

Appendix 8: Dartmoor National Park Forecasting Results

This appendix sets out the forecasting results for the Dartmoor National Park (DNP) area.

1 Employment Change by Sector 2015-40 (based on FTE jobs)

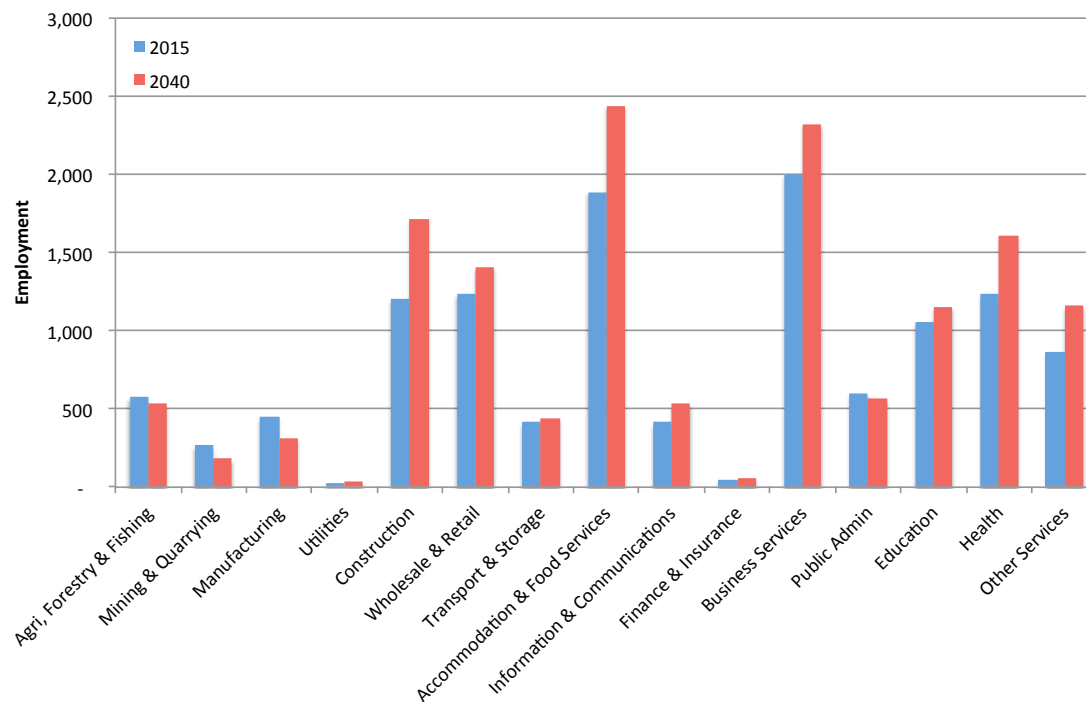
Experian forecast an increase in employment of 1,060 over the period 2015-40. This represents a 10% increase. Over the same period Cambridge Econometrics (CE) forecast growth of 2,400, equating to 24% growth. The CE forecast is substantially higher than Experian. The table below sets out employment change by sector. It is clear that the CE forecast includes much greater growth in the construction sector, with notably higher employment growth also forecast for wholesale & retail, accommodation & food services, information & communications, business services, education and other services.

A hybrid or average scenario has been prepared using the two baseline forecasts. This provides a 'middle ground' taking account of the differing expectations and modelling approaches used by the two forecasters. This leads to an employment growth of around 1,700 jobs over the 2015-40 period, equivalent to 17% growth.

	Experian	CE	Hybrid
Agri, Forestry & Fishing	-40	-40	-40
Mining & Quarrying	-50	-120	-90
Manufacturing	-160	-110	-130
Utilities	10	0	0
Construction	140	830	480
Wholesale & Retail	80	190	130
Transport & Storage	70	-30	20
Accommodation & Food Services	350	440	390
Information & Communications	40	180	110
Finance & 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

The figure below shows employment in both 2015 and 2040 based on the hybrid scenario for the DNP area. This sets the results from the table above in further context by showing the overall scale of each sector.

Employment 2015 and 2040 by Sector in the DNP Area – Hybrid Scenario



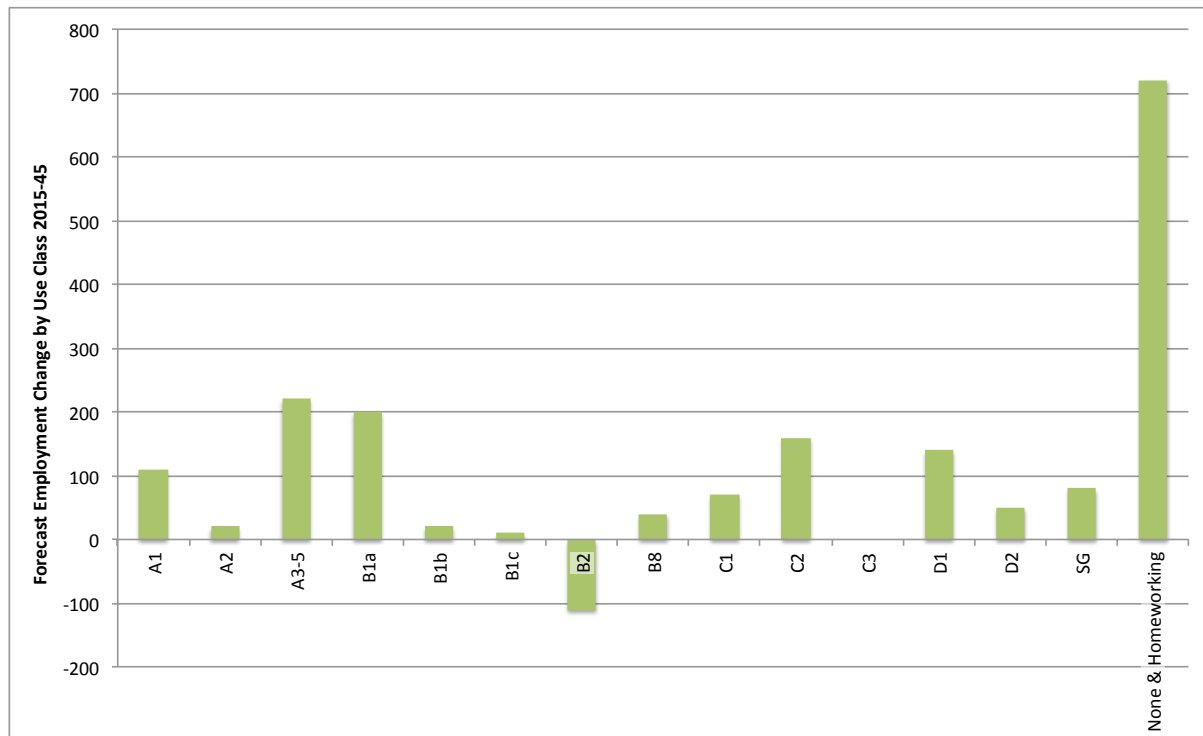
2 Employment Change by Use Class 2015-40

The table below shows employment change by Use Class (based on FTE jobs). This is also illustrated in the chart. This shows the largest growth in employment is within those activities which are either home based or do not require direct provision of space (e.g. itinerant workers).

	Experian	CE	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
C3	0	0	0
D1	100	180	140
D2	30	70	50
SG	70	100	80
None & Homeworking	330	1,110	720
Total	1,070	2,390	1,730

There is also growth in the A, C1 and D2 Use Classes related to the tourism and leisure economy. Growth in office based employment is forecast as well as small scale growth in B1b and B1c activities. Growth in C2 and D1 activities stems from forecast growth in health and education employment.

Employment Change by Use Class



3 Net Additional Floorspace by Use Class 2015-40 (sq m)

The table below shows forecast net additional floorspace requirements across the DNP area (based on FTE jobs). The largest growth is within the A3-5 Use Class reflecting growth in the food services sector.

	Experian	CE	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

4 Estimates of Floorspace and Land Requirements 2015-40 (all figures sq m unless otherwise specified, based on FTE jobs)

The table below sets out the estimates of future employment floorspace and land requirements for the period 2015-40 across the DNP area. This includes the requirement for replacement demand as well as the adjustments for net changes in the economy. It is estimated that a total of 1 hectares will be required to accommodate office development and around 3-4 hectares to accommodate industrial development.

	Experian		Cambridge Econometrics		Hybrid	
	Office	Industrial	Office	Industrial	Office	Industrial
Total Stock	20,700	66,350	20,700	66,350	20,700	66,350
Replacement Provision (A)	5,200	16,600	5,200	16,600	5,200	16,600
Net Additional Requirement (B)	1,290	-1,290	4,110	2,150	2,700	420
Total Requirement (C=A+B)	6,490	15,310	9,310	18,750	7,900	17,020
Delivered on Existing Employment Sites (D)	1,298	3,062	1,862	3,750	1,580	3,404
Net Requirement (E=C-D)	5,192	12,248	7,448	15,000	6,320	13,616
Flexibility Allowance (F)	519	1,225	745	1,500	632	1,362
Total Requirement (G=E+F)	5,711	13,473	8,193	16,500	6,952	14,978
Average Annual Requirement	228	539	328	660	278	599
Total Land Requirement (hectares)	1	3	1	4	1	4
Average Annual Land Requirement (hectares)	0	0.1	0	0.2	0	0.1