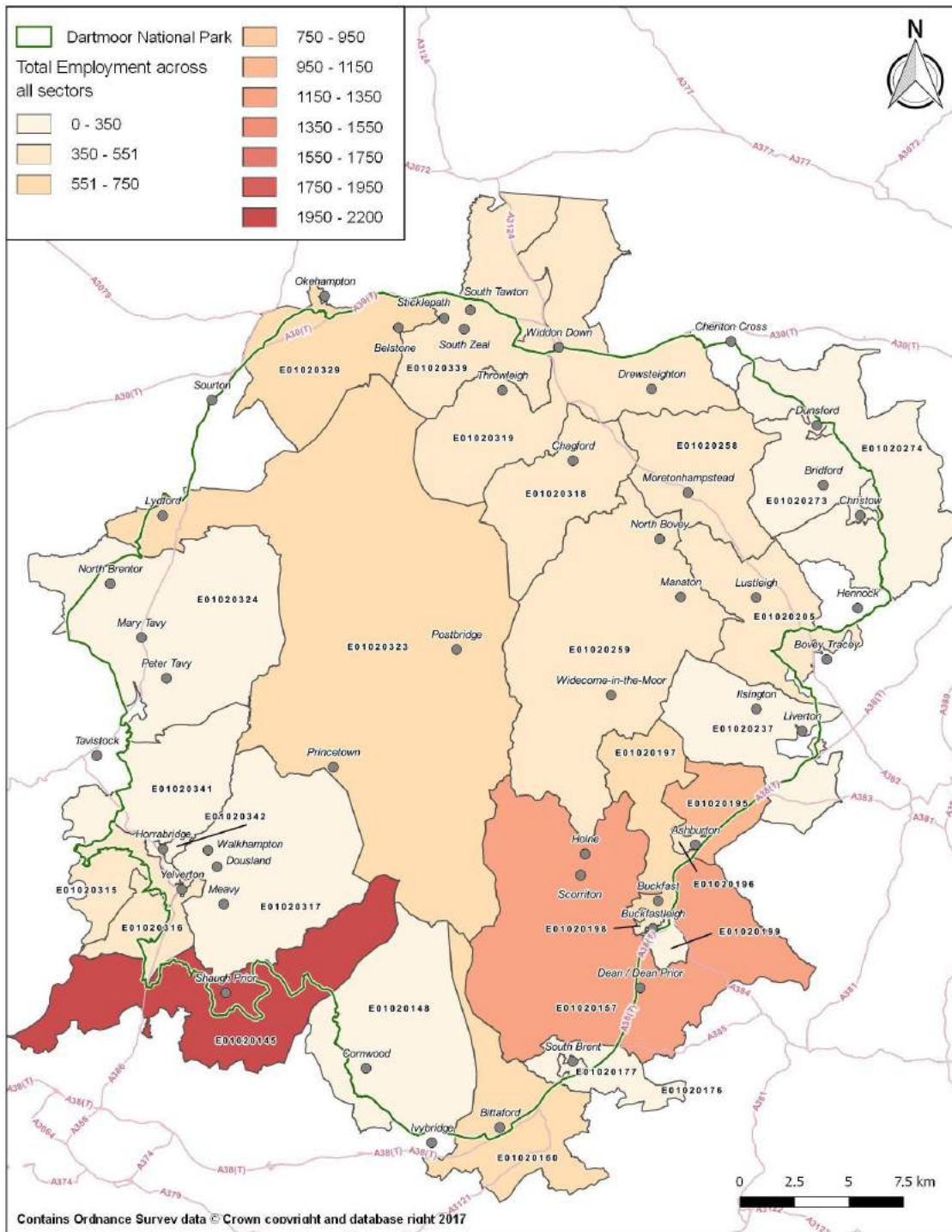
Source: Business Register and Employment Survey (excluding units registered for PAYE only): Open Access

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Please note that totals do not add due to rounding required to meet UK Statistics Authority code of practice

* These figures exclude farm agriculture (SIC subclass 01000).

4.17 The map overleaf illustrates there are large concentrations of employment along the A38 at Ashburton and Buckfastleigh and employment on the Plymouth Fringes in close proximity to the edges of the National Park. In terms of other employment locations, the map illustrates the relatively disbursed nature of overall employment distribution across Dartmoor.



CLIENT Dartmoor National Park Authority	DATE 15.12.2017 SCALE 1:250,000 JOB NO. BE1720	OS REF. DRWG NO. EXIST REV.	Drawn by PMG Checked AT	DLP PLANNING LIMITED Broad Study House (5th floor), Prince Street Bristol, BS1 4DJ t 01179 058 850 f bristol@dipconsultants.co.uk <small>Offices also at: Brixol, Cardiff, East Midlands, Leeds, London, Milton Keynes, Rugby and Sheffield</small>	
	PROJECT Dartmoor Employment Land Review	DRWG TITLE Analysis of Existing Employment			

- 4.18 In addition to the map showing overall employment (jobs) distribution, individual maps for each employment sector have been produced and are set out in **Appendix A**. They show the distribution of employment (Based on the BRES data set out in **Table 4**).
- 4.19 **Table 5** below sets out a summary of the map analysis in **Appendix A** to identify the largest concentrations of employment (by sector) across the National Park. This analysis has been done on a Lower Super Output Area (LSOA) basis and seeks to identify any locational trends for specific sectors. To assist in understanding the LSOA analysis, local centres and rural settlements within each LSOA have been identified to provide an indication of where employment may be located. It is important to note that LSOA's can cover large geographical areas, employment could be located anywhere within the LSOA and in some instances the level of employment (jobs) within the area can be low.

Table 5 Distribution of Employment by Sector (Based on BRES 2016)

Sector	Primary Location	Secondary Locations
B: Mining & quarrying	E01020195 (Ashburton)	E01020148 (Cornwood) E01020145 (Shaugh Prior/Plymouth Fringe)
C: Manufacturing;	E01020145 (Shaugh Prior/Plymouth Fringe)	E01020198 (Buckfastleigh) E01020157 (Holne/Dean Prior/Scorriton)
E: Water supply; sewerage, waste management and remediation activities	-	-
F: Construction	E01020145 (Shaugh Prior/Plymouth Fringe)	E01020195 (Ashburton) E01020160 (Bittaford) E01020339 (South Zeal/South Tawton and Sticklepath)
G: Wholesale & retail trade; repair of motor vehicles & motorcycles	E01020157 (Holne/Dean Prior/Scorriton)	E01020318 (Chagford) E01020196 (Ashburton) E01020197 (Buckfast) E01020198 (Buckfastleigh)
H: Transportation and storage	E01020145 (Shaugh Prior/Plymouth Fringe)	E01020258 (Moretonhampstead) E01020160 (Bittaford)
I: Accommodation & food service activities	E01020329 (Okehampton/Belstone)	E01020359 (North Bovey/Widcombe-in-the-moor/Manaton) E01020323 (Princetown/Postbridge)
J: Information & communication	E01020198 (Buckfastleigh)	E01020197 (Buckfast)
K: Financial & insurance activities	-	E01020316 (Yelverton)
L: Real estate activities	-	E01020198 (Buckfastleigh)

		E01020359 (North Bovey/Widcombe-in-the-moor/Manaton)
M: Professional, scientific & technical activities	-	-
N: Administrative & support service activities	-	E01020195 (Ashburton) E01020339 (South Zeal/South Tawton and Sticklepath)
O: Public administration & defence; compulsory social security	E01020145 (Shaugh Prior/Plymouth Fringe)	E01020323 (Princetown/Postbridge)
P: Education	E01020195 (Ashburton)	E01020157 (Holne/Dean Prior/Scorriton)
Q: Human health & social work activities	-	E01020145 (Shaugh Prior/Plymouth Fringe) E01020195 (Ashburton) E01020196 (Ashburton) E01020197 (Buckfast) E01020157 (Holne/Dean Prior/Scorriton) E01020315 (Yelverton) E01020324 (Mary Tavy/Peter Tavy/North Brentor)
R: Arts, entertainment & recreation	-	E01020205 (Lustleigh)
S: Other Services	-	E01020315 (Yelverton)

4.20 The analysis of existing employment distribution provides an indication of the underlying locational preferences of each employment sector. **Appendix A** contains maps illustrating the distribution for each sector.

Past Employment Permissions 2013-2017

4.21 An indication of future employment requirements can be gained from the analysis of past employment permissions. Take up rates for permitted developments can also show the level of market activity in the National Park. The following information provided by the Authority shows the broad level of floorspace provision granted between 2013-2017. It should be noted that these figures include completions and unimplemented permissions.

Table 6 Past employment floorspace permissions identified by DNPA

Year	Net Permissions (Sq. m)
2013/2014	470+
2014/2015	6,229+
2015/2016	2,769+
2016/2017	494+
2017/Present	2,468+
Totals	12,430 sq. m

Source: DNPA employment monitoring.

4.22 **Table 6** shows that new employment floorspace has been permitted within Dartmoor National Park within each of the last 5 years. We would however note that new provision is generally small (under 100 - 200 sq. m) and overall provision is largely determined by occasional large-scale permissions, such as Tucker's Chuley Road, Ashburton for 4,884 sq. m in 2014/15.

5.0 STEP 3 BUSINESS SURVEY REVIEW AND CONSULTATION (STAGE 1)

5.1 The first step in Stage 1 was the review of the Devon Renaissance (DR) Business Survey and conducting the ELR consultation exercise to obtain views on the economic, supply, demand and delivery from representatives involved with the development of Devon and Dartmoor's economy.

DR Business Survey, South Hams, Teignbridge and West Devon 2014

5.2 In 2014 the Devon Renaissance Company (DR) were commissioned by West Devon Borough Council, Teignbridge District Council, South Hams District Council and Dartmoor National Park Authority to undertake a joint business survey covering their respective authorities.

5.3 The online / telephone survey involved contacting a large number of businesses operating in these areas, to ascertain first-hand information in relation to their business practises and exploring themes significant to each. The survey covered a selection of topics including: general business demographics, developing new ideas, products and services, business planning, current premises and future needs, computers and broadband.

5.4 Overall 365 businesses responded to the survey of which 23% were based within the Dartmoor National Park. The following information taken from the survey highlights some key points for consideration.

5.5 It was apparent from those businesses surveyed that the area has a high proportion of long-standing businesses who have been operating for over 10 years, particularly the case in Dartmoor where 65% of businesses were over 10 years old. At the other end of the scale there appeared to be a lower than average proportion of start-up businesses at just 3% (compared with the south west average of 14%).

5.6 In terms of recruitment a number of those surveyed, particularly those in the accommodation and food service industry reported finding it difficult to recruit staff, an important factor when considering future growth. Those businesses who have tried to recruit recently, reported that they had received an insufficient number of applications; with the reasons given for this surrounding issue of inadequate public transport, inaccessibility, lack of affordable housing and difficulties attracting employees away from large urban areas.

- 5.7 The report also mentions the research undertaken through the 2014 People 1st Review on the hospitality sector¹³ which reported that 38% of reported vacancies in the hospitality and tourism sector are deemed “hard to fill”. This was reiterated in the DR review which highlighted that of those surveyed in Dartmoor “71% of businesses found it hard to meet wage demands” in this industry. 50% of businesses in both South Hams and Dartmoor identified poor public transport links as a constraint or significant constraint to business growth.
- 5.8 The majority of businesses questioned across the review area were looking to plan for moderate growth over the next 3 years, including 53% of those questioned in Dartmoor. When considering future accommodation requirements however only 4% raised the issue of finding suitable available premises to be a significant barrier to development. It was also noted by those looking to grow that they tended to look to find suitable existing premises rather than building or adapting their own premises. Also of note when considering the current situation was that 29% of those businesses surveyed in Dartmoor operated from home, with a further 25% operating from land based/farm premises.
- 5.9 Interestingly given the potential decline in B2 industrial activities, within the Dartmoor National Park (as shown in Figure 7.1 and described in paragraph 7.3.19 of the Greater Exeter EDNA¹⁴), the greatest demand was for industrial premises of all sizes followed by larger land based premises. There was also however some demand for smaller offices in the area.
- 5.10 According to those surveyed, across Dartmoor the most frequently selected locations where businesses are looking to relocate included Ashburton, Buckfastleigh and South Brent, although there were businesses prepared to consider more rural parts of Dartmoor.
- 5.11 It is also interesting to note that 38 of the businesses surveyed had moved into the area over the last 5 years and of these 42% were located within Dartmoor National Park. The majority of these businesses were quoting quality of life and quality of the natural environment as the main draws.

¹³ Peoples 1st (2014) Hospitality and Tourism – Creating a sustainable workforce

¹⁴ HJA (2017) Greater Exeter Economic Development Needs Assessment

DR Survey Findings

5.12 The findings from the DR Business Survey can be summarised as:

- The DR survey respondents included a high number (65%) of existing businesses and a low number of new start-up businesses (3%), so may not reflect the opinion of emerging sectors;
- Recruitment issues were highlighted in DR survey, particularly for accommodation and food services industry and hospitality. The reasons identified included inadequate public transport, inaccessibility, lack of affordable housing and difficulties attracting employees away from large urban areas;
- 53% of businesses in the DR survey were planning for moderate business growth, but only 4% raises issues about suitable premises, indicating that the a high proportion of existing business growth may not require additional floorspace, such reasonable availability of space to facilitate moving;
- 29% of those businesses surveyed in Dartmoor operated from home, with a further 25% operating from land based/farm premises. This indicates that a significant part of the Dartmoor Economy is not accommodated in traditional B Class employment premises;
- Demand for premises across the DR survey area was largely for Industrial premises of all sizes with some demand for small office premises;
- The DR survey identified the most popular location for premises relocations within the National Park as Ashburton, Buckfastleigh and South Brent (all located on the A38);
- A high proportion (42%) of new businesses in the DR survey had chosen to locate within the National Park due to quality of life and the natural environment.

Employment Land Review Consultation

5.13 As part of the Employment Land Review direct consultation was conducted. A selection of local agents, economic development officers, business associations/ partnerships, specific landowners and local employers were approached. Through email exchanges and telephone interviews the consultation obtained informal views on the following:

- The economy of Dartmoor and its place in the wider market;

- Current supply of employment premises e.g. quality, location, rents and availability of stock;
- Economic growth and the demand for premises, including size, location, type and sector preferences.
- Barriers to delivery of employment premises, including funding, planning policy and market appetite.

5.14 Details of the organisations approached are contained in **Appendix B**.

Consultation Findings

5.15 The following points represent a summary of the findings from the consultation exercise:

The economy of Dartmoor and its place in the wider market;

- The Devon/Dartmoor economy is performing well in terms of job growth/unemployment and is tracking the UK economy;
- Agriculture, forestry and tourism continue to be important sectors for Dartmoor;
- There has been job growth in information communication technology (ICT), business services and creative industries in recent years which represent emerging sectors that are more footloose;
- Dartmoor provides a minor supporting role to the main economic drivers of the Devon economy. Dartmoor is different from other Devon rural economies as there is a need to balance economic growth with the purposes of the National Park;
- Accessibility is very important for the economy as the movement of staff, goods and provision of services are critical to economic performance;
- Improvements to broadband connectivity and mobile coverage are allowing more footloose business to prioritise quality of life issues when locating/relocating their business;
- Dartmoor has a unique selling point (USP) which is particularly attractive to food and drink business. These tend to do very well on Dartmoor and there is a good amount of available business support for this sector; and
- Property prices are high which present affordability issues for labour in lower paid sectors.

Current supply of employment premises e.g. quality, location and availability of stock;

- In general quality of premises was considered appropriate reflecting the mix of high and low quality requirements;
- Occupancy was considered high with vacancy generally low. There is a need to ensure premises are occupied due to limited business rate relief for vacancy (3 months);
- Locations that are more accessible, e.g. main A road locations such as the A38, A30 and A386 were popular especially Ashburton, Buckfastleigh and South Brent.
- There is not considered to be a lack of available premises of suitable quality in Dartmoor. However, the Authority has highlighted recent examples where they have been unable to locate businesses who have sought help i.e. Carpenter Oak and R&D Machinery.
- Rental levels do vary across Dartmoor, but in general are currently £3-£6 per sq ft. for Industrial and £5-8 per sq ft for office. Respondents noted that prices were sensitive to wider economic conditions, availability of alternative premises in close proximity (particularly in less accessible locations) and at points required incentives e.g. reductions of rent and or rent free periods.

Economic growth and the demand for premises, size, location, type and sector.

- Key sectors for Dartmoor include all the existing important employment sectors, e.g. tourism, agriculture and forestry, but also emerging sectors such as ICT, businesses services, creative industries (digital and craft), agritech, food and drink, big data and health and social care;
- The Dartmoor economy is diverse and therefore the potential for economic growth is also quite broad;
- The farming community is currently anxious about Brexit and its impact of EU funding;
- Enquiries for employment premises tended to be for smaller scale premises. 99.7% of businesses in Devon are small to medium enterprises (SME). Whilst speculative developments are rare, they can be successfully let;

- Popular locations are those which are more accessible e.g. main A roads such as A38, A30 and A386 and new provision should be directed to these locations;
- Lifestyle and quality of life issues combined with broadband improvements offer scope for slightly less accessible locations. Some respondents highlighted that some occupiers are noting that other quality of life issues are an important part of attracting staff, e.g. walkable locations for town centre facilities and onsite facilities such as gyms.

Barriers to delivery of new provision, funding, planning policy and market appetite.

- When it came to making planning decisions some respondents considered that the Authority prioritised protecting the environment at the expense of economic development. It was suggested that the Authority could be more flexible, but the majority of respondents did also express an awareness of the National Parks special qualities and an understanding of need to protect the Park from inappropriate development.
- Financial viability of employment development is a key consideration. Whilst availability of finance is less of a problem now, developers need certainty to deliver development given the lower financial margins and associated cost of infrastructure. Employment development is viable in the National Park;
- Speculative development across Devon is generally limited, with several respondents stating that given the constraints developers were unlikely to pursue speculative development proposals. Some examples were given of speculative developments within the National Park, but investment tends to be driven by existing businesses or developers who can secure pre-lets;
- Public funding/support is available, including the Greater Dartmoor LEAF which is/has been providing capital grants to support business start ups and growth. Capital funding for site delivery and infrastructure is relatively scarce;
- Many respondents considered that DNPA could be more proactive about economic development suggesting a specific economic development officer for the National Park;

- Planning policy needed to be more specific about employment development, and identify sites for allocation and protection/redevelopment. Greater certainty was required to support delivery and planning can help with this;
- A focus on delivery of sites within Local Centres and redevelopment of existing employment sites would help support economic growth, whilst balancing the purposes of the National Park to conserve the natural environment;
- Mixed views were received on agricultural diversification and rural enterprise policy being a barrier to delivery. Some respondents highlighted that the Authority should be more flexible, whilst others thought policy was flexible enough already;
- Processing planning applications can be slow (particularly for simple changes of use) and planning policy currently provides no certainty regarding the outcome. Some respondents had been frustrated by subjective decisions that appeared to always give little weight to the economic benefits of development;
- It was considered that restrictions to business signage within the National Park was an issue for business viability, particularly those creative and retail businesses that needed signage to direct customers to business premises;
- It was noted by one respondent that the high moor had different environmental characteristics and was more sensitive to development than the fringes within the National Park. It was suggested that the Authority could be more flexible to employment proposals in fringe locations;
- Changes to business rates nationally was an issue for employment space delivery and retention, as rate relief had been reduced and this added an extra financial burden and reduced the likelihood of investment for continued employment use.

6.0 STEPS 4/5 EMPLOYMENT SITE ASSESSMENTS AND RECOMMENDATIONS (STAGE 1)

6.1 This section of the review sets out the overall findings of the Employment Site Assessments. The site assessments form a large part of the primary analysis associated with this review and involved a survey of existing employment areas / premises to understand the current quantity, quality, usage and general suitability of sites.

6.2 For each site an overview of the existing provision is provided and recommendations surrounding their continued use. Detailed site criteria, maps and assessment information is contained within the **Appendix B**.

Employment Site Assessments

6.3 The site assessments of existing employment sites were undertaken by the DLP Planning team in conjunction with planning officers from Dartmoor National Park Authority. They build on previous work undertaken in 2007 and 2012 Employment Land Reviews.

6.4 The site assessments were conducted to establish the current status of existing employment sites including their:

- General appearance;
- Current occupants/ vacancies;
- Market attractiveness;
- Environmental quality and known constraints;
- Strategic access and accessibility;
- Relevant planning issues; and
- Developable space

6.5 The list of sites provided by the Authority included all sites assessed in the previous 2007 and 2012 Employment Land Reviews and other commercial/industrial sites identified by the National Park Authority. The full list of those sites surveyed as part of this review is as follows:

- ELR01 - A38 Garage, Ashburton;
- ELR02 - Buckfast Spinning Co, Lower Mills, Buckfast;

- ELR03 - Buckfastleigh Spinning Works, Chapple Street, Buckfastleigh;
- ELR04 - Bullycleaves Quarry, Buckfast Road, Buckfast;
- ELR05 - Chuley Road Estate, Chuley Road, Ashburton;
- ELR06 - Crannafords Industrial Park, Chagford;
- ELR07 - Dial Motors, Buckfastleigh;
- ELR08 - Dolbeare Meadow, Eastern Road, Ashburton;
- ELR09 - Duchy Yard and Dartmoor Brewery, Princetown;
- ELR10 - Elliot Plain Warehouse, Buckfastleigh;
- ELR11 - Gidleys Meadow Rural Workshops, Christow;
- ELR12 - Glentor, Balland Lane, Ashburton;
- ELR13 - Mardle Way, Buckfastleigh;
- ELR14 - Linhay Business Park, Ashburton;
- ELR15 - Long Meadow Business Parks, South Brent;
- ELR16 - Manor Mills, Avon Works, South Brent;
- ELR17 - Dial Iron Foundry Site, Buckfastleigh;
- ELR18 - The Old Mill & Old Gasworks, Moretonhampstead;
- ELR19 - Old English Industrial Estate, near Yelverton;
- ELR20 - Old Station Yard, South Brent;
- ELR21 - Owlesfoot Garage and Wainhomes, South Zeal;
- ELR22 - Pittscliffe Industrial Estate, Okehampton Road, near Tavistock;
- ELR23 - Redlake Trading Estate, Ivybridge;
- ELR25 - Land West of Public Car Park, Station Road, Princetown;
- ELR26 - Brent Mill Farm, South Brent;
- ELR27 - Thompsons, Station Road, Moretonhampstead;
- ELR28 - Betton Way, Moretonhamptead;
- ELR29 - Land at Whiddon Down;
- ELR30 - Chagford Cattle Market, Crannafords Bridge, Chagford;
- ELR31 - Higher Buckfast Mill, Buckfast Abbey, Buckfast;
- ELR32 - Delamore Business Park, Cornwood;
- ELR33 - Duchy Square, Princetown;

Site Assessment Criteria

6.6 The site assessment criteria was agreed with the Authority prior to the survey. The general approach was based on the ODPM 2004 Planning Employment Land Reviews¹⁵ guidance (now revoked), updated to reflect the NPPF and good practice on employment planning. The site assessment criteria include:

- Site reference;
- Address;
- Site area;
- Market segment;
- Description of site and surrounding uses;
- Planning history/ownership, including unit occupier, business, use class and footprint;
- Market attractiveness criteria;
- Market appraisal;
- Sustainable development factors;
- Environmental quality and known constraints;
- Strategic access and accessibility;
- Strategic planning factors;
- Developable space and vacancy; and
- Recommendation.

6.7 It is considered that the normal operation of the commercial market requires a level of vacant premises and floorspace to enable churn. The employment site assessment represents a snapshot in time and the vacant premises identified at this time might well become occupied very quickly. As part of the site survey, sites with vacant premises have been assessed. Those which are clearly unsuitable for continued employment use have been identified. In general, this would be where concentrations of poor quality vacant floorspace have been discovered and market agents have indicated no/limited market interest.

Summary of Findings

6.8 Detailed employment site assessment proformas are attached in **Appendix C** setting out the consideration of each site. **Table 7** sets out the key characteristics of the existing

¹⁵ ODPM (2004) [Employment Land Reviews](#)

employment sites and initial recommendations for consideration by the Authority. Initial recommendations include:

- Protect – The site could potentially be safeguarded for continue employment use;
- Intensify – The site could potentially be intensified, by making better use of vacant or underused space for employment additional floorspace;
- Redevelop – The site of could potentially be redeveloped in part or comprehensively for employment or mixed us development
- Release – The site has relatively low occupancy/demand and could potentially be considered for release for non-employment uses
- Develop – The site represents a new employment land opportunity and could potentially be considered for an allocation.

Table 7 Summary of Key Site Characteristics

Ref	Address	Site Size ha	Mix of uses	Floorspace (sq. m)	Occupancy	Quality	Accessibility	Initial Recommendation
ELR01	A38 Garage Business Park, Ashburton	0.67	B1/B2/D2	1,386	Good	Good / Average	Good	Protect
ELR02	Buckfast Spinning Co, Lower Mills, Buckfast	4.19	A1/B1/B2/ Vacant land	20,981	Poor	Average	Good	Re-develop
ELR03	Buckfastleigh Spinning Works, Chapple Street, Buckfastleigh	2.54	B1/ B2	3,563	Average / Scope for Intensification	Average/ Poor	Good	Protect/ Intensify
ELR04	Bullycleaves Quarry, Buckfast Road, Buckfastleigh	2.91	B1/B2/B8	1,117	Average	Average/ Poor	Good	Protect
ELR05	Chuley Road Estate, Chuley Road, Ashburton	2.73	A1/B1/B2/D1	3,061	Average / Scope for intensification	Good/ Average/ Poor	Good	Protect / Intensify
ELR06	Crannafords Industrial Park, Chagford	0.43	B1/B2/B8	969	Average	Poor	Average	Protect / Intensify
ELR07	Dial Motors, Buckfastleigh	0.10	A1/B2/SG	200	Average	Average	Good	Protect
ELR08	Dolbeare Meadow, Eastern Road, Ashburton	1.37	B1/ Vacant land	896	Good/ Vacant land	Good	Good	Protect / Intensify
ELR09	Duchy Yard, Princetown	0.55	B1/B2	1,047	Average	Average	Average	Protect
ELR10	Elliot Plain Warehouse, Buckfastleigh	0.03	n/a	318	Poor	Poor	Good	Redevelop/ Release
ELR11	Gidleys Meadow Rural Workshops, Christow	0.55	B1/B8/SG	1,099	Good	Average	Average	Protect
ELR12	Glentor, Balland Lane, Ashburton	0.32	B1	329	Good	Good	Good	Protect
ELR13	Mardle Way Business Park, Buckfastleigh	1.91	A1/B1/B2/B8	8,064	Good	Average	Good	Protect

Ref	Address	Site Size ha	Mix of uses	Floorspace (sq. m)	Occupancy	Quality	Accessibility	Initial Recommendation
ELR14	Linhay Business Park, Ashburton	2.03	A1/ B1	6,482	Good	Good	Good	Protect
ELR15	Long Meadow Business Parks, South Brent	1.45	B1/B2/B8	4,629	Good	Average	Good	Protect
ELR16	Manor Mills, Avon Works, South Brent	1.26	B8/ Vacant Land	2,154	Good / scope for intensification	Average / Poor	Average	Protect / intensify
ELR17	Dial Iron Foundry Site, Fore Street, Buckfastleigh	0.11	n/a	Unknown	Poor	Poor	Poor	Redevelop/ Release
ELR18	The Old Mill, Station Road, Moretonhampstead	0.45	A1/B1/B8	940	Good	Average	Good	Protect
ELR19	Old English Industrial Estate, Princetown Road	0.33	B8	1,154	Average	Average	Average	Protect
ELR20	Old Station Yard, South Brent	0.58	A1/B2	1,329	Good	Average	Good	Protect
ELR21	Owlesfoot Garage and Wainhomes, South Zeal, Okehampton	0.22	B1/ B2	788	Good	Average	Good	Protect
ELR22	Pitts Cleave Industrial Estate, Okehampton Road Tavistock	3.62	A1/B1/B2/B8	6,624	Good	Good / Average	Good	Protect
ELR23	Redlake Trading Estate	2.89	B1/B8	Unknown	Average	Average	Average	Protect
ELR25	Land West of Public Car Park, Station Road, Princetown	0.93	n/a	n/a	n/a	n/a	Average	Develop (already permitted)
ELR26	Brent Mill Farm, South Brent	1.48	n/a	n/a	n/a	n/a	Good	Develop

Ref	Address	Site Size ha	Mix of uses	Floorspace (sq. m)	Occupancy	Quality	Accessibility	Initial Recommendation
ELR27	Thompsons, Station Road, Moretonhampstead	2.76	SG/B8	5,248	Average / Poor	Average	Average	Redevelop
ELR28	Betton Way Rural Workshops, Moretonhamstead	0.47	B1/B2	1,139	Good	Average	Average	Protect
ELR29	Whiddon Down, Okehampton,	1.61	n/a	n/a	n/a	n/a	Good	Develop
ELR30	Cattle Market, Crannafords Bridge, Chagford	1.58	n/a	n/a	n/a	n/a	Average	Develop
ELR31	Higher Buckfast Mill, Buckfast Abbey, Buckfast	0.54	B1	1,571	Average	Good	Good	Protect
ELR32	Delamore Business Park, Cornwood	0.52	B1	1,021	Average	Good	Average	Protect
ELR33	Duchy Square, Princetown	0.11	A1/D1/B1	501	Good	Good	Average	Protect

6.9 Overall the majority of sites are in active employment use, have good occupancy levels and are therefore recommended for continued employment purposes. We would recommend that sites should be safeguarded for employment purposes in the emerging Local Plan through a specific policy designation.

6.10 The employment site assessments have also identified some sites that are underutilised, have low occupancy levels and/or potential for new employment development. It is considered that the Authority may consider these sites for future employment, mixed-use development/redevelopment or alternative uses in the future. These sites include:

- ELR02 - Buckfast Spinning Co, Lower Mills, Buckfast;
- ELR03 - Buckfastleigh Spinning Works, Chapple Street, Buckfastleigh;
- ELR05 - Chuley Road Estate, Chuley Road, Ashburton;
- ELR06 - Crannafords Industrial Park, Chagford;
- ELR08 - Dolbeare Meadow, Eastern Road, Ashburton;
- ELR10 - Elliot Plain Warehouse, Buckfastleigh;
- ELR16 - Manor Mills, Avon Works, South Brent;
- ELR17 - Dial Iron Foundry Site, Buckfastleigh;
- ELR26 - Brent Mill Farm, South Brent;
- ELR27 - Thompsons, Station Road, Moretonhampstead;
- ELR29 - Land at Whiddon Down; and
- ELR30 - Chagford Cattle Market, Crannafords Bridge, Chagford.

7.0 STEP 6 FUTURE DEMAND ANALYSIS (STAGE 2)

7.1 Step 6 comprises further demand analysis of evidence to set out the context for economic potential in Dartmoor National Park.

Dartmoor's Sector Outlooks 2013

7.2 In 2013 SERIO (part of Plymouth University), published a Sectors Research Outlook report for Dartmoor. The report analysed the application of an employment growth model, which identified a short list of sectors which were considered to have potential to create significant employment growth for the National Park. These included:

- Business services;
- Tourism and leisure; and
- Construction and property.

7.3 These sectors have an existing critical mass to build upon and are relatively unconstrained by infrastructure requirements compared to some other employment sectors. As well as potential job creation these sectors also have the ability for potential increased productivity and higher value jobs. The SERIO report therefore looked to consider what might help or inhibit this potential growth.

7.4 **Table 8** below has been replicated from Dartmoor's Sector Outlooks report and shows those sectors with the highest overall employment in the Dartmoor National Park. It excludes those sectors which account for less than 1% of the total employment and the public sector (equating to around 20% of the overall employment) and retail/ wholesale.

Table 8 Employment Sectors in Dartmoor National Park

Sector	Total Employment 2011	Comment
Accommodation	1,000	Nearly 10% of Dartmoor's employment is related to tourism accommodation providers.
Food and beverage service activities	950	As with accommodation, this underlines the importance of tourism and leisure
Residential care	530	
Specialised construction activities	450	This is an important employment sector in most rural areas and is principally small local trades people.
Construction of buildings	400	

Land transport and transport via pipelines	350	The majority of this employment is in road freight transport
Mining and quarrying	230	The data shows two clusters of employment in the South Hams, and Teignbridge (although the South Hams employment may relate to activity just outside the National Park boundary)
Real estate activities	220	
Sports activities and recreation	210	
Civil engineering	210	
Office administrative, office support and other business support activities	180	This includes a cluster of activity related to call centre operation in Teignbridge (possibly one company)
Manufacture of textiles	170	The only manufacturing sector that employs more than 1% of the National Park's workforce
Computer programming & consultancy	170	This includes some employment in the software development and consultancy sub sectors.
Services to buildings and landscaping	170	
Travel agency, tour operators etc	160	
Libraries, archives, museums etc	160	Mainly in tourism related activity
Activities of membership organisations	150	
Activities of head offices, management consultancy	140	This is almost entirely management consultancy
Other professional, scientific and technical	130	This includes some specialist design activities and a range of other technical services

Source Table 1 (page 6) Dartmoor's Sector Outlooks

7.5 Table 2 of the SERIO report highlights those sectors in Dartmoor which have grown in absolute terms between 2008 and 2011 and highlights the current increase in the three industries stated in para 7.2. The growth in specific sectors includes:

- Construction of buildings (190);
- Residential care (170);

- Accommodation (170)
- Land transport (170);
- Specialised construction (160);
- Travel agency/ tour operators (110);
- Manufacturing of textiles (90);
- Other professional, scientific, technical (70);
- Manufacturer of electrical equipment (30); and
- Motion picture, video and television production (30).

7.6 The following paragraphs look into the potential growth and constraint factors affecting the key sectors identified in the SERIO report.

Business Services

7.7 In 2011 the total employment in the business service sector in Dartmoor National Park was around 450 jobs, equating to 4% of the workforce. The most significant workspaces in the National Park include estates such as Chuley Road and Linhay Business Park, both in Ashburton and both of which have been surveyed through this review.

7.8 The growth in this industry is both local and national as highlighted through the report;

“Societal drivers indicate there is likely to be significant increasing domestic and global demand for business services; while UK business has the potential knowledge and skills to exploit new market opportunities. Most commentators therefore predict that business services will see the greatest growth in the coming years...”

7.9 When considering this growth and potential opportunities and limitations in this sector the following issues have been raised as important considerations.

Opportunities

- The move towards more home working could provide further opportunities for people in more rural areas, such as the National Park, however this does require high quality connectivity;
- Growth in this sector could provide a potentially higher value, higher skilled workforce. As mentioned there are opportunities to grow in this sector through

attracting footloose industries drawn to Dartmoor's USP in terms of its attractive location and high quality natural environment;

- Business services are less space intensive, can be delivered to a higher density and therefore potentially have less impact on the natural environment;
- Services which can be provided in any location, building upon Dartmoor's USP.

Constraints

- The lack of speculative development may mean that small enterprises looking to grow could find the appropriate accommodation harder to come by, with increased rents.
- In terms of local skills, evidence suggests that limited labour supply is a particular issue in the National Park, in part due to the tendency of young people to leave Dartmoor to go to University and not to come back to work
- The perception that the area is not one where high tech (in particular) business services are located. Also, that wages are generally are lower than in the South East.

Tourism Sector

7.10 Employment in Dartmoor's tourism sector totalled 2,200 in 2011, just under 20% of total employment in the National Park. This is obviously a very important industry and one which also has a direct link to one of the statutory purposes of National Parks being "*to promote opportunities for the understanding and enjoyment of the special qualities of the area by the public*".

7.11 The report highlights a number of opportunities and limitations in this respect, however many of these are not issues which can be appropriately addressed through the strategic planning process. That said improvements to access and accommodation may be essential if the tourism industry on Dartmoor is to sustain higher numbers and potential growth. As set out in the report given the planning constraints which exist in this important landscape, it will be critical for the National Park Authority to work with other partners which cover areas adjacent to the National Park.

Construction Sector

7.12 In 2011 the construction and real estate sector employed around 600 people in the National Park, equating to over 5% of total employment. As discussed in the Sector Outlooks report, employment and output in construction are both sharply cyclical and sensitive to macroeconomic systems. Whilst growth in this industry is considered likely, there are a series of both opportunities (green construction and innovation) and limitations (including skills shortages, finance etc). Apart from improvements to strategic infrastructure, given those employed in the construction industry are generally site based (rather than being based at a specific employment premises) it is harder to address this through the strategic planning process.

The SW Rural Productivity Commission¹⁶

7.13 The SW Rural Productivity Commission was tasked with exploring rural productivity within the four Local Enterprise Partnership areas (LEP's) of the south west. These include Heart of the South West (HotSW) where Dartmoor National Park is located, Swindon and Wiltshire (SWLEP), Cornwall and the Isles of Scilly (C&IOS) and Dorset.

7.14 The priorities for growth across the HotSW LEP include the drive to create appropriate conditions for growth, to maximise productivity and employment opportunities and to capitalise on their distinctive assets, the latter being particularly relevant for Dartmoor. The information provides a useful context and also again highlights those issues and opportunities faced by rural locations such as Dartmoor in terms of business growth.

7.15 An important theme within the report specifically concerning Dartmoor and Exmoor National Parks concerns the importance of agriculture and tourism in terms of business growth and the potential opportunities for links between the two. Within the National Parks 32% of businesses are within agriculture. In terms of tourism the report states that *“Dartmoor and Exmoor are two of the strongest tourism brands in the South West attracting over 5 million visitor days, with an economic value of over £250m a year and supporting over 4,500 FTEs”*.

7.16 Whilst these industries offer important opportunities for growth, the report again highlights those limitations surrounding these sectors, including that they tend to be associated with lower pay and can suffer from lower than average productivity.

¹⁶ C&IOS, Dorset, HotSW & SWLEP LPA's (2017) [South West Rural Productivity Commission](#)

- 7.17 The report highlights the challenges surrounding businesses and staff recruitment in rural locations such as Dartmoor including the affordability of housing in these areas and also the provision of affordable childcare. This was also specifically identified within the report when referring to Dartmoor and Exmoor National Parks. Given the relative size of these sectors in rural areas addressing the challenge of productivity and low wages is a vital component of addressing the rural productivity challenge.
- 7.18 The commission also however reiterates the opportunities provided through the regions natural assets and high quality natural environment which can represent a significant USP for businesses. This is highlighted by businesses such as the high tech firm Grey Matter (located in Chuley Road Estate) who according to the commission recognise that quality of premises and location can make a business an attractive place for skilled employees. On the other hand, those behind the new Princetown whisky distillery were attracted to the wild and rugged Dartmoor environment to associate with its brand.

8.0 STEPS 7/8 ECONOMIC FORECASTS AND TRANSLATION (STAGE 2)

8.1 Steps 7 and 8 set out the consideration of economic forecasts and their translation to future floorspace requirements.

Economic Forecasts

8.2 Economic Forecasts for Dartmoor National Park have been produced as part of the Greater Exeter Economic Development Needs Assessment 2017 (EDNA). This was commissioned by the Greater Exeter Strategic Plan Authorities and includes specific forecasts for the National Park. The review commissioned two sets of economic forecasts from Experian and Cambridge Econometrics.

8.3 The Experian Forecasts set out employment change by sector between 2015 to 2040 (based on FTE jobs). These show an increase in 1,060 jobs over the period 2015 to 2040. This represents a 10% job increase within the National Park. The Cambridge Econometrics forecast show employment change of 2,400 jobs over the same time period. This equates to job growth of 25%. **Table 9** below sets out the employment change by sector for each forecast alongside a hybrid (average scenario) that takes a middle ground to reflect the differing expectations and assumption of each forecast.

Table 9 Economic Forecasts 2015 to 2040 (FTE jobs)

Sector	Experian	Cambridge	Hybrid
Agri, Forestry & Fishing	-40	-40	-40
Mining and Quarrying	-50	-120	-90
Manufacturing	-160	-110	-130
Utilities	10	0	0
Construction	140	830	480
Wholesale and Retail	80	190	130
Transport and Storage	70	-30	20
Accommodation & Food Services	350	440	390
Information & Communications	40	180	110
Finance and Insurance	0	10	10
Business Services	170	370	270
Public Admin	-70	20	-30
Education	40	100	70
Health	330	230	280
Other Services	140	290	210
Total	1,060	2,370	1,710

Source: Hardisty Jones Associates EDNA 2017

Please note totals do not add due to rounding required due to UK Statistic Authority code of practice.

8.4 Overall the differing forecasts highlight that economic forecasting requires a degree of ‘crystal ball gazing’ and making a series of assumptions about how the economy may grow. Both of the economic forecast companies are well respected and tend to reflect both conservative and optimistic versions of economic potential. The main difference in the forecasts is the much greater growth forecast by Cambridge Econometrics in construction, wholesale and retail, accommodation and food services, information & communication, business services, education and other services.

Employment Translation

8.5 The Greater Exeter EDNA 2017¹⁷ importantly sets out the translation of job forecasts into floorspace requirements. A key component of this translation is the consideration of job growth by planning use class. The Town and Country Planning (Use Classes) Order 1987 (as amended) can be found for reference in **Appendix D**.

8.6 **Table 10** below shows employment growth/decline by use class (based on FTE jobs). It should be noted that the review considers that the largest growth sectors are those activities which are either home based or do not require direct provision of space e.g. itinerant workers.

Table 10 Job Forecast by Use Class 2015 to 2040 (FTE jobs)

Use Class	Experian	Cambridge	Hybrid
A1	70	150	110
A2	10	20	20
A3-5	190	250	220
B1a	100	310	200
B1b	10	30	20
B1c	0	10	10
B2	-130	-80	-110
B8	30	40	40
C1	60	80	70
C2	190	140	160
D1	100	180	140
D2	30	70	50
Sui Generis	70	100	80
None & Homeworking	330	1,110	720
Total	1,070	2,390	1,730

Source: Hardisty Jones Associates EDNA 2017

Please note totals do not add due to rounding required due to UK Statistic Authority code of practice.

¹⁷ HJA (2017) Greater Exeter Economic Development Needs Assessment

8.7 The none & homeworking category accounts for 31% of economic growth forecast by Experian and 46% of economic growth forecast by Cambridge Econometrics. Growth in this category is home-based and does not require additional floorspace, which effectively reduces the combined future provision required between the different scenarios. Table 11 below set out the forecasts net additional floorspace by Use Class 2015-2040:

Table 11 Floorspace (sq m) Forecast by Use Class 2015 to 2040

Use Class	Experian	Cambridge	Hybrid
A1	1,620	3,630	2,620
A2	180	450	310
A3-5	4,060	5,180	4,620
B1a	1,290	4,110	2,700
B1b	790	1,630	1,210
B1c	270	410	340
B2	-5,080	-3,110	-4,100
B8	2,730	3,220	2,970
Total	5,860	15,520	10,670
Total B Class Only	0	6,260	3,120
Total B Class excluding losses	5,080	9,370	7,220

Source: Hardisty Jones Associates EDNA 2017

Please note totals do not add due to rounding required due to UK Statistic Authority code of practice.

8.8 Overall the floorspace requirements for Dartmoor National Park vary from 5,860 sq. m under Experian to 15,520 sq. m under Cambridge Econometrics. When considering A class floorspace (largely retail) It is important to note the majority of this growth is likely to take place within existing premises and locations, e.g. town and village centres, it is therefore outside the scope of this assessment. It is important to also note that whilst these are described in this report as 'requirements' this is an objective assessment of requirement, and does not take into account the policy circumstances within the National Park. It is for the Local Plan review to determine the extent to which it would be desirable, reasonable and achievable to seek to meet the 'requirement' within the National Park through appropriate planning policy and site identification.

8.9 The next consideration is the loss of employment land. It should be noted that not all job growth / loss will directly impact upon supply, require new floorspace or release existing floorspace, e.g. an existing firm could make 2 people redundant, but remain in the same office/industrial unit. This issue was highlighted in the consultation findings (DR Survey) that identified that 53% of businesses in Dartmoor were planning for moderate business growth, but only 4% raised issues about suitable premises.

8.10 When planning for employment growth the Local Plan will need to take a view on employment losses by evaluating how they could impact on employment sites and deciding whether there is a subsequent need for policy to safeguard specific sites or allow them to be developed. This task has been considered through the employment site assessment in Step 4. Therefore, employment forecast losses have been stripped out of the floorspace requirements at this point as to include them would underestimate the level of new provision required. The overall gross floorspace provision required under Experian is therefore 5,080 sq. m and 9,370 sq. m under Cambridge Econometrics.

8.11 The EDNA report goes on to set out a series of assumptions on:

1. The level of replacement provision required to keep employment stock at adequate quality levels (1% replacement stock per annum),
2. The split, between new allocations and delivery within existing sites (80/20 split) and;
3. A flexibility allowance (10%)

8.12 The EDNA report suggests making an allowance for choice and flexibility, to ensure that businesses have a choice of possible properties to meet their needs and that there is sufficient flexibility in the employment property stock to allow businesses to upgrade or downgrade their requirement dependent on their particular circumstances. As set out in Paragraph 7.7.1 of the EDNA report in line with industry standards, an uplift of 10% has been applied.

8.13 As part of the employment land Review, DLP consider it worthwhile to reflect the flexibility allowance and acknowledge the need for employment space replacement/renewal. The EDNA report identifies that total existing stock within the National Park is 87,050 sq. m (including 20,700 sq. m of office and 66,350 sq. m of industrial). The EDNA study therefore assumes that 21,800 sq. m of replacement provision will be required in addition to maintaining the existing level of stock.

8.14 On this basis the overall floorspace requirements for Dartmoor are set out below:

Table 12 Overall Floorspace Requirements

	Experian	Cambridge	Hybrid
Total B Class excluding losses	5,080	9,370	7,220

Replacement/Renewal of existing stock (1% PA)	21,800	21,800	21,800
Flexibility Allowance (10%)	2,688	3,117	2,902
Overall Floorspace Requirements including renewals	29,568	34,287	31,922

- 8.15 Given the overall forecasts loss of B2 industrial premises, the future requirement largely relates to B1 and B8, but it should be acknowledged that the renewal of industrial stock by 2040 is likely to require B2 provision as part of the mix.

9.0 STEP 9 SUPPLY AND DEMAND (STAGE 3)

9.1 This section looks at the quantitative and qualitative fit between demand for general B-class employment premises likely to arise and how the existing and potential supply could meet that demand for the period up to 2040.

9.2 Steps 2 to 8 have taken stock of the existing employment situation and assessed the demand for future provision. The following paragraphs represent the culmination of these steps, to identify future B-class employment provision to meet requirements and provide initial recommendations on which sites could potentially be considered for protection, redevelopment or release by the Authority.

Employment Supply against Demand

9.3 The consideration of supply and demand has been conducted as a series of steps:

- Recommend existing employment sites for potentially safeguarding/protection;
- Identify the impact of existing employment permissions (loses/gains) on the level of future floorspace required;
- Examine potential employment distribution options;
- Consider future requirements, including scope for intensification/redevelopment within existing employment sites, release for alternative uses and new sites; and
- Recommend employment policy for specific issues, e.g. rural employment sites.

9.4 The first step towards building a portfolio of employment sites is to consider which sites could potentially be protected for employment purposes. Existing sites which are well used and are a strategically important resource to support the existing economy will require protection through planning policy from speculative development applications that could undermine economic activity in the National Park.

Sites to Potentially Protect for Employment Use

9.5 Sites in good use for employment purposes and remain attractive to the market in suitably accessible locations should be protected for employment purposes. Sites recommended for consideration by the Authority for protection for continued employment purposes include:

- ELR01 - A38 Garage, Ashburton
- ELR02 - Buckfast Spinning Co, Lower Mills, Buckfast
- ELR03 - Buckfastleigh Spinning Works, Chapple Street, Buckfastleigh
- ELR04 - Bullycleaves Quarry, Buckfast Road, Buckfast
- ELR05 - Chuley Road Estate, Chuley Road, Ashburton
- ELR06 - Crannaforde Industrial Park, Chagford.
- ELR07 - Dial Motors, Buckfastleigh
- ELR08 - Dolbeare Meadow, Eastern Road, Ashburton
- ELR09 - Duchy Yard and Dartmoor Brewery, Princetown.
- ELR11 - Gidleys Meadow Rural Workshops, Christow
- ELR12 - Glentor, Balland Lane, Ashburton
- ELR13 - Mardle Way, Buckfastleigh
- ELR04 - Linhay Business Park, Ashburton
- ELR15 - Long Meadow Business Parks, South Brent
- ELR16 - Manor Mills, Avon Works, South Brent
- ELR18 - The Old Mill & Old Gasworks, Moretonhampstead
- ELR19 - Old English Industrial Estate, near Yelverton.
- ELR20 - Old Station Yard, South Brent
- ELR21 - Owlesfoot Garage and Wainhomes, South Zeal
- ELR22 - Pittscliffe Industrial Estate, Okehampton Road, near Tavistock
- ELR23 - Redlake Trading Estate, Ivybridge
- ELR25 - Land West of Public Car Park, Station Road, Princetown
- ELR27 - Thompsons, Station Road, Moretonhampstead
- ELR28 - Betton Way, Moretonhampstead
- ELR31 - Higher Buckfast Mill, Buckfast Abbey, Buckfast
- ELR32 - Delamore Business Park, Cornwood
- ELR33 - Duchy Square, Princetown

9.6 It is recommended that all these existing sites should be considered by the Authority as valuable employment locations and protected by planning policy in the Local Plan.

Existing Employment Permissions

9.7 The second step of the process is to take into consideration existing employment commitments (i.e. permitted planning applications for employment floorspace that have not been implemented). Step 8 identified a future floorspace requirement between

29,568 sq m and 34,287 sq m of employment provision (including renewals). **Table 13** overleaf summarises this floorspace requirement by B use class:

Table 13 Floorspace Requirements by Use Class

Use Class	Experian	Cambridge	Hybrid
B1a	1,290	4,110	2,700
B1b	790	1,630	1,210
B1c	270	410	340
B2	-5080	-3,110	-4,100
B8	2,730	3,220	2,970
Total B Class Only	0	6,260	3,120
Total B Class excluding losses	5,080	9,370	7,220
Replacement/Renewal of existing stock (1% PA)	21,800	21,800	21,800
Flexibility Allowance (10%)	2,688	3,117	2,902
Overall Floorspace Requirements including renewals	29,568	34,287	31,922

9.8 Dartmoor National Park Authority monitoring identifies existing unimplemented planning permissions that are likely to result in a gain or loss of employment floorspace in the future. These permissions include:

- 0308/13 – Development of land adjacent to Pear Tree Cross for relocation of 'Tuckers Country Store'. Farmer's market and garden supplies plus new highway and pedestrian access into site, associated car parking and landscape works (4,884 sq. m replacement/renewal floorspace);
- 0145/13 - 15A St Lawrence Lane, Ashburton. Conversion of existing storage building to office (B1(a)), including new roof and internal alterations (88 sq. m B1a floorspace);
- 0366/15 - land off Lower Street, Chagford. Residential development comprising 93 dwellings, access roads, public car park, public open space, demolition of and

rebuilding of fire station, new B1 business units and public toilets (171 sq. m gross gain in B1a floorspace);

- 0402/17 - Devonia Sheepskins & Tannery Ltd, Mardle Way, Buckfastleigh. Demolition of store and erection of new trimming building (300 sq. m replacement/renewals floorspace);
- 0041/16 - Devonia Sheepskin and Tannery Ltd, Mardle Way, Buckfastleigh. Demolition of first floor offices and erection of replacement offices (148 sq. m replacement/renewals floorspace);
- 0540/16 - Devon Cycle Hire, Sourton Down, Okehampton. Erection of shed for storage including office/workshop (77 sq. m B1c floorspace)
- 0655/16 - Land west of public car park, Station Road, Princetown. Construction of whisky distillery, visitor centre, small scale spirit storage, new road access & associated parking & demolition of two industrial units (1,720 sq. m B1c floorspace)
- 0296/17 - Plot 3a, Pitts Cleave Quarry, Pitts Cleave Industrial Estate, Tavistock. Erection of light industrial building (288 sq. m replacement/renewals floorspace)
- 0245/17 - Freemasons Hall, 13 Station Road, Moretonhampstead. Change of use of hall to offices (use class B1a) – (160 sq. m B1a floorspace).

9.9 **Table 14** below summarises the total committed employment floorspace and shows that 7,836 sq. m of B-class employment floorspace could be available to facilitate future employment growth.

Table 14 Outstanding Commitments – Gains

Use Class	Net Floorspace Gain (Sq. m)
B1 (a, b, c)	2,216
B2	0
B8	0
B Class replacement/renewals	5,620
Total B Class (including Renewals)	7,836

Summary of Demand Minus Unimplemented Permissions

9.10 Based on the summary of existing permitted supply, it is considered that existing employment commitments could provide 7,836 sq. m of floorspace towards future requirements. **Table 15** below provides a summary of future requirements by broad use class once commitments have been subtracted.

Table 15 Net Future Floorspace Requirements by Use Class

Use Class	Committed Gain/Loss	Experian	Experian Shortfall	Cambridge	Cambridge Shortfall	Hybrid	Hybrid Shortfall
B1 (a,b,c)	2,216	2,350	134	6,150	3,934	4,250	2,034
B2	0	-5,080	-5,080	-3,110	-3,110	-4,100	-4,100
B8	0	2,730	2,730	3,220	3,220	2,970	2,970
Renewal stock (1% PA)	5,620	21,800	16,180	21,800	16,180	21,800	16,180
Overall Floorspace Requirements*	7,836	29,568	21,732	34,287	26,451	31,922	24,086

Figures include renewals, flexibility allowance and exclude losses

9.11 **Table 15** takes the overall floorspace requirements identified in **Table 13** (which includes the 10% flexibility allowance and replacement/renewals allowance) and subtracts the committed gains identified in **Table 14**. This illustrates that overall the future floorspace requirements (once existing unimplemented permissions have been taken into consideration) ranges between 21,732 sq. m and 26,451 sq. m.

9.12 This overall floorspace range comprises 16,180 sq. m for replacement/renewal of existing stock, 134 sq. m to 3,934 sq. m required for new B1 (a, b, c) floorspace and 2,730 sq. m to 3,220 sq. m of new B8 floorspace. If the Authority decides to provide this level of overall new B1 and B8 floorspace, it will be important that it proactively plans for sufficient new floorspace and provides sufficient flexibility/policy guidance to enable existing sites to deliver replacement/renewed floorspace.

9.13 The next stage of the consideration of supply and demand is to examine the potential spatial options for distribution of future demand.

Potential Employment Distribution Options

9.14 As well as supporting economic growth across the National Park, employment development plays an important role in maintaining or strengthening the role and function of the Local Centres and Rural Settlements and there surrounding rural areas. The overarching objectives for the strategy development process are taken from the Strategic Aims contained in the Adopted Core Strategy. It is acknowledged that these are under review as part of the Local Plan production, these fundamental principles are unlike to change significantly. The ELR has used the Strategic Aims to set the context and inform the criteria for assessment.

Table 16 Strategic Aims Relevant to the Employment Strategy

Objective	Detail
Landscape Evolution	To conserve and enhance Dartmoor as a living, working, evolving landscape that continues to offer special qualities of peace and quiet, remoteness, solitude, unspoilt natural beauty, wide open spaces, wildness and wildlife habitats, the freedom to roam, and archaeological qualities/sense of history.
Nature Conservation	To base all policies and proposals upon maintaining or enhancing the characteristic biodiversity and geodiversity of the National Park and its contribution to national, European and global diversity.
Historic Landscapes	To protect the integrity of Dartmoor as a historic landscape by conserving, protecting and enhancing sites, areas, buildings and features of archaeological, historic, cultural or architectural interest.
Built Environment	To ensure that development and land and water management conserves or enhances the character of Dartmoor's built environment and is provided to the highest practical quality standards.

Recreation Use	To assist everyone to enjoy the special qualities of Dartmoor in ways that do not harm the National Park environment, local communities, and the enjoyment and rights of others.
Tourism	To ensure that tourism development in the National Park is based upon the special qualities of Dartmoor and benefits its environment and economy.
Farming	To assist in sustaining viable farming and forestry systems as a vital element in the local economy particularly in ways that further the purposes of National Park designation.
Employment	To assist in the provision of local employment and business opportunities, particularly in the Local Centres, and in the diversification of the rural economy in ways that are beneficial to the National Park and its community.
Housing	Actively to encourage and promote affordable housing to meet the needs of local communities, in the Local Centres and Rural Settlements, whilst resisting residential development where it would be damaging to National Park purposes.
Local Services and Facilities	To assist in the provision of local services and facilities in such a way as to promote community welfare without harm to the local environment and to retain existing services and facilities wherever feasible.
Traffic and Transport	To facilitate better access to local facilities, to reduce the need to travel, especially by car, and provide for visitor access in ways which are least damaging to the environment and local interests.
Major Development	To resist major development proposals, unless there is a proven overriding national need and no reasonable alternative ways of meeting that need outside the National Park.

9.15 To achieve the Strategic Aims, a range of employment distribution options for Dartmoor National Park could be considered. The move towards creating sustainable economic communities is the overarching planning principle. In terms of employment planning, this involves a need to encourage development that is accessible to all sectors of the community, whilst balancing market demand for particular locations.

9.16 Each option (set out below) has been assessed against a range of bespoke criteria, which take their principles from the Strategic Aims set out above. The assessment criteria are set out in **Table 17**, setting out planning and policy comments for each objective in turn.

Table 17 Key Policy Assessment Criteria

Objective	Detail
Improve economic performance	To improve economic performance through promoting opportunities that could potentially increase local expenditure, enhance image and promote inward investment.
Maintain and support existing settlements' employment functions	The Authority should be proactive in encouraging appropriate development to maintain and enhance their functions as employment centres.
Promote sustainable patterns of development	Reduce need to travel, especially by car. Employment development should be located to improve the self-containment and reduce out commuting if possible.
Promote sustainable communities and social inclusion	To ensure new employment provision provides an appropriate mix of jobs and homes to enable greater access to all social groups.
Ensure deliverability through assessment of viability and commercial realism	It must be demonstrated that strategies and objectives are deliverable, taking into account the need for sufficient infrastructure, policy considerations, involvement of key stakeholders and partners.
Address deficiencies and gaps in the network of employment sites	The Authority should be proactive in encouraging appropriate development to maintain and enhance their settlements employment function. Growth strategies should ensure that an appropriate hierarchy is planned through addressing deficiencies, whilst avoiding over concentration.

Note: Key policy assessment criteria have been informed by Dartmoor National Park adopted Core Strategy Strategic Objectives and supplemented by additional commercial and national policy considerations.

9.17 In this context, the following four potential strategic options are considered:

- **Status Quo:** distribution of employment provision based upon current employment distribution. This strategy would seek to plan for new employment floorspace in line with current employment distribution across Dartmoor. On this basis there would be reasonable levels of floorspace required in all local centres, some rural settlements and surrounding rural areas.
- **Polarisation Strategy:** to limit economic growth in Dartmoor National Park and conserve the natural environment. This strategy would allow for continued out commuting to adjacent districts on some comparable or greater levels to existing travel patterns. The strategy would reflect that currently a 50% of workers leave the National Park for work and consider that a similar proportion would do the same, effectively planning less employment provision than required to support proposed housing targets.
- **Focussed Strategy:** to concentrate all employment growth at the main A road corridors (A38, A386 and A30 corridors) which have high levels of existing employment premises and demand (as indicated by consultation responses). As the main employment locations in Dartmoor, the National Park Authority would need to plan to deliver the majority of the floorspace requirements through a combination of redevelopment and new employment sites.
- **Distribution Strategy:** to identify and distribute employment floorspace at the key Local Centres and Rural Settlements in the National Park i.e. A38 Local Centres and other Local Centres and Rural Settlements with good strategic access and a suitable level of local services, but also provide an allowance for rural business needs in other locations. This would match future growth aspirations with employment requirements to promote sustainable patterns of development, whilst allowing appropriate growth in rural areas to support the rural economy.

9.18 Each option apart from the second option are based on the assumption that Dartmoor National Park will provide a balanced level of employment and housing that seeks to meet all economic growth forecast and enable all new workers to live and work in Dartmoor. It is conceivable that the Authority may want to pursue an even more proactive approach to reducing out-commuting to other districts, e.g. Plymouth and Exeter, however, we would urge caution with this approach as it must be acknowledged that large settlements in adjacent districts will always represent significant employment locations. It is also very conceivable that the Authority will look to balance economic

growth with the wider purposes of the National Park. Only option 2 prioritises conserving the natural beauty of Dartmoor over supporting economic growth.

9.19 The Employment Land Review considers and evaluates each distribution option in isolation. It is quite conceivable that the National Park Authority may identify a preferred strategy which forms a composite based upon elements from more than one option put forward.

Options Appraisal

9.20 The remit in this strategic review is to evaluate various options for growth in broad terms. Four strategic options have been appraised against a set of key policy criteria which take into consideration local and ‘sound’ planning objectives.

Appraisal Approach

9.21 While it is acknowledged that it is important to avoid adopting a mechanistic and prescriptive approach to the appraisal process, since the assessment of the criteria and objectives is often subjective and will depend on the weight given to the individual factors. However, it is considered desirable to provide an evaluation rating for each of the strategic growth options using a simple rating mechanism, as follows:

- Good – wholly or substantially achieves the criteria objective;
- Moderate – partially achieves the criteria objective; and
- Poor – wholly or substantially fails to achieve the criteria objective.

9.22 The four strategic options for meeting the employment needs of the National Park are assessed in matrix format in **Table 18** below.

Table 18 Strategic Option Assessment

Objective	Status Quo	Polarisation	Focused	Distribution
Improve economic performance	<u>Moderate</u> - The local centres and rural settlements grow according to current distribution, however this may not reflect the	<u>Poor</u> - This option would constrain economic potential by undersupplying employment floorspace. Valuable economic investment	<u>Moderate</u> – The A38 and A30 are attractive employment locations, but focused growth could limit market choice and	<u>Good</u> - this option would still allow strategic growth locations, but also support other settlements in the National Park that have

	market appetite for key locations, e.g. A38, A30 and A386.	could be lost to other areas.	limit supply in other locations which are currently popular with local businesses.	a defined employment function.
Maintain and support existing settlements employment function	<u>Moderate</u> - While this option should provide enhanced employment functions at more settlements, it may lead to inappropriate development in areas where capacity is limited.	<u>Poor</u> - By consolidating or maintaining the sub regional centres the strategy undermines the ability to proactively enhance the employment function, likely to result in poor economic performance.	<u>Moderate</u> - Development directed to A38, A30 and A386 corridors would serve to enhance their primary employment function but could potentially have long term effects on the other settlements economic offer.	<u>Good</u> - The strategy builds on the A38, A30 and A386 employment role but provides the opportunity for the other key settlements to maintain and strength their economic function.
Promote sustainable patterns of development	<u>Moderate</u> - Dependant on the housing distribution a more dispersed distribution could lead to greater travel distances.	<u>Poor</u> - This option plans for the continue level of out-commuting from Dartmoor and leads to a greater number of residents travelling further to work.	<u>Moderate</u> - The strategy is likely to improve self-containment at certain local centres, but focused growth in these locations and nowhere else may encourage more travel between settlements and beyond.	<u>Good</u> - The strategy allows for development of floorspace in all the areas of potential growth, thus supporting growth is a sustainable pattern by balancing the distances travelled and with local employment opportunities.
Promote sustainable communities and social inclusion	<u>Moderate</u> - More dispersed employment growth could allow local residents to live and work locally, but the diversity of occupations is likely to limit this benefit.	<u>Poor</u> - The imbalance of employment floorspace compared to housing will reduce the sustainability of settlements and lessens opportunity for all social groups to access employment	<u>Moderate</u> - This option only targets A38, A30 and A386 locations which maybe at the expense of the other settlements in Dartmoor.	<u>Good</u> - the distribution would allow access to employment at key settlements. The distances will be reasonable for all social groups.

		within the National Park		
Ensure deliverability through assessment of viability and commercial realism	<u>Poor</u> - It will be difficult to deliver new development in some locations with limited site options and where market interest is lower.	<u>Moderate</u> - While planning for less new development would negate the need to ensure deliverability, this may also undermine the commercial appeal and ability for existing businesses to grow.	<u>Moderate</u> - This location is likely to be the most attractive but the quantity of floorspace could be beyond the limits of market appetite within the plan period.	<u>Moderate</u> - Whilst the A38, A30 and A386 are the most likely area to attract investment, market demand is present in other settlements to ensure deliverability and support local business needs.
Networks - Addressing deficiencies and gaps in the network of employment sites	<u>Good</u> - The distribution is based on the existing employment provision; the dispersed approach allows greater scope to provide employment sites in a range of locations.	<u>Poor</u> - This option would limit floorspace and therefore limit improvements to the existing employment portfolio and have less scope to address existing issues e.g. grow-on space in key settlements.	<u>Moderate</u> - This option would ultimately reinforce certain locations as the primary locations within Dartmoor and potentially help to improve overall retention within the National Parks. However, there are demands in other locations which strategy would not address.	<u>Moderate</u> - This option would ultimately reinforce A38, A30 and A386 as the primary locations in Dartmoor and also assist other local centres, rural settlements and rural areas. The relatively focused strategy has limited flexibility

Appraisal Findings

9.23 As **Table 18** highlights, the strongest performing strategy option is likely to be the distribution strategy, which has the highest number of good and moderate ratings.

- The **Status Quo Strategy** performs reasonably well, but does not maximise economic potential in the National Park. Deliverability is also potentially undermined by site availability and willingness of the market to deliver schemes in certain locations;
- The **Polarisation Strategy** would plan to increase out-commuting to outside the

National Park. The strategy is rated poorly in most economic aspects due to the negative approach this strategy poses, which could reduce economic confidence and future investment in the Local Centres and Rural Settlements and conflicts with current policies to increase sustainability and self-containment of settlements. The strategy however could compliment the overarching objectives of the National Park to conserve the natural environment;

- The **Focused Strategy** also has some merit by concentrating all growth near the main A road corridors (A38, A386 and A30). It could increase employment at these more accessible locations relative to other significant employment draws outside the National Park. It may maintain or improve overall commuting patterns. However, market delivery of large quantum of floorspace is questionable and in reality, the pace of growth is still likely to be dwarfed by that provided in Exeter and Plymouth; and
- **The Distribution Strategy** is clearly the most balanced approach by supporting the locations with the strongest employment demand, but allowing suitable level of growth at other Local Centres and Rural Settlements which enables greater opportunities to live and work locally, whilst potentially reducing commuting distances to reasonable levels by providing a network of provision. Importantly, the strategy allows for rural business growth by continuing to provide more small business units in rural areas that have proved to be popular with existing businesses in the National Park (as identified through the consultation exercise).

9.24 It is recommended that the Local Plan employment strategy takes into account several factors which inform the distribution of growth across the National Park. Location of employment areas is largely driven by the market unless major incentives are put in place by the public sector. The market generally follows the existing market as there is a more ready access to labour force. Therefore, the distribution strategy generally follows the existing pattern of main employment locations. Added to this we have also considered the Authority's existing spatial strategy, whereby the focus for growth is at Local Centres, and Rural Settlements and some flexibility for development in rural areas, if appropriate.

9.25 There are several ways that the shortfall from **Table 15** can be accommodated, which include:

- Intensification/redevelopment of existing employment sites at Local Centres and Rural Settlements;
- Identifying new employment sites at Local Centres and Rural Settlements; and
- Increasing flexibility in planning policy to allow new rural employment sites.

Intensification/Redevelopment of Existing Employment Sites

9.26 The following existing employment sites are considered to have potential for intensification or redevelopment for employment floorspace:

- ELR002 - Buckfast Spinning Co, Lower Mills, Buckfast;
- ELR003 - Buckfastleigh Spinning Works, Chapple Street, Buckfastleigh;
- ELR005 - Chuley Road Estate, Chuley Road, Ashburton;
- ELR008 - Dolbeare Meadow, Eastern Road, Ashburton; and
- ELR027 - Thompsons, Station Road, Moretonhampstead.

9.27 It is clear that planning for economic growth in the National Park needs to be balanced by the wider purposes of the National Park designation. Intensification and redevelopment of existing employment locations is considered an appropriate approach to meet employment demand whilst limiting the impact of development on the natural environment. Existing sites are already in use for employment purposes and tend to be located within existing settlement boundaries.

Identification of New Employment Sites

9.28 The Local Plan could potentially consider allocating or allowing for the creation of new employment sites in the following locations:

- ELR026 - Brent Mill Farm, South Brent
- ELR029 - Land at Whiddon Down
- ELR030 - Chagford Cattle Market, Crannafords Bridge, Chagford

9.29 New employment allocations could potentially have a greater impact on the natural environment and therefore will require careful consideration by the Authority.

Establish Policy to Allow New Rural Employment Sites

9.30 Rural business units can represent an important element in the consideration of rural diversification. It is difficult to specifically identify all these opportunities, but over a

number of years, former agricultural premises and other buildings have been converted for employment use. The consultation exercise has shown that, in general, these can be popular with occupiers (at the right rents) and need to be supported, albeit at a low level of provision.

- 9.31 Current adopted policy for rural enterprises and agricultural diversification (DM35 and DMP34) provide flexibility to allow specific developments to come forward if they meet the criteria and are justified. Given the extension of permitted development rights since the adoption of current policy it is recommended that a comparable policy may be considered, to continue to encourage the positive development of small rural employment premises in appropriate locations.

Policy Recommendations

- 9.32 Whatever employment strategy is pursued by the Authority, it should ensure that appropriate monitoring and phasing of development is conducted to support the economic objectives of the National Park and avoid undermining delivery in key locations. The strategic issues which will need to be considered by the National Park Authority as a result of this report include:

- Identification of key employment sites at the Local Centre and Rural Settlements and in rural areas;
- Proposals for the intensification and redevelopment of existing employment sites;
- Management and phasing of land release; and
- Mixed use sites and linking new housing with employment.

- 9.33 The specific policy issues that will need to be addressed include:

- Safeguarding sites for employment uses;
- Use of and requirement for developer contributions (CIL/S106);
- Potential allocation of new or redeveloped employment sites; and
- Restriction on uses at certain sites to cater for specific growth sectors, e.g. B1 (a,b,c).

9.34 Supporting economic growth and stimulating regeneration in growing employment sectors is a complex task. This will require comprehensive and coordinated use of all the available tools to achieve the necessary outcomes. An important aspect of delivering the right growth within Dartmoor National Park will be achieved by setting objectives at the strategic level that can be combined with the use of policy tools and techniques which encourage and support appropriate types of new and alternative development at the right locations across the National Park.

9.35 The recommendation to protect employment sites needs further thought in the context of a few declining employment sectors (see Table 9) and the need for policy to enable the economic potential of the area to be achieved. The issue is more complex than simple numbers. The consideration of development proposals that would result in the loss of a site or floorspace currently or previously used for employment must be made according to policies that consider the overall economic development strategy. This means proposals that would lead to the loss of poorer quality employment areas, including those targeted by residential developers because of their location, are no longer dealt with on a piecemeal basis, but relate to a wider context. Appropriate policies for the Local Plan will need to:

- Provide for decisions to be made in the context of any sub-regional economic strategy (e.g. Plymouth and Exeter) which sets out to deliver what economic potential exists, recognises the role of land and premises as part of the delivery of that wider strategy and recognises the role of smaller as well as larger sites;
- Require a variety of types of site to be part of the overall portfolio, including sites suitable for lower cost base operations and perhaps relate this requirement to different parts of the National Park, particularly the needs of rural businesses;
- Ensure consideration is given to other non-b class employment potential. The Local Plan should include policies on tourism, retail and residential care to

ensure that important employment growth is guided by the National Park Authority; and

- Provide a positive policy on rural diversification to allow the continued provision of small business units in appropriate premises/locations to meet the needs of the rural economy.

9.36 Overall, clear direction is required to ensure that there is no over or under supply of employment provision compared with the vision and strategy established by the Authority. Through the supply and demand analysis we have considered that a variety of employment sites are available to enable market choice and to improve/maintain existing residents' opportunities to work locally. With these broad requirements on future proposals considered, there would presumably be other tests to do with the suitability for other uses of a site in its context, as part of the more generic criteria policies in the plan.

9.37 The use of phasing and managed release mechanisms will be an essential part of achieving the preferred spatial vision for Dartmoor National Park Authority. These mechanisms can offer a valuable tool in achieving co-ordinated and sustainable development. Importantly, for Dartmoor to achieve higher economic growth forecast by Cambridge Econometrics, it is essential that there is a managed development of sites and that monitoring manages the achievement of outcomes related to the strategic objectives and essential targets set out in the Local Plan.

9.38 There are a number of different policy approaches that can be used to set up a robust phasing or management process which creates a direct relationship between allocations, actual built development and monitoring. It will be important to establish what is to be achieved and clarify the opportunities offered by these techniques and their appropriate use in different parts of the Local Plan.

Fit between Homes and Jobs

9.39 The Department for Communities and Local Government (DCLG) released a long-awaited consultation document "Planning for homes in the right places" in September 2017. The document sets out the Government's proposed measures to enable LPAs to plan the scale and distribution of housing to meet local need, including a standardised approach for calculating housing need.

- 9.40 This has been proposed to make assessing local housing need simpler, quicker and more transparent. There will be only limited circumstances in which an LPA might deviate from this approach, including economic led housing requirements. DCLG has issued an illustrative housing need figure for each Local Planning Authority (LPA) based on the proposed calculation methodology. It is important to note that where local planning authorities do not align with local authority boundaries, such as National Parks, available data does not allow local housing needs to be calculated using the standard method set out. In these cases the Government has proposed that authorities should continue to identify a housing need figure locally, but in doing so have regard to the best available information on anticipated changes in households as well as local income levels.
- 9.41 It will therefore be important for the Authority to consider a locally identified housing need figure in light of economic job forecasts. The EDNA forecasts job growth of between 1,060 and 2,390 jobs by 2040 (2015-2040). Supporting this level of economic growth will require appropriate growth in the economically active population of the National Park i.e. sufficient working people to fill jobs. It will therefore be important for to consider economic activity rates when determining a housing need figure if economic ambitions are to be realised.

10.0 STEP 10 EMPLOYMENT DELIVERY (STAGE 3)

10.1 In this section we look at factors constraining employment land development within Dartmoor National Park and offer ideas on delivery options and implementation tools to help bring forward sites identified in Step 9.

Delivery Issues

10.2 Within the Employment Land Review area, bringing new business floorspace forward onto the market has sometimes proved problematic. The main constraints to delivery identified in the Employment Land Review are:

- Market viability, where development risks and costs for employment uses, including the developer's return, exceed achievable values this creates negative site values and thus no incentive to investment;
- If site servicing and preparation raises costs to uneconomic levels, development will not be forthcoming. The scale of infrastructure costs can also discourage development, especially if it involves major investment in, for example, site access. There is limited public funding to overcome these issues;
- Limited planning policy employment site allocations may be undermining delivery due to lack of certainty for developers. Employment policy provides flexibility for employment proposals to come forward, but again with flexibility comes a degree of uncertainty;
- Lack of specific dedicated economic development resources to support existing/ new businesses, facilitate landowner/developer discussions and provide advice and access to available smaller scale funding sources.

10.3 Lack of progress with the delivery of new employment floorspace is likely to be the consequence of one or a combination of the above factors. These factors are not unique to Dartmoor National Park and there are no magic solutions to solve these problems. The completion of this Employment Land Review and the integration of the conclusions of this evidence study into the new Local Plan may now offer the right vehicle to help mitigate these deliverability problems.

Market Signals

10.4 The critical point to understand is that just because an allocated employment site is not developed it does not mean that the problem is one of 'delivery'. It can be interpreted as a market signal indicating that this is not the best use for the site. This is important for

the Authority if it decides to embark on site allocations for employment uses, as it will need to be particularly careful that identified sites are in the right locations and have landowner support.

- 10.5 The National Park is under increased pressure for housing development and therefore alternative residential uses may be promoted from a developer/landowner value perspective. Therefore, in certain cases it may be important to confirm owner intentions of sites to avoid the risk that sites fail to be delivered and/or greenfield sites allocations for employment uses are used to support the principle of development in general for alternative uses e.g. residential.

Market Viability

- 10.6 The viability of the development of any given site will depend upon market conditions at that particular time, including rental and capital values and upon site specific factors such as higher than average project costs. For example; the need for piling due to poor ground conditions; remediation of contaminated land; flood protection measures and/or need to raise floor levels and provide compensatory flood storage; infrastructure costs such as new access roads, highway improvements/roundabouts; availability and capacity of utility supplies; Section 106 Agreement costs, CIL; costs incurred in obtaining planning consent including professional advisors etc.
- 10.7 If development does not provide an adequate profit margin then schemes are unlikely to proceed. Ideally sites within the National Park will require appropriate investigation pre allocation or pre application to limit the risks of infrastructure costs increasing and the site being rendered unviable.

Delivery Options for Potential Employment Sites

- 10.8 Step 9 identified a series of sites that are considered to offer future potential for new/renewed employment floorspace. These include:
- ELR002 - Buckfast Spinning Co, Lower Mills, Buckfast;
 - ELR003 - Buckfastleigh Spinning Works, Chapple Street, Buckfastleigh;
 - ELR005 - Chuley Road Estate, Chuley Road, Ashburton;
 - ELR008 - Dolbeare Meadow, Eastern Road, Ashburton;
 - ELR026 - Brent Mill Farm, South Brent;
 - ELR027 - Thompsons, Station Road, Moretonhampstead;
 - ELR029 - Land at Whiddon Down; and

- ELR030 - Chagford Cattle Market, Crannafords Bridge, Chagford.

10.9 The Employment Land Review has sought to identify development delivery recommendations for these sites based on the following delivery options and tools:

- **Standard Commercial Delivery** – Suitable for identified sites where development risks and costs for developing employment premises, including the developer's return, exceed achievable values and sufficient market demand supports speculative delivery. The Authority may need to support the investigation of site delivery e.g. cost of access and liaising with owners and promoters to ensure delivery;
- **Anchor Occupiers/Business Plans** - Pre-lets or anchor occupiers are important to realising larger development/redevelopment schemes. For this to be identified as a 'practical' solution the developer/landowner will need to have an identified end user, to know how much space they will buy and when. The Authority will need to work with the existing land owners and/or key existing business that could act as the anchor tenant to understand their specific business plans and the potential for growth/new provision on sites to support delivery;
- **Mix of Uses** – Provision of employment space as part of a mixed use scheme improves the viability of employment provision due to the shared infrastructure costs and potential cross subsidy from high value development uses e.g. retail and residential. The market likes mixed-use schemes as they can spread developers' risks. Residential use to enable development on green field sites could help kick start development of the commercial elements e.g. like Land at Lower Street Chagford, but the site would need to be attractive for employment purposes in isolation. We would also note that planning policy allocations need to be realistic about the quantum of employment floorspace within a mixed-use scheme. Aspirations for a higher quantum could frustrate delivery. The Authority will need to have early discussions with site promoters to inform any future planning policy;
- **Planning Policy** – Planning should guide the market positively to stimulate demand and encourage development, through tools like development briefs, masterplans and Local Development Orders (LDOs). Dartmoor National Park Authority could produce planning guidance/policy for key sites. The Authority has already undertaken this for a variety of sites and it is recommend that some existing sites will benefit from guidance that sets out the objectives e.g. quantum and type of commercial space,

policy constraints, types of interventions (if necessary) and landowner/developer/ Authority delivery arrangements, including funding (if required).

10.10 The following site specific commentary sets out initial delivery recommendations:

- **ELR002 - Buckfast Spinning Co, Lower Mills, Buckfast** – The site is largely vacant and demolition of part of the site was underway at the time of survey. The remaining premises are very large and considered unlikely to be attractive for new occupiers. The size and location of the site make it suitable for a mixed-use (residential led) redevelopment. It is recommended that the Authority liaises with the developer/landowner to establish the quantum of employment floorspace that could be delivered;
- **ELR003 - Buckfastleigh Spinning Works, Chapple Street, Buckfastleigh** – The site is partly occupied by Devonia who are the owner and key anchor occupier of this site. Recent investments and permissions have started the redevelopment process on the site supporting the economic growth of the anchor business and facilitating other businesses to locate on the site. The Authority should continue to support this process and liaise with the landowner to establish the quantum of additional floorspace that is required/could be accommodated on site (continued allocation).
- **ELR005 - Chuley Road Estate, Chuley Road, Ashburton** – The site is well located for the strategic road network and Ashburton town centre and has the potential to build on the emerging businesses that are starting to locate on the site. Parts of the site are underused e.g. vacant or used for surface storage, and some of these more industrial or intense uses may not be appropriate in this location given its constrained access through the centre of the town. The Authority should continue to work with landowners/developers to establish an appropriate mixed use, including a quantum of employment floorspace, for potential continued allocation.
- **ELR008 - Dolbeare Meadow, Eastern Road, Ashburton** – The site has remained vacant since the previous developer went out of business. The site appears serviced and is an attractive accessible location for future employment premises. It is considered that subject to sites availability the site could be brought forward by the market without specific intervention.
- **ELR026 - Brent Mill Farm, South Brent** – The site has been promoted for employment

purposes and is well related to existing employment provision that is well used, well located and attractive to the market. It is considered that subject to investigation of potential site access arrangement and costs, that the site could potentially be delivered by standard market mechanisms;

- **ELR027 - Thompsons, Station Road, Moretonhampstead** – The site is currently underutilised and provides 2.76 hectares of employment land on the edge of Moretonhampstead. It is understood that the current landowner wishes to retain its engineering operation on the site, but is relocating its storage and distribution elsewhere. The site represents a good opportunity to provide mixed uses, with new/renewed employment floorspace either incorporating the key anchor business or not. The quantum of employment floorspace should be determined in liaison with the developer/landowner.
- **ELR029 - Land at Whiddon Down** – The site has been promoted for development and is relatively well located to the A30 on the edge of Whiddon Down (Rural Settlement). The site could potentially be brought forward for a mixed-use scheme to deliver valuable employment space, to ensure good integration with adjacent residential uses and cross subsidise delivery. In isolation the site would be attractive for employment uses, but site size is probably in excess of demand.
- **ELR030 - Chagford Cattle Market, Crannafords Bridge, Chagford** – The site has been promoted for development and is located on the B3206 removed from the Chagford settlement boundary. Notwithstanding the site's detached location DMD Policy considers the site an outlier of the settlement and is favourable towards its development. The site is potentially suitable and available for employment development and will be considered in further detail through the local plan review process.

Available Funding

10.11 In instances where site investigations or liaison with developers/landowners have identified barriers to market delivery, the Authority may have to consider the following potential funding sources to unlock sites:

- **S106 Agreements** – Currently most developer contributions towards infrastructure are through the S106 system. It is possible that S106 can help to pay for or subsidise

employment space, e.g. small workspaces. In a study by McFarlane¹⁸, it was found that only 15 per cent of English local authorities had used or try to use S106 agreements to generate employment or training opportunities. London boroughs were more likely to have used S106 for these purposes, which is probably because of strong housing demand and return on developments. When local authorities were asked why they had not used S106, the most popular comments suggested a lack awareness of these possibilities or concerns about the legality of such requests. S106 is only justified under certain circumstances to make development appropriate where it would not be otherwise.

- **Community Infrastructure Levy (CIL)** – The Authority could introduce a Community Infrastructure Levy (CIL) to secure funds. Development values for residential are high across Dartmoor and therefore a CIL charge for residential uses could generate funding to support infrastructure delivery, including infrastructure improvements to support employment site delivery. It is noted, though, that the Authority’s strategic focus on affordable housing means that a limited amount of market housing comes forward, and where it does the value from that is sought to cross-subsidise affordable housing delivery;
- **Public Funding** – It is more likely that commercial development will be driven by the private sector and therefore intrinsic viability will be a crucial issue. There may be some scope for public funding of development and this would need investigating with a project in mind. Public sector support for office and industrial development may rely on Government and European funding. The ELR consultation identified a selection of current and emerging funding sources that could provide assistance to deliver sites, such as capital grants from the Greater Dartmoor Local Enterprise Action Fund 2015-2020;
- **Public Sector Land** – One specific form of funding can be through a contribution from the Authority in the form of land or of site servicing. Land at nil value reduces overall development costs, hence improving viability. Clearly such an approach has opportunity costs and needs weighing in terms of the National Park overall objectives and will most importantly depend upon the location and suitability of land holdings. Local authorities may help facilitate developments where there are land ownership

¹⁸ Richard McFarlane, *Local jobs from local development: The use of Planning Agreements to target training and employment outcomes*, 2006

issues by purchasing land using their own funding. For instance, if a site is in multiple ownership then the use (or threatened use) of Compulsory Purchase Order (CPO) powers may be more persuasive in acquiring land into single ownership to release development.