


Staffordshire Moorlands Employment Land Study

August 2006

Final Report

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Executive Summary

1.1 Introduction

In April 2006, Staffordshire Moorlands District Council commissioned Atkins and Lambert Smith Hampton to undertake this Employment Land Study. Daniel & Hulme local property agents also inputted local knowledge of the commercial property market to the study. The primary purpose of this study is to provide a robust evidence base for the development of employment land and related policies in the District's emerging Local Development Documents (LDDs).

1.2 Policy Context

Our review of planning and economic policy at the national, regional and local level identified the need for Staffordshire Moorlands to take a proactive role in providing a full range of employment sites across the District.

1.3 Commercial Property Review

Overall, the commercial market in Staffordshire Moorlands is limited and dominated by the industrial sector with very little in the way of office accommodation.

1.4 Review of Existing Employment Land Supply

A review of the employment land supply in Staffordshire Moorlands District took place involving a logical site identification process and subsequent criteria based appraisal process that has provided the data for a comprehensive review of the existing characteristics of employment land and premises across the District. The information gathered was inputted into Microsoft Access and the site boundaries were plotted on GIS. The database was used to help identify the issues relating to the future role of the 37 employment sites and the key findings are as follows:

- ◆ The total area of the sites assessed amounted to 297 hectares and each varied in size considerably. A further 74 hectares equal to 25 per cent (the percentage used by Atkins is based on previous employment land supply work elsewhere) is believed to exist on sites too small for inclusion in this study;
- ◆ Of the 37 sites that were assessed, 29 contained some proportion of either vacant employment land or opportunity land. Twelve sites contained some vacant employment land, totalling 18.4ha, whilst 19 sites contained opportunity land, totalling 124ha. Intensification at existing locations was observed as possible on a large number of sites with vacancy observed on both previously developed and greenfield land.
- ◆ A total of 210 employment premises were identified within the assessed sites. Of these, approximately 95 per cent were occupied and 5 per cent vacant. Sites with a town centre location contain the largest amount of vacant floorspace, with 4,919 m² (37.0 per cent of all vacant floorspace in the District). Sites within the urban edge were assessed to contain 4,240m² of vacant floorspace (43 per cent of the total vacant floorspace in the District).

- ◆ Factories accounted for the overwhelming majority of B-class floorspace (72.1 per cent), warehousing accounted for 24.7 per cent of the total floorspace.
- ◆ Sites for Specific Occupiers occupy the biggest proportion of employment land in the District (35.9 per cent), with a total of 54.4 ha. There are a number of very large sites which contain Sites for Specific Occupiers, including the JCB Plant on Leek Road (site no.17) and Bolton Copper Works (site no.30).
- ◆ The most common size of premises is between 1,000 and 2,000 m², with 33.7 per cent of premises assessed within this category. The largest sites are located within the Countryside where there is more space and less intrusion into residential amenity. Smaller sites generally tend to be located on the Edge of the Town Centre, although some are located within smaller settlements.

1.5 Review of Future Business Needs

We undertook a business survey of a representative sample of local businesses and undertook a detailed assessment of socio-economic conditions. The key findings were:

- ◆ Staffordshire Moorlands is over dependent on the public sector for employment. It is therefore important for the LDF to assist in accommodating the needs of the private sector in order to grow the private sector employment base in future. The distribution, hotels & restaurants sector, the second largest employer, continues to grow and therefore planning and economic policy should help provide suitable sites. Despite manufacturing appearing very competitive, the industry as a whole is in continual decline.
- ◆ Staffordshire Moorlands District Council needs to proactively assist in offering a wide portfolio of employment sites and premises in terms of size;
- ◆ There is a need to adopt a plan for downsizing and closure possibilities as well as new and expanding sectors particularly to encourage the development of business activities with good growth prospects;
- ◆ Banking, financial and other business activities are under-represented. This will require addressing issues of image and pursuing regeneration initiatives in the town centres which can assist in creating occupier office markets;
- ◆ The majority of future demand for employment floorspace is likely to be generated by SMEs; and,
- ◆ The level of entrepreneurship is comparatively rather low in the District. In response, policies should aim to encourage entrepreneurship and improve the rate of start-ups and provide appropriate premises. The skill level of the workforce should be improved to attract higher level employment and as a result increase the access to higher wages and employment opportunities in the longer term.

1.6 Employment Forecasts 2004 to 2021

We provide a series of quantitative forecasts of workplace employment in Staffordshire Moorlands for the period up to 2021. Also provided are our estimates of the future demand for employment floorspace, which are derived from the employment forecasts. These forecasts concentrate on B-use class employment. The key findings are as follows:

- ◆ A total floorspace requirement of approximately 88,000m², which is equivalent to approximately 184,000m² of employment land, will be required by Staffordshire Moorlands;
- ◆ The greatest demand for floorspace is likely to be for B1a and B1b uses, which will account for approximately half of additional floorspace; and
- ◆ The greatest demand is likely to be for premises that are up to 100m². Business premises of between 1,001m² and 2,500m², whilst only accounting for approximately 10 per cent of total business unit demand, are however likely to account for over a third of the additional employment land allocation.

These figures are indicative and should not be considered as precise calculations.

1.7 Future Employment Land Suitability

The study identifies a portfolio of sites including those considered suitable for retention as employment sites, those which require further investigation and those sites that are no longer considered suitable for future employment use and therefore should be considered for other uses. In summary, the total amount of land evaluated equalled 217.4 hectares as shown in Table 1.

Table 1 - Summary Table

Category	Total Employment Land (Ha)	Vacant Land (Ha)	Opportunity Land (Ha)	Vacant Floorspace (m ²)
Sites of high suitability for employment use	83.5	19.6	3.5	12,943.9
Sites suitable for employment use - subject to further investigation/known constraints	110.6	1.9	39.6	200.0
Sites considered less suitable for employment use	23.4	0.3	19.2	0.0
Total	217.4	21.8	62.3	13,143.9

1.8 Conclusions

The Staffordshire Moorlands property market is localised and static. It is concentrated around the three main towns and deals mainly with demand from small companies and public bodies and there has not been much evidence of interest from outside the District. In summary it is believed that the District is behind when it comes to providing employment facilities and it needs to expand from its manufacturing base to allow the economy to modernise, particularly design, ICT functions, management functions, sales and services. Key issues are:

Knowledge Economy and Incubator Space

The study considered Knowledge economy and incubator space in detail. The key finding was that there is potential to develop serviced centres within the District for creative individuals who live in Staffordshire Moorlands.

Farm Diversification

Staffordshire Moorlands District Council could develop policies to encourage further farm diversification. The provision of grants to assist in the set up of such facilities would need to be in place and should be explored further.

Employment Land Supply

The key finding of the 297 hectares appraised was approximately 80 hectares of this total are not for general employment use as it includes sites that were of regional significance or for the sole use by key employers. The remaining 217 hectares is comprised of 32 sites available for general employment use. Our analysis recorded 21.8 hectares as vacant and 65.4 hectares as opportunity land. Of the 21.8 hectares, nearly two thirds of vacant land was at established employment locations with scope for change.

Employment Land Demand

In total there are 5,214 manufacturing jobs. Part of the over-representation in manufacturing is partly due to JCB. In fact, it is believed that one in ten jobs are linked to the larger employers such as JCB and the two building societies, therefore the District needs to support major employers whilst developing economic development policies to diversify the economic base.

The District requires more distribution, hotels, restaurants, banking, finance and insurance, transport and communications as it has not benefited from as much growth in these sectors when compared to the rest of the country.

The total floorspace requirement of approximately 88,000m², which is equivalent to approximately 184,000m² of employment land, will be required by Staffordshire Moorlands District.

The greatest demand for floorspace is likely to be for B1a and B1b uses, which will account for approximately half of additional floorspace. However B8 uses are likely to account for the most additional employment land at approximately 43 per cent whilst B1a and B1b uses are set to account for approximately 39 per cent. Due to the lower density at which B1c, B2 and B8 premises tend to be built, these premises will account for a higher proportion of total employment land than they do of total floorspace and the most popular size of premises are 1,001-2,500 m².

Market Equilibrium

This employment land study has concluded that there is market equilibrium in Staffordshire Moorlands. We have identified an employment land requirement of 184,000m² or 18.4 hectares of employment land up to 2021. We have demonstrated that 19.6 hectares of vacant land already exists at sites with high suitability for future employment uses.

However, whilst this may appear adequate, it is in reality unlikely to match exactly the aspirations of indigenous and inward investing companies, in terms of the range of size of premises in the right part of the Staffordshire Moorlands area. It is imperative that the District Council proactively plans for a full range of sites to accommodate

different sized operations at different locations in terms of types (town centre, urban edge etc), and in sub-areas of the District.

1.9 Recommendations

Based on the conclusions we have put forward the following policy recommendations:

- ◆ Staffordshire Moorlands District Council should establish an employment policy framework that protects land identified in this study as high suitability. This builds upon previous policy set out in E7 of the Local Plan;
- ◆ it should protect the sites suitable for employment – subject to investigation/known constraints; and,
- ◆ it is important that the District Council does not retain sites unnecessarily that could be more appropriate for other land uses.

Economic Development Action

Staffordshire Moorlands District Council are advised to take a more proactive role to stimulate private sector investment in the commercial property market by making sites available for more modern employment facilities identified as required by modern employers and to enable its manufacturing base to diversify. Key areas of economic development include:

- ◆ intensification where possible to ensure the most effective use of land;
- ◆ Further investigations where there are known constraints should be progressed;
- ◆ provision of additional medium sized premises for high value B1/B2 uses in Cheadle, Upper Tean, and Waterhouses and incubator units in the District; and,
- ◆ Staffordshire Moorlands District Council is advised to develop policies to encourage more farm diversification.

1. Introduction

1.1 Background

In April 2006, Staffordshire Moorlands District Council commissioned Atkins and Lambert Smith Hampton to undertake this Employment Land Study. Daniel & Hulme local property agents also inputted local knowledge of the commercial property market to the study.

The need for the study arises out of national policy guidance. In particular PPG3 (Housing), PPS7 (Sustainable Development in Rural Areas) and PPG4 (Industrial, Commercial Development and Small Firms) highlight that local authorities should undertake local needs assessments in order to establish the quantity, quality and type of employment facilities required to meet future needs in their areas.

National guidance is reinforced through the West Midlands Regional Spatial Strategy (June 2004), the Staffordshire and Stoke-on-Trent Structure Plan 1996/2011, and the Staffordshire Moorlands Local Plan 1998.

The relationship between employment land reviews and Regional Spatial Strategies is set out in PPS11 (ODPM, 2004) and the relationship between employment land reviews and Local Development Frameworks is set out in PPS12 (ODPM, 2004).

Recent guidance produced by the ODPM has provided detailed advice on the approach which should be adopted by local authorities in conducting employment land reviews. Fundamental to the guidance is that local planning authorities ensure that policies:

- ◆ provide for a sufficient supply of land of appropriate quality to meet the varied needs of businesses throughout the plan period;
- ◆ protect suitable existing employment land and premises which are required by the market in the short and long term;
- ◆ where appropriate, identify new employment allocations if the current stock of land falls short of meeting future needs (in quantitative and qualitative terms); and,
- ◆ where appropriate, facilitate the transfer of existing employment sites and allocations to alternative uses if they are unsuitable for employment and/or are genuinely surplus to requirements.

Consequently, the primary purpose of this study is to provide a robust evidence base for the development of employment land and related policies in the District's emerging Local Development Documents (LDDs).

These will eventually replace the existing Local Plan. The assessments undertaken as part of this study are fully consistent with the ODPM's guidance notes.

1.2 Objectives of the Study

The core objectives of the study are to:

- ◆ assess the suitability of existing employment land supply to meet Structure Plan requirements having regard for both quantitative and qualitative factors;
- ◆ define need and identify key gaps in provision having regard to spatial distribution, site size, use class, accessibility, market realism, regeneration and sustainability;
- ◆ assess the economic characteristics of the district and identify key constraints and opportunities;
- ◆ identify inward investment opportunities and highlight the role of the employment land policies in providing for site and premises requirements;

1.3 Spatial Areas

An important requirement of the brief was to assess both demand and supply factors having regard to the following key sub-areas within the District:

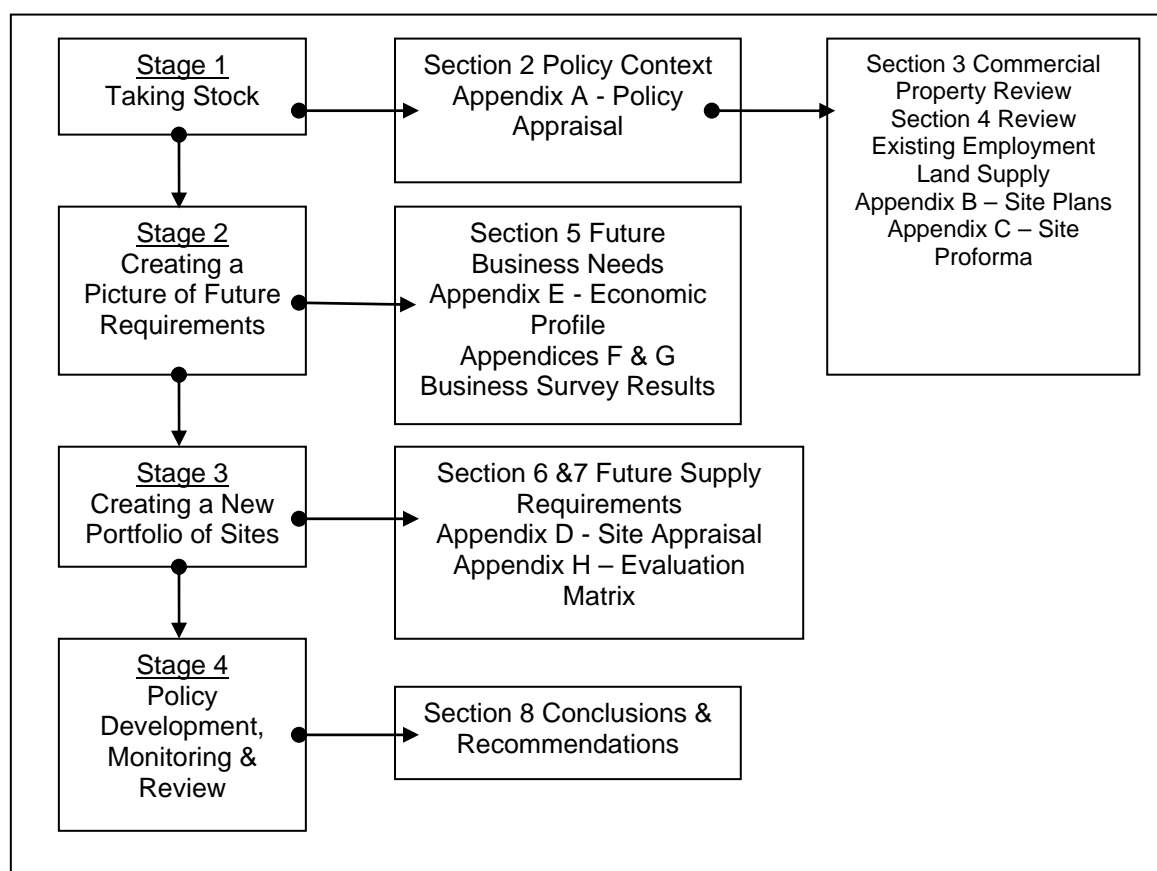
- ◆ Leek
- ◆ Cheadle
- ◆ Biddulph
- ◆ Remainder of District

1.4 Structure of the Report

The main findings of our research are set out in this report. The sections are compiled from information and data accumulated from separate and complementary study tasks.

The conclusion section draws together the separate findings from the separate tasks in a coherent and straight forward manner. This is supplemented by a series of detailed appendices which are provided in a separate document. Figure 1.1 provides a flow diagram which summarises the research process and the linkages between key outputs.

Figure 1.1 – Summary of Research Process



This report is structured as follows:

- ◆ Section 2 – summarises the key national, regional and local policy context of relevance to the study. Appendix A provides the detailed assessment of these policies and strategies.
- ◆ Section 3 & 4 – provides an overview of the property market and the existing employment land supply in the Staffordshire Moorlands District. The detailed site appraisal proforma is contained in Appendix C and the site boundaries are shown in Appendix B in site plans.
- ◆ Section 5 – sets out our assessment of future needs for employment land and premises in the District. This provides a detailed analyses which includes:
 - a) An economic profile and appraisal of the District and sub-areas (Appendix E); and,
 - b) Results in a statistically significant survey of 205 established businesses in Staffordshire Moorlands District (Appendix F),
 - c) The B –Use employment categories are set out in Appendix G;
- ◆ Section 6 – provides the employment forecasts for the District;
- ◆ Section 7 – Considers the future land requirements with a supporting evaluation matrix located in Appendix H; and

- ◆ Section 8 - draws conclusions of the research and analysis stages to inform the recommendations for the emerging Staffordshire Moorlands Local Development Documents.

2. Policy Context

2.1 Introduction

This section provides a summary of the key issues stated in planning and economic development policies and strategies relevant to this study. Appendix A sets out a more detailed explanation of each policy.

The primary purpose of this section is to identify the main national, regional and local policy drivers which:

- ◆ determine the requirement for local authorities to assess employment land and premises needs in urban and rural areas;
- ◆ define the regional and sub-regional objectives to which Staffordshire Moorlands District Council should contribute in the development of their emerging employment policies; and
- ◆ highlight the key local economic, social and regeneration objectives and initiatives which should be complemented by emerging employment land policies.

2.2 National Policy

2.2.1 PPS1 – Delivering Sustainable Development

PPS1 sets out the overarching planning policies on the delivery of sustainable development through the planning system. The PPS states that planning should facilitate and promote sustainable development and inclusive patterns of urban and rural development by making suitable land available for development in line with economic, social and environmental objectives.

PPS1 reaffirms that the plan-led system, and the certainty and predictability it aims to provide, is central to planning and plays a key role in integrating sustainable development objectives. It notes that where the development plan contains relevant policies, applications for planning permission should be determined in line with the plan, unless material considerations indicate otherwise.

2.2.2 PPG3 – Supporting the Delivery of New Housing

In January 2005, the ODPM introduced new paragraph 42(a) to PPG3. This highlights that local planning authorities should consider favourably planning applications for housing or mixed use developments which concern land allocated for industrial or commercial use unless:

it can be demonstrated, preferably through an up-to-date review of employment land, that there is a realistic prospect of the allocation being taken up for its stated use in the plan period.

2.2.3 PPS3 – Housing

Draft PPS3 will in due course replace PPG3 published in March 2000 and Planning Circular 6/98: *Planning and Affordable Housing*. Within PPS3 it is stated that for sites not allocated within the local plan for housing, local planning authorities should consider favourably planning applications on sites, allocated or previously used for industrial and commercial use, which are no longer identified as needed for that use.

2.2.4 PPG4 – Industrial, Commercial Development and Small Firms

Planning Guidance Note 4 provides guidance on issues relating to industrial and commercial development and small firms. The PPG emphasises that one of the Governments key aims is to encourage continued economic development in a way which is compatible with its stated environmental objectives. The guidance emphasises the importance of taking into account both the locational demands of industry and commerce and the maintenance and improvement of environmental quality.

As part of the update of PPG4 to PPS4, the ODPM issued in May 2004, a research document to inform the new guidance.

2.2.5 PPS7 – Sustainable Development in Rural Areas

Planning Policy Statement 7 (PPS7), Sustainable Development in Rural Areas, highlights that planning authorities should focus new development in or near to local service centres where employment, housing and other facilities can be provided in close proximity to each other. The objectives of PPS7 are:

- ◆ to raise the quality of life and the environment in rural areas;
- ◆ to promote more sustainable patterns of development;
- ◆ to promote the development of the English regions by improving their economic performance so that all are able to reach their full potential (by developing competitive, diverse and thriving rural enterprise); and
- ◆ to promote sustainable, diverse and adaptable agricultural sectors.

PPS7 states that in rural areas, planning authorities should focus new development in or near to local service centres where employment, housing, services and other facilities can be provided close together. However, it goes on to highlight that:

Planning authorities should set out in LDDs their policies for allowing some limited development in, or next to, rural settlements that are not designated as local service centres, in order to meet local business and community needs and to maintain the vitality of these communities. In particular, authorities should be supportive of small-scale development of this nature where it provides the most sustainable option in villages that are remote from, and have poor public transport link with, service centres.

In meeting the economic needs of rural areas, PPS7 states that local planning authorities should:

- ◆ identify in LDDs suitable sites for future economic development, particularly in those rural areas where there is a need for employment creation and economic regeneration; and
- ◆ set out in LDDs their criteria for permitting economic development in different locations, including the future expansion of business premises, to facilitate healthy and diverse economic activity in rural areas.

2.2.6 Regional Spatial Strategies (PPS11) & Local Development Frameworks (PPS12)

Planning Policy Statement 11 (PPS11) (ODPM, 2004) provides Government guidance on the relationship between employment land reviews and Regional Spatial Strategies and Planning Policy Statement 12 (PPS12) (ODPM, 2004) provides Government guidance on the relationship between employment land reviews and Local Development Frameworks. These two Planning Policy Statements provide an understanding of the relationship between employment land reviews and policy development at both the regional and local level.

2.3 Regional and Sub-Regional Policy

2.3.1 Prosperity for All - West Midlands Regional Spatial Strategy

The key regional policy document is the (June 2004) Regional Spatial Strategy (previously Regional Planning Guidance) for the West Midlands, which is now being reviewed in three phrases. Under the heading 'Prosperity for All', the RSS sets out a number of key policies to encourage the diversification and modernisation of the regional economy. These reflect the approach advocated in the Regional Economic Strategy (RES) 'Delivering Advantage' prepared by Advantage West Midland (AWM), this framework will have a strong policy impact on future land allocations.

Ensuring the provision of employment land in the right amounts of the right type in the right places is a key part to the Regional Spatial Strategy. Policy PA6 states that the portfolio should be developed in accordance with Spatial Strategy and should include a hierarchy of sites.

Policy PA5 (Employment Areas in Need of Modernisation and Renewal) states that there is an urgent need to renew existing employment areas whose worn-out untidy appearance discourages new investment and encourages further decline. This policy is relevant to Staffordshire Moorlands due to many of the employment sites being neglected and needing investment.

Regional Investment Sites (RIS) (Policy PA7), states that development on RISs will be strictly controlled to ensure that they support the objectives of Spatial Strategy. RISs will be identified within development plans. In identifying such sites, account should be taken of the provision of existing Premium Employment Sites (e.g. Blythe Bridge).

2.3.2 Regional Economic Strategy

Delivering Advantage, the West Midlands Economic Strategy for 2004/2010, sets out a Vision for transforming the West Midlands into a world-class region by 2010.

The Vision for 2010 is 'The West Midlands is [to be] recognised as a world-class region in which to invest, work, learn, visit and live and the most successful in creating wealth to benefit all of its people'.

Central to the RES is the development of a diverse and dynamic business base, which includes modernisation of the manufacturing base.

The RES states that development sites are a crucial condition for future growth. Only 39 per cent of the region's land stock for future employment use is currently available to companies and there are significant gaps in the availability of large sites across the region. The challenge is to ensure that Regional Planning Guidance is implemented and sites are made available to meet the needs of business and to increase investment.

2.3.3 Staffordshire and Stoke-on-Trent Structure Plan 1996/2011

The County's Structure Plan that outlines the future development strategy for the Staffordshire and Stoke-on-Trent area focuses on five key aims:

- ◆ increase the prosperity of Staffordshire and Stoke-on-Trent and reduce unemployment levels;
- ◆ maintain and enhance environmental quality;
- ◆ meet identified housing needs;
- ◆ develop a more sustainable integrated accessibility strategy; and,
- ◆ revitalise the image of Staffordshire and Stoke-on-Trent.

In terms of employment development, Policy E1 (Employment Land Provision and Distribution) sets out the provision made for 1,245 hectares (gross) of employment land in the industrial, office, warehousing and distribution sectors (Class B uses) between 1996 and 2011. This was allocated throughout the county as shown in Table 2.1 below.

Table 2.1 – Employment Land Provision

Area	Amount (Ha)
East Staffordshire	250
Stoke-on-Trent	240
Lichfield	185
Stafford	150
Newcastle	120
Tamworth	120
Cannock Chase	80
South Staffordshire	60
Staffordshire Moorlands	40
Total	1,245 hectares

Source: *Staffordshire and Stoke-on-Trent Structure Plan, 1996/2011*

The basis for the figures is commitments already made including large sites with planning permission, which are under construction or newly completed and sites

allocated in Local Plans. Separate provision is made within the Structure Plan for new Premium Sites within Policy E4 (Premium Employment Sites).

Policy E2 (Increasing the Choice of Sites) states that existing allocation and expiring permissions for employment land should be reviewed to see whether reallocation for alternative uses would provide for more sustainable development. The provision of new employment land should complement rather than duplicate the existing stock of sites by creating a more diverse land portfolio.

Policy E3 (Locational Factors for New Sites) indicates that new employment sites should be located where the requirements of those firms most likely to be accommodated on them can be met. The principle underlying this policy is the reconciliation of the needs of modern employment and developers with the imperative that development should not compromise the ability of communities to develop in a sustainable way.

Policy E8 (Loss of Employment Land and Buildings) states that development which would lead to the loss of business or general industrial land considered to be necessary to meet market requirements and provide a diverse portfolio of employment opportunities, will be resisted, subject to the provisions for review contained in Policy E2.

With regard to the rural economy, development related to the operational requirements of the agricultural industry will be supported having regard to improving or maintaining the local economy and protecting the local countryside character and the environment.

2.4 Local Policy

2.4.1 Staffordshire Moorlands Economic Strategy 2000/05

The strategy recognises that presently in many respects Staffordshire Moorlands is fortunate to have a relatively strong local economy. For example, average unemployment rates are below the national average. However it is recognised that there are hidden weaknesses in the local economy such as dependence on traditional industries; issues regarding long hours and low pay; and difficulties faced by particular geographic communities.

There are four main priorities. The first relates to business investment and diversification. This involves encouraging the growth of new and existing businesses, helping them to invest in the local area and to adapt to change in ways which will build a sustainable and diversified business base in Staffordshire Moorlands. Skills and Jobs are also prioritised, which involves helping local people to develop their skills, to improve their employability and their access to jobs, as well as to improve their income by accessing better paid jobs.

Community regeneration is also to be encouraged, which involves supporting people to get involved in the regeneration of their communities.

Sustainable development and infrastructure is also highlighted - involving developing a local infrastructure which encourages business growth and investment as well as

helping people to access jobs while maintaining a high quality of life for local residents and enhancing the local environment.

2.4.2 Local Futures 'State of the District' Report

The Local Futures report highlights that in practical terms Staffordshire Moorlands needs to build policy and capacity in four competitive areas of the knowledge economy, which are as follows:

- ◆ Entrepreneurship, business sites and networks - strengthening the supporting economic institutional framework.
- ◆ Local innovation - improving product and process innovation across the business economy, based on collaboration between firms, the public sector, universities, colleges and other key players.
- ◆ An educated, skilled and flexible workforce - built around the Learning and Skills Council strategic area reviews and workforce development strategies, including improvements in IT skills and reducing education deprivation.
- ◆ Infrastructure - Staffordshire Moorlands' knowledge economy will require an advanced electronic infrastructure and a variety of e-services for a more technology-based economy and society.

2.4.3 Study of the Creative Industries in the Staffordshire Moorlands: Shop Floor or Shop Window?

The Creative Industries report makes the following conclusions:

- ◆ The creative industries are a substantial, albeit fragmented, industry: whilst there is no one dominant individual organisation - collectively it adds up to a sizeable and significant sector.
- ◆ The creative industries are an established sector in Staffordshire Moorlands, with little evidence yet of many new start-ups or a great deal of high-tech creative activity.
- ◆ The creative industries, with the exception of the antiques/retail sector, are predominantly a producing, not a marketing industry sector.
- ◆ Whilst production skills may have been necessary for expansion, business skills are required now, and marketing is essential.
- ◆ Creative industries suffer from a combination of the area's low profile, exacerbated by being under the shadow of surrounding high profile areas- especially the Peak District - therefore the sector needs to go out more to its markets
- ◆ Tourist-focused creative businesses need to join together with each other/other attractions to become an attraction in their own right - and in groupings that make sense to the tourist. They need to establish an identity.
- ◆ There is a need for immediate and active collaboration with other authorities, partners and agencies, so as to create the critical mass to draw down funding.
- ◆ There is a need for a focus/icon building/location for the creative industries development in the area, with flexible space for production, retail and

development activities. In choosing the location, tourism needs must be considered.

- ◆ In moving to the future- there is a need to be a) realistic – the District employment locations cannot compete with Birmingham/Manchester and b) go with the flow - presently creative industries in the Staffordshire Moorlands are essentially traditional - not new media/high-tech.
- ◆ Staffordshire Moorlands' creative industries need to raise their profile and their critical mass if they are to secure more creative industries development funding.
- ◆ Marketing is essential and a key question is whether to 'go it alone' or whether to join forces with/be subsumed into the adjoining Peak District and/or Stoke-on-Trent initiatives and identities.
- ◆ Also it considers how to exploit the existing local experiences/expertise in national and international marketing.
- ◆ If the tourist market and local markets are to be exploited then the following needs to be addressed: an identity for the area; an identity for the sector; an identification of markets for sectors/specialisms; and the amateur market is essentially local – and would benefit from a stronger local communications network.

2.4.4 Staffordshire Moorlands Local Plan

The Staffordshire Moorlands Local Plan was adopted in September 1998. Policy E1 makes a provision for a total of 19.7 hectares of land to be developed in Staffordshire Moorlands for general employment purposes within classes B1 and B2, as shown in Table 2.2 below.

Table 2.2 – Designated Employment Allocations: 1998

	Ha.
New Haden II, Cheadle	4.0
Cornhill, Leek	3.7
Wharf Road, Biddulph	3.4
Walley Street, Biddulph	2.9
Froghall	2.0
New Haden I, Cheadle	1.7
Waterhouses	1.0
Brookhouses II, Cheadle	0.7
Ipstones	0.3
Total	19.7

Source: Staffordshire Moorlands Local Plan (Adopted 1998)

Traditional industries in the District have been based on textiles and coal mining in the main settlements and on agriculture and quarrying in the rural areas. Due to the decrease in employment in rural areas in both agriculture and quarrying there has been a significant growth of tourism-related jobs in the District (Adopted Plan, 1998).

Government guidance states that commercial and light industry development in the open countryside away from existing settlements should be strictly controlled. It is

desirable however that industry should be located reasonably close to main residential areas so that commuting over long distances can be avoided.

As noted previously Structure Plan Policy E2 advises that new employment should provide a range of different types and sizes of sites capable of meeting various market requirements as they arise. In relation to this policy it is noted in the Staffordshire Moorlands Local Plan that due to the long history of industrial development in Staffordshire Moorlands there are a number of sites which have been vacated by the previous users. Such sites often need a great deal of work to make them suitable for new employment activities. Table 2.3 identifies the sites that have been designated as employment allocations and de-allocations in the Local Plan Revised Policies and Proposals July 2003.

Table 2.3 – Designated Employment Allocations (Revised Policies and Proposals July 2003)

Employment Sites	Proposals
Biddulph	Existing allocation at Whalley Street (south of the bypass) Existing allocation at Wharf Road (employment/retail)
Blythe Bridge	Premium Employment Site
Cheadle	Allen Street (site allocated for affordable housing and light industry) Draycott Cross Leek Road Existing allocation at New Haden II
Leek	Existing allocation at Cornhill
Froghall	Existing allocation at Bolton Copper Works
Mobberley	Land adjoining the existing employment uses
Waterhouses	Existing allocation at Crowtrees Farm Extension to existing allocation at Crowtrees Farm
Employment de-allocations	
Leek	White's Bridge
Ipstones	Land at sewage works

Source: Staffordshire Moorlands Local Plan (Revised Policies and Proposals July 2003)

Policy E2 states that Staffordshire Moorlands has allocated a site of about 50 hectares at the junction of the A50 (T) with the Blythe Bridge Bypass which will be developed as a premium employment site to serve the North Staffordshire Sub-Region.

With regard to development in the countryside, Policy E3 states that applications for agricultural land or buildings may be approved provided that they will diversify the rural economy by providing wide and varied opportunities for rural people. The aim of this policy is to encourage a healthy rural economy.

Policy E7 states that development involving the loss of existing employment sites will not be permitted except where it can be shown that the location is undesirable in environmental or traffic terms and where an alternative site is available.

2.4.5 Staffordshire Moorlands Local Development Framework

In accordance with the Planning and Compulsory Purchase Act 2004, Staffordshire Moorlands District Council is currently working on their Local Development Framework (LDF). The Core Strategy for Staffordshire Moorlands is now being prepared. Consultation on Issues and Options is expected in late 2006.

The first document produced as part of this process is the Biddulph Town Centre Area Action Plan. The AAP and accompanying evidence base was submitted to the Secretary of State for independent examination in January 2006. The examination in public will be held in October 2006, with the adoption of the town centre AAP scheduled for Spring 2007.

As part of the LDF the Biddulph Area Action Plan (AAP) has been produced in accordance with national, regional and county planning policies. The AAP will supersede that part of the Staffordshire Moorlands Local Plan and those policies which have a direct relevance to the Biddulph Town Centre area. The AAP is the statutory planning document for assessing planning applications in the town centre and will allocate sites for certain uses. The following policies have been developed for sites identified within the AAP:

- ◆ Policy DS1 Wharf Road Site;
- ◆ Policy DS2 Bypass Site;
- ◆ Policy DS3 Library Site and Adjoining Land;
- ◆ Policy DS4 Walley Street Area;
- ◆ Policy DS5 Numbers 2-32 High Street;
- ◆ Policy DS6 77 Tunstall Road; and
- ◆ Policy DS7 Open Land between Walley Street Area and Bypass.

2.4.6 Employment sites

Key employment sites have been identified through past studies and development briefs these include Staffordshire Moorlands Mills Study, Blythe Bridge employment site and Victoria Business Park. Refer to Appendix A.

2.4.7 Staffordshire Moorlands Mills Study

Local property agent Daniel & Hulme was commissioned to undertake an audit of some fifty former textile mills for Staffordshire Moorlands District Council. Ten were vacant and the forty that were occupied were shown to be used for a variety of uses,

including employment and residential purposes. At least nine of the occupied mills were observed to be underutilised. The study, through research and a thorough evaluation, produced a short-list of six premises that were subject to further assessment to confirm their suitability for employment purposes with an indication of budget costs for refurbishment produced.

The employment land study has considered the findings of the Mills Study as the former textile mills contribute to the future employment requirement of the District and will, at a more detailed level, contribute to:

- ◆ the creation of a local floorspace ladder;
- ◆ the requirements of the important antiques sub-sector;
- ◆ the creation of a live/work culture; and
- ◆ the expansion of the successful Town Yard employment scheme.

2.5 Summary of Policy Context

The policy appraisal of national, regional and local planning and economic policy identified the following key points:

- ◆ National policy guidance requires local authorities to undertake an assessment of existing and allocated employment land sites. The aim of the assessments is to promote positive planning, ensure that existing and allocated sites are suitable for employment use and where suitable, to highlight options for transfer to other uses.
- ◆ Regional policy, including the West Midlands Regional Spatial Strategy, ensures that employment land is provided in the right amount and of the right type in the right places. In doing so a number of key policies to encourage the diversification and modernisation of the regional economy are provided.
- ◆ Local policy identifies specific designated areas of land, the most significant of which is the Blythe Bridge Premium Employment Site, whose allocation is a response to an acute lack of high quality employment land throughout North Staffordshire. The Local Plan is now being updated in the form of the Staffordshire Moorlands LDF which will take into consideration national, regional and local policy in designating further employment sites.
- ◆ There is a body of local policy and research work, including the Mill Study, which will be considered and integrated into the findings and output of this strategic study.

3. Commercial Property Review

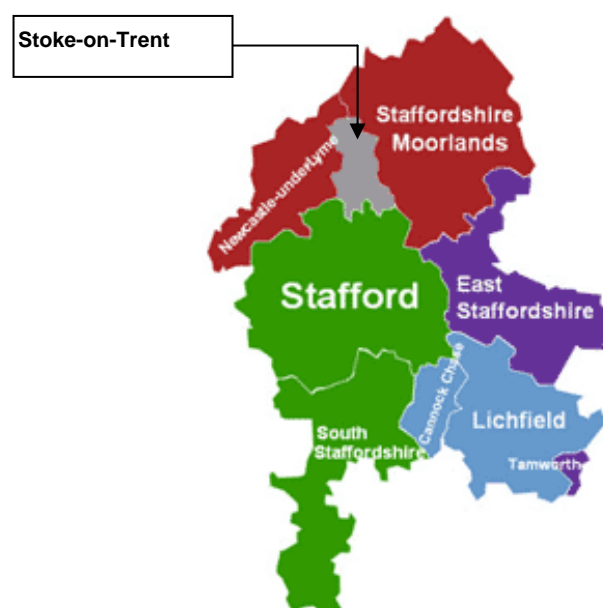
3.1 Introduction

This section of the report has been produced by Lambert Smith Hampton in consultation with Daniel & Hulme Surveyors. It provides a strategic overview of the District's commercial property market within the North Staffordshire context down to the key areas within Staffordshire Moorlands which include Leek, Biddulph, Cheadle and the remainder of the district. This section considers the supply and demand of commercial property within the District and reviews rental and freehold values. It also considers the South Cheshire and Derbyshire Dales areas that share similar property market characteristics to those of Staffordshire Moorlands. Particular attention has been placed on new property trends such as the emergence of the knowledge economy, incubator space, and farm diversification.

As a general overview the Staffordshire Moorlands property market is rather localised. It is concentrated around the District's three main towns and deals mainly with demand from small local companies and public bodies. The District has significant competition from surrounding areas with the M6 corridor through Cheshire and Stoke-on-Trent being strong and the A50 and A500 corridors providing significant employment opportunities.

3.2 Staffordshire

Staffordshire's central location at the heart of the motorway network provides quick and easy access through the Midlands and to the rest of Britain. There is also a long industrial tradition within the area in manufacturing, particularly the ceramics, steel, brewing and engineering industries. Staffordshire is made up of the following districts:



Through liaison with Staffordshire County Council and InStaffs (the development agency for Staffordshire) the following information has been compiled.

In recent years the skills base has expanded into the service sector and high technology industries. In particular, Staffordshire Technology Park occupies 17.8 hectares (44 acres) on the eastern outskirts of Stafford adjacent to Staffordshire University. This was an initiative conceived and developed by Staffordshire County Council, within easy reach of M6 junction 14 and Stafford Town Centre. The development benefits from a wealth of local amenities and west coast main line rail services to London and the north-west. It provides a top quality environment in which high technology companies can prosper. Two principal developers, Gladman Developments and Pritchard Holdings acquired the land and have built speculatively, providing a variety of accommodation, developed during the 1990s following a period of rapid growth of science parks in this country to create jobs in the high technology sector and offset the decline in traditional industries helping to diversify the Staffordshire economy.

The County Council has completed three phases of infrastructure, which provides fully serviced sites for developers and end users. The first phase, and much of the second phase, has benefited from consistent speculative development from Gladman Development Ltd. A range of high quality buildings from 1,500 square feet to 12,000 square feet has been provided, attracting a diversity of uses. The second phase to the County Council's Innovation Centre was completed in 2004, known as Stafford Business Village, which is a partnership development involving Staffordshire County Council, Staffordshire University, Stafford SRB6 and the Staffordshire and Black Country Business Innovation Centre (BIC). The accommodation is aimed at businesses and start-ups with high growth potential, such as IT, media and design and is aimed specifically at graduate retention throughout the Midlands Region.

The BIC Phase I provides accommodation for new high technology businesses, which can prosper within a supportive environment and develop links with Staffordshire University. The Centre benefits from the establishment of a European BIC (the Staffordshire and Black Country Business Innovation Centre), which supports the day-to-day management of the building. The BIC assists businesses and individuals to evaluate and develop inventions, innovations and technology related ideas, as well as offering a host of ancillary services to benefit small and medium sized enterprises.

The Business Innovation Centre Phase II, providing over 40 small units was completed in 2005. It is a joint project between Staffordshire County Council and Staffordshire University with a strong emphasis on graduate retention and spin-out companies from the University. The project forms part of Stafford's drive to get new businesses off the ground under the Government's Single Regeneration Budget programme, which saw the District win almost £5 million in funding. Stafford's SRB supported this latest project with a £500,000 grant in a deal with the university, the county council and the new centre.

In addition, further development within the Staffordshire Technology Park includes Anson Court Business Centre a new science technology centre. The £4 million project provides flexible space ranging from 500 square feet to the maximum 42,000 square feet. With some units reserved for expanding businesses currently in the Innovation Centre. A sister development, Wolesley Court has also been completed

providing 60,000 square feet of space with the emphasis on technology/research and development.

There is currently 400,000 sq feet of space, either built or under construction, within the Technology Park and it is estimated that the scheme will support 2000 jobs when fully developed. The Technology Park has made a significant contribution in replacing recent job losses in traditional industries by strengthening and diversifying the local economy through the creation and growth of businesses in the high technology sectors.

3.3 North Staffordshire and Staffordshire Moorlands

The Integrated Economic Development Strategy for the North Staffordshire Conurbation (2005) states that North Staffordshire, consisting of Stoke-on-Trent, Newcastle-under-Lyme and Staffordshire Moorlands, is behind in providing employment facilities and the conurbation needs to expand from its manufacturing base to allow the economy to modernise. The Strategy identifies that this could be achieved through the development of service activities associated with manufacturing such as design, ICT functions, management functions, sales and service.

Staffordshire Moorlands was a thriving silk, textile and dyeing industry, at its height in the nineteenth Century, which has subsequently resulted in a large number of obsolete mill premises following the decline of such industries in this Country. The majority of these mills are located by water courses for industrial purposes and therefore sites may have contamination issues. The mills typically have a footprint that occupies about 90 per cent of the site area. The internal layouts are not fit for modern requirements and the servicing is on narrow terraced streets. Car parking is not provided on former mill sites unless adjacent land has been more recently acquired.

Within Staffordshire Moorlands, there is the proposed development of a Business Park at Blythe Vale on a greenfield investment site comprising 14.5 acres (5.9 ha) in phase 1 with future expansion land to 117 acres (47.3 ha). Buildings are designed to specific occupiers needs from 15,000sq ft (1,393.5 m²). The site is also well located on the A50 M1-M6 link road and is 7 miles south east of Stoke-on-Trent City Centre. The site is also within 9 miles of junction 15 of the M6. The site is owned by St Modwen Developments.

InStaffs produce a Property Market Trends report every six months for the whole of Staffordshire. The most recent document, which covers the October 2005 to March 2006 period, made the following observations about the Staffordshire Moorlands Property Market:

- ◆ in terms of enquiries, Staffordshire Moorlands had only 3 per cent of the total traditional enquiries for the County and 8 per cent of the total Internet enquiries;
- ◆ the average industrial rent across the district was £2.50 per sq ft (psf);
- ◆ the average office rent across the district was £6.56 psf;
- ◆ the average land price was £156,000 per acre; and,
- ◆ of the limited number of enquiries that were received a third were for industrial units under 10,000 sq ft

3.4 Stoke-on-Trent

Nearby in the City of Stoke-on-Trent, a former colliery at Chatterley Whitfield is being redeveloped with the former Main Office complex being converted into business and training accommodation to support small and medium enterprise accommodation and skills training. The colliery is an historic site of exceptional importance and is recognised as England's best-preserved example of a coalmining complex. Part of the site was given Scheduled Ancient Monument status by English heritage in 1993. The buildings have differing levels of historical significance but it is the completeness of Chatterley Whitfield that is in part the reason for its historic value. Removing or altering any of the buildings could affect the significance of the site as a whole.

The redevelopment will also include the upgrade and widening of the existing access road to enable re-use of further buildings in future phases. The surviving buildings are grouped into zones running across the site which can be roughly defined as the miners welfare zone, the manufacture and support zone and the coal processing zone. The main office complex sits within the welfare zone along with the Pithead Baths, Canteen, Medical Centre and Rescue Station and additional laboratories. These buildings controlled the overall management and administration functions of the working colliery along with the provision of medical and pastoral care for its employees. Chatterley Whitfield is likely to compete with sites in Staffordshire Moorlands particularly Victoria Business Park in Biddulph.

3.5 South Cheshire

The Cheshire Property Market Assessment 2005¹ states that the Cheshire Property market has been particularly buoyant over the last few years with a strong demand from both investors and occupiers. Within South Cheshire there has been considerable growth in Crewe, which is recognised as due to the change in government legislation regarding drive times and its impact on distribution operatives, the expansion of Manchester Metropolitan University and a planned town centre redevelopment.

There has been significant growth in Sandbach, especially in the industrial and distribution market due to its close proximity to the M6. Regeneration proposals have also provided an economic boost for the area. As part of the Market Town Initiative an Enterprise Centre located in Sandbach town centre was planned, providing office and incubation space for small businesses. The Creative Enterprise Centre was originally a project incorporating business incubation and development, learning and community related projects within one centre. It was envisaged that the business element could subsidise the community activity area. However the project was not feasible and deemed insufficient community consultation had been taken place to really meet the needs of the community. The project is now being revised in response to these issues.

Within Cheshire there is a unique network of Business Generation Centres offering purpose designed units, studios and offices in a business village setting. The Business Generation Centres provide total business support to help young companies to grow successfully. Currently there is a Business Centre in Congleton,

¹ A report produced by CB Richard Ellis and Cheshire County Council

two located in Crewe and others situated in Chester, Ellesmere Port and Winsford. In 2004 Cheshire County Council made the decision to move away from managed workspaces to provide more incubator units.

Congleton has also attracted investment with the recent development of the Congleton Business Park which will provide 12 acres for office, industrial and retail uses. In addition, the redevelopment of the West Heath shopping centre has provided the town with a range of new modern retail units. The restoration and redevelopment of many textiles mills is ongoing for a range of uses such as residential, office and retail. The Silk Ribbon and Victoria Mills have now been redeveloped as successful retail outlets.

There has also been a growth in the Self Invested Pension Plans (SIPP) market within the locality. The SIPPs have been popular throughout Cheshire while interest rates remain low. There has been considerable growth in this market in Middlewich and Northwich investing in offices, mainly in schemes of 10,000 sq ft and under.

3.6 Derbyshire Dales

Derbyshire Dales has very limited commercial property market. In terms of both industrial and office space, there is little supply but also little demand.

The reason for this low take up is that historically the demand for commercial premises was primarily generated from the agricultural sector. With the overall demise in farming this demand has dwindled which has also led to an increase in supply. Compounding this is the poor quality of accommodation which mainly consists of old or converted farm buildings which no longer suit the modern occupier.

The commercial market has now developed away from the traditional uses which focused only on the immediate area and the local populace. Greater flexibility in the market and increased competition has meant that industries have either had to relocate out of the region due to merger or expansion, or consolidate their position into modern purpose built premises.

Staffing and accessibility are also major drivers now for companies expanding or relocating. Locally this has resulted in the bulk of any new commercial development focusing on and around the A6.

The main commercial locations in the District are Matlock and Bakewell. However, even these locations are not renowned for their commercial activity and are more tourist destinations. The entire District, as a whole, only gets between 30 and 50 enquires for commercial space annually of which only a small number are converted into transactions.

Given the supply of employment land and space in Derbyshire Dales, it is expected that the market position will not improve in the foreseeable future and if anything it is likely to get worse. The continuing decline in the farming industry is likely to create more vacant employment space with no demand to fill it. It is considered that this will create an increase in the oversupply.

The Derby and Derbyshire Economic Partnership (DDEP) identifies that the development of incubators is seen as important to the success of the sub region and the provision of follow-on space and high quality business environments are seen currently as barriers to be addressed. The DDEP Business Plan 2005/08 proposes development of incubator facilities along the central corridor near Matlock and to bring forward with Derby City Council significant investment in new creative industries workspace, to name but a few. This will build upon the investments the DDEP has already made in supporting projects across Derbyshire, such as supporting the introduction of business start-ups, providing small loan funds, assisting in technology transfer and importantly with Derbyshire Constabulary to provide support to businesses to help reduce the impact of business crime across the whole of Derbyshire. In addition the DDEP supports rural areas through the provision of rural business and innovation centres for key growth sectors in the Rural Action Zone (RAZ). The RAZ covers the whole of High Peak and Derbyshire Dales districts and this is seen as a powerful tool for driving forward the rural economy for the area in the future.

3.7 Leek

Leek is the largest town within Staffordshire Moorlands. Leek has declined over the years from a heavy textile base and the property market is limited with the main industrial use in the area being the Leekbrook Industrial Estate. This is an estate with smaller previously occupied industrial space. Recently a 7,500 sq ft unit was sold at a rate of £50 psf. This is the maximum that has been achieved in Leek although there is currently a unit available being marketed at between £50 and £55 psf.

Kerrygold, have an industrial unit on Barnfields Industrial Estate and are the main industrial employer. There are two other industrial estates in Leek the Leekbrook, Industrial Estate and Town Yard Business Park. They both provide previously occupied accommodation with rents and freehold values similar to those at Leekbrook. The Town Yard Business Park is a council development of 21 small units under 1,000sq ft that was built in the 1990s.

There is a small localised office market within Leek. Offices tend to be in the region of 500 to 2,000 sq ft, achieving rents of up to £5 psf in units above shops. There is no new build and it would be expected that a developer would require rents between £10 to £12 psf to even contemplate new office development. The market is dominated by mainly localised professional firms.

The main employer within the town is Britannia Building Society which has a large stand alone office complex on two sites situated on the A520 within the town providing significant employment. Also located in Leek is Leek United Building Society and this is also a significant employer in the town.

There has been limited new development within the whole of Leek. It could be expected that if smaller units up to a maximum of 10,000 sq ft are built and available on a freehold basis, then the demand exists in the area to accommodate these units. For new units it would be expected that the maximum freehold value would be £55 psf with rent reaching £5 psf.

In relation to land the maximum that would be paid would be from owner occupier developers, who would be able to pay up to £175,000 per acre. However, most private developers, building speculatively, would not be able pay more than £100,000 per acre.

Another significant location for employment land is the industrial area on Macclesfield Road. Here there are many different owners of premises located on the River Churnet. Tessengerlo, a chemical company, and a number of medium sized textile companies, including a sports shirt manufacturer, are located in the area.

3.8 Biddulph

Biddulph has seven of the forty employment sites located within the settlement boundary. Selectus, a ribbon manufacturer, based in purpose-built mill premises surrounded by housing still operates from Biddulph and is the significant local employer.

Of the three main towns in Staffordshire Moorlands Biddulph is the only town that has had any significant new employment development. The Victoria Business Park has been developed on the site of a former colliery with Phase 1 completed in 2004. The park was developed using grant funding from the National Coalfields Programme and was a partnership scheme with property developer Priority Sites, English Partnerships and Staffordshire Moorlands Council.

Victoria Business Park a 29-acre site that provides eight modern industrial units on the edge of the Stoke-on-Trent conurbation. All the eight units were sold on a 999 year lease. The scheme consists of a total of approximately 45,000 sq ft of high quality industrial/office units incorporating curved roofs and flat panelled cladding, with feature lighting and first floor protruding office pods to the prominent building on the site frontage.

The site has achieved land values of £85,000 per acre. Freehold values of £48 psf have been achieved and rents of £5 are being quoted.

At Victoria Business Park there is a mix of occupiers on the first phase ranging from engineering companies to computer companies including PC Interworks and Park Engineering Logistics. The units range between 3,000 and 10,000 square foot and cost in the region of £45 per square foot. In total there are 64 people employed here, the most with 20 employees is Piper Boats.

The second phase at Victoria Business Park is due on site in the near future and negotiations are underway about a potential office scheme within the second phase. Should this go ahead, rents of between £10 to £12 psf would be expected. At the current time, Biddulph has no significant office market with existing stock mainly above shops and occupied by professional firms. Regarding the industrial aspect of the scheme, this speculative development could achieve between £50 and £55 psf depending on the size of unit. There are no other significant industrial properties within Biddulph other than a number of old mills that achieve rents of up to £1 psf and a number of older accommodation. These provide low cost premises and a number are used by local occupiers.

In addition, it is reported that there are a number of parties interested in pursuing land sales and they are looking to pay between £100,000 and £125,000 per acre depending on the occupier.

Biddulph has in recent times seen a drift of companies moving from the Cheshire plain around Congleton. Prices in these areas have increased and have resulted in companies relocating further south. It is expected that this trend could continue when the second phase of Victoria Business Park is complete.

The Biddulph Town Centre Area Action Plan sets out a number of development site policies with employment uses, including the Bypass Site. The Bypass site is a comprehensive development scheme including:

- ◆ a new enterprise centre with 15 to 20 units ranging from 15 to 30 m² and support facilities;
- ◆ up to 10 trade counter units ranging from 300 to 550 m² ; and,
- ◆ up to 10 purpose built industrial warehouse units of 50 to 200 m² .

In addition to employment uses at the Bypass Site there are also proposals for non-food retail, and leisure.

At Walley Street plans to improve the environment and local amenity have been indicated by Staffordshire Moorlands District Council in partnership with landowners who aim to:

- ◆ refurbish employment premises; or
- ◆ replace with more suitable employment premises.

3.9 Cheadle

Cheadle experiences a local market dominated by the agricultural industry and many occupiers tend to be from this sector. There are several industrial estates located around Cheadle in the Draycott Road and New Haden area producing a major location for employment development. International manufacturing firm JCB has recently opened a large plant on the outskirts of Cheadle in addition to existing premises on Oakamoor Road. A number of manufacturing businesses that supply JCB are located in the vicinity.

Industrial rents are £3.50 to £4 psf with freehold values at £50 psf. There is no supply of freehold units and again it could be expected that smaller freehold units would be successful in this location. Land values of £75,000 per acre reflect the local market.

In terms of office development there is no significant market in Cheadle with the offices that do exist occupied by small professional occupiers.

In the event that one or more of the larger companies decided to relocate elsewhere there would be a need to explore the potential for similar companies to come into the area and take advantage of the highly skilled workforce. In such circumstances it is unlikely that such a large company would be found and an amount of retraining would need to be pursued. There is a cycle for such movement within concentrated

areas such as Staffordshire Moorlands which has previously been seen when looking at the history of the area and the dominance of collieries and manufacturing in the area.

The most significant employer outside the urban areas is Alton Towers².

3.10 Remainder of the District

A 50 hectare Premium Employment Site has been allocated in the Staffordshire Moorlands Local Plan at Blythe Bridge to serve the needs of the North Staffordshire sub-region.

There are a number of small settlements with established employment land and premises including Creswell, Cheddleton, Ipstones, and Waterhouses that emerged through English Estates investment programme following the decline of the coal industry.

The most significantly sized employment land outside of the towns is at the Bolton Copper Works site in Froghall.

In these locations smaller freehold units are very popular for business owners and semi-retired business owners as part of working nearer to where they live, development of 'hobby-businesses' and as part of pension investments. Uses such as storage of wedding cars and engineering of parts associated with JCB are located in these areas.

Each of these settlements has the need to balance supply and demand, for example if a large amount of employment land was made available at Froghall, it could have a detrimental impact upon premises in Ipstones and Cheddleton. A delicate balance needs to be made so as not to flood the market and thereby reduce property values.

3.11 Knowledge Economy and Incubator Space

Advantage West Midlands (AWM) works closely with a range of partners including universities, research and technology organisations, business support organisations, science parks and incubators to help promote innovation in the region.

Staffordshire has a central role in working towards this objective and the AWM funds a number of projects namely, Different by Design which is spending £2.7m to help ambitious firms to create market leading new products in Staffordshire and Creative Networks which has been established to provide support and professional development for designers and creative individuals based in Staffordshire.

In addition, there are a number of projects which cover the whole of the West Midlands region to promote innovation and support for new companies.

There may be potential to develop serviced centres within villages for residents of particular areas of Staffordshire Moorlands to reduce the need to travel to work or for

² We have excluded Alton Towers land from the study as it is classed as D2 Leisure in terms of the Town and Country Planning Use Class Order, April 1995.

people who would like to work from home but do not have the appropriate facilities. These centres would provide broadband and associated office equipment such as photocopying and would benefit areas where broadband does not reach rural areas. This would need to be explored further to identify if it would be cost effective.

3.12 Farm Diversification

The Draft Regional Spatial Strategy for the West Midlands states that areas such as Staffordshire Moorlands should build on the location strengths, environmental qualities, regeneration opportunities and the linkages between them and their local hinterlands to develop their own distinctive roles and character.

Through Policy PA15: Agriculture and Farm Diversification the RSS identifies that strategies should recognise the continuing importance of the agricultural sector in the Region and promote farm diversification through the development of innovative business schemes.

Farm diversification, both agricultural and non-agricultural covers a wide range of potential activity which can add value to supplement farm incomes, in particular, development of regional and local food products, organic produce, local supply chains and marketing and links to the region's strong and growing environmental economy and tourist industry.

There could be potential to encourage such diversification within Staffordshire Moorlands and the provision of organic or specialist farming, holiday cottages or rural leisure centres could be a realistic opportunity. However, the deliverability of such schemes would need to be explored further and the provision of grants to assist in the set up of such facilities would need to be in place and should be explored further.

3.13 Property Conclusions

Within the West Midlands, Birmingham is the main economic centre and has a national significance within the Country and is recognised as the second business location outside London. As a result, the city attracts major national companies. The key cities and towns in the West Midlands which hold a secondary status to Birmingham include Solihull, Coventry, Wolverhampton and Stoke-On-Trent, are the main towns for their respective sub-regions and attract regional companies and regional public sector bodies such as County Councils.

The remaining areas within the key cities and towns, including Staffordshire Moorlands, have a tertiary role in the market and tend to attract local employers or the District Council as main employers. Some areas do however benefit from major employers such as JCB in Cheadle and Britannia Building Society in Leek. In the event that a large employer decided to relocate, it is unlikely that a similarly large company would locate in the area due to the area's position in the wider market.

Within Staffordshire Moorlands, Biddulph has the most potential for growth and development and should take advantage of the wealth within South Cheshire by continuing to provide good quality, cheaper facilities which are easily accessible to attract companies. Leek and Cheadle are more constrained by the lack of a major route such as the A50 or A500 and subsequently cannot compete easily with towns

such as Stoke-on-Trent and Crewe. However, there may be potential to provide small speculative units available on either a freehold or leasehold basis to attract small companies to the area. In addition, there may be potential to develop serviced centres and diversify farms within the more rural areas although the opportunity.

The commercial market in Staffordshire Moorlands is limited and dominated by the industrial sector with very little in the way of office accommodation existing. Occupiers are mainly in the south of the District, although there has been migration of businesses from South Cheshire to northern parts of the District. There is demand for small (under 10,000 sq ft) freehold industrial units in the three towns and it is expected that more developments similar to the first phase at Victoria Business Park would be successful. A summary of rental and land values is contained in Table 3.1 below.

Table 3.1 - Rental and Land Values in Staffordshire Moorlands

Location	Industrial Space		Office Space		Land Values (£ per acre)
	Freehold (£ psf)	Rent (£ psf)	Freehold (£ psf)	Rent (£ psf)	
Leek	50	-	55	5	100,000
Biddulph	48	4.75	-	10 ³	85,000
Cheadle	50	3.75	-	-	75,000

³ Expected at Victoria Business Park Phase 2 once complete.

4. Review of Existing Employment Land Supply

4.1 Introduction

In accordance with the ODPM Employment Land Guidance Note this section sets out the review of the existing supply of land in Staffordshire Moorlands District (existing, allocated and additional). It describes the site identification and criteria based appraisal process that has been adopted and provides a comprehensive review of the existing characteristics of employment land and premises at the following levels of detail:

- ◆ District-wide; and
- ◆ individual sites and sub-divisions where appropriate.

The main body of this Section describes the key results for the District and for the sub-areas. This is supported by a series of detailed tables, provided in Appendix D, which set out the site specific findings (Tables i to xiii).

4.2 Methodology

Existing and potential employment land within the District was identified using the current planning policy designations in the Local Plan for Staffordshire Moorlands (1998). Forty sites were originally identified for consideration in this study, however sites at Allen Street, Cheadle (site no.21) and Foker Grange, Leek (site no.7) were discounted as they had previously been considered as unsuitable for the purpose of employment. A further site Warslow Industrial Estate (site number 40) was visited but excluded from the study due to its location within the Peak District National Park boundary and thus falling under the responsibility of the National Park Authority.

Therefore, of the thirty-seven sites that were thought to be suitable for appraisal, twelve were designated as allocated employment land and twenty-five as established employment locations.

Each site was assessed through a separate site appraisal. Site locations are listed in Table 4.1 below, and shown in Figure 4.1 in Appendix B.

4.3 Small Sites Collective Area

It is understood that other smaller employment land locations exist throughout the District, but they are too numerous and small in scale to require individual site appraisals.

The percentage used by Atkins is based on our previous employment land supply work elsewhere and are equal to approximately **twenty-five per cent** of the total supply of land and premises in the Staffordshire Moorlands District. In order to ensure that they were taken into account this figure has been factored into the appraisal process.

Table 4.1 – Sites included in the study

Site ID	Site Name	Address
1	British Trimmings	Ball Haye Road, Leek
2	Fowlchurch Tip	Reclaimed Tip off Nelson Street, Leek
3	Springfield Road	Springfield Road, Leek
4	Macclesfield Road	Macclesfield Road, Leek
5	Mills on Brook Street	Brook Street, Leek
6	Whites Bridge	Macclesfield Road, Leek
8	Barnfields Industrial Estate	Barnfields Industrial Estate A53 Newcastle Road, Leek
9	Cattle Market	Cattle Market, Junction Road, Leek.
10	Britannia Building Society	Cheddleton Road, Leek
11	Town Yard	Town Yard Industrial Estate, Station Street, Leek
12	Brooklands Way	Basford Lane Industrial Estate, Brooklands Way, Leekbrook
13	Part of Former Joshua Wardle	Extension to Leekbrook Industrial Estate, Leekbrook
14	Churnetside Business Park	Churnetside Business Park, Station Road/Harrison Way, Cheddleton
15	Beresford/PMT Depot	Beresford/PMT Depot, Cheadle Road, Cheddleton
16	Pointon Site	Felthouse Lane, Cheddleton
17	JCB, Leek Road	JCB Plant, Leek Road, Cheadle
18	JCB, Oakamoor Road	JCB Plant, Oakamoor Road, Cheadle
19	New Haden/Brookhouses	New Haden/Brookhouses, Draycott Cross Road, Cheadle
20	Mobberley	Tean Road (opposite The Crown public house), Mobberley.
22	Bridge Villa	Bridge Villa, Draycott Road, Upper Tean
23	Premium Employment Land Blythe Vale	Blythe Vale Premium Employment Land, Blythe Bridge
24	Victoria Business Park	Off A527, Biddulph
25	Wharf Road	Wharf Road (By-pass site), Biddulph
26	Former Council Depot	Former Council Depot, Meadows Way, Biddulph
27	Walley Street	Walley Street, Biddulph
28	Uplands Mill	The Uplands, Biddulph
29	Gillow Heath Sewage Works	Off Marsh Green Road, Congleton Road, Biddulph,
30	Bolton Copper Works	Froghall, ST10 2HG
31	Far Lane Industrial Estate	Far Lane, Ipstones
32	Waterhouses Enterprise Centre	A523, Waterhouses
33	Blithe works, Sandon Road	Blithe Works, Cresswell
34	Dilhorne Road and The Green	Former Mill, Dilhorne Road, Cheadle
35	Queen Street	Queen Street, Leek
36	Lymers Depot	Lymers Depot/William Plant, Thomas Road, Upper Tean
37	Leekbrook Industrial Estate	Leekbrook Industrial Estate, Leekbrook Way, Leekbrook
38	Co-op Milk Plant	Uttoxeter Road, Checkley
39	Power Wash Indus. Estate & Brown Lees Indus. Est.	Tunstall Road, Biddulph

N.B As mentioned earlier in the report sites numbered 7, 21 and 40 were considered unsuitable for employment uses and therefore removed from the list of sites to be appraised.

Comprehensive site appraisals were undertaken for each site, which investigated the following;

- ◆ size of site (ha);
- ◆ existing uses including the total number of employment premises and business activity types;
- ◆ details and amount (ha) of vacant land, opportunity land, and vacant floorspace (m²);
- ◆ property appraisal including the type, age, condition, and quality of premises;
- ◆ appraisal of access and transport issues including external and internal access, parking arrangements and public transport accessibility;
- ◆ environmental condition and quality including the provision of amenities;
- ◆ issues affecting the marketing and management of the site;
- ◆ identification of development constraints; and
- ◆ potential scope for change and future uses.

In order to ensure a consistent and robust assessment of the 37 employment sites, a site appraisal pro-forma was developed. This incorporated a variety of closed tick-box style questions and open-ended questions. Adopting this approach has enabled a mixture of qualitative and quantitative analysis to be undertaken.

To ensure that reliable and consistent data was collected, a set of pro-forma guidelines was prepared which established how each of the different questions should be completed. A copy of the site pro-forma and pro-forma guidelines is provided in Appendix C. The site surveys were undertaken during May 2006.

4.3.1 Definitions

Vacant Land

Vacant Employment Land represents land which is suitable for development/redevelopment within an existing cluster of employment uses. There may be an opportunity to develop the land parcel if, for example, the plot is no longer in use and the building stock is in very poor condition. Factories, warehouses and plants that are no longer in operation are good examples of vacant employment land. It is important to note that the land does not necessarily have to be previously developed to represent vacant employment land. For example, an under-utilised plot within an existing industrial estate still represents vacant employment land. There will be opportunities to provide additional employment floorspace on these vacant plots in order to help meet demand.

Opportunity Land

Opportunity Land represents land which has the potential for development for employment uses but which currently does not support such uses. Greenfield sites which may be suitable for future employment development as well as vacant schools, hospitals and residential uses which are no longer required in their current use are good examples of opportunity land. Opportunity land is only usually developed if the existing vacant employment land within existing employment areas cannot accommodate the demand for floorspace, or if the existing employment areas are

thought be unsuitable for the type of employment space required (such as a new high quality office park).

Vacant floorspace

Vacant employment floorspace represents completely vacant premises which are suitable for re-occupation without redevelopment/major renovation. These premises will be able to accommodate some of the additional demand for floorspace.

4.3.2 Data entry, checking and verification

Following the completion of the site appraisal stage of the study, the information obtained from the site surveys was fed into Microsoft Access database. The information was then checked and verified by the client and study team for accuracy. In addition to undertaking these tasks, information from the Staffordshire Moorlands Local Plan and other sources were also added to the database.

The data was then analysed using Microsoft Access to enable detailed analysis of various issues affecting the 37 sites, including information on vacancy rates, the balance of uses, the range, age and condition of premises found within the sites, and site accessibility. The database was used to help identify the issues relating to the future role of the sites (including scope for change and potential development constraints).

4.4 Analysis of Issues Affecting Staffordshire Moorlands Employment Areas

4.4.1 Introduction

This section of the report provides an analysis of the principal issues affecting the sites, and should be read in conjunction with the A1 plans in Appendix B, Site Appraisal Proforma and Guidance Notes and detailed tables included in Appendix D.

Figure 4.1 shows the locations of the sites, vacant employment land, opportunity land and vacant premises floorspace.

Summary tables are included to provide an analysis of attributes by the following location types and site types within the District:

- ◆ Town Centre;
- ◆ Edge of Town Centre;
- ◆ Within Urban Area;
- ◆ Urban edge;
- ◆ Within / adjoining Rural Settlement;
- ◆ Countryside;
- ◆ Employment Land Allocation (Underdeveloped);
- ◆ Employment Land Allocation (Partially Developed);
- ◆ Established Employment Location (Scope for Change); and
- ◆ Established Employment Location (Little Scope for Change);

4.4.2 Site Type, Location and Size

Table 4.2, below, demonstrates the number of sites located within each location and by site typology. Individual site details are shown in Table 4i in Appendix D.

Just over 32 per cent of the sites were located within the 'urban edge', and 19 per cent 'within / adjoining rural settlement'. 50 per cent of those sites designated as 'employment land allocation (underdeveloped)' were located within the 'countryside'. 37.5 per cent of 'employment land allocation (partially developed)' was located 'within / adjoining rural settlement' and 40 per cent of 'established employment location (scope for change)' located within an 'urban edge'.

Table 4.2 - Location and Site Type

Sub Area	Total Sites		Town Centre		Edge of Town Centre		Within Urban Area		Urban edge		Within / adjoining Rural Settlement		Countryside	
	No.	No.	% of Total	No.	% of Total	No.	% of Total	No.	% of Total	No.	% of Total	No.	% of Total	
Employment Land Allocation (Underdeveloped)	4	0	0.0	1	25.0	0	0.0	1	25.0	0	0.0	2	50.0	
Employment Land Allocation (Partially Developed)	8	0	0.0	1	12.5	1	12.5	2	25.0	3	37.5	1	12.5	
Established Employment Location (Scope for Change)	15	2	13.3	2	13.3	2	13.3	6	40.0	3	20.0	0	0.0	
Established Employment Location (Little Scope for Change)	10	0	0.0	2	20.0	2	20.0	3	30.0	1	10.0	2	20.0	
Total	37	2	5.4	6	16.2	5	13.5	12	32.4	7	18.9	5	13.5	

Source: See Appendix Di for further details.

The total area of the sites assessed amounted to 297 hectares (Table 4.3). Table Dii in Appendix D contains details of site areas for each of the assessed sites.

The sites vary in size considerably, with the largest site (Site 23 – Premium Employment Land Blythe Vale) encompassing nearly 49 hectares of land, and the smallest site (Site 26 - Former Council Depot) encompassing only 0.2 hectares.

Approximately 38.0 per cent of the assessed land was located within an 'urban edge' location, and 26 per cent in the 'Countryside'. Just 1 per cent of the employment land assessed was located within a 'town centre' location.

Land supply was relatively evenly split across the site types, with 'established employment locations (partially developed)' encompassing the largest proportion of total site area (33.3 per cent), and 'established employment location (little scope for change)' representing the smallest proportion (13.2 per cent).

Table 4.3 - Land Supply

	Total Site Area (ha)	% of Total
Town Centre	2.84	1.0
Edge of Town Centre	10.52	3.5
Within Urban Area	38.28	12.9
Urban edge	111.73	37.7
Within / adjoining Rural Settlement	55.44	18.7
Countryside	77.96	26.3
Total	296.77	100.0
Employment Land Allocation Underdeveloped	61.31	20.7
Employment Land Allocation (Partially Developed)	98.68	33.3
Established Employment Location (Scope for Change)	97.52	32.9
Established Employment Location (Little Scope for Change)	39.26	13.2
Total	296.77	100.0

4.4.3 Employment Premises

The site appraisal process was used to ascertain the total number of occupied employment premises located in each site. Vacant premises were also identified, facilitating analysis of the percentage of vacant employment premises in each site and sub-area (see Table 4.4 below and Table Dii in Appendix D). In order to maintain a consistent approach throughout the site appraisals, a multi-occupier single building was considered to represent one employment premises. For each vacant employment premises, the numbers of vacant storeys within the building was recorded, in order to accurately identify the amount of vacant floorspace (see Table 4.6 below).

A total of 210 employment premises were identified within the assessed sites. Of these, approximately 95 per cent were occupied, and 5 per cent vacant. However, there was some variation in vacancy rates depending on the location, with approximately 9 per cent of 'edge of town centre' employment premises being vacant at the time of the assessment, compared to none in the 'countryside'.

In terms of individual sites, there was little variation in terms of vacant employment premises, with no sites containing more than one vacant employment premises. Two sites (Blithe works, Sandon Road and New Haden/Brookhouses) contained thirty or more (occupied) employment premises, and a further seven sites contained more than ten employment premises. At the time of the assessment twelve of the sites contained only one employment premises, and eight contained none.

Table 4.4 - Summary of Vacant and Occupied Employment Premises

Site Location / Type	Total number of employment premises	Occupied Employment Premises		Vacant Employment Premises	
		No.	% of Total	No.	% of Total
Town Centre	15	14	93.3	1	6.7
Edge of Town Centre	23	21	91.3	2	9.1
Within Urban Area	42	39	92.9	3	7.0
Urban edge	62	59	95.1	3	4.8
Within / adjoining Rural Settlement	65	63	96.9	2	3.1
Countryside	3	3	100.0	0	0.0
Total	210	199	94.8	11	5.2
Employment Land Allocation (Underdeveloped)	3	3	100.0	0	0.0
Employment Land Allocation (Partially Developed)	41	40	97.6	1	2.4
Established Employment Location (Scope for Change)	83	76	91.6	7	8.4
Established Employment Location (Little Scope for Change)	83	80	96.4	3	3.6
Total	210	199	94.8	11	5.2

4.4.4 Vacant / Opportunity Land

Vacant employment land is defined by this study as vacant land situated within an existing employment area which could be developed for additional B class use. Opportunity Land refers to the larger sites which are not currently in employment use and which may be suitable for employment development in the slightly longer-term.

To ensure a consistent approach to the site appraisals, it was decided that vacant employment land should incorporate buildings which were clearly abandoned, severely dilapidated or unusable, in addition to empty plots of land.

Of the 37 sites that were assessed, 29 contained vacant employment land or opportunity land. Twelve sites contained vacant employment land, which equated to approximately 18 hectares, whilst 19 sites contained opportunity land (sites can contain both vacant employment land and opportunity land), which equated to 124 hectares (see Table 4.5). Vacant employment land represented 6.2 per cent of all land surveyed whilst opportunity land represented 41.8 per cent. However, the proportion of total site area represented by vacant employment land or opportunity land varied by location type. Forty seven percent of all opportunity land is located within the 'countryside' whilst just three percent is located within the edge of town centre location. The urban edge contains the largest proportion of vacant employment land (68 per cent), whilst town centre and countryside locations accommodate no vacant employment land.

Unsurprisingly, employment land allocations which are underdeveloped contain the majority of opportunity land (49 per cent), whilst established employment locations with little scope for change contain the least. Employment land allocations which are partially developed and established employment locations with scope for change together account for approximately 98% of vacant employment land (approximately

49% each). Only 1.7 percent of vacant employment land is located within established employment locations with little scope for change.

Eight sites were represented entirely by vacant employment or opportunity land (Sites 1, 2, 6, 13, 20, 23, 25 and 26). Sites 2, 6, 20, 23 and 25 were made up solely of opportunity land whilst sites 1, 13 and 26 were made up solely of vacant employment land. Of these, Site 23 (Premium Employment Land Blythe Vale) contains the largest amount (48.9ha) followed by Site 2 (Fowlchurch Tip - 14.4ha), and Site 6 (Whites Bridge – 9.9ha), all of which is opportunity rather than vacant employment land. Just eight sites contained no vacant employment or opportunity land.

Table 4.5 – Vacant Employment Land

Site Location / Type	Total Site Area (ha)	Vacant Employment Land (ha)	Vacant Employment Land %	Opportunity Land (Ha)	Opportunity Land %
Town Centre	2.84	0.00	0.0	0.00	0.0
Edge of Town Centre	10.52	1.22	6.7	3.70	3.0
Within Urban Area	38.28	0.89	4.9	9.98	8.0
Urban edge	111.73	12.5	68.2	35.00	28.2
Within / adjoining Rural Settlement	55.44	3.73	20.3	17.17	13.8
Countryside	77.96	0.00	0.0	58.2	46.9
Total	296.77	18.34	100	124.04	100
Employment Land Allocation (Underdeveloped)	61.31	0	0.0	61.31	49.4
Employment Land Allocation (Partially Developed)	98.68	9.05	49.3	25.29	20.4
Established Employment Location (Scope for Change)	97.52	8.99	49.0	27.23	22.0
Established Employment Location (Little Scope for Change)	39.26	0.31	1.7	10.21	8.2
Total	296.77	18.34	100	124.04	100

4.4.5 Vacant Employment Floorspace

Table 4.6 summarises the total vacant employment floorspace found within the sites. The floorspace figures relate to gross floorspace (incorporating the numbers of storeys within each premises) and are shown in square metres. The total amount of vacant employment floorspace in the assessed sites amounted to over 13,000m².

Sites located within a 'town centre' contained the highest proportion of the total vacant floorspace (37.4 per cent), with the vast majority of the remaining vacant floorspace in the District being located in 'urban edge' locations (32.3 per cent) or 'within urban areas' (24.6 per cent). Most vacant floorspace is located within sites classified as 'Established Employment Location (Scope for Change)' (73.9 per cent), although 24.6% is located within Established Employment Locations with little scope for change.

Overall, only seven of the assessed sites contained any vacant floorspace. Most of the employment sites with vacant floorspace are located within an established employment location with scope for change.

Table 4.6 – Vacant Employment Floorspace

Site Location / Type	Total Site Area (ha)	Vacant Floor-space (m ²)	% of Total Vacant Floor-space	No. of sites	No. of sites with Vacancies	% of Sites with Vacancies
Town Centre	2.84	4,919	37.4	2	0	0.0
Edge of Town Centre	10.52	0	0.0	6	1	16.7
Within Urban Area	38.28	3,227	24.6	5	3	60.0
Urban edge	111.73	4,240	32.3	12	5	41.7
Within / adjoining Rural Settlement	55.44	757	5.8	7	3	42.9
Countryside	77.96	0	0.0	5	0	0.0
Total	296.77	13,144	100.0	37	12	32.43
Employment Land Allocation Underdeveloped	61.31	0	0.0	4	0	0.0
Employment Land Allocation (Partially Developed)	98.68	200	1.5	8	2	25.0
Established Employment Location (Scope for Change)	97.52	9,717	73.9	15	8	53.3
Established Employment Location (Little Scope for Change)	39.26	3,227	24.6	10	2	20.0
Total	296.77	13,144	100.0	37	12	32.43

4.4.6 Total Employment Floorspace

Table 4.7 shows the spread of B-class floorspace within the District by employment type, extracted from the ODPM and Valuation Office Commercial and Industrial Floorspace Statistics. These figures encompass the entire District of Staffordshire Moorlands, and therefore include hereditaments⁴ and floorspace outside of the sites assessed for this study.

There were 1,368 B-class hereditaments within the District containing some 754,098 m² of floorspace. Factories accounted for the overwhelming majority of B-class floorspace (72.1 per cent) and also the total hereditaments. Warehousing accounted for 24.7 per cent of the total floorspace, but the least amount of hereditaments (362). Table 4.8 demonstrates that office premises are generally much smaller than either factories or warehousing premises within the District.

⁴ Hereditaments is defined as premises including land and property

Table 4.7 - B-Class Floorspace, 2005

	Total Hereditaments	Total floorspace m ²	% of total floorspace
Office	432	24,098	3.2
Factories	574	544,000	72.1
Warehouses	362	186,000	24.7
Total	1,368	754,098	100.0

Source: ODPM Commercial and Industrial Floorspace Statistics 2005

Table 4.8 – Average Premises Size 2005

	Average premise size (m ²)
Office	56
Factories	948
Warehouses	514
Total	551

Source: ODPM Commercial and Industrial Floorspace Statistics 2005

4.4.7 Type of Premises

The balance of uses in occupied employment premises was assessed at each site location (see Table iii of Appendix D for individual site details). Employment uses were split into the following types;

- ◆ Established Office Locations;
- ◆ High Quality Business Parks;
- ◆ Research & Technology / Science;
- ◆ Warehouse / Distribution;
- ◆ General Industrial Areas / Business Areas;
- ◆ Incubator / SME Sites / Managed Workspace;
- ◆ Specialised Freight Terminals (e.g. Aggregates, road, rail, wharves, air);
- ◆ Sites for Specific Occupiers;
- ◆ Recycling / Environmental Industrial Site (incl. aggregates); and
- ◆ Farm-Based Employment Locations

A percentage was allocated to each category reflecting the area of the site occupied by each particular use. The percentage totals for each site were used to calculate the total site area (in hectares) occupied by each employment usage, based upon the total occupied site area (total site area minus vacant land).

Table 4.9 illustrates the total occupied area (in ha) within the District by premise type. The Table demonstrates that premises classified as Sites for Specific Occupiers occupy the biggest proportion of employment land in the District (35.9 per cent), with a total of 54.4 ha of land. There are a number of very large sites which contain Sites for Specific Occupiers, including the JCB Plant in Leek Road (Site no.17) and Bolton Copper Works (Site no.30).

Table 4.9 – Balance of Employment Types within the District

Site Type	Area (ha)	%
Established or Potential Office Locations	0.0	0.0
High Quality Business Parks	8.8	5.7
Research and Technology Parks	2.0	1.3
Warehouse & Distribution Parks	2.5	1.6
General Industrial / Business Areas	44.1	28.6
Heavy / Specialist Industrial Sites	25.4	16.4
Incubator / SME Cluster Sites	0.4	0.3
Specialised Freight Terminals	4.0	2.6
Sites for Specific Occupiers	54.4	35.9
Recycling / Environmental Industries	7.5	4.9
Farm-based Employment Location	5.3	3.4
Totals	154.4	100.0

Table 4.10, below, illustrates the type of employment land by location. The Table demonstrates that all High Quality Business Parks, Research and Technology uses and Warehouse & Distribution uses are located within the Urban Edge. General Industrial Business Areas are located within a number of different location types, as are Sites for Specific Occupiers. The Urban Edge contains the widest variety of employment types whilst the Countryside accommodates the least.

Table 4.10 – Balance of Employment Uses by Location

	Town Centre		Edge of Town Centre		Within Urban Area		Urban Edge		Within / Adjoining Rural Settlement		Countryside		Total	
	Area (ha)	%	Area (ha)	%	Area (ha)	%	Area (ha)	%	Area (ha)	%	Area (ha)	%	Area (ha)	%
Established or Potential Office Locations	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	N/A
High Quality Business Parks	0.0	0.0	0.0	0.0	0.0	0.0	8.8	100.0	0.0	0.0	0.0	0.0	8.79	100
Research and Technology Parks	0.0	0.0	0.0	0.0	0.0	0.0	2.0	100.0	0.0	0.0	0.0	0.0	1.99	100
Warehouse & Distribution Parks	0.0	0.0	0.0	0.0	0.0	0.0	2.5	100.0	0.0	0.0	0.0	0.0	2.46	100
General Industrial / Business Areas	1.4	3.2	0.6	1.3	13.6	30.8	15.7	35.6	12.8	29.1	0.0	0.0	44.12	100
Heavy / Specialist Industrial Sites	0.6	2.4	0.0	0.0	5.9	23.2	11.6	45.6	7.3	28.8	0.0	0.0	25.38	100
Incubator / SME Cluster Sites	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	100.0	0.0	0.0	0.44	100
Specialised Freight Terminals	0.0	0.0	0.0	0.0	0.0	0.0	4.0	100.0	0.0	0.0	0.0	0.0	3.98	100
Sites for Specific Occupiers	0.8	1.5	1.4	2.6	5.7	10.4	14.8	27.3	13.9	25.6	17.8	32.6	54.44	100
Recycling / Environmental Industries	0.0	0.0	0.0	0.0	2.6	35.1	4.9	64.9	0.0	0.0	0.0	0.0	7.53	100
Farm-based Employment Location	0.0	0.0	3.3	61.9	0.0	0.0	0.0	0.0	0.0	0.0	2.0	38.1	5.26	100
Total	2.8	1.8	5.2	3.4	27.8	18.0	64.2	41.6	34.5	22.4	19.8	12.8	154.38	100

Note: Percentages refer to the percentage of each employment type within each location. For example, 35.1 per cent of all recycling/environmental industries are located within the urban area, whilst 64.9 per cent are located within the urban edge

4.4.8 Size of Building Stock

The proportion of premises within particular size thresholds was identified for each Cluster and type of premises during the site assessments. Table iv in Appendix D displays individual site findings.

Table 4.11 below demonstrates the size of premises within the District. The most common size of premises is between 1,000 and 2,000 m², with 33.7 per cent of premises assessed within this category. However, the range of size types is reasonably well spread with 29.4 per cent of all premises falling into the 0 to 500 m² category and 23.7 per cent assessed as being 500 – 1,000 m² category. Only the 2,000 m² and over category has a significantly lower proportion of premises, with 13.2 per cent of all premises assessed within the highest size threshold.

Table 4.11 – Size of Premises by Use Type (m²) %

Use	0-500	500-1,000	1,000-2,000	2,000+	Total
Established or Potential Office Locations	0	0	0	0	N/A
High Quality Business Parks	0	0	0	100	100
Research and Technology Parks	0	0	100	0	100
Warehouse & Distribution Parks	0	100	0	0	100
General Industrial / Business Areas	39.9	23.1	32.1	4.9	100
Heavy / Specialist Industrial Sites	20.8	25.6	41.6	12.0	100
Incubator / SME Cluster Sites	100	0	0	0	100
Specialised Freight Terminals	0	50	50	0	100
Sites for Specific Occupiers	15.7	24.1	24.6	35.6	100
Recycling / Environmental Industries	0	0	50	50	100
Farm-based Employment Location	0	50	50	0	100
Total	29.4	23.7	33.7	13.2	100

Note: Table 4.11 refers to the percentage of premises that fall into each of the four size thresholds by employment type. For example, 50 per cent of specialised freight terminals in the District occupy premises of 500 to 1,000 m² whilst 50 per cent occupy premises of 1,000 to 2,000 m²

Table 4.11 also shows that particular industries are accommodated in various size premises, with Recycling/Environmental Industries and firms in High Quality Business Parks typically occupying larger premises whilst Incubator/SME Cluster Sites typically occupying smaller premises, as can be expected. Again, General Industrial and Business Areas are located within a wide range of size types.

Table 4.12 demonstrates the size of premises by location type. The largest sites are located within the Countryside where there is more space and less intrusion into residential amenity. However, some large sites do exist within the Urban Area. Smaller sites generally tend to be located on the Edge of the Town Centre, although some are located within smaller settlements.

Table 4.12 – Size of premises by location (%)

Location	0-500	500-1000	1000-2000	2000+	Total
Town Centre	25	25	25	25	100
Edge of Town Centre	90.5	4.8	4.8	0.0	100
Within Urban Area	14.0	13.5	34.4	38.1	100
Urban Edge	16.5	32.5	42.5	8.4	100
Within / Adjoining Rural Settlement	34.4	29.2	36.4	0.0	100
Countryside	0.0	0.0	33.3	66.7	100
Total	29.4	23.7	33.7	13.2	100.0

Note: Table refers to the percentage of premises that fall into each of the 4 size thresholds by location. For example, 33 per cent of all premises in the countryside occupy premises of 500-1000 m² whilst 67 per cent occupy premises of 1000-2000 m²

4.4.9 Age of Building Stock

The proportion of premises developed in the last five years was identified for each type during the site assessments. Table 4.13 below shows the average percentage of premises developed in the last five years by type of premises, whilst Table v in Appendix D displays individual site details.

Overall, just fewer than 2 per cent of premises within the sites assessed were deemed to have been developed in the last five years. Just two employment types; High Quality Business Parks and Sites for Specific Occupiers, were assessed as including premises that were developed within the last five years.

The type of employment premises with the highest proportion developed in the last five years was High Quality Business Parks, which is largely due to new development at Victoria Business Park (Site no. 24).

Table 4.13 - Percentage of Premises Developed in the Last Five Years

Use	%
Established or Potential Office Locations	0
High Quality Business Parks	83.3
Research and Technology Parks	0
Warehouse & Distribution Parks	0
General Industrial / Business Areas	0
Heavy / Specialist Industrial Sites	0
Incubator / SME Cluster Sites	0
Specialised Freight Terminals	0
Sites for Specific Occupiers	4.1
Recycling / Environmental Industries	0
Farm-based Employment Location	0
District Total	1.8

4.4.10 Condition of Building Stock

Table 4.14 below shows a summary of the condition of premises by location. A breakdown by site is available in Table vi in Appendix D.

To be classed as being in a 'poor' state of repair, buildings had to display evidence of being significantly dilapidated, have possible structural problems⁵, and ultimately, a limited lifespan without extensive renovation. Overall, 7.2 per cent of premises were classified as 'Poor'.

The majority (53 per cent) of buildings were deemed to be in a 'good' state of repair. To satisfy this criterion, buildings had to be well maintained and managed, and there should be a high-probability of reoccupation should the premises become vacant.

Variations in the condition of premises exist according to premise type. Table 4.14 demonstrates that all sites classified as Established or Potential Office Locations or as Specialist Freight Terminals were all assessed as being in poor condition. However, High Quality Business Parks, Research and Technology Parks, Incubator/SME sites and Sites for Specific Occupiers were largely assessed as being in good condition. Again, General Industrial/Business Areas were more mixed, which reflects the large number of these employment types.

Table 4.14 - Condition of Premises by Site Type (%)

Use	Good	Fair	Poor
Established or Potential Office Locations	0.0	0.0	100.0
High Quality Business Parks	83.3	16.7	0.0
Research and Technology Parks	100.0	0.0	0.0
Warehouse & Distribution Parks	28.4	47.0	24.6
General Industrial / Business Areas	52.6	45.1	2.3
Heavy / Specialist Industrial Sites	44.6	41.9	13.5
Incubator / SME Cluster Sites	100.0	0.0	0.0
Specialised Freight Terminals	0.0	0.0	100.0
Sites for Specific Occupiers	74.1	22.6	3.3
Recycling / Environmental Industries	25.0	75.0	0.0
Farm-based Employment Location	0.0	100.0	0.0
District Total	53.1	39.7	7.2

Note: Table 4.14 refers to the proportion of premises within each quality category by employment type. For example, 25 per cent of all recycling/environmental industries were assessed to occupy good quality premises where as 75 per cent were assessed to occupy fair quality premises. The District Totals refer to the overall proportion of premises within each quality category within the District

Table 4.15 demonstrates that employment sites within the urban edge were largely assessed to be in poorer quality, with sites within an urban area considered to be generally fair.

⁵ Although this has only been considered on the basis of an external visual inspection by a planning consultant and not a qualified building surveyor.

Table 4.15 – Condition of Premises by Location (%)

Location	Good	Fair	Poor
Town Centre	100.0	0.0	0.0
Edge of Town Centre	81.0	19.0	0.0
Within Urban Area	15.4	77.7	6.9
Urban Edge	42.1	39.2	18.7
Within / Adjoining Settlement	68.8	31.2	2.0
Countryside	66.7	33.3	0.0
Total	53.1	39.7	7.2

4.4.11 Access and Transport Issues

Each site appraisal considered the following access and transport issues;

- ◆ location;
- ◆ public transport and access;
- ◆ proximity to the Strategic Road Network;
- ◆ freight access; and
- ◆ a qualitative analysis of the external and internal access, circulation, servicing arrangements, and the adequacy of parking.

Tables vii and viii in Appendix D accessibility at each site.

4.4.12 Location

For a small number of sites, the location was noted to be a problem. For instance, Site 36 – (Lymers Depot), and Site 18 – (JCB Oakamoor Road) are only accessible via narrow roads which may restrict access, and several sites such as Site 20 - (Mobberley) and Site 38 – (Co-op Milk Plant) are located in relatively remote locations.

4.4.13 Public Transport and Access

No public transport facilities were observed at 20 of the 37 sites. Additionally, restrictions to site access were noted at several sites, including Site 2 (Fowlchurch Tip), and Site 34 (Dilhorne Road and The Green).

4.4.14 Proximity to the Strategic Road Network and Freight Access

Lack of access to the strategic road network is regarded to be a constraint at several locations throughout the District, including Site 11 (Town Yard), Site 2 (Fowlchurch Tip) and Site 34 (Dilhorne Road and The Green). The potential for freight access is identified at only two sites (30 - Bolton Copper Works and 8 - Barnfields Industrial Estate).

4.4.15 Internal Access, Servicing and Parking

As demonstrated by Table 4.16 below, five sites were identified as having evidence of parking difficulties relating to employment use (Sites 4, 8, 22, 25 and 35). Three of these sites were located within established employment locations with scope for change. Additionally, two sites (Sites 25 and 35) were identified as having inadequate access or servicing facilities for existing occupiers.

Table 4.16 – Internal Access, Servicing and Parking Difficulties

Location Type / Site Type	Evidence of Parking Difficulties Relating to Employment Uses	Access / Servicing Inadequate for Existing Occupier(s)
Town Centre	0	0
Edge of Town Centre	1	1
Within Urban Area	2	1
Urban edge	2	0
Within / adjoining Rural Settlement	0	0
Countryside	0	0
Total	5	2
Employment Land Allocation Underdeveloped	1	1
Employment Land Allocation (Partially Developed)	0	0
Established Employment Location (Scope for Change)	3	0
Established Employment Location (Little Scope for Change)	1	1
Total	5	2

Note: Table 4.16 refers to the total number of sites assessed to have parking, access or servicing difficulties as assessed during the sites visits.

4.4.16 Development Constraints and Environmental Issues

Table 4.17 below summarises the development constraints and environmental problems affecting each sub-area, in terms of the numbers of sites and the percentage of sites within each area. An individual site breakdown is shown in Tables ix and x in Appendix D.

Over half of the sites do not have the potential to support 24-hour working. However, it is considered that existing operations are incompatible with sensitive neighbouring uses in only one site (Macclesfield Road).

Table 4.17 - Development Constraints and Environmental Problems

	Total Sites	Potential to Support 24 hr Working		Introduction of non-B Class Uses May Compromise the effective Operation of Site		Existing Operations Incompatible with Sensitive Neighbouring Land Uses	
	No.	No.	% of Total	No.	% of Total	No.	% of Total
Town Centre	2	0	0.0	0	0.0	0	0.0
Edge of Town Centre	5	1	20.0	2	40.0	0	0.0
Within Urban Area	6	3	50.0	0	0.0	0	0.0
Urban edge	12	6	50.0	3	25.0	1	8.3
Within / adjoining Rural Settlement	7	4	57.1	0	0.0	0	0.0
Countryside	5	4	80.0	2	40.0	0	0.0
Total	37	18	48.6	7	18.9	1	2.7
Employment Land Allocation Underdeveloped	5	3	60.0	2	40.0	0	0.0
Employment Land Allocation (Partially Developed)	8	4	50.0	3	37.5	0	0.0
Established Employment Location (Scope for Change)	16	8	50.0	2	12.5	1	6.3
Established Employment Location (Little Scope for Change)	8	3	37.5	0	0.0	0	0.0
Total	37	18	48.6	7	18.9	1	2.7

4.5 Sub-Area Characteristics

The following sub-section provides an overview of the main employment land characteristics of the each of the four sub-areas considered in the study.

4.5.1 Town Centre

The town centre location area contains only two employment sites which represent just 1 per cent (2.8ha) of the total employment land assessed in the District.

Fifteen premises were recorded within a town centre location. However, one premise totalling 4,949m² of floorspace, was assessed to be completely vacant, which is 50 per cent of all recorded vacant floorspace in the District. No vacant employment land or opportunity land was recorded in a town centre location.

The building stock is spread evenly across a range of size types which contain General Industrial/Business Areas, Specialist Industrial Sites and other Sites for Specific Occupiers. All of the building stock was assessed as being in good condition although none of the stock was built in the last five years

4.5.2 Edge of Town Centre

The building stock is generally quite small and contains General Industrial/Business areas and Sites for Specific Occupiers. The building stock was assessed as generally good (81 per cent) although no buildings have been developed within the past five years within this location.

The Edge of Town Centre location type contains five sites which accommodate a total of 3.4 per cent of the total employment land (10.1ha) in the District. These sites contain no vacant floorspace, although a total of 1.22ha of vacant employment land was recorded (about 6 per cent of all vacant land in the District) in addition to 3.7ha of opportunity land (about 3 per cent of the total opportunity land in the District).

4.5.3 Within Urban Area

Locations within an urban area contain six sites which accommodate a total of 14 per cent of the total employment land (41.8ha) in the District.

A total of 43 premises were recorded within an urban area location with no vacant floorspace recorded. Just 0.89ha of vacant employment land was recorded within an urban area location (4 per cent of the total vacant employment land in the District), with a total of 13ha of opportunity land recorded (11 per cent of the total opportunity land in the District).

The urban area contains the most (in terms of total site area) General Industrial/Business Areas of all the location types (35 per cent of the District total). Sites in the urban area also contain heavy/specialist industrial sites, sites for specific occupiers and recycling industries. Just over one-third, (38 per cent), of all the building stock falls into the largest size category (2,000 + m²) with the vast majority of premises (78 per cent) assessed as being in fair condition.

Six sites within the urban area were assessed as able to support 24-hour working.

4.5.4 Urban Edge

Locations within an urban edge contain twelve sites, which is more than any other location type in the District. The Urban Edge also contains the most employment land in terms of overall area, with a total of 110ha (37 per cent of the District total).

A total of 62 premises were recorded within an urban area location. Two sites with vacant floorspace were recorded within the Urban Edge, totalling 4,240m² which is 43 per cent of all vacant floorspace in the District.

The Urban Edge was assessed to contain 16ha of vacant employment land, which is by far the largest proportion of all the location types (74 per cent of the District total). The Urban Edge also contains 30ha of opportunity land (25 per cent of the District total). The large proportion of vacant employment land means that the Urban Edge

has the largest potential to accommodate additional employment development within established employment locations in the short term.

The Urban Edge contains the widest variety of employment types, with all employment types represented excluding Incubator/SME sites and Farm-based employment sites. The Urban Edge also contains a wide range of premise sizes, with the 1,000-2,000 m² category most represented (42.5 per cent of all premises in the Urban Edge fall within this size threshold). Most premises were assessed as being in good condition, although the Urban Edge contains the most amount of premises assessed to be in poor condition (18.7 per cent of all premises within the Urban Edge).

4.5.5 Within/Adjoining Rural Settlement

Locations within/adjoining a rural settlement contain seven sites which total 55ha of employment land (18 per cent of the District).

A total of 65 premises were recorded within/adjoining a rural settlement, which is the highest number of premises, recorded of all location types. This location type was recorded to contain 757m² of vacant floorspace, which is 7.6 per cent of the total recorded in the District.

Rural settlements were assessed to contain 4ha of vacant employment land (17 per cent of the vacant employment land in the District) in addition to 17ha of opportunity land (14 per cent of the total opportunity land in the District).

Rural settlements contain general industrial/business areas, heavy/specialist industrial sites and sites for specific occupiers. All of the District's SME/incubator sites were recorded within/adjoining a rural settlement. Premises within rural settlements were spread across a range of sizes, although no units over 2,000 m² were recorded. Most premises were assessed as being in good condition (69 per cent), with some assessed in fair condition (29 per cent) and a small amount in poor condition (2 per cent).

4.5.6 Countryside

Locations within the countryside contain a total of five sites which contain a total of 78ha of employment land (26 per cent of the District total). However, the majority (75 per cent) of this land is opportunity land. The countryside contains the most amount of opportunity land of all location types (58ha, which is 48 per cent of all opportunity land in the District). It also contains the most sites which (along with the urban edge) have employment land allocation but which are underdeveloped. The Countryside therefore has the largest potential to accommodate further employment development outside existing employment locations in the longer-term, subject to the suitability of these sites (discussed in Chapter 7).

A total of three premises were recorded in the countryside, which is by far the least number of premises of all the location types. This is largely because the majority of

the employment sites surveyed were completely vacant whilst those that were occupied were so by single businesses on each site. No vacant employment premises were recorded within the countryside.

The countryside therefore only contains Sites for Specific Employers and some Farm-based employment. The majority (67 per cent) of premises were assessed to be over 2,000 m², with the same proportion also assessed to be in good condition.

4.6 Summary of Existing Employment Land Supply Section

The database was used to help identify the issues relating to the future role of the 37 employment sites and the key findings are as follows:

- ◆ The total area of the sites assessed amounted to 297 hectares and each varied in size considerably. A further 74 hectares equal to 25 per cent is believed to exist on sites too small for inclusion in this study;
- ◆ Of the 37 sites that were assessed, 29 contained some proportion of either vacant employment land or opportunity land. Twelve sites contained some vacant employment land, totalling 18.4ha, whilst 19 sites contained opportunity land, totalling 124ha. Intensification at existing locations was observed as possible on a large number of sites with vacancy observed on both previously developed and greenfield land.
- ◆ A total of 210 employment premises were identified within the assessed sites. Of these, approximately 95 per cent were occupied and 5 per cent vacant. Sites with a town centre location contain the largest amount of vacant floorspace, with 4,919 m² (37.0 per cent of all vacant floorspace in the District). Sites within the urban edge were assessed to contain 4,240m² of vacant floorspace (43 per cent of the total vacant floorspace in the District).
- ◆ Factories accounted for the overwhelming majority of B-class floorspace (72.1 per cent), warehousing accounted for 24.7 per cent of the total floorspace.
- ◆ Sites for Specific Occupiers occupy the biggest proportion of employment land in the District (35.9 per cent), with a total of 54.4 ha. There are a number of very large sites which contain Sites for Specific Occupiers, including the JCB Plant on Leek Road (site no.17) and Bolton Copper Works (site no.30).
- ◆ The most common size of premises is between 1,000 and 2,000 m², with 33.7 per cent of premises assessed within this category. The largest sites are located within the Countryside where there is more space and less intrusion into residential amenity. Smaller sites generally tend to be located on the Edge of the Town Centre, although some are located within smaller settlements.
- ◆ The only premises developed in the last five years were those at Victoria Business Park.
- ◆ Just over half of buildings were observed to be in a 'good' state of repair. Employment sites within the urban area were largely assessed to be in poorer quality, with sites within an urban area considered to be generally fair.
- ◆ Staffordshire Moorlands is relatively remote in terms of it operating as a business location with lack of access to the strategic road network being observed.

However, only a couple of sites were observed to have access difficulties. Few public transport facilities were observed.

- ◆ Half of the employment land is located within the Urban Area and at the Urban Edge. However 65 premises were recorded within/adjoining Rural Settlement which was the highest number of all the location types.

5. Review of Future Business Needs

5.1 Introduction

This section of the report provides an assessment of the future demand for employment land and floorspace. It draws upon the results of the business survey we have completed with 205 local businesses.

5.2 Economic Appraisal

The detailed assessment of socio-economic conditions (Appendix E) highlights the following key findings in respect of existing and potential future employment demand in Staffordshire Moorlands. In this appendix we have set out our detailed analysis as follows:

- ◆ E2 Employment Structure
- ◆ E3 Business Structure
- ◆ E4 Business Size
- ◆ E5 Enterprise
- ◆ E6 Population and Labour Market
- ◆ E7 Travel to Work Patterns

5.2.1 Public Sector Employment

Public sector employment in Staffordshire Moorlands is significant. The sector is slightly overrepresented compared to the county, regional and national averages and continues to grow. It represents 28.5 per cent of total employment compared to 25.8 per cent and 26.1 per cent in the West Midlands and England & Wales respectively. Whilst the district's role as an important administrative centre may continue to be important in the future, over-reliance on public sector employment may limit opportunities for economic diversification driven by the private sector. Consequently, whilst providing for the needs of public sector occupiers, it is important for the LDF to assist in accommodating the needs of a wide range of dynamic private sector activities.

5.2.2 Distribution, Hotels and Restaurants Employment

The distribution, hotels and restaurants sector is the second largest employment sector and has witnessed significant growth over the last eight years. The sector is still slightly under represented compared to regionally and nationally but looks set to continue increasing. Whilst most of the premises requirements fall outside the B-use class here (apart from distribution) hotels, restaurants and retail trade will be important to the future of the district and in the development of the evening and visitor economy. Consequently, it will be important to ensure that land-use,

regeneration and economic policy combines to support growth and demand in this sector.

5.2.3 Dependency on Key Employers

There is significant employment in two sub-sectors in Staffordshire Moorlands, which collectively account for around 10 per cent of total employment. These represent the presence of two major employers - Britannia Building Society and JCB Operations as well as the associated supply chain. This implies that one in ten jobs are within these sub-sectors, which makes it imperative that the district remains a competitive location for businesses within these sectors. This also makes it important for economic development policies to support efforts to diversify the economic base. In addition this dependency on large companies makes it vital to look at schemes to support SMEs so that the employment base can grow in a more diverse fashion.

5.2.4 Manufacturing Employment

Manufacturing is still an important sector in the district. Most B-use and industrial employment is in the manufacturing sector and the sector is overrepresented compared to nationally and regionally. The manufacture of machinery and equipment is a very competitive sub-sector and is experiencing considerable growth in the district which is out of balance with trends for the industry as a whole, however, as discussed above this represents the presence of JCB operations. This indicates that it is important for the District's LDF to provide site and floorspace opportunities for elements of the industry that are expanding. However the industry as a whole is in continual decline which implies that policies should also have regard to:

- ◆ the need to provide premises which are fit for the purposes of modern occupiers including those engaged in light industrial activities;
- ◆ offering a wide portfolio of industrial sites and premises in terms of size, especially smaller units;
- ◆ the need to plan for on-going restructuring of the manufacturing sector in order to anticipate downsizing and closure possibilities as well as new and expanding sectors. Policies should focus on retaining and attracting industrial sectors which can operate competitively in Staffordshire Moorlands and operate on land already zoned for B2 uses; and
- ◆ to begin a pro-active approach to encouraging the development of business activities with good growth prospects. Given the changing economic structure of the district and global economic trends, employment in manufacturing is unlikely to grow in the future. The LDF needs to respond to these changes by the development of positive planning policies for economic development. This should include sufficient provision being made for expansion and establishment of high-value manufacturing activities (particularly small and medium size operations).

5.2.5 Growing Business Sectors

Following national economic trends, growth in banking, financial and other business activities has occurred over the last eight years including the Building societies. However this sector is still substantially underrepresented in employment terms compared to the West Midlands and England & Wales, which implies the district is not achieving the same benefits as other parts of the country from this growth sector. For instance employment in the banking and finance sector represented only 12.7 per cent of employment in Staffordshire Moorlands compared to 17.3 per cent in the West Midlands and 20.2 per cent in England & Wales. Employment land policies in the LDF should respond appropriately to this growth by providing a sufficient quantity and range of sites and premises. In Staffordshire Moorlands, the challenge will be to stimulate the creation of more employment opportunities in these activities. This will require addressing issues of image and pursuing regeneration initiatives in the town centres which can assist in creating occupier office markets.

5.2.6 Business Size and Entrepreneurship

Despite the important role played by relatively large employers in Staffordshire Moorlands (particularly the public sector, financial sector and manufacturing activities), the majority of future demand for employment floorspace is likely to be generated by SMEs. In the district the growth in micro B-use businesses (1-10 employees) and small businesses (11-49 employees) has been strongest. Collectively micro and small businesses accounted for 92.2 per cent of all businesses in 2004 and this position is unlikely to change.

Whilst the major challenge for the LDF will be to accommodate demand from SMEs in a variety of sectors, sufficient expansion and consolidation opportunities will need to be provided (in terms of sites and premises) to meet the needs of larger occupiers. This will be particularly important for established businesses in the area that are planning to expand locally or respond to changing market circumstances. In meeting these needs, it will be necessary for employment land policies to be complemented by on-going dialogue and consultation with major employers in the area. Many of these have bespoke requirements which should be identified in advance through a proactive and integrated corporate local authority approach in terms of economic development, land-use and transportation strategies.

The level of entrepreneurship in the district appears to be quite low, with VAT registrations per 10,000 population significantly lower than nationally. This implies that policies should also aim to encourage start-ups including providing appropriate premises. The district compares quite favourably in terms of the proportion of self employed people it has, and there may be scope for growth in this area in the future.

5.2.7 Occupations, qualifications and wages

The occupational status of the working population of Staffordshire Moorlands is skewed towards the administrative and skilled trade occupations, with a low level of persons in higher skilled and service occupations. This is accompanied by a

workforce characterised by low and medium skilled levels but lower graduate level workers. Workplace wages are low compared to resident based wages which implies that there is a strong pattern of out-commuting from Staffordshire Moorlands to better paid jobs. Consequently, there will be a need to ensure that the promotion of new job opportunities is accompanied by efforts to improve the skills profile of local residents and increase access to such opportunities.

5.2.8 Population

In 2004 Staffordshire Moorlands had a declining population in the region of 93,300 people. Initiatives aimed at creating employment growth should be considered in light of the declining population. There is an ageing and declining population in the region. Key initiatives should focus on measures to attract people of working age to the district to ensure sufficient labour market capacity to meet future recruitment needs. It is important to ensure that employment land allocations are realistic and can support the creation of job opportunities for the local population. The creation of job generating opportunities will play an important factor in encouraging young people and other participants in the labour market to retain in, or to be attracted to, the district.

5.2.9 Inward Investment Needs

The availability of a sufficient supply of good quality employment sites will be an important factor in influencing inward investment locations to the district. Other key factors relate to issues of strategic accessibility, availability and skills profile of the local labour force, local educational capacity and standards, wage levels, house prices, quality of life and proximity to key suppliers and markets.

Whilst strategic accessibility and labour market constraints mean that none of the towns are likely to be suitable to accommodate a significant number of large scale inward investment projects, they offer potential in attracting new projects and relocations of SMEs in key sectors.

The inward investment approach to be reflected in the LDF should mirror a broader economic development strategy aimed at encouraging economic diversification, increasing value-added activities and building on existing strengths.

5.3 Empirical Business Survey

The full details to the business survey methodology, survey sample, and survey results are contained in Appendix F. In brief the information summarised below was collected through a series of 15 minute telephone interviews with 205 businesses located within Staffordshire Moorlands. Interviews were conducted with owners, managers or directors as appropriate.

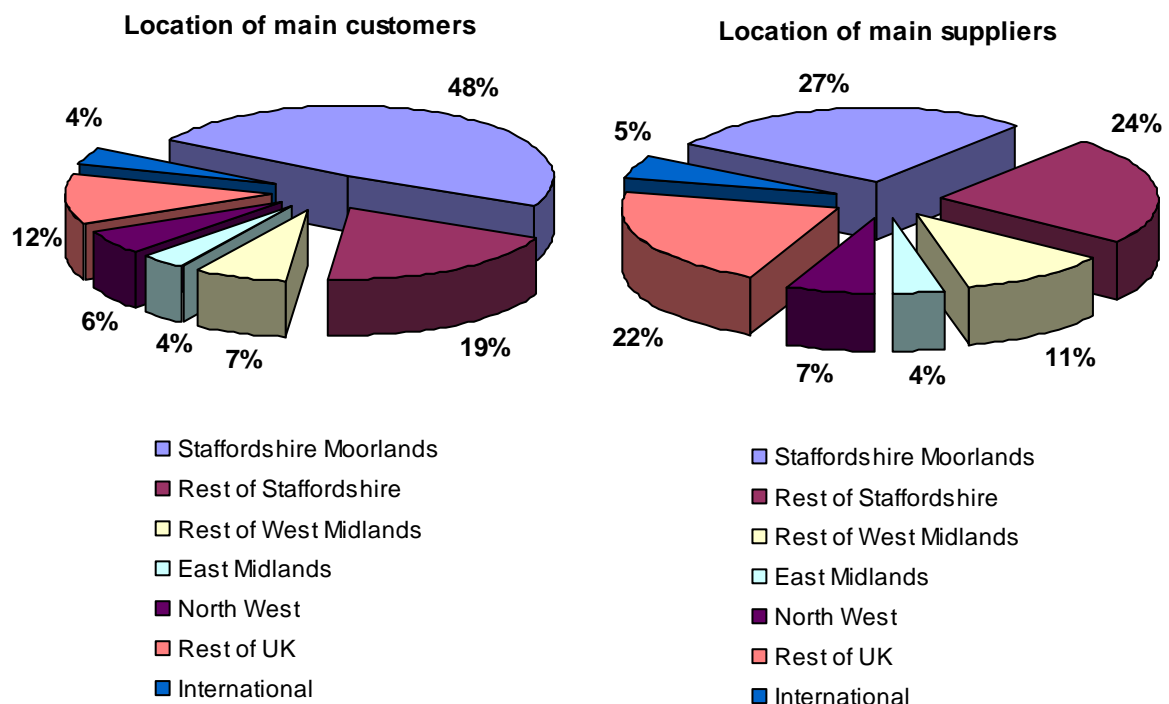
5.3.1 Summary of Business Survey Results

Full-time workers make up the vast majority of employees of the businesses surveyed. On average, 89.5 per cent of employees were employed on a full-time basis. Businesses in the 'other services' sector were the most likely to employ part-time staff, with an average of 25.2 per cent of staff employed on a part-time basis.

On average 62.4 per cent of surveyed businesses employees live within the Staffordshire Moorlands District. Employees working in the construction sector, banking, finance & insurance sector and distribution & wholesale sector were most likely to live within the District. Large businesses saw a particularly large proportion of their employees travel into the District for work, with an average of just 16.7 per cent of their employees living within Staffordshire Moorlands.

The charts in Figure 5.1 show the location of the surveyed businesses main customers and suppliers. They show that business' main suppliers tend to be more widely dispersed than their main customers. All of the sectors and business size bands show a trend of having a lower proportion of their suppliers located within Staffordshire Moorlands and Staffordshire overall than the proportion of their customers.

Figure 5.1 – Location of Main Customers and Suppliers



On average, nearly half of all surveyed business' main customers are local, based within Staffordshire Moorlands, with a further 19 per cent located within the rest of

Staffordshire (67 per cent in Staffordshire overall). The construction and distribution & wholesale sectors have the most localised customer base, with 85.9 per cent and 81.6 per cent, respectively, of their customers based within Staffordshire. The manufacturing sector has by far the widest customer base, with just 34 per cent located within Staffordshire and 10 per cent located internationally. The smaller businesses tend to be the most locally focussed; of their main customers, 63.8 per cent are located within Staffordshire, whilst for large businesses this figure drops to just 33.6 per cent.

The location of surveyed business' main suppliers is far more widely spread. On average, just 27 per cent are based within Staffordshire Moorlands and 51 per cent within Staffordshire overall. However the pattern across the sectors is very similar to that of customer location. The construction sector has the most localised supplier market, with nearly 80 per cent located within Staffordshire. The manufacturing sector and large businesses have the widest spread of supplier networks. In particular, nearly 21 per cent of surveyed large business' main suppliers are located internationally.

Nearly 60 per cent of those businesses surveyed have been established in Staffordshire Moorlands for more than 10 years, which displays a good degree of loyalty to the area. Just 27.6 per cent have been established within the last five years. Nearly 90 per cent of those business established in the last five years have been small businesses. The other services sector and the banking, finance & insurance sector have the largest number of young businesses with 45.0 per cent and 39.2 per cent respectively of surveyed businesses establishing themselves in the District in the last five years. For the transport & communications sector this figure was just 7.7 per cent.

5.3.2 Premises

Freehold is the most common form of tenure, preferred by 46.2 per cent of surveyed businesses, followed by leasehold. Freehold is particularly common for medium (80.0 per cent) and large (75.0 per cent) businesses. Nearly a quarter of surveyed small businesses work from home and there may be latent demand from this cohort for small business space in the area.

There was a particularly low response when businesses were asked what the size of their current premises was. Therefore a full analysis was not possible and care should be taken when interpreting the results. On average though, businesses occupied approximately 440m². This figure varied depending on business size, with small businesses averaging 337m².

The vast majority (81.0 per cent) of surveyed businesses said that their current premises were suitable for their business. Medium and large businesses were the most likely to think that their premises were either unsuitable or reasonably suitable. Of the reasons given why their premises were unsuitable, by far the most common reason was that the site/premises were too small.

5.3.3 Expansion Plans

Of surveyed businesses, those in the banking, finance & insurance sector were the most likely to be considering expanding whilst those in the construction and transport & communications sectors were the least likely.

Notably small businesses were the least likely to be considering expanding. Just fewer than 10% of small businesses said that they were definitely planning to expand in the next 10 years and just over 16% said that they were considering expanding.

Over 57 per cent of those planning to expand thought that they would need additional floorspace. However, only a very small number (12 respondents) were able to give an estimate of the amount of floorspace that they would need. From these respondents, the average additional floorspace requirement was 498m². Nearly 68 per cent of those respondents who are planning to expand do not think that they will be able to accommodate their floorspace needs on their current site.

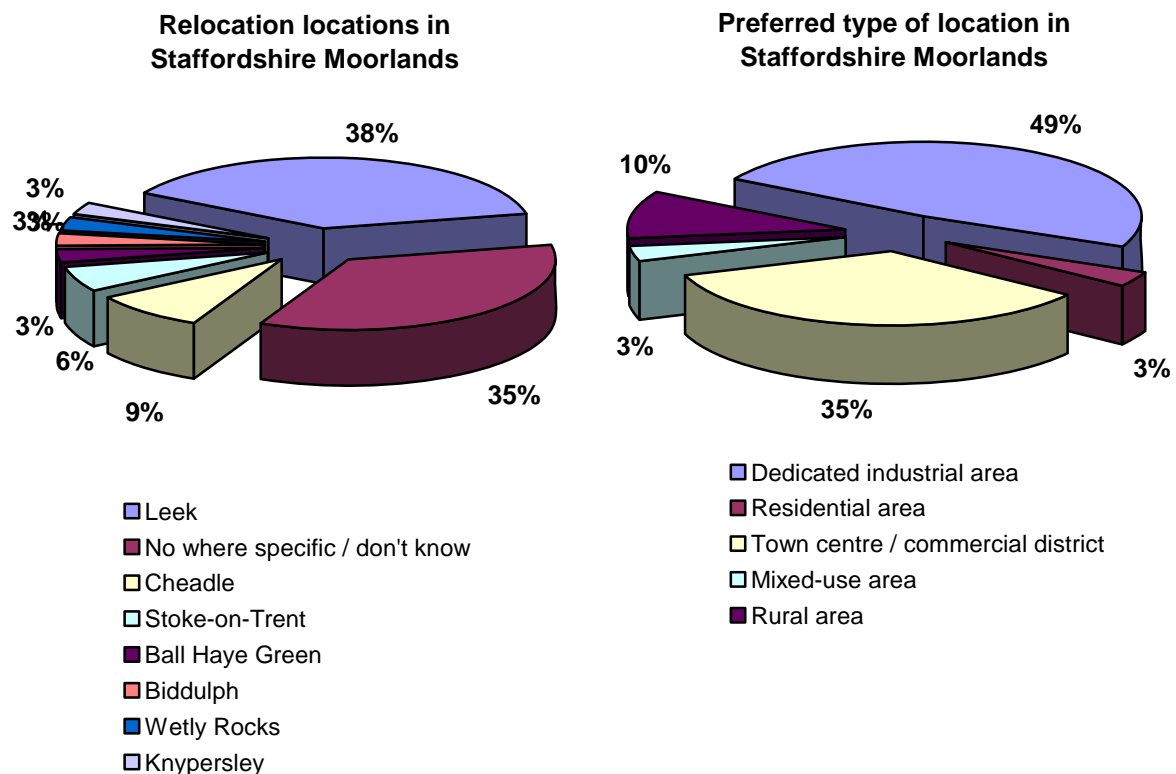
5.3.4 Relocation

Nearly a quarter of surveyed businesses have considered relocating. The vast majority, 68.0 per cent, have considered relocating within Staffordshire Moorlands with a further 34.0 per cent having considered elsewhere in Staffordshire.

The charts in Figure 5.2 show the relocation preferences for respondents who have considered relocating within Staffordshire Moorlands. The most common location is Leek, considered by 38 per cent of respondents whilst the most common type of location is a dedicated industrial area, followed by a town centre/commercial district.

Over a quarter of those who have considered relocating do not think the type of premises they seek are available in the Staffordshire Moorlands.

Figure 5.2 – Relocation Preferences



5.3.5 Total Expansion Requirements: Survey-Based Forecasts

Using data from the Annual Business Inquiry we can provide indicative estimates of the total number of B-use class businesses in Staffordshire Moorlands by size. By applying the sample results to reflect the total number of B-use class businesses, estimates can be provided of the total expansion requirements of indigenous businesses in the District.

Two methods have been used in order to calculate an upper and a lower forecast of future demand as follows:

- ◆ Method 1 - is calculated based on only those respondents who responded that they would definitely be expanding and that they would need additional floorspace.
- ◆ Method 2 - also includes both those respondents who had definite plans for expansion and those with only tentative plans for expansion, so providing an upper forecast. The figures are then further analysed using data from the questions on floorspace requirements and relocation preferences.

Table 5.1 shows the floorspace estimates required to accommodate all expansion plans of indigenous businesses within Staffordshire Moorlands.

Table 5.1 – Expansion floorspace requirements in Staffordshire Moorlands (m²)

Size of Business	Small	Medium & Large	Total
Method 1 – Lower level forecast	37,123	11,553	48,676
Method 2 – Upper level forecast	98,740	24,261	123,001

The lower level forecast gives a floorspace requirement of approximately 50,000m² in order to meet existing businesses expansion plans. The upper level forecast gives a floorspace requirement of approximately 125,000m².

It is important to highlight three key factors when looking at the estimates set out in the table:

- ◆ The estimates exclude the B-use class requirements of public sector organisations.
- ◆ The estimates refer only to the additional floorspace requirements of indigenous businesses. The potential requirements of inward investors to the District are not included.
- ◆ The estimates refer only to additional floorspace requirements and make no allowances for floorspace vacated by contracting businesses.

The estimates are solely based on business survey responses and are likely to include a high degree of optimism. Therefore these figures only inform our floorspace forecasts and as such should be read with consideration to the full forecast analysis as set out in Appendix F.

5.4 Summary of Business Needs

Staffordshire Moorlands is over dependent on the public sector for employment. It is therefore important for the LDF to assist in accommodating the needs of the private sector in order to grow the private sector employment base in future. The distribution, hotels & restaurants sector, the second largest employer, continues to grow and therefore planning and economic policy should help provide suitable sites. Despite manufacturing appearing very competitive, the industry as a whole is in continual decline which implies that policies should also have regard to:

- ◆ provision of land and premises fit for the purposes of modern occupiers including those engaged in light industrial activities;
- ◆ offering a wide portfolio of employment sites and premises in terms of size;
- ◆ adopt a plan for downsizing and closure possibilities as well as new and expanding sectors;

-
- ◆ adopt a pro-active approach to encouraging the development of business activities with good growth prospects;
 - ◆ Banking, financial and other business activities are underrepresented. This will require addressing issues of image and pursuing regeneration initiatives in the town centres which can assist in creating occupier office markets;
 - ◆ The majority of future demand for employment floorspace is likely to be generated by SMEs;
 - ◆ It is worth highlighting that there was a low response when asked how much additional floorspace businesses are likely to need to accommodate their expansion plans, so reducing the robustness of the results of this question. However, the averages produced and used in the forecasts are inline with what we have seen in other studies;
 - ◆ Expansion and consolidation land and premises also need to be provided for larger occupiers. This will be particularly important for established businesses in the area that are planning to expand locally or respond to changing market circumstances. It is important for the local authority to foster good relationships with major local employers to help retain them in the District. The supplier networks are quite widely spread but businesses tend to serve the local market; and,
 - ◆ The level of entrepreneurship is comparatively rather low in the District. In response policies should aim to encourage entrepreneurship and improve the rate of start-ups and provide appropriate premises. The skill level of the workforce should be improved to attract higher level employment and as a result increase the access to higher wages and employment opportunities in the longer term.

6. Employment Forecasts 2004 to 2021

6.1 Introduction

This section provides a series of quantitative forecasts of workplace employment in Staffordshire Moorlands for the period up to 2021. Also provided are our estimates of the future demand for employment floorspace, which are derived from the employment forecasts. These forecasts concentrate on B-use class employment.

The forecasts have been prepared using three distinct techniques which conform to the latest guidance from the ODPM on employment land reviews. A preferred scenario option, which takes into consideration all three of these forecasting techniques as well as the overall socio-economic conditions in Staffordshire Moorlands and the regional and national context, has then been prepared.

Contextual Economic Performance

Employment growth in Staffordshire Moorlands was impressive between 1996 and 2004, averaging 2 per cent per annum. This was higher than the regional figure (1.5 per cent) but slightly lower than England and Wales (2.1 per cent). The banking, finance & insurance and distribution, hotels & restaurants sectors have been the key growth areas for employment across most of the UK over this period.

6.2 Staffordshire Moorlands Forecast Techniques

The three forecasting techniques are as follows:

- ◆ Labour Demand Technique. This technique involves the extrapolation of historical trends in sectoral employment over the forecast period. This provides an estimate of the future growth of the industrial sectors represented in the Staffordshire Moorlands economy based upon the historical performance of each sector. The starting point in history for the trend analysis has a significant impact on the outcome of the modelling process. Looking back over the last twenty years, equivalent to the long-run growth rate, takes into account more than one full business cycle therefore including both recessions and booms. Looking at trends that have occurred within the last ten years, equivalent to the short-run rate, gives more focus on the recent performance and direction of the Staffordshire Moorlands economy;
- ◆ Labour Supply Technique. This technique relates to changes in the population and changes in age structure, economic activity, unemployment and commuting patterns. This is effectively a labour supply constrained model of the economy which limits the growth in employment to the availability of labour within the local area. Population forecasts are based on those produced by the ONS and housing targets that have been set for the District; and,
- ◆ Business Survey. The business survey collated information on the future expansion plans of a representative sample of businesses in Staffordshire

Moorlands. This information has been aggregated for the survey sample and expanded to reflect estimates of the quantified demand for employment land and premises for the total population of businesses in Staffordshire Moorlands. This information reflects the aspirations of the business community over the next ten years.

Both the labour demand and labour supply forecasting techniques produce forecasts for the number of jobs but not the amount of required employment floorspace. In order to convert these figures into floorspace values we apply a range of employment density ratios (the amount of floorspace required per employee) as defined by English Partnerships⁶. These densities are included within the presentation of the analysis for clarity.

6.3 Staffordshire Moorlands Future Economic Scenarios

There are likely to be a range of potential factors that will shape the structure and performance of the Staffordshire Moorlands economy over the coming years, it is necessary to devise a range of potential future scenarios for the District, which can account for the impact of these forces to varying degrees.

Three future scenarios for Staffordshire Moorlands which cover the period up to 2021 have been designed and are set out in the following section. They have been designed with regard to current employment and historical employment trends in the district. The key scenarios are:

- ◆ Scenario (1) - There is a decline in employment with a downturn in the larger businesses in the district;
- ◆ Scenario (2) - Growth is weak in the district with a continued dependency on larger businesses whilst start-ups remain static or decline; and,
- ◆ Scenario (3) - There is restructuring within the economy and stronger growth as major employers see continued growth and start-up rates increase.

Scenario (1) - There is a decline in employment with a downturn in the larger businesses in the district.

Under this scenario, restructuring is very slow and uneven in Staffordshire Moorlands. Manufacturing is in long term decline but in addition there is a downturn in those sectors the economy is heavily dependent upon. In addition entrepreneurial activity remains low in the district and below the level of the West Midlands.

Manufacturing is in long term decline and very limited restructuring occurs. Large manufacturers in the District see a downturn and this also has implications for the performance of the local supply chains. Public administration having consistently expanded over the period 1984-2004 starts to contract slightly in line with current trends (since 2003). The distribution, hotels & restaurants sector continues to grow but at a much lower rate than in the past, due to the impact of those sectors experiencing decline. Banking, finance & insurance employment growth is weak due

⁶ Employment Densities: A Full Guide, English Partnerships (2001).

to a lack of entrepreneurial activity, competition from neighbouring districts and a downturn from major employers.

Supply Factors

Population growth is very low and inclined toward an ageing population, in line with ONS population projections. As a result there is a decline in the working age population. In addition due to the decline of those sub-sectors the economy has some dependency upon there is an increase in unemployment and out-commuting causing further decline in growth.

Scenario (2) - Growth is relatively weak in the district with a continued dependency on larger businesses.

Under this scenario, growth within the district is in line with medium-long term growth rates whilst there is continued dependency upon larger businesses. The distribution, hotels & restaurants and banking, finance & insurance sectors are the main drivers of growth. This is led by a robust performance by major employers and growth opportunities in other business activities and tourism-related activities.

There is some positive progress in increase start-up and business survival rates, aided by related policy drivers, however these remain below the regional average. Overall most of the growth sectors see slightly weaker employment growth than regionally.

The manufacturing sector remains in long term decline, however buoyant performances by major employers in the sector and some restructuring limit the rate of decline.

Supply Factors

Population growth is fairly slow in line with ONS projections however the decline in those of working age is much less severe given the more upbeat state of the economy. In addition economic activity rates remain high and unemployment remains low whilst commuting levels remain similar to the current picture.

Scenario (3) - There is restructuring within the economy and stronger growth as major employers see continued growth and start up rates increase.

Under this scenario growth is fairly strong as the economy restructures and major employers continue to expand their operations. The distribution, hotels and restaurants sector continues to grow impressively whilst the banking, finance and insurance sector is also a key growth sector as start ups improve and major employers expand. In particular there is an increase in other business activities, in part driven by the pick up in economic activity. In addition there is some growth within the public administration, education and health sector. The manufacturing sector continues to decline but, reflecting continued strong growth by major employers and successful underlying restructuring, declines less rapidly. Notably start-ups and business survival rates move more inline with the regional average.

Supply Factors

Given the restructuring in the economy and increased job opportunities the population grows faster than ONS population projections whilst the working age population remaining similar to its 2004 level. The economic activity rate, the unemployment rate and patterns of net commuting are assumed to remain steady.

6.4 Scenario Forecast Results

Table 6.1 sets out the employment forecast results (using the Labour Supply Technique and the Labour Demand Technique) for total employment and B-use employment in Staffordshire Moorlands under the three scenarios.

Table 6.1 - Overall Results: Annual employment growth rates (%)

	Scenario 1	Scenario 2	Scenario 3
TOTAL EMPLOYMENT			
Labour supply technique	-0.6	0.2	0.6
Labour demand technique	-0.2	0.9	1.9
B-USE EMPLOYMENT			
Labour supply technique	-0.6	0.2	0.7
Labour demand technique	-0.6	0.8	1.4

6.5 Business Survey Forecasts

Using data from the Annual Business Inquiry we can provide indicative estimates of the total number of B-use class businesses in Staffordshire Moorlands by size. By applying the sample results to reflect the total number of B-use class businesses, estimates can be provided of the total expansion requirements of indigenous businesses in the District.

Two methods have been used in order to calculate an upper and a lower forecast of future demand as follows:

- ◆ Method 1 - is calculated based on only those respondents who responded that they would definitely be expanding and that they would need additional floorspace.
- ◆ Method 2 - also includes both those respondents who had definite plans for expansion and those with only tentative plans for expansion, so providing an upper forecast. The figures are then further analysed using data from the questions on floorspace requirements and relocation preferences.

Table 6.2 shows the floorspace estimates required to accommodate all expansion plans of indigenous businesses within Staffordshire Moorlands.

Table 6.2 - Expansion floorspace requirements in Staffordshire Moorlands (m²)

Size of business	Small	Medium & Large	TOTAL
Method 1 – Lower level forecast	37,123	11,553	48,676
Method 2 – Upper level forecast	98,740	24,261	123,001

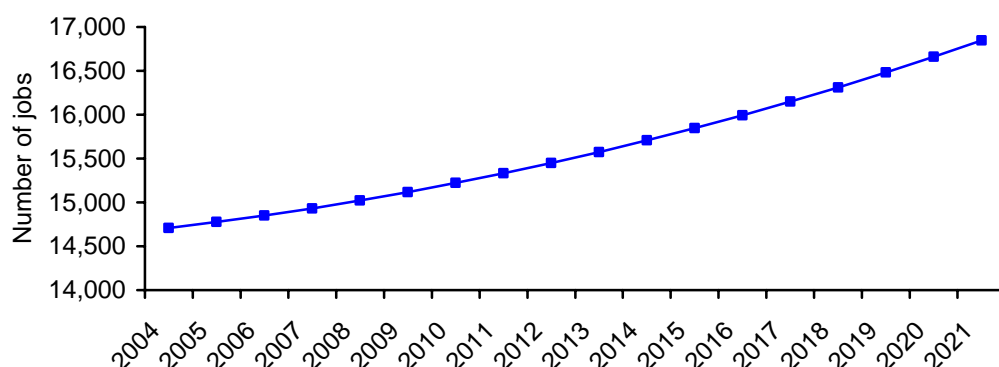
The lower level forecast gives a floorspace requirement of approximately 50,000m² in order to meet existing businesses expansion plans. The upper level forecast gives a floorspace requirement of approximately 125,000m².

It is important to highlight three key factors when looking at the estimates set out in the table.

- ◆ The estimates exclude the B-use class requirements of public sector organisations;
- ◆ The estimates refer only to the additional floorspace requirements of indigenous businesses. The potential requirements of inward investors to the District are not included;
- ◆ The estimates refer only to additional floorspace requirements and make no allowances for floorspace vacated by contracting businesses; and,
- ◆ The estimates are solely based on business survey responses and are likely to include a high degree of optimism.

6.6 Staffordshire Moorlands Preferred Option Forecasts

The forecasts produced under Scenario 2 were considered to provide the most realistic range of outcomes. The following tables set out the preferred forecast, which combines both the labour demand and labour supply techniques, results from the business survey and property market intelligence. Figure 6.1, below, illustrates the growth curve for B-use employment in Staffordshire Moorlands.

Figure 6.1 - B-Use employment forecasts for Staffordshire Moorlands

The tables below are intended to set out an indication of the nature of future demand rather than a prescriptive requirement for the District.

Table 6.3 details the employment forecasts by B-use category and the associated floorspace requirements. The numbers of jobs forecast for the District for each sector were converted into a forecast floorspace requirement using employment densities⁷. An employment density refers to the average floorspace per person in an occupied building and is therefore a measure of how much space each additional job will require. The densities vary across sectors due to the difference in working practices and floorspace requirements.

Table 6.3 – Preferred scenario forecasts for Staffordshire Moorlands District by sector

B-Use	Total Jobs	% growth per annum	Change in total jobs 2004-	Employment Densities	Additional Floorspace by
B-Use Banking, Finance and Insurance (BC)	5,508	2.3	1,766	19	33,554
B-Use Construction (BC)	1,784	2.4	592	5	2,960
B-Use Distribution and Wholesale (BC)	2,296	2.0	656	50	32,800
B-Use Manufacturing (BC)	3,450	-2.4	-1,764	27	-47,628
B-Use Other Services (BC)	2,257	2.0	645	19	12,255
B-Use Transport and Communications (BC)	1,549	1.0	241	27	6,507
TOTAL	16,845	0.8	-	-	-
Jobs created	-	-	3,900	-	-
Jobs lost	-	-	-1,764	-	-
Net change in jobs	-	-	2,136	-	-
Gross floorspace demand	-	-	-	-	88,076
Gross floorspace vacated	-	-	-	-	-47,628

Table 6.4 provides an illustration of the gross floorspace requirements for Staffordshire Moorlands by B-Use Class and Table 6.5 of the employment land requirements for Staffordshire Moorlands.

⁷ Employment Densities: A Simple Guide; English Partnerships

Table 6.4 - Floorspace requirements by B-Use Class

B-Use Class	Additional floorspace requirement		Vacated floorspace	
	% of total	Floorspace (m ²)	% of total	Floorspace (m ²)
Offices (B1a & B1b)	49.2	43,295	15.0	-7,144
Factories (B1c, B2 & Sui Generis)	15.2	13,398	85.0	-40,484
Warehousing (B8)	35.6	31,383	0.0	0
TOTAL	100.0	88,076	100.0	-47,628

The total land requirements assume a range of plot ratios as shown in Appendix B and E. Plot ratios relate to the ratio of amount of employment land that is required to provide a particular amount of floorspace. They therefore provide a method for estimating the required amount of employment land that will be needed to provide the forecast level of floorspace.

The plot ratios used are produced by Atkins based on our previous building planning and development experience. We have assumed a plot ratio of 0.6 for B1a and B1b. This allows for the bulk of the premises to be located within business parks (where we assume two storey developments) and a smaller proportion to be located within town centres (where we assume greater development of at least two storeys). For B1c, B2, B8 and Sui Generis we assume a plot ratio of 0.4 (where we assume single storey development).

Table 6.5 - Employment land requirements by B-Use Class

B-Use Class	Additional employment land requirement			Vacated employment land	
	Plot ratio	% of total	Employment land (m ²)	% of total	Employment land (m ²)
Offices (B1a & B1b)	0.6	39.2	72,159	10.5	-11,907
Factories (B1c, B2 & Sui Generis)	0.4	18.2	33,494	89.5	-101,210
Warehousing (B8)	0.4	42.6	78,457	0.0	0
TOTAL		100.0	184,110	100.0	-113,117

Table 6.6 provides an estimate of the gross floorspace and employment land requirements by premises size band. It should be noted that the forecasts laid out in this section refer only to B-use class employment and therefore exclude, for example, both retail and public sector employment.

Table 6.6 - Additional floorspace and employment land requirements by premises size

Business premises size (m ²)	% of premises	% of floorspace & employment land	Floorspace (m ²)	Employment land (m ²)
0 – 100	44.2	6.5	5,725	119,67

101 – 250	15.2	5.3	4,668	9,758
251 – 500	15.2	11.3	9,953	20,804
501 – 1,000	10.9	16.1	14,180	29,642
1,001 – 2,500	10.1	35.1	30,915	64,623
More than 2 500	4.3	25.8	22,724	47,500
TOTAL	100	100	88,076	184,110

The tables show that a total floorspace requirement of approximately 88,000m², which is equivalent to approximately 184,000m² or 18.4 hectares of employment land, will be required in the Staffordshire Moorlands. The greatest demand for floorspace is likely to be for B1a and B1b uses, which will account for approximately half of additional floorspace. However B8 uses are likely to account for the most additional employment land at approximately 43 per cent whilst B1a and B1b uses are set to account for approximately 39 per cent. Due to the lower density at which B1c, B2 and B8 premises tend to be built, these premises will account for a higher proportion of total employment land than they do of total floorspace.

It should be recognised that the above estimates provide only a guide to how the additional floorspace needs are likely to be broken down by use class. The exact proportions will depend on (for example) how much useable vacant floorspace comes onto the market from firms who cease trading and the success of initiatives to upgrade the quality of the existing B-class building stock. It should also be noted that well located, flexible and adaptable premises may be suitable for occupation by a range of B-class activities.

Table 6.6 details the forecasts by size of premises. The greatest demand is for premises that are up to 100m². However, it should be noted that whilst these premises are likely to see the highest demand, it is the larger premises that will account for most of the additional employment land. Business premises of between 1,001m² and 2,500m², whilst only accounting for approximately 10 per cent of total business demand, are likely to account for over a third of the additional employment land allocation. (Premises size forecasts are based on the results of the business survey, and due to the low response rate with regard premises size and expansion care should be taken when interpreting the results).

6.6.1 Summary of Other Scenario Forecast Results

This section provides a summary of the results from the two alternative scenarios, providing both total change in jobs, floorspace and employment land requirements.

Table 6.7 – Other Scenario Forecast Results

	Scenario (1)		Scenario (3)	
	Additional	Lost/vacated	Additional	Lost/vacated
B-use jobs	1,867	-3,220	5,223	-1,385
Floorspace (m ²)	41,269	-86,947	117,218	-37,400
Employment land (m ²)	88,259	-206,709	241,934	-88,824

6.7 Summary of the Employment Forecasts 2004 to 2021

Employment growth in Staffordshire Moorlands was higher than the region but slightly lower than England and Wales for the last twenty years. Three forecasting techniques have been applied to produce three future scenarios for the District. The key scenarios are:

- ◆ Scenario (1) - There is a decline in employment with a downturn in the larger businesses in the district.
- ◆ Scenario (2) - Growth is weak in the district with a continued dependency on larger businesses.
- ◆ Scenario (3) - There is restructuring within the economy and stronger growth as major employers see continued growth and start up rates increase.

We considered the forecasts produced under Scenario 2 to provide the most realistic range of outcomes and the following tables set out the preferred forecasts, which combine both the labour demand and labour supply techniques, results from the business survey and property market intelligence. The key findings are as follows:

- ◆ A total floorspace requirement of approximately 88,000m², which is equivalent to approximately 184,000m² of employment land, will be required by Staffordshire Moorlands;
- ◆ The greatest demand for floorspace is likely to be for B1a and B1b uses, which will account for approximately half of additional floorspace; and
- ◆ The greatest demand is likely to be for premises that are up to 100m². Business premises of between 1,001m² and 2,500m², whilst only accounting for approximately 10 per cent of total business unit demand, are however likely to account for over a third of the additional employment land allocation.

As previously mentioned these figures are indicative and should not be considered as precise calculations.

7. Future Employment Land Suitability

7.1 Introduction

This Section focuses on identifying a portfolio of sites including those considered suitable for retention as employment sites, those which require further investigation and those sites that are no longer considered suitable for future employment use and therefore should be considered for other uses.

This process will inform a portfolio of employment land and premises which will be required to meet the future business accommodation requirements identified in Section 6. The following key steps were taken as part of this process:

- ◆ Firstly, a list of sites comprising vacant and opportunity land within allocated land, existing employment locations and potential (new) additional employment locations was provided from the site appraisal process set out in section 4;
- ◆ Secondly, the amount of land and floorspace needed to be provided in order to meet future requirements was identified via the business survey and trend based analysis and forecast methods in sections 5 and 6; and,
- ◆ Thirdly, from known constraints at particular locations and assessment of the employment requirement broken down by land use, size of premises, and the employers within growth or emerging sectors that the District should try to attract the list of identified potential sources of supply, recommendations were provided regarding which sites were considered most suitable in terms of meeting future employment needs.

This Section should be read in conjunction with the evaluation matrix provided in Appendix H.

7.2 Supply pipe line

The floorspace forecasts identified in section 6 indicate that there is a potential gross floorspace requirement of 88,000m², equal to approximately 184,000m² of employment land, in Staffordshire Moorlands between 2006 and 2021. **These figures represent total needs to be planned for over this period and not the balance to be provided.** The floorspace figures are expressed in terms of gross external floorspace.

The floorspace estimates are identified in the employment forecasts to 2021. Depending on levels of economic growth, the floorspace requirements of prospective occupiers in terms of location, size and type of premises may be lower than the requirements identified. However, it is necessary to plan for this level of variability to ensure there is sufficient choice and flexibility in the portfolio of employment locations and to ensure there is a managed supply of sites available for immediate development.

7.2.1 Removed Sites

We have removed the following sites from the evaluation:

- ◆ The high quality site at Blythe Bridge is of sub-regional importance and has therefore been removed from the evaluation matrix. The scale of the site at nearly 50 hectares also distorts the land supply figures.
- ◆ Sites under the minimum threshold 0.25 hectares were considered too small in scale. This meant that site 26 the Former Council Depot at Meadows Way, Biddulph was removed.
- ◆ Major single occupier sites were also removed from the evaluation as they are not available for general use and are therefore not part of the land which the District Council can implement policies to bring forward for the forecasted B-uses. This resulted in sites 10 Britannia Building Society, Cheddleton Road and site 17 JCB Leek Road, Cheadle and site 18 JCB Oakamoor Road, Cheadle to be removed from the evaluation matrix. As with the premium employment land these sites falsely inflate the amount of supply available. However, unlike on page 4-10 where we include Bolton Copper Works a single occupier we have not removed the land from the evaluation matrix as it is vacant and therefore available for general use.

Therefore there are 32 sites ranked according to overall suitability score

7.2.2 Breakdown of Quantitative Requirements

The ODPM Employment Land Review Guidance note that accompanies PPG 4 states that it is necessary to disaggregate future requirements as far as possible. The segmentation of future requirements is evidence based and uses the findings of the site appraisals and business survey conducted as part of this study together with ODPM data on the existing quantum and distribution of existing floorspace. This information has been used to define the future portfolio have been defined in terms of use class, premises size requirements and broad location. The parameters should be viewed as a broad indication of the type and nature of employment sites required to meet future requirements rather than a precise means of directing growth.

Requirements by use class

An estimate has been derived of the broad types of premises required within the District by use class through:

- ◆ An analysis of ODPM data relating to existing B-class floorspace by type;
- ◆ Consideration of existing patterns of premises occupancy (derived from the business survey);
- ◆ The premises requirements of those businesses seeking to expand (derived from the business survey); and
- ◆ Local property market indicators.

Taking these indicators into consideration, this information was then applied to the additional floorspace requirements needed up to 2021. The results for Staffordshire Moorlands District are shown in Table 7.1 which provide a split between office, factory and warehouse premises. The use classes that fit into these broad categories are specified and are consistent with data available from the ODPM. It is not possible to derive accurate estimates for individual economic sectors due to the uncertainty and limitations in identifying future needs relating to each sector.

A key point is the need to balance the District economy with more office and distribution land uses as there is a disproportionately high amount of factory use at 72.1 per cent. Therefore 43,296m² of the overall 88,000 m² should be developed for B1a & B1b office uses.

Table 7.1 – Market Led Floorspace Requirement by Use Class (Staffordshire Moorlands)

Use Class	All existing floorspace	Business Survey Mix	Business Survey Expansion Requirement	Floorspace Requirement
	%	%	%	M ²
Office (B1a&B1b)	3.2	34.3	49.2	43,296
Factory (B1c B2 &Sui Generis)	72.1	30.1	15.2	13,376
Warehouse (B8)	24.7	35.6	35.6	31,328
Total	100.0	100.0	100.0	88,000

N.B All existing floorspace - source Section 4 figures

N.B Business Survey Mix: Type of premises occupied by businesses surveyed / interviewed N.B Business Survey Expansion Requirements – Expansion requirements identified by business survey.

It should be recognised that the above estimates provide only a guide to how the additional floorspace needs are likely to be broken down by sector. The exact proportions will depend on (for example) how much useable vacant floorspace comes onto the market from firms who cease trading and the success of initiatives to upgrade the quality of the existing B-class building stock. It should also be noted that well located, flexible and adaptable premises may be suitable for occupation by a range of B-class activities.

Requirements by size of premises

It is possible to identify the likely size of premises needed by existing and future occupiers by considering several different indicators namely:

- ◆ The sizes of existing premises in the District;
- ◆ The floorspace requirements identified by firms seeking to relocate;
- ◆ Business start up and survival rates to identify the space requirements of new firms based on VAT Registration and De-Registration rates considered in Appendix E and rates of Business Survival; and

- ◆ Qualitative indicators gained from consultation and property market intelligence.

Based upon the consideration of existing and potential occupancy requirements of existing firms it is possible to estimate the approximate size requirements relating to indigenous business needs in terms of the size of individual premises as shown in Table 7.2.

Table 7.2 - Floorspace Requirements by Premises Size Mix (Staffordshire Moorlands)

Business Size	% of employment premises	% of employment land	Floorspace Requirement m ²	Employment land (m ²)
0 – 100	44.2	6.5	5,725	119,67
101 – 250	15.2	5.3	4,668	9,758
251 – 500	15.2	11.3	9,953	20,804
501 – 1 000	10.9	16.1	14,180	29,642
1 001 – 2 500	10.1	35.1	30,915	64,623
More than 2 500	4.3	25.8	22,724	47,500
TOTAL	100	100	88,076	184,110

Premises between 1,001-2,005 m² represent more than one third of the land requirements and which local property agents highlighted as a popular size for local businesses.

It should be recognised that the size of premises is not the only criteria sought by small businesses. Firms may have particular requirements relating to the type of accommodation sought (including location, level of business support management and leasing terms).

Spatial distribution/choice of locations

It is important to provide businesses with a choice of types of location and to encourage a range of different forms of employment premises in different parts of the District. This will provide flexibility to growth sectors, enable indigenous businesses to grow and to meet the requirements of prospective inward investment.

The key location for businesses was identified as Leek with 38 per cent of companies identifying it as a place they wished to expand as shown in Table 7.3. However 35 per cent of respondents did not know the location where they wished to expand.

Table 7.3 – Key Location preferences of surveyed businesses considering relocation

Location	Proportion (%)	Employment land (m ²)
Leek	38	69,962
Biddulph	3	5,523
Cheadle	9	16,570
Remainder of District	3	5,523
Outside District	12	22,093
Don't know	35	64,439
Total	100	184,110

Of concern was that a quarter of companies who considered relocating did not think that the type of premises that they were after were available in Staffordshire Moorlands.

From section four, 37 sites of the following three categories were identified for more detailed evaluation:

- ◆ Allocated - existing employment commitments identified at the District level (with or without planning permission);
- ◆ Existing employment locations - sites of occupied and/or vacant premises on existing employment locations; and,
- ◆ Additional employment land - areas of land that are currently not used for employment use, which may have the potential to be used as such in the future.

7.3 Evaluation Criteria

The suitability of potential employment locations and opportunity/vacant land has been considered in order to assess how the existing balance of sites in terms of their location and suitability for different employment uses compares with the requirements identified for the period up to 2021. Details are located in the plans in Appendix B.

A criteria based matrix based on ODPM guidance 2004, has been used as the basis to evaluate potential employment locations within the District. The 4 main groups of criteria identified are:

- ◆ Access;
- ◆ Sustainability;
- ◆ Availability; and
- ◆ Marketability.

Within each of the 4 main groups listed, a range of indicators were derived to address highlighted issues and constraints. A score for each indicator was derived for each location based upon assigning a number of points based on the descriptive

criteria which most accurately reflected the site. A composite percentage score was derived which weighted the criteria based on their respective significance see Table 7.4 below.

Each indicator under the 4 main headings is described below, the site assessment matrix and ranked scores are included within Appendix H.

Table 7.4 - Evaluation Matrix Weighting

Criteria	Sub-criteria	Significance	Weighting
Access	Public Transport	Medium	10
	Access to SRN	Medium	15
Sustainability	Sequential Test	Low	5
	PDL	High	25
	Other Services	Low	5
Availability	Timescale	Medium	20
Marketability	Level of Demand	Medium	20
Total			100

Access

A scoring system was devised to assess accessibility factors at each site. This was based on the proximity of each site to rail/bus routes and to local road hierarchy.

Public Transport Access

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

The assessment of public transport accessibility has been based upon the proximity of each location from a public transport route. Generally Staffordshire Moorlands is poorly served by public transport when compared elsewhere. A score of 5 was given to sites that were clearly within 400m of a station/bus route, 3 points were awarded for sites with fair access, within 800m of a station/bus route, and a single point awarded for sites that are further than 800m from a station/bus route. Distances were measured on a straight line basis.

Strategic Transport Access

The importance of being located close to the strategic road network varies according to business sector, the stage in the supply chain, market access dependencies and the frequency of inward and outward deliveries. Firms within the B8 use class who

are engaged in storage and distribution activities are likely to attach the most importance to proximity and access to the strategic road network. B1(c) firms may also have a strong business need for good access to the road network.

Points have been awarded to the potential employment locations on the following basis: 5 points for sites with direct access to the Strategic Road Network (SNR), 3 points for roads within 1 km distance from the SRN, 1 point for poor access to the SRN. Proximity to the Strategic Road Network includes consideration of proposed improvements. Distances were measured on a straight line basis.

Sustainability

To minimise journey times between work and home locations, it is desirable to locate employment uses either within, or adjacent to the most densely populated urban areas where the size of the labour pool is greatest.

In order to reflect the need to locate employment locations in sustainable locations, a scoring system was developed to score the site on the following basis;

- ◆ For a sequential test approach, sites within an urban area were assessed as 'good' (5 points), sites located on the urban fringe were assessed as fair (3 points), and sites in rural countryside locations were assessed as 'poor' (1 point). However it is understood that Staffordshire Moorlands is a predominately rural area so the weighting of this factor was reduced as not to unduly prejudice the viability of existing rural employment locations;
- ◆ In sustainability terms it is preferable to re-use previously used land and buildings. Therefore sites were assessed as yes (5 points), no (1 point), or part (3 points) to show whether the land had been previously developed or not or previously developed in part. A higher weighting was used on this category to reinforce policy preference of using previously developed land. This is to fall in line with increased priority of sustainability criteria being called for by Government at the regional level; and
- ◆ Other services refer to the internal layout, the servicing of sites, parking arrangements, signage, catering amongst other site specific considerations. The sites with excellent services scored 5 points, good services scored 4 points, average 3 points, below average scored 2 and poor amenities scored 1 point.

Availability

The availability of a site is influenced by its current physical state including whether it accommodates an existing use and the presence of constraints such as physical or environment constraints that need to be overcome prior to development. The need for land assembly may also reduce the availability of a site for development in the short-medium term. The availability of a site has a direct relationship on the ease at which a site can be brought forward for development and development costs. Sites that accommodate an existing use and require land assembly are generally harder to develop than undeveloped sites in single ownership.

For undeveloped land the assessment of availability has also taken into account environmental and other development constraints that could influence the extent to which a site may be suitable for development, or could even preclude development of all or part of a site. These include flood risk, ecological and heritage designations, overhead power lines and infrastructure requirements.

In order to give a timescale perspective to the assessment of sites a scoring system was introduced to distinguish between short term (5 points), medium term (3 points) and long term (5 points). This factor was believed to be of medium importance so weighted accordingly.

Marketability

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

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

Certain occupiers may have particular site requirements depending on the operations of their business particularly in terms of accessibility, and environmental requirements. For example, headquarter locations within some sectors have a preference for a high quality business park type environment in a prominent location whereas similar functions in other sectors are less prescriptive. B1(c) and B8 firms typically require purpose built, low density sites in order to undertake their operations in an efficient manner. Room for expansion or intensification at an existing site is beneficial to avoid costly relocations in the future. An assessment has been made of the market attractiveness of each potential location in terms of:

- ◆ suitability in meeting the location, use class and size requirements for the area in which it is located;
- ◆ flexibility of the site in meeting the needs of a range of employment requirements;
- ◆ accessibility by road and public transport; and,
- ◆ potential to establish an attractive environment to meet the needs of the target use class(es).

The attractiveness of each potential location has been summarised on the basis of the factors described above for B1(a), B1(c) and B2, and B8 use in turn, on a scale of 1 to 5 (where 1 = very poor, 5 = very good). The use with the highest score has been used to form the overall marketability rating for each location.

Market demand factors were also judged to be important to this assessment. Sites were therefore assessed on the following basis:

- ◆ Sites considered as very attractive to the market were scored as 'high' marketability and scored 5 points;
- ◆ Sites considered as good marketability were scored as 'medium' and scored 3 points; and,
- ◆ Sites considered as suitable marketability were scored 'low' (3 points).

A balanced and considered opinion has been informed by information provided by Staffordshire Moorlands Officers (including policy documents at the national, regional, sub-regional and local level,) private sector knowledge of the local property market and comments received from employers during the business survey. The completed site appraisal proforma for each individual site and experience from employment land studies elsewhere in England enabled this judgement.

7.3.1 Overall Suitability Score

The sites were individually scored against each of the criteria listed above and the weighting was applied to produce an overall suitability score. The scores were split into three categories:

- ◆ A - Sites of high suitability for employment use. This band related to the higher scoring sites of 70+ overall suitability score;
- ◆ B – Sites suitable for employment use - subject to further investigation/known constraints. For this banding a site should achieve a score of between 50 and 69 overall suitability score; and,
- ◆ C – Sites considered less suitable for employment use. The banding for this score is less than 50 suitability score.

The sites were then split into three categories of:

- ◆ Allocated employment land;
- ◆ Existing employment land; and,
- ◆ Additional employment land

7.4 Evaluation Matrix Results

The evaluation matrix should be viewed in light of its purpose to rank sites in terms of their suitability for 'future' use and represent a guide to future employment land policy. The full matrix is shown in Appendix H with a summary of the areas and breakdown by search area.

7.4.1 Leek Sites

In Tables 7.5, 7.6, and 7.7 the employment sites in Leek are shown according to whether it is considered they should be retained, subject to further investigation of

possible constraints or possibly released for other uses due to being considered less suitable for future employment use.

Table 7.5 - Leek Sites of high suitability for employment use

No	Site Name	Total Site Area (ha)	Vacant Land Ha	opportunity land Ha	Vacant Floorspace M2	overall suitability score
Allocated Employment Sites in the Local Plan						
9	Cattle Market	5.5	0.0	2.3	0.0	70
Traditional/existing Employment Land Locations						
8	Barnfields Industrial Estate	23.6	3.7	0.0	2,169.7	99
3	Springfield Road	0.6	0.2	0.0	0.0	88
37	Leekbrook Industrial Estate	3.3	0.2	0.0	557.2	83
1	British Trimmings	1.2	1.2	0.0	0.0	81
11	Town Yard Industrial Estate	1.0	0.0	0.5	0.0	81
13	Part of Former Joshua Wardle	2.2	2.2	0.0	0.0	78
5	Mills on Brook Street	2.0	0.0	0.0	1,332.6	72
4	Macclesfield Road	11.5	3.4	0.0	0.0	72
Additional Employment Land Locations						
35	Queen Street	0.4	0.1	0.0	3,227	80
Total (ha)		51.4	11.0	2.7	7,286.9	70+

There is 51.4 hectares of land considered to have a high suitability for employment use in Leek of which 11.2 hectares is vacant. The Cattle Market site has 2.3 hectares of opportunity land available and Town Yard Industrial Estate has half a hectare of opportunity land identified as of high suitability for employment use and therefore favourable for retention. A significant amount of vacant floorspace is available at Barnfields Industrial Estate, Mills on Brook Street and Leekbrook Industrial Estate.

Table 7.6 Shows two sites in Leek, Whites Bridge and Brooklands Way that are considered suitable for use based on further investigations and/or known constraints with a combined area of 26.5 hectares of which 17.7 hectares is opportunity land.

Table 7.6 – Leek Sites suitable for employment use - subject to further investigation/known constraints

No	Site Name	Total Site Area (ha)	Vacant Land Ha	opportunity land Ha	Vacant Floorspace M2	overall suitability score
<i>Allocated Employment Sites in the Local Plan</i>						
6	Whites Bridge	9.9	0.0	9.9	0.0	57
<i>Traditional/existing Employment Land Locations</i>						
12	Brooklands Way	16.6	0.0	7.8	0.0	69
Total (ha)		26.5	0.0	17.7	0.0	50-69

Fowlchurch Tip shown in Table 7.7 was considered as less suitable for future use as employment and this means 14.4 hectares of land could be released from the total employment land supply.

Table 7.7 – Leek Sites considered less suitable for employment use

No	Site Name	Total Site Area (ha)	Vacant Land Ha	opportunity land Ha	Vacant Floorspace M2	overall suitability score
<i>Additional Employment Land Locations</i>						
2	Fowlchurch Tip	14.4	0.0	14.4	0.0	45
Total (ha)		14.4	0.0	14.4	0.0	below 50

7.4.2 Biddulph

In Table 7.8 the identified sites of high suitability for employment use are Victoria Business Park, Power Wash Industrial Estate & Brown Lees Industrial Estate, and Walley Street with a combined area of 18 hectares. Of this area 8.5 hectares is identified as vacant or opportunity land. In terms of vacant floorspace, 3,587 m² was recorded at Walley Street.

A further 5.3 hectares was identified as employment land with suitability for retention based on further investigations/known constraints at Wharf Road and Uplands Mill. However there was no vacant land or vacant floorspace recorded in this category and only 1.0 hectare of opportunity land, as shown in Table 7.9.

Table 7.8 - Biddulph Sites of high suitability for employment use

No	Site Name	Total Site Area (ha)	Vacant Land Ha	opportunity land Ha	Vacant Floorspace M2	overall suitability score
Allocated Employment Sites in the Local Plan						
24	Victoria Business Park	9.6	7.7	0.0	0.0	93
Traditional/existing Employment Land Locations						
39	Power Wash Indus. Estate & Brown Lees Indus. Est.	7.6	0.0	0.8	0.0	76
27	Walley Street	0.8	0.0	0.0	3,586.8	73
Total (ha)		18.0	7.72	0.8	3,586.8	70+

Table 7.9 – Biddulph Sites suitable for employment use - subject to further investigation/known constraints

No	Site Name	Total Site Area (ha)	Vacant Land Ha	opportunity land Ha	Vacant Floorspace M2	overall suitability score
Allocated Employment Sites in the Local Plan						
25	Wharf Road	1.0	0.0	1.0	0.0	64
Traditional/existing Employment Land Locations						
28	Uplands Mill	4.3	0.0	0.0	0.0	65
Total (ha)		5.3	0.00	1.0	0.0	50-69

Gillow Heath Sewage works was considered as less suitable for future employment use and therefore could be considered for the purpose of other land uses.

Table 7.10 - Biddulph Sites considered less suitable for employment use

No	Site Name	Total Site Area (ha)	Vacant Land Ha	opportunity land Ha	Vacant Floorspace M2	overall suitability score
Traditional/existing Employment Land Locations						
29	Gillow Heath Sewage Works	7.7	0.0	4.8	0.0	41
Total (ha)		7.7	0.0	4.8	0.0	Below 50

7.4.3 Cheadle

There were no sites of high potential for retention as employment sites allocations in Cheadle or any sites to be released. The only site of note in Cheadle was the New Haden/ Brookhouses site which is a significant employment site in the District with 35.0 Ha of employment land of which 8.7 Ha was recorded as opportunity land and identified for retention subject to further investigations/known constraints. Therefore, we would advise the District Council to consider additional allocations for employment land & premises in Cheadle.

Table 7.11 - Cheadle Sites suitable for employment use - subject to further investigation/known constraints

No	Site Name	Total Site Area (ha)	Vacant Land Ha	opportunity land Ha	Vacant Floorspace M2	overall suitability score
<i>Allocated Employment Sites in the Local Plan</i>						
19	New Haden/Brookhouses	35.0	0.0	8.7	0.0	58
Total (ha)		35.0	0.00	8.7	0.0	50-69

7.4.4 Remainder of the District

Table 7.12 shows three existing sites with a combined area of 14.1 hectares. There is little vacant land or opportunity land considered to be land with high potential for retention as employment allocations. We would advise the District Council to protect this land for employment and consider further land for allocation in Upper Tean based on this lack of vacant land.

Churnetside Business Park, Cheddleton has a significant amount of vacant floorspace recorded at 2,070 m².

Table 7.12 – Remainder of the District Sites of High Suitability for Employment Use

No	Site Name	Total Site Area (ha)	Vacant Land Ha	opportunity land Ha	Vacant Floorspace M2	overall suitability score
<i>Traditional/existing Employment Land Locations</i>						
36	Lymers Depot, Upper Tean	0.4	0.0	0.0	0.0	82
22	Bridge Villa, Upper Tean	0.3	0.0	0.0	0.0	78
14	Churnetside Business Park, Cheddleton	13.4	0.86	0.0	2,070.3	74
Total (ha)		14.1	0.86	0.0	2,070.3	70+

A list of eight sites with a combined area of 43.7 hectares was identified in the remainder of the District as employment land suitable for employment based on further investigations/known constraints, as shown in Table 7.13. A large amount of land at 12.2 hectares was recorded as opportunity land. There was a very small amount of vacant floorspace or 200m² observed during the sites visits.

Table 7.13 - Remainder of the District Sites suitable for employment use - subject to further investigation/known constraints

No	Site Name	Total Employment Land (Ha)	Vacant Land (Ha)	Opportunity Land (Ha)	Vacant Floorspace (m ²)	overall suitability score
Allocated Employment Sites in the Local Plan						
31	Far Lane Industrial Estate, Ipstones	0.9	0.0	0.4	200.0	64
32	Waterhouses Enterprise Centre (Crowtrees Farm)	1.7	0.0	1.3	0.0	62
20	Mobberley, Cheadle	1.6	0.0	1.6	0.0	55
30	Bolton Copper Works, Froghall	17.1	1.3	3.6	0.0	53
Traditional/existing Employment Land Locations						
33	Blithe works, Sandon Road, Cresswell	13.6	0.0	4.1	0.0	64
38	Co-op Milk Plant, Fole	2.0	0.0	0.0	0.0	62
16	Pointon Site, Cheddleton	5.0	0.0	0.0	0.0	57
Additional Employment Land Locations						
15	Beresford/PMT Depot, Cheddleton	1.9	0.6	1.3	0.0	60
Total (ha)		43.7	1.91	12.2	200.0	50-69

Based upon the information available in Table 7.13 and the outcome of the business demand section we would advise that the District Council considers the identified opportunity land at Waterhouses for extension of the popular existing employment location. There were no sites considered less suitable for employment uses in the Remainder of the District.

7.5 Future Employment Land Summary

In summary, the total amount of land evaluated equalled 217.4 hectares as shown in Table 7.14.

Table 7.14 – Summary Table

Category	Total Employment Land (Ha)	Vacant Land (Ha)	Opportunity Land (Ha)	Vacant Floorspace (m ²)
Sites of high suitability for employment use	83.5	19.6	3.5	12,943.9
Sites suitable for employment use - subject to further investigation/known constraints	110.6	1.9	39.6	200.0
Sites considered less suitable for employment use	23.4	0.3	19.2	0.0
Total	217.4	21.8	62.3	13,143.9

The key findings were as follows:

- ◆ Sixteen sites, with a combined 83.5 hectares of land were considered as having high potential for retention as employment. Nearly two thirds of this land is occupied with only 19.6 hectares identified as vacant and 3.5 hectares as opportunity land. The amount of vacant floorspace was significant at 12,944 m² distributed across six sites in Leek, Biddulph and Cheddleton;
- ◆ Thirteen sites, with a combined area of 110.6 hectares were considered as suitable for employment use subject to further investigations/known constraints due to having known constraints (a range of environmental, physical, contamination, planning approval, existing use, ownership issues etc). However, two thirds of this land is currently occupied with only 1.9 hectares identified as vacant, however, a more significant 39.6 hectares was recorded as opportunity land. Only 200 m² was recorded as vacant floorspace;
- ◆ Three sites Dilhorne Road and The Green, Fowlchurch Tip and Gillow Heath Sewage Works with a combined area of 23.4 hectares were identified as less suitable for employment uses and therefore should be considered for other land uses in the future. Only 3.9 hectares of this land is actually occupied, 0.3 hectares vacant and the majority identified as opportunity land;
- ◆ Furthermore and additional 74.3 hectares needs to be added from land on sites smaller than 0.25 hectares considered too small for detailed assessment; and,
- ◆ We advise that the District Council consider additional employment allocations for B1/B2 (not storage and distribution) uses to provide small to medium sized premises in Cheadle, Upper Tean, and Waterhouses where we have identified demand at popular locations but where no available vacant land or premises exist;

8. Conclusions & Recommendations

8.1 Introduction

The conclusions highlight the key findings concerning employment land supply and identified future requirements across the District and are drawn from the significant body of evidence summarised in earlier sections of this report, and in the more detailed data in the appendices.

The recommendations suggest policy actions at the District and sub-District level to support Staffordshire Moorlands District Council in capitalising upon opportunities for improved economic performance and growth and to embed positive planning for economic development into the emerging Local Development Framework.

8.2 Conclusions

8.2.1 Policy

National policy guidance requires local authorities to undertake an assessment of existing and allocated employment land sites. The aim of the assessments is to promote positive planning, ensure that existing and allocated sites are suitable for employment use and where suitable, to highlight options for transfer to other uses. The key ODPM guidance set out in Planning for Economic Development (PPS4), 2004 states Staffordshire Moorlands District Council need to:

- ◆ provide for a sufficient supply of land of appropriate quality to meet the varied needs of businesses throughout the plan period;
- ◆ protect suitable existing employment land and premises which are required by the market in the short and long term;
- ◆ where appropriate, identify new employment allocations if the current stock of land falls short of meeting future needs (in quantitative and qualitative terms); and,
- ◆ where appropriate, facilitate the transfer of existing employment sites and allocations to alternative uses if they are unsuitable for employment and/or are genuinely surplus to requirements.

Regional policy, including the West Midlands Regional Spatial Strategy, ensures that employment land is provided in the right amount and of the right type in the right places. In doing so a number of key policies to encourage the diversification and modernisation of the regional economy are provided.

Local policy identifies specific designated areas of land, the most significant of which is the Blythe Bridge Premium Employment Site, whose allocation is a response to an acute lack of high quality employment land throughout North Staffordshire. The Local Plan is now being updated in the form of the Staffordshire Moorlands LDF which will

take into consideration national, regional and local policy in designating further employment sites.

8.2.2 Commercial Property Review

The Staffordshire Moorlands property market is localised and static. It is concentrated around the three main towns and deals mainly with demand from small companies and public bodies and there has not been much evidence of interest from outside the District. Key points from the commercial property review include:

- ◆ In summary it is believed that the District is behind when it comes to providing employment facilities and it needs to expand from its manufacturing base to allow the economy to modernise, particularly design, ICT functions, management functions, sales and services;
- ◆ There has been no new employment development in Leek in the last five years. The two main employment locations are at Leekbrook Industrial Estate and Barnsfield Industrial Estate. There is nowhere for companies to move to when expanding or down-sizing. In Leek, Town Yard consisting of 21 small units up to a maximum of between 500 and 2,000sq ft is popular. Further smaller units up to 10,000 sq ft are needed;
- ◆ Biddulph is the only location with employment development in the last five years, Victoria Business Park. Chatterley Whitfield nearby in the City of Stoke-on-Trent will compete with the Biddulph employment land and premises market. The Tunstall By-pass has stimulated the market. The Biddulph Town Centre Area Action Plan identifies new development sites and includes for between 35 to 40 new units;
- ◆ In Cheadle employment premises of freehold tenure are popular; and
- ◆ There are a number of other small settlements where employment uses exist including, Cresswell, Cheddleton, Ipstones and Waterhouses. Again small freehold units are popular in these locations.

Knowledge Economy and Incubator Space

The study considered Knowledge economy and incubator space in detail. The key findings were:

- ◆ There is potential to develop serviced centres within the District for creative individuals who live in Staffordshire Moorlands. This would cater for a latent demand identified for people who work from home but do not have the appropriate facilities. These centres could provide broadband and associated office equipment such as photocopying. This would need to be explored further to identify if it would be cost effective. Cheshire County Council has proposals to provide more incubator units. Derby and Derbyshire Economic Partnership has also identified that the development of incubator space with 'follow-on space'⁸.
- ◆ Advantage West Midlands works closely with a range of partners including universities, research and technology organisations, business support

⁸ Premises to move to once the business start-up has been successfully incubated

organisations, science parks and incubators to help promote innovation in the region.

Farm Diversification

The study also considered farm diversification which is encouraged in policy at all levels. The key study finding was:

- ◆ Farm diversification was not observed to be abundant during the research. Staffordshire Moorlands District Council could develop policies to encourage further farm diversification. The provision of grants to assist in the set up of such facilities would need to be in place and should be explored further.

8.2.3 Employment Land Supply

The site appraisal work provided a vast amount of data for inputting into a Microsoft Access database and for using GIS techniques to quantify employment areas. The key findings were:

- ◆ The overall land appraised⁹ was 297 hectares. Approximately 80 hectares of this total are not for general employment use as it includes sites that were of regional significance or for the sole use by key employers. The remaining 217 hectares is comprised of 32 sites available for general employment use. Our analysis recorded 21.8 hectares as vacant and 65.4 hectares as opportunity land. Of the 21.8 hectares, nearly two thirds of vacant land was at established employment locations with scope for change;
- ◆ In total 210 employment premises were recorded on the appraised sites, with only five per cent vacant. Blithe Works and New Haden/Brookhouses are important employment locations with over thirty occupiers recorded at each site;
- ◆ A significant area in this study has been the Urban Edge with 110 hectares equal to 37 per cent of the total employment land recorded. Furthermore 43 per cent of vacant floorspace was identified at the Urban Edge. All High quality business space, research & technology parks and warehouse and distribution parks are located at the urban edge. All other types of premises were also recorded at the Urban Edge except incubator space and SME businesses;
- ◆ Factories represent almost three quarters of the employment land available with the remaining quarter used for warehousing and no office provision. The ODPM, 2005 figures for average premises size for office, factory and warehouse was 56 m², 1,000 m² and 500 m², respectively;
- ◆ Generally, there was found to be a good spread of premise sizes. The most popular size of premises was observed to be 1,000 to 2,000 m². Specific occupiers, recycling and high quality business parks occupied the larger

⁹ The research only considered the larger employment sites and therefore, smaller locations scattered throughout the District need to be factored in at circ. 25 per cent of the total land used for employment uses based on previous employment land studies. This equals an extra 74.3 hectares to the overall land supply

premises above 2,000 m². Buildings of 500-1,000 m², and 1,000-2,000 m² were most commonly found at the urban edge. However, a high degree of poor quality was noted at the urban edge;

- ◆ There was not much evidence of development in the past five years and what has been has been for high quality Business Park at Victoria Business Park in Biddulph. Of the warehousing that was recorded only 28.4 per cent was described as in good condition; and,
- ◆ Other constraints of note were that not many sites were served by public transport, and over half of the sites were considered unsuitable for 24hr working. Parking and servicing to existing premises did not present as a particular issue.

8.2.4 Employment Land Demand

Section 5 and 6 show the economic appraisal of the district, the results from the business survey and forecast figures to the year 2021. The key aspects of employment land demand are:

- ◆ District jobs have varied between 25,000 and 29,000 over the past eight years with public sector and manufacturing jobs above regional and national averages;
- ◆ The top three manufacturing employment categories are:
 - Manufacture of office machinery and equipment jobs not elsewhere classified;
 - Manufacture of fabricated metal products, except machinery and equipment not elsewhere classified; and
 - Manufacture of other non-metallic mineral products;
- ◆ Firms in Staffordshire Moorlands are also involved in the manufacture of chemicals, chemical products and textiles. Staffordshire Moorlands needs a policy to attract more modern and specialist manufacturing sub-sectors such as publishing, print and reproduction of recorded media, radio, television and communications, and manufacture of medical precision and optical instruments, which compare fairly low with elsewhere;
- ◆ In total there are 5,214 manufacturing jobs. Part of the over-representation in manufacturing is partly due to JCB. In fact, it is believed that one in ten jobs are linked to the larger employers such as JCB and the two building societies, therefore the District needs to support major employers whilst developing economic development policies to diversify the economic base;
- ◆ Banking, finance and insurance has experienced steady growth and there is still potential for growth as there is an under-representation in the sector. There has also been growth in the hotel and restaurant sector has been very strong. Conversely, there has been decline in recreational, cultural and sporting activities;
- ◆ The District requires more distribution, hotels, restaurants, banking, finance and insurance, transport and communications as it has not benefited from as much growth in these sectors when compared to the rest of the country;
- ◆ B-Use classes represent 14,700 jobs equal to 50.1 per cent as in the rest of the country. B-Use business units however, account for 66.5 per cent of the total

and increased from 64.0 per cent in 1996. Banking, finance and insurance is the largest occupier of B-Uses at 30.3 per cent. Manufacturing account for 360 units equal to 59.3 per cent, however this is lower than in 1996 when it was 65.6 per cent. The business structure is dominated by micro-businesses with between one and ten employees equal to 85.6 per cent – refer to figure E.9 in Appendix E;

- ◆ Historically Staffordshire Moorlands has a high level of self employed people. There were 3,300 VAT registered businesses in 2004 a two per cent increase since 1994, which compares poorly to the national average of 12.9 per cent. VAT de-registrations fluctuated since 1994, with slumps identified in 1998 and 2001;
- ◆ Staffordshire Moorlands District has a declining and ageing population. Overall the district is not severely income deprived, however employment deprivation evident. Workplace wages are low which causes a strong pattern of out-commuting from the District;
- ◆ The total floorspace requirement of approximately 88,000m², which is equivalent to approximately 184,000m² of employment land, will be required by Staffordshire Moorlands District;
- ◆ The greatest demand for floorspace is likely to be for B1a and B1b uses, which will account for approximately half of additional floorspace. However B8 uses are likely to account for the most additional employment land at approximately 43 per cent whilst B1a and B1b uses are set to account for approximately 39 per cent. Due to the lower density at which B1c, B2 and B8 premises tend to be built, these premises will account for a higher proportion of total employment land than they do of total floorspace;
- ◆ The most popular size of premises are 1,001-2,500 m²;
- ◆ Of the businesses surveyed, nearly nine out of ten people are employed on a full time basis. Business suppliers were more widely dispersed than customers who were comparatively localised;
- ◆ There appeared to be some loyalty in the District with 87.6 per cent of businesses having operated in Staffordshire Moorlands for the past 5 years and 60 per cent for ten years;
- ◆ The size of new premises was not sufficiently substantiated by the business survey due to a low response about current business size provided by businesses consulted. As a result it is also difficult to quantify the floorspace requirement for expansion from the business survey. However, by applying a forecasting technique to the answers that were received we have been able to estimate a total floorspace between 48,676 and 123,001 m². This estimate is likely to be optimistic and relates only to indigenous businesses, not inward investors;
- ◆ From the survey it was possible to conclude that the banking, finance and insurance sector was the most likely businesses to expand;
- ◆ Leek was the most popular destination to relocate to in Staffordshire Moorlands considered by 38 per cent of respondents. The most wanted location type was town centre sites; and,

- ◆ Unfortunately, one quarter of those who considered relocating did not think the type of premises they required existed in the District. Furthermore one quarter of all small businesses operate from home and this is likely to involve some latent demand for affordable small business space.

8.2.5 Evaluation of Sites

The key outcome of this employment land review is to examine the Staffordshire Moorlands District existing portfolio of sites and identify those sites that should be released, assess their future employment land requirements (in conjunction with the Regional Planning Body) and adopt a new balanced portfolio of sites in the Local Development Framework.

It is important to establish sites with high suitability for employment use to be protected by planning policy and deliver an appropriate mix of new sites and premises to meet the diverse needs of different market segments and specialised land requirements over the period until 2021.

The study compared 32 key sites covering 217.4 hectares of employment land against criteria relating to access, sustainability, availability and marketability in the evaluation matrix shown in Appendix H.

This employment land study has concluded that there is market equilibrium in Staffordshire Moorlands. We have identified an employment land requirement of 184,000m² or 18.4 hectares of employment land up to 2021. We have demonstrated that 19.6 hectares of vacant land already exists at sites with high suitability for future employment uses as shown in Table 8.1.

However, whilst this may appear adequate, it is in reality unlikely to match exactly the aspirations of indigenous and inward investing companies, in terms of the range of size of premises in the right part of the Staffordshire Moorlands area. It is imperative that the District Council proactively plans for a full range of sites to accommodate different sized operations at different locations in terms of types (town centre, urban edge etc), and in sub-areas of the District.

Table 8.1 - Sites with High Suitability for Employment Use

no	Site Name	Total Site Area (ha)	Vacant Land Ha	Opportunity Land Ha	Vacant Floorspace m ²
<i>Allocated Sites</i>					
24	Victoria Business Park	9.6	7.7	0.0	0.0
9	Cattle Market	5.5	0.0	2.3	0.0
<i>Existing Employment Locations</i>					
8	Barnfields Industrial Estate	23.6	3.7	0.0	2,169.7
3	Springfield Road	0.6	0.2	0.0	0.0
37	Leekbrook Industrial Estate	3.3	0.2	0.0	557.2
36	Lymers Depot	0.4	0.0	0.0	0.0
1	British Trimmings	1.2	1.2	0.0	0.0
11	Town Yard Industrial Estate	1.0	0.0	0.5	0.0
22	Bridge Villa	0.3	0.0	0.0	0.0
13	Part of Former Joshua Wardle	2.2	2.2	0.0	0.0
39	Power Wash Indus. Estate & Brown Lees Indus. Est.	7.6	0.0	0.8	0.0
14	Churnetside Business Park	13.4	0.9	0.0	2,070.3
27	Walley Street	0.8	0.0	0.0	3,586.8
5	Mills on Brook Street	2.0	0.0	0.0	1,332.6
4	Macclesfield Road	11.5	3.4	0.0	0.0
<i>Additional Sites</i>					
35	Queen Street	0.4	0.1	0.0	3,227
Total		83.5	19.60	3.5	12,943.9

In real terms it is unlikely that the 19.6 hectares identified in Table 8.1 will cater for all of the specified requirements for the different market segments in the desired locations across the district so other land will need to be identified.

Table 8.2 sets out the sites identified as suitable for employment use - subject to further investigation/known constraints. However only 1.9 hectares of vacant land was recorded at these locations and therefore the sites would not offer a significant contribution to meeting the identified future employment land requirement.

Where vacant land cannot fully cater for the future land requirements it will be appropriate to consider expanding existing employment locations onto identified opportunity land.

Table 8.2 – Sites Suitable for Employment Use – Subject to Further Investigation/Known Constraints

No	Site Name	Total Site Area (ha)	Vacant Land Ha	opportunity land Ha	Vacant Floorspace m ²
<i>Allocated Employment Sites in the Local Plan</i>					
25	Wharf Road	1.0	0.0	1.0	0.0
31	Far Lane Industrial Estate	0.9	0.0	0.4	200.0
32	Waterhouses Enterprise Centre	1.7	0.0	1.3	0.0
19	New Haden/Brookhouses	35.0	0.0	8.7	0.0
6	Whites Bridge	9.9	0.0	9.9	0.0
20	Mobberley	1.6	0.0	1.6	0.0
30	Bolton Copper Works	17.1	1.3	3.6	0.0
<i>Traditional/existing Employment Land Locations</i>					
12	Brooklands Way	16.6	0.0	7.8	0.0
28	Uplands Mill	4.3	0.0	0.0	0.0
33	Blithe works, Sandon Road	13.6	0.0	4.1	0.0
38	Co-op Milk Plant	2.0	0.0	0.0	0.0
16	Pointon Site	5.0	0.0	0.0	0.0
<i>Additional Employment Land Locations</i>					
15	Beresford/PMT Depot	1.9	0.6	1.3	0.0
Total		110.6	1.91	39.6	200.0

Table 8.3 identifies the sites that were considered less suitable for future employment use. These sites should be considered for alternative uses where appropriate.

Table 8.3 - Sites Considered Less Suitable for Employment Use

No	Site Name	Total Site Area (ha)	Vacant Land Ha	opportunity land Ha	Vacant Floorspace m ²
<i>Traditional/existing Employment Land Locations</i>					
34	Dilhorne Road and The Green	1.3	0.3	0.0	0.0
<i>Additional Employment Land Locations</i>					
2	Fowlchurch Tip	14.4	0.0	14.4	0.0
29	Gillow Heath Sewage Works	7.7	0.0	4.8	0.0
Total		23.4	0.3	19.2	0.0

8.3 Recommendations

Staffordshire Moorlands District Council has endorsed national, regional policies on employment land through the commissioning of this employment land study and aims to use the emerging LDF process as a means of embedding positive planning for employment land in the local policy framework.

Policy

Based on the conclusions we have put forward the following policy recommendations to support the District Council in proactively planning for a full range of sites to respond to all existing, expanding and potential new employment uses across each of the sub-areas of the District:

- ◆ Firstly, in the face of developer pressure on greenfield land and competition from higher value land uses on allocated, existing and potential new employment land Staffordshire Moorlands District Council should establish an employment policy framework that protects land identified in this study as high suitability. This builds upon previous policy set out in E7 of the Local Plan;
- ◆ Secondly, it should protect the sites suitable for employment – subject to investigation/ known constraints. Loss of these sites to alternative uses runs the risk of constraining employment growth, limiting economic diversification and fuelling a significant imbalance between the size of the resident workforce and the number of jobs locally available. This would be subject to the viability of the sites subject to the identified constraints being overcome;
- ◆ Thirdly, it is important that the District Council does not retain sites unnecessarily that could be more appropriate for other land uses. It is therefore suggested that sites considered less suitable for future employment use should be considered for other more appropriate land uses. However these sites should still be subject to robust policies which protect the sites from transfer to other uses except when it can be demonstrated strict criteria can be met. This should include evidence of marketing activity which has taken place over a defined period of time:
 - Policies should highlight the need for applicants to demonstrate the land and rental values being sought through the marketing process. It is important that these are appropriate in light of the local and sub-regional market conditions and in relation to the specific characteristics of the site or premises being offered to the market;and,
 - Also of importance, policies should require developers or landowners to demonstrate that sites have appropriately been offered to the market in terms of potential redevelopment opportunities for employment use. It is critical that the marketing process is not constrained by the current condition and/or specification of the building on site.

The creation of a portfolio of sites must take into consideration that constraints on sites will be easier to overcome at some locations as oppose to others and therefore further work is required to consider actions required to overcome barriers to the re-use of land identified in Table 8.2.

Economic Development Action

Based on the conclusions we have also suggested economic development action-orientated recommendations in support of this aim:

- ◆ Staffordshire Moorlands District Council are advised to take a more proactive role to stimulate private sector investment in the commercial property market by making sites available for more modern employment facilities identified as required by modern employers and to enable its manufacturing base to diversify;
- ◆ Many employment locations Staffordshire Moorlands District Council need to be considered for intensification to ensure adequate use of vacant land and reduce areas of under-use to ensure the most effective use of land;
- ◆ We advise that the District Council consider additional employment allocations for high value B1/B2 (not storage and distribution) uses to provide small to medium sized premises in Cheadle, Upper Tean, and Waterhouses where we have identified demand at popular locations but where no available vacant land or premises exist;
- ◆ Further investigations should be progressed to understand the cost implications and likelihood of development at employment sites where there are known constraints at the locations identified in Table 8.2;
- ◆ In particular, further smaller units up to 10,000 sq ft, and smaller incubator units should be developed to stimulate demand from both investors and occupiers in the areas of Leek, Cheadle and the Remainder of Staffordshire District. This will encourage the development of creative industries. In Biddulph the new by-pass has improved the marketability of some existing underused employment land and premises and these would also be ideal for smaller incubator units. We have included a case study below of successful incubator and small serviced employment land and premises in a rural location that has been successfully developed in the Scottish Borders.
- ◆ Staffordshire Moorlands District Council is advised to develop policies to encourage more farm diversification. The provision of grants to assist in the set up of such facilities would need to be in place and should be explored further.

Case Study: Tweed Horizons Business Centre, Newtown St Boswells, Scottish Borders

Tweed Horizons Business Centre provides high quality business premises and a first class conference and meeting venue. The Business Centre at Tweed Horizons, developed by Scottish Enterprise, provides office units of varying sizes, suiting small medium and larger enterprises. These well maintained and serviced spaces offer competitively priced accommodation for a range of business services. Based in a former monastery, just minutes from a main trunk road, Tweed Horizons offers:-

- ◆ High quality competitively priced modern business premises
- ◆ First class meeting and conference facilities
- ◆ Excellent connectivity
- ◆ Induction loop system
- ◆ Energy saving technologies
- ◆ An ideal environment for relaxing and leaving behind the office

Figure 8.1 - Tweed Horizons Business Centre



The Business Centre at Tweed Horizons provides office units of varying sizes, suiting small, medium and larger enterprises. Each office is equipped with energy-saving technologies and has access to full voice telecommunication services with availability of affordable fixed wireless symmetrical broadband.

These well-maintained and serviced spaces offer competitively priced accommodation for a range of business users. Tweed Horizons enjoys access to a high-capacity communications link which is of particular value to the software, technology, engineering and advanced electronics industries.

The combination of services and accommodation on offer at Tweed Horizons set in a tranquil setting makes it an ideal venue. Tweed Horizons is located just minutes from the main A68, and is just 44 miles from Edinburgh and 65 miles from Newcastle.

http://www.scottish-enterprise.com/sedotcom_home/services-to-the-community/property/tweedhorizons.htm