Craven Business and Employment Needs Study

Final Report to Craven District Council

ECOTEC
Research & Consulting Limited

Priestley House
28-34 Albert Street
Birmingham B4 7UD
United Kingdom

Tel: +44 (0)121 616 3600
Fax: +44 (0)121 616 3699
Web: www.ecotec.com

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Priestley House
28-34 Albert Street
Birmingham B4 7UD
United Kingdom
Tel: +44 (0)121 616 3600
Fax: +44 (0)121 616 3699

Web: www.ecotec.com
E-mail: welcome@ecotec.co.uk

13b Avenue de Tervuren
B-1040 Brussels
Belgium
Tel: +32 (0)2 743 8949
Fax: +32 (0)2 743 7111

Modesto Lafuente 63 – 6a
E-28003 Madrid
Spain
Tel: +34 91 535 0640
Fax: +34 91 533 3663

6-8 Marshalsea Road
London SE1 1HL
United Kingdom
Tel: +44 (0)20 7089 5550
Fax: +44 (0)20 7089 5559

31-32 Park Row
Leeds LS1 5JD
United Kingdom
Tel: +44 (0)113 244 9845
Fax: +44 (0)113 244 9844

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1.0 INTRODUCTION

ECOTEC Research and Consulting were appointed by Craven District Council to undertake research into business and employment needs in the district in order to develop pro-active interventions within the local economy, and to inform current and future demand for sites and premises within the district.

The objectives of the research as set out in the brief[1] were to enable Craven District Council to ascertain:

- Key economic intelligence about future demand that will effect the development of the business economy within Craven;
- Potential areas for further work within the district: including recommendations for the Local Development Framework to take into account, through assessing current and future need for business growth within the district;
- Evidence of the level of demand for specific employment types, land and premises within and around identified settlements.

1.1 Study Context

The Craven economy is predominately rural with the majority of the district being located within the Yorkshire Dales National Park. Population density is relatively low and the largest settlement is Skipton with a population of some 21,000.

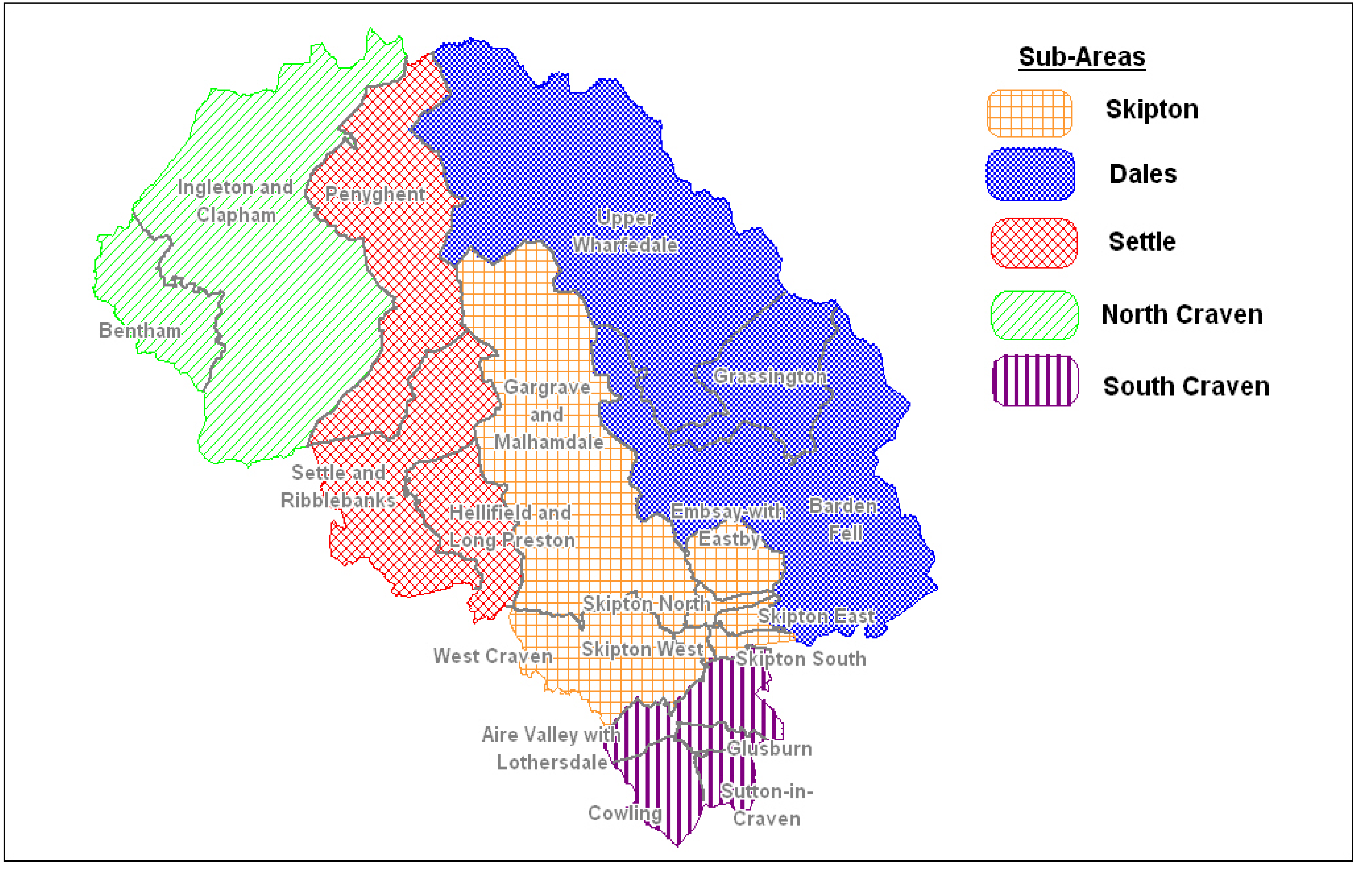
Over recent years the district has seen a change to its agricultural economy and a decline in traditional textile manufacturing. Despite this however, Craven has maintained high levels of employment through diversification. The district has benefited from a well-developed tourism sector and the growth in new micro businesses. The future is likely to see continued diversification of the agricultural sector and the development of smaller footloose digital based businesses.

To support economic development and ensure the sustainability of the local economy, Craven District Council is in the process of preparing its forthcoming Local Development Framework (LDF) and Economic Development Strategy. To inform the development of these documents, research is required to explore the dynamics of the local economy and to determine the future demand for specific employment types.

For the purpose of the research to be undertaken it was agreed with Craven District Council that the study would focus on businesses, which fell within B1, B2 & B8 employment classifications. Five sub areas were identified, which formed the spatial elements to the study[2]. (see Figure1)

[1] Craven District Council: Brief for Business and Employment Needs Survey, 2004
[2] The sub areas were defined as Skipton, Dales, Settle, North Craven and South Craven.

Figure 1: Craven Sub Areas



Two comparator areas were defined, these being Richmondshire in North Yorkshire and South Lakeland in Cumbria[3].

1.2 Approach to work undertaken

In order to meet the aims and objectives of the study, our proposal to Craven District Council[4] set out the broad approach to the study, with our methodology also detailed and agreed with representatives of Craven District Council at an inception meeting and further progress meetings. In response to the objectives of the study our work has included:

- Profiling of the Craven business sector
- Policy review
- Analysis of sites and premises register and inward investment enquiries
- Postal Survey of businesses and consultation with key players
- Mapping and gapping analysis
- Analysis of current employment land supply
- Monitoring and review strategy

1.3 Structure of the Report

This report represents the Final Report to Craven District Council. The structure of this report is as follows:

- Section 2: Policy Context – provides a review of strategic and policy developments relating to Craven and its wider economy;

- Section 3: Local Economy Audit – this sets out a structured analysis of the profile and performance of the Craven economy against a national and regional context and selected comparator areas;

- Section 4: Craven Local Economy – provides an overview of the economic conditions in Craven against comparator areas and the implications for the development of the local economy;

- Section 5: Supply Analysis – review of sites in Craven to determine the supply side analysis of employment land available within the district;

- Section 6: Demand analysis - analysis of employment land take up and business needs, to determine future demand requirements and implications for the district;

[3] Richmondshire and South Lakeland were agreed as the comparator Local Authority Districts based upon previous research work undertaken by Craven District Council.
[4] ECOTEC: Business and Employment Needs Survey: A proposal to Craven District Council, 2004.

- Section 7: Conclusions and Recommendations – sets out the strategic conclusions from the research and identifies gaps in provision

- Section 8: Future Monitoring and Review - identities key actions to be taken forward by Craven District Council to monitor and review business and employment needs.

2.0 POLICY CONTEXT

2.1 Introduction

This section of the report provides a review of strategic and policy documents relating to Craven and its wider economy. The purpose of this review is two – fold:

- To assess future trends in business development in Craven so as to ensure that the needs and aspirations of businesses can be better planned for;
- To ensure that any key proposals are commensurate with these key pieces of policy documentation.

2.2 National Policy Context

2.2.1 Planning Policy Guidance (PPG) 4: Industrial, Commercial Development and Small Firms

One of the Government's key aims, as set out in PPG4[5], is to encourage economic development in a way which is compatible with its stated environmental objectives, whereby economic growth and a high quality environment have to be pursued together.

The planning system plays an important role in integrating environmental and economic objectives by establishing its policy framework through its local development plan. Planning authorities should therefore ensure that development plans contain clear land-use policies for different types of industrial and commercial development, and positive policies to provide for the needs of small businesses. In allocating land for industry and commerce, planning authorities should be realistic in their assessment of the needs of businesses. However, such needs should be reconciled with the demands for other forms of development and for the protection of the environment.

Development plans should aim to ensure there is sufficient land available which is readily capable of development and well served by infrastructure. Development should be encouraged in locations that reduce unnecessary congestion by minimising the length and number of journeys by car and are well served by public transport.

2.2.2 Planning Policy Statement (PPS) 7: Sustainable Development in Rural Areas

Planning Policy Statements set out the Government's national policies on different aspects of land use planning in England. The policies set out in PPS7[6] apply to rural areas, including country towns and villages and the wider, largely undeveloped, countryside up to the fringes of larger urban areas.

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[5] ODPM, Planning Policy Guidance 4: Industrial, Commercial Development and Small Firms, March 2001.
[6] ODPM, Planning Policy Statement 7: Sustainable Developments in Rural Area, August 2004

Sustainable development is the core principle underpinning land use planning. Planning authorities have a role to play in delivering the Government's objectives for rural areas through their operation of the planning system and the application of policies as set out in policy guidance. With regards to rural areas, PPS 7 establishes the Government's objectives as follows:

- To raise the quality of life and the environment in rural areas through the promotion of: thriving, inclusive and sustainable communities, sustainable economic growth and diversification, good quality sustainable development and continued protection of the open countryside.

- To promote more sustainable patterns of development by focusing development in, or next to, existing towns and villages, discouraging urban sprawl and the development of Greenfield land, and promoting a range of uses to maximise the potential benefits of the countryside fringing urban areas.

- Promoting the development of the English regions by improving their economic performance so that they are able to reach their full potential by developing competitive, diverse and thriving rural enterprise that provide jobs

- To promote a sustainable, diverse and adaptable agricultural sector.

2.2.3 Employment Land Reviews: Guidance Note

The Employment Land Review Guidance Note[7] provides local planning authorities with an effective tool in which to assess the demand for and supply of land for employment. The guide helps local authorities to assess the suitability of sites for employment development, to safeguard the best sites in the face of competition from other higher value uses; and identify those which are no longer suitable for employment development which should be made available for other uses. The importance of carrying out employment land reviews is emphasised in the recent changes to Planning Policy Guidance Note 3, which will have implications for the allocation and safeguarding of employment sites for Craven District Council.

The guide sets out specific objectives, which will help planning authorities to:

- Assess the future demand for employment land (at the regional down to the local level);
- Assess the future supply of sites for employment (at the local up to the regional level);
- Assess the suitability of individual sites, whether existing, permitted or proposed for future employment uses;

[7] ODPM, Employment Land Reviews: Guidance Note, December 2004

- Identify sites which are clearly unlikely to be required by the market or are now unsustainable for employment development;
- Develop future policies and proposals in regional spatial strategies (RSS), but more particularly in local development frameworks (LDFs)
- Improve systems for monitoring outcomes and reviewing employment policies and programmes.

These objectives ensure that local planning authorities review their portfolio of employment sites and apply up to date and sensible criteria in terms of sustainable development and market realism. This will enable them to identify a robust and defensible portfolio of strategic and local employment sites within their LDFs and, where appropriate, to safeguard new and existing employment land for employment rather than for other uses.

The importance and the need for carrying out a review of employment land has been further reinforced by the recent changes to Planning Policy Guidance Note 3 (PPG3)[8]. In accordance with the updated PPG 3, local planning authorities should consider favourably planning applications for housing or mixed use development which concern land allocated for industrial and commercial uses in development plan documents, but which is no longer needed for such use unless it can be proved that:

- The proposals fail to reflect the policies in PPG3, relating to the site's suitability for development;

- The housing development would undermine the planning for housing strategy set out in the RSS or the development plan documents, where this is up to date;

- It can be demonstrated, preferably with 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 or that its development for housing would undermine regional and local strategies for economic development and regeneration.

2.3 Regional Policy Context

2.3.1 Regional Economic Strategy

The Regional Economic Strategy (RES)[9] provides a ten-year strategy for the sustainable economic growth of Yorkshire and Humber. The RES recognises that sustainable development is central to its strategy and that this can only be achieved through the inter-relationship between economic performance, supporting social inclusion and quality of life and enhancing the environment. To achieve this 6 key themes have been identified that run through the strategy:

[8] Update to PPG3:Housing: Supporting the Delivery New Housing, Office Deputy Prime Minister, January 2005
[9] Yorkshire Forward, Regional Economic Strategy for Yorkshire and the Humber, 2003 - 2012

- ***Grow the region's businesses***, focusing on key clusters to create a radical improvement in the competitiveness, productivity and value they add to the region's wealth;
- ***Achieve higher business birth rate and survival rates*** to create radical improvement in the number of new businesses that last;
- ***Attract and retain more private and public investment*** by creating the right product for investors, and more effective marketing of the region;
- ***Skills and education***, radically improve the development and application of education, learning and skills, particularly high vocational skills;
- ***Connect*** all the region's communities to economic opportunity through targeted regeneration activity; and
- ***Enhance and utilise the region's infrastructure*** of physical and environmental assets.

The economic strategy will be delivered through the development of five action plans; one regional and four sub regional. The York and North Yorkshire Investment Plan[10] sets out the sub region's priorities for accessing the Yorkshire Forward's single pot funding as well as other investment. In relation to the Craven economy, the key objectives for the sub region are to build a new economic base in rural areas and to encourage the start up and growth of high value added businesses.

The Investment Plan has identified two sets of investment themes; *Sub regional themes:* that will connect national and regional priorities; and *Spatial themes*: which will address issues and disparities that currently divide the sub region. Turning to these themes, Table 2.1 below summarises the priorities in relation to Craven and this particular study, by establishing the implications for the local economy.

[10] York & North Yorkshire Partnership Unit: Investment Plan for York & North Yorks. 2004/2009, July 2004

Table 2.1: York & North Yorks. Investment Plan Priorities

Priority	**Implications for Craven**
Sub Regional Themes	
Business Support: to increase the number of businesses in high growth sectors and ensure business survival.	Supporting high value added businesses through the support of priority clusters & sectors. Overseas tourism, food and drink, and digital industries are integral to this. Skipton has a number of companies in the following clusters - chemicals, digital based industries, advanced engineering & metals and food and drink. However the bulk is predominantly located in the centres of York & Harrogate.
Broadband: to make available fast speed broadband access and promote the usage of broadband technology.	A key issue for the Investment Plan is to ensure the provision of modern telecommunications throughout the sub region. Firms in North Yorkshire use the internet on average more than the region as a whole. Broadband is available in most market towns including Skipton but is not available 5km from these exchanges or in any upland market towns. Poor broadband connections were identified as one of the key issues affecting businesses in Craven (See Section 6).
Spatial Themes	
Develop the sub region's role in the Leeds and Bradford City Region: develop market towns such as Skipton and Settle as rural capitals.	The RES acknowledges that the right spread of small and large employment sites must be made available to meet the needs of businesses and investors. To support the growth of clusters and support services the region needs to develop and maintain a stock of modern and flexible workspaces, to ensure affordable and accessible premises are available for new and expanding early years' businesses.
Utilise heritage and the natural assets of the upland areas and their market towns as economic drivers: to promote recreation as a new economic driver, to develop collaboration between market towns including Skipton and Settle through the renaissance programme, to support the development of high value added businesses and promote the diversification for traditional industries and develop effective communications infrastructure.	The importance of Craven, in particular the role of its markets towns of Settle and Skipton as economic drivers, is emerging in relation to the district's proximity to the Bradford and Leeds City Region. The priority for the sub region is to harness the dynamism of the Leeds and Bradford economy, by ensuring that investment in housing, employment and infrastructure is maximised.

Source: York & North Yorkshire Partnership Unit: Investment Plan for York & North Yorks., July 2004

2.3.2 Regional Spatial Strategy

The revised Regional Spatial Strategy (RSS) for Yorkshire and Humber was published on 1 December 2004[11]. This represents the completion of the selective review of RPG12, which started in 2003. RSS sets out the regional spatial strategy for the region up to the period 2016, and provides the framework to inform the preparation of local development documents, local transport plans and sub regional strategies. Work has started on developing the new RSS for the Region and will replace the current RSS when it is issued in late 2007. Until then, the current RSS has statutory status in accordance with the Compulsory Purchase Act 2004.

The RSS provides limited guidance on the overall provision to be made for employment land in the North Yorkshire Sub Region. A regional employment land survey will be undertaken to determine the future provision and requirements of employment land. The RSS acknowledges that the majority of employment land in the North Yorkshire sub region should meet both sub regional and local development needs and be focussed on the main urban areas, markets and coastal towns. It is likely that one premium employment site[12] will be required in the sub region and will potentially be located in the Greater York area. The distribution of other regionally significant employment sites will not be finalised until the completion of the regional employment land survey. In planning the provision of future employment land, the RSS states that local authorities should undertake a rigorous assessment of the amount of employment land needed based on:-

- Past rates of development and projected needs;
- The need to provide a range of size and type of sites for businesses;
- Regeneration and policy requirements;
- National and regional measures to improve the regional economy;
- The regional employment land survey.

2.4 Local Policy Context

2.4.1 North Yorkshire County Structure Plan

The North Yorkshire County Structure Plan[13] seeks to meet the needs of existing employers and the local workforce, whilst recognising the need to protect the attractive environment in North Yorkshire. The Structure Plan made provision for 25 hectares of employment land for industrial/business development in Craven district between 1991 – 2006. Following the Planning and Compulsory Purchase Act of 2004, the County Council will no longer prepare strategic polices contained within a Structure Plan. The

[11] ODPM, Regional Spatial Strategy for Yorkshire and Humber, December 2004

[12] Premium Employment Sites are locations for major employment projects with a national or international choice of location, designed to meet the needs for high-tech products and processes and service sector growth. The sites are generally within the size range of 15-40ha.

[13] North Yorkshire County Council, Structure Plan 1991-2006

RSS and emerging Local Development Frameworks (LDF) will form the development plan, and then the current Structure Plan will remain part of the development plan until September 2007.

2.4.2 Craven District Local Plan, 1991 - 2006

Employment policies within the Local Plan[14] ensure that there is enough readily available land within the district to meet the needs of the local economy. Under policy EMP 1 the current plan, which runs until 2006, made provision for 26.25 hectares of land. In addition 5.5 hectares has been allocated within the Craven area of the Yorkshire Dales National Park boundary. Most of this land is provided in and around the larger settlements of the district, thus allowing these areas to maintain their services and employment functions, to enable existing companies to relocate or expand and to encourage more sustainable modes of transport.

The employment land figure of 26.25 hectares was based on land with current and lapsed planning consent as set out in policies EMP 2 & 3. In addition, the Plan allocated a further 4 hectares of land to accommodate local land shortfalls in Skipton, Gargrave and Ingleton. This brought the potential land supply to 30.34 hectares and allocated three new sites:

- Eshton Road, Gargrave (0.2ha)
- Land adjacent to the Industrial Est., off New Road, Ingleton (1.17ha)
- Land adjacent to the western by-pass south of the sewerage works, west of Snaygill Industrial Est., Skipton (2.72 ha)

As reflected in the Local Plan, it was not envisaged that all of the employment land would be brought forward during the current plan period; and more realistic figure was likely to be in the region of 20 hectares of land[15].

2.4.3 Yorkshire Dales Second Deposit Local Plan (revised)

The Yorkshire Dales' Plan[16] acknowledges that the provision of sites and premises is essential in order to strengthen the local rural economy. An issue facing the Dales National Park Authority is the increasing demand from applications to change land allocated for employment use to housing land. Its policies relating to employment, seek to protect, retain and enhance the key service centres and promote economic development in the rural economy. Policy E1 has allocated a supply of new employment sites within or near the four key service centres of Sedbergh, Hawes, Reeth and Grassington in order to meet demand. In relation to the Craven district area that falls within the Yorkshire Dales planning boundary, a total of 4.96 hectares of land has been allocated at Thresfield Quarry, Grassington.

[14] Craven District Council, Local Plan 1991 - 2006
[15] Craven District Council, Local Plan 1991 – 2006
[16] Yorkshire Dales National Park Authority, Yorkshire Dales Local Plan Second Deposit (revised), May 2003

The Local Plan looks to support the development of land around key service centres and villages, for new or relocating small-scale employment uses. In order to accommodate changing demands particularly around farm diversification and a move toward more flexible employment arrangements, the Local Planning Authority has incorporated polices to support the expansion of existing firms (where appropriate) and to accommodate proposals that will look to convert both tradition and modern buildings for employment purposes and for home based working.

The Inspector's Report into the Local Plan Inquiry was issued in November 2004. The report did not put forward any recommendations to modify Policy E1. At the time of writing, The National Park Authority was in the process of considering the Inspector's Report and was looking to issue any modifications to the Local Plan in the summer of 2005, with a view to adoption in late September 2005.

2.4.4 The Craven Community Strategy- Community Plan

The Community Strategy[17] aims to enhance the quality of life for Craven residents through the co-ordinated activity of the Craven Local Strategic Partnership (LSP) to improve the economic, social and environmental well-being of the district and contribute to sustainable development. The Strategy has 5 aims: to create a prosperous economy, maintain education and skills for all, to develop sustainable communities, enhance good health and well being and conserve a quality environment.

The strategy acknowledges a shortage of significant employment land within the district, a GDP which is below the national average in the more rural parts of the district and the constraints experienced by some businesses through the lack of broadband connectivity. In order to support the sustainable growth of the local economy, the Community Strategy has developed an action plan which has established a number of Strategic Objectives and key actions to be delivered. The identified actions to be taken forward will provide support for new rural economies and diversification of existing businesses, it will support the renaissance of the market towns and the development of service centres as local economic hubs and encourage planning and transport polices that support sustainable economic development through the allocation of employment land and improved transport facilities.

2.4.5 Craven Integrated Development Plan (IDP) for Objective 2

The aim of the IDP is to create wealth and prosperity through economic regeneration and improve the quality of life for all local residents through partnership working in the key market towns and their rural hinterlands[18]. The plan has 6 objectives, one of which is 'to attract and retain investment in employment land, telecommunications and transport infrastructure'. To achieve this, the plan focuses on the markets towns and key

[17] Craven Local Strategic Partnership, Craven Community Strategy Community Plan 2003 – 2013
[18] Craven Economic & Development Group, Craven Integrated Development Plan for Objective 2 Priority 4, August 2003.

service areas (Settle, Ingleton, Grassington, Crosshills, Bentham & Hellifield) as the vehicles for delivery.

Under the current delivery plan[19], capital investment is targeted at the development of high quality business units. The rationale for this is based upon the identified need for high quality business premises, particularly for the expansion of existing SMEs. The IDP has focused on bringing forward schemes within Settle and its hinterland and South Craven. Projects include the provision of small workspace units (70sqm per unit) at Marshfield House in Settle. Additional business and workspace units are proposed at Langcliffe Business Centre in the Yorkshire Dales National Park, and Clapham Village. In South Craven a more strategic and long term economic development programme has been developed which will look to provide a range of business premises either through refurbishment of existing premises or new build developments.

2.5 Summary and Implications

The policy review clearly sets out the national and regional priorities in terms of economic development and employment land allocation. The planning system has a crucial role to play in ensuring that sufficient land is made available for employment development and that this adequately meets business needs. In determining future land requirements consideration should be given to national and regional measures to improve the regional economy. Land allocations should take in to consideration previous development rates, the projected needs of businesses and provide a range of sites and sizes to suit all types of businesses

In reflecting national and regional policies, there are a number of implications in ensuring that the needs and aspirations of businesses are better planned for:

- In allocating land for employment purposes planning authorities should be realistic in their assessment of the needs of businesses and ensure that a sufficient supply of land is made available which is readily capable of development and well served by infrastructure;

- In assessing future demand, systems will need to be put in place that monitor the outcomes of employment land take up and review employment policies and programmes;

- Employment land allocation in Craven will need to reflect the priorities established with the RES, in terms of developing a new economic base and encouraging start up and growth of high value added businesses. To support business growth, land allocation will need to provide the right spread of small and large sites. Policies will need to ensure that adequate provision is made for modern and flexible workspaces for new and expanding businesses;

[19] Craven Economic & Development Group, Craven Integrated Development Plan for Objective 2 Priority 4, August 2003.

- Employment policies should promote the need for adequate infrastructure to serve future sites and premises, including the provision of modern telecommunications.

3.0 LOCAL ECONOMY AUDIT

In accordance with Government policy, the need for benchmarking and strategic monitoring has increased considerably over recent years. The *Local Economy Audit*™[20] provides a systematic analysis of the essential profile and performance of Craven's economy. Specifically, it adopts an external perspective in order to 'map and measure' the local area against the national and regional context and selected comparator areas, across a range of economic indicators and competitiveness domains. A LEAM data source table is attached to the Appendices.

3.1 LEAM Domains

A series of carefully selected indicators[21] are employed in order to identify specific strengths and weaknesses, challenges and opportunities, associated with the district's economy. These indicators are grouped around a series of economic competitiveness factors enabling Craven and its comparators to be benchmarked across the whole of Britain. The principal 'factors' or domains that we have used to benchmark and profile the performance of Craven are set out in Table 3.1, below:

Table 3.1 – Local Economy Audit: economic factors

Factor	*Description*
Economic Scale	Comparative size or 'economic mass' – including: employment, population, and business rateable value
Dynamism	Recent growth performance and capacity; direction and pace of change – including: employment, labour force, and business base
Sector Structure	Depth and composition of high growth and high value-added industrial sectors – including: Knowledge Economy and Consumer Services
Enterprise	Profile and performance of small business sector ('enterprise culture') – including: formation rates, business density, self employment and micro businesses
Labour Market	Skills base and workforce profile – including: skills attainment, occupational structure, and unemployment

Source: ECOTEC Research & Consulting

The key results of the analysis are presented in the form of charts and statistical tables. The interpretation of the research findings is used to identify and assess different

[20] ECOTEC's *Local Economy Audit* draws on a wide range of economic indicators and analytical techniques to allow policy makers to benchmark performance at the local, sub-regional or regional level across the whole of GB. It can be used to produce league tables, policy diagnostics, and economic profiles.

[21] A data source tabled has been included in the Annex to the Report.

attributes of Craven's economic profile and performance. Together with comparators (South Lakeland) sub regional (North Yorkshire), regional (Yorkshire and the Humber) and national (GB) benchmark, the analysis includes coverage of the following North Yorkshire comparator districts:

- Hambleton
- Harrogate
- Richmondshire
- Ryedale
- Scarborough
- Selby
- York

3.2 Economic Scale

'Scale' is a major factor in the classification of any local economy; overall size being important in determining a local economy's relative position within the wider economic system. Attaining a certain level of scale or economic 'mass' may also confer particular competitive advantage in terms of the composition of local markets and the representation of key institutions and infrastructure.

We measured the scale of Craven's economy using key indicators relating to total workplace employment, resident population, and business rateable value. Individual values on these indicators have been combined to create a composite index score[22] for *economic scale*.

Table 3.2 – Economic Scale: indicator values and scores

	Population, 2001			Business Rateable Value, 2000			Employment, 2002			Scale Composite	
Area	Value	Score	Rank	Value	Score	Rank	Value	Score	Rank	Score	Rank
Craven	**53620**	**38.3**	**385**	**£ 32,585,752**	**30.5**	**353**	**24059**	**38.4**	**355**	**35.7**	**368**
Hambleton	84111	60.1	314	£ 46,423,818	43.5	299	37871	60.5	262	54.7	291
Harrogate	151336	108.1	120	£ 97,517,283	91.3	137	66303	105.9	119	101.8	131
Richmondshire	47010	33.6	394	£ 26,920,525	25.2	371	14361	22.9	395	27.2	395
Ryedale	50872	36.3	388	£ 29,827,213	27.9	361	23033	36.8	359	33.7	375
Scarborough	106243	75.9	235	£ 63,597,734	59.5	228	40766	65.1	241	66.9	234
Selby	76468	54.6	345	£ 47,520,272	44.5	292	28154	45.0	335	48.0	330
York	181094	129.4	87	£ 160,452,249	150.2	57	99663	159.2	63	146.3	67
South Lakeland	102301	73.1	246	£ 76,622,278	71.7	185	44376	70.9	212	71.9	209
North Yorkshire	750754	71.8	32	£ 504,844,846	62.1	31	334210	70.8	31	68.2	32
Yorkshire & Humber	4964833	95.6	7	£ 3,203,462,199	80.8	7	2148138	92.5	7	89.7	7
Great Britain	57103927	100.0	N/A	£43,588,065,833	100.0	N/A	25537773	100.0	N/A	100.0	N/A

Source: ECOTEC Research & Consulting

[22] Composite scores for each factor represent unweighted averages of underlying indicator scores. In all cases indicator scores are indexed against the national average (GB=100).

In summary:

- Craven's economy is relatively small compared to the economies of the comparator districts, with only Richmondshire and Ryedale ranking lower than Craven in terms of economic scale.

- Its similarly small population levels explain the relatively small size of Craven's economy. This is also reflected in the relatively low business rateable value and employment indicators.

3.3 Dynamism

'Dynamism' refers to the growth performance and capacity of a local economy. We have measured Craven's dynamism using key indicators of change in employment, the labour force and business base during the period since the late 1990s.

Table 3.3 – Dynamism: indicator values and scores

	Employment Change 1998-02			Change in Business Stock 1998-2003			Projected Population Change 1996-2006			Dynamism Composite	
Area	**Value**	**Score**	**Rank**	**Value**	**Score**	**Rank**	**Value**	**Score**	**Rank**	**Score**	**Rank**
Craven	**9.1%**	**104.2**	**114**	**5.4%**	**100.0**	**233**	**2.7%**	**99.8**	**194**	**101.3**	**151**
Hambleton	5.2%	100.3	186	4.0%	98.6	273	6.5%	103.6	95	100.8	176
Harrogate	14.1%	109.1	45	8.1%	102.8	143	5.8%	102.8	110	104.9	51
Richmondshire	2.8%	97.9	232	2.2%	96.8	322	4.7%	101.7	145	98.8	260
Ryedale	12.5%	107.5	64	3.3%	97.9	295	2.7%	99.8	196	101.7	130
Scarborough	6.8%	101.8	159	3.3%	97.9	293	3.6%	100.7	171	100.1	206
Selby	13.0%	108.1	60	10.2%	104.9	85	6.5%	103.6	92	105.5	34
York	7.4%	102.4	147	10.5%	105.2	75	5.1%	102.2	131	103.3	87
South Lakeland	7.7%	102.7	141	6.6%	101.2	192	4.7%	101.7	146	101.9	121
North Yorkshire	9.0%	104.1	8	6.3%	100.9	21	5.0%	102.0	17	102.4	8
Yorkshire & Humber	4.8%	99.9	7	4.1%	98.7	9	1.3%	98.3	6	99.0	7
Great Britain	5.0%	100.0	N/A	5.4%	100.0	N/A	2.9%	100.0	N/A	100.0	N/A

Source: ECOTEC Research & Consulting

In summary:

- Craven scores well in terms of its dynamic performance, scoring higher than regional and national benchmarks. Statistical evidence indicates that Craven is more dynamic than some comparator districts, including Hambleton, Richmondshire and Scarborough.

- Craven has experienced strong employment change in recent years presenting above regional and national average employment change. Compared to other localities in the region, employment change has been stronger than in York and South Lakeland.

- In terms of change in the business stock, Craven mirrors the GB average and shows stronger performance than the region as a whole. Only three other comparator districts score higher than Craven on this indicator, York, Selby and Harrogate.

- In view of recent changes in employment and business stock, Craven presents positive economic prospects. However, population projections for Craven are the lowest amongst some of the comparator districts; this may impact upon the district's economic growth in future years.

3.4 Sector Structure

In evaluating industrial structure we have focused on those sectors most capable of *sustaining local competitive advantage*, both in terms of high value output and providing a broad range of employment opportunities. Increasingly, it will be the knowledge – intensive *Information Economy* sectors – together with those driven by increasing consumption (e.g. tourism and other consumer based services such as recreation) that are likely to represent the strongest future growth areas, particularly in rural areas where consumer services has played a crucial role in underpinning future economic prosperity.

Table 3.4 – Sector Structure: indicator values and scores

	% Consumer Services, 2002			% High Technology Manufacturing, 2002			% Knowledge-Based Services, 2002			Sector Structure Composite	
Area	Value	Score	Rank	Value	Score	Rank	Value	Score	Rank	Score	Rank
Craven	**24.5%**	**117.5**	**83**	**5.5%**	**263.3**	**16**	**14.6%**	**83.3**	**163**	**78.9**	**208**
Hambleton	21.2%	101.7	197	0.9%	43.5	319	8.3%	47.7	321	48.1	378
Harrogate	27.6%	132.3	38	2.2%	102.7	148	16.5%	94.1	126	79.2	206
Richmondshire	34.1%	163.5	9	0.4%	18.6	398	7.1%	40.8	359	50.3	364
Ryedale	22.6%	108.2	138	1.0%	48.7	295	7.1%	40.4	361	54.7	336
Scarborough	36.0%	172.6	5	2.1%	99.2	156	7.8%	44.4	341	52.2	355
Selby	17.2%	82.5	354	0.4%	17.3	400	10.6%	60.7	237	67.4	256
York	25.8%	123.8	59	1.4%	66.1	244	14.6%	83.2	164	60.4	305
South Lakeland	34.3%	164.5	8	4.0%	192.3	36	8.1%	46.5	332	63.2	286
North Yorkshire	26.2%	125.6	1	1.7%	81.7	30	12.2%	69.9	33	62.8	41
Yorkshire & Humber	20.0%	96.1	9	1.8%	84.6	8	13.7%	78.1	8	66.4	10
Great Britain	20.9%	100.0	N/A	2.1%	100.0	N/A	17.5%	100.0	N/A	100.0	N/A

Source: ECOTEC Research & Consulting

In summary:

- Craven's industrial structure scores significantly low against the national benchmark but higher than the regional and sub-regional benchmarks. Compared to other districts in North Yorkshire, Craven scores significantly higher than other comparator districts, with only Harrogate showing a stronger sector structure.

- There is an important concentration of high technology manufacturing businesses in Craven; the district scores more than two and a half times the national average. This gives the district a clear competitive advantage amongst comparator districts.

- Craven's knowledge based services is below the national benchmark but higher than regional and sub-regional benchmarks. There are opportunities to further develop the knowledge-based sector and build on the benefits resulting from high-tech manufacturing businesses.

3.5 Enterprise

In evaluating this factor we have considered the strength of local *entrepreneurial culture* together with the associated competitive performance of SMEs in Craven. Whilst inward investment represents the most direct and immediate form of employment generation, increasingly the impetus for future local economic and employment growth is likely to rest with the quality of indigenous small businesses – the backbone of economic life in Craven's rural economy.

Table 3.5 – Enterprise: indicator values and scores

	Business Formation Rate (Avg. 2002&2003)			Business Density (2003)			% Self Employed, 2001			Business Population Rate (2002)			Enterprise Composite	
Area	Value	Score	Rank	Value	Score	Rank	Value	Score	Rank	Value	Score	Rank	Score	Rank
Craven	**7.5%**	**73.1**	**373**	**6.5**	**172.8**	**18**	**18.3%**	**190.9**	**11**	**62.9**	**128.0**	**67**	**141.2**	**27**
Hambleton	7.4%	72.5	375	6.0	160.1	29	16.0%	166.8	27	60.0	122.0	90	130.4	53
Harrogate	9.5%	92.2	278	5.4	143.5	66	14.6%	152.4	49	69.1	140.6	43	132.2	48
Richmondshire	6.9%	67.6	385	5.2	137.3	79	16.0%	166.5	28	48.1	97.9	197	117.4	105
Ryedale	6.7%	65.7	389	7.2	191.6	9	19.6%	203.9	5	58.6	119.2	101	145.1	18
Scarborough	8.5%	83.0	337	3.7	99.0	209	13.8%	144.2	71	43.3	88.1	248	103.6	193
Selby	10.2%	99.7	188	4.4	117.2	136	10.7%	111.8	180	53.1	108.1	150	109.2	151
York	10.4%	101.1	168	3.1	81.4	286	8.2%	85.8	283	39.5	80.3	297	87.2	304
South Lakeland	8.1%	79.1	354	5.8	153.7	39	17.4%	181.8	16	66.1	134.5	53	137.3	37
North Yorkshire	8.6%	84.2	43	4.8	126.1	6	13.3%	138.5	3	53.0	107.8	16	114.2	8
Yorkshire & Humber	10.1%	98.2	4	3.2	85.8	8	8.6%	89.3	8	40.6	82.6	8	89.0	8
Great Britain	10.3%	100.0	N/A	3.8	100.0	N/A	9.6%	100.0	N/A	49.2	100.0	N/A	100.0	N/A

Source: ECOTEC Research & Consulting

In Summary:

- Craven's entrepreneurial drive is considerably higher than national, regional and sub-regional benchmarks. In relation to other comparator districts Craven is rated after Ryedale as the district with the highest levels of entrepreneurship and small business performance in North Yorkshire.

- The district is characterised by an above national and regional average business population rate, and considerably high levels of business density and self employment (almost twice the national average). However, the district suffers from low levels of business formation, which weighs down Craven's overall entrepreneurial spirit. Here, there appears to be an opportunity for developing a strong business support network, particularly for business start-ups.

3.6 Labour Market

In evaluating Craven's stock of human capital we have focused particularly on the skills profile and occupational structure of the resident workforce, as well as mismatches between labour supply and labour demand. Higher skills levels are now considered an essential prerequisite to raising productivity, facilitating the shift towards higher value-added and higher wage economic specialisation.

Table 3.6 – Labour Market: indicator values and scores

Area	% Knowledge Workers, 2001			% Unskilled/Semi-skilled Workers, 2001			%NVQ4+5, 2001			% NVQ1 or no quals, 2001			Economic Activity Rate, 2002			Workforce Composite	
	Value	Score	Rank	Value	Score	Rank	Value	Score	Rank	Value	Score	Rank	Value	Score	Rank	Score	Rank
Craven	**41.6%**	**100.9**	**152**	**20.2%**	**105.8**	**159**	**23.0%**	**112.8**	**108**	**41.9%**	**111.5**	**109**	**83.9**	**107.2**	**82**	**107.6**	**122**
Hambleton	44.6%	108.1	117	18.8%	113.6	123	23.7%	116.4	93	40.9%	114.4	92	88.0	112.4	14	113.0	96
Harrogate	49.0%	118.7	62	16.0%	132.9	66	24.8%	122.0	73	37.7%	124.0	51	85.4	109.1	48	121.3	57
Richmondshire	47.7%	115.5	74	18.5%	115.2	118	19.1%	93.6	189	43.1%	108.4	132	81.5	104.1	159	107.4	124
Ryedale	34.3%	83.1	312	25.2%	84.6	301	19.3%	94.7	184	46.9%	99.7	209	82.8	105.7	119	93.6	245
Scarborough	34.7%	84.0	306	24.9%	85.5	293	16.1%	79.2	276	49.1%	95.2	260	73.3	93.7	344	87.5	305
Selby	38.1%	92.2	228	24.1%	88.3	273	17.5%	85.7	235	47.1%	99.3	211	81.3	103.8	165	93.9	241
York	41.7%	101.1	151	21.5%	99.1	194	23.6%	115.7	96	39.4%	118.7	65	81.6	104.2	154	107.7	121
South Lakeland	41.1%	99.6	164	20.2%	105.6	160	23.8%	116.7	92	40.7%	114.8	89	81.4	103.9	164	108.1	117
North Yorkshire	42.2%	102.3	15	20.7%	103.0	18	21.6%	105.9	13	42.3%	110.6	13	82.1	104.9	12	105.4	15
Yorkshire & Humber	36.7%	88.9	9	24.9%	85.6	9	16.4%	80.4	9	50.3%	93.0	8	77.2	98.6	7	89.3	10
Great Britain	41.3%	100.0	N/A	21.3%	100.0	N/A	20.4%	100.0	N/A	46.8%	100.0	N/A	78.3	100.0	N/A	100.0	N/A

Source: ECOTEC Research & Consulting

In summary:

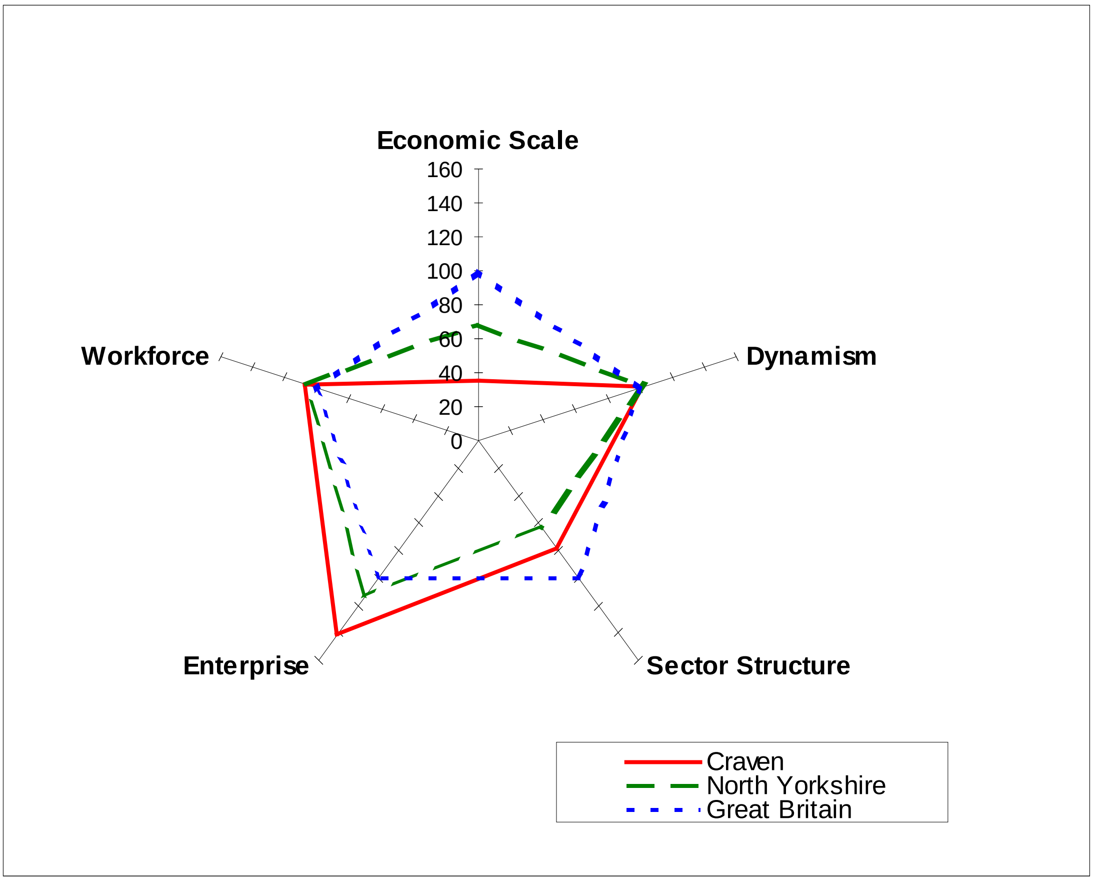
- Craven scores well on this competitiveness factor, scoring slightly higher than the national, regional and sub-regional benchmarks. The above GB average percentage of people with low or no qualifications is balanced by a similar above average percentage of people with university degrees or equivalent qualifications. Equally, Craven's above average percentage of unskilled and semi-skilled workers is balanced by an above GB average percentage of knowledge workers.

- The economic activity rate in Craven is higher than national, regional and sub-regional benchmarks. In relation to the comparator districts, Craven presents a slightly higher economic rate than larger economies such as York, Selby and South Lakeland.

3.7 Overall Economic Profile

The preceding analysis has benchmarked and evaluated Craven's relative performance against a range of key competitiveness factors. Craven's competitiveness summary chart shows how it scores on each of these factors is presented below. The chart uses a spider graphic to compare Craven's economy overall, relative to Great Britain as a whole and North Yorkshire.

Chart 3.1 – Overall Economic Profile: Craven



Source: ECOTEC Research & Consulting

Note: Composite scores for each factor represent outweighed averages of underlying indicator scores. In all cases indicator scores are indexed against the national average (GB=100)

3.8 Summary and Implications

The above analysis provides an overview of the challenges (or opportunities) currently facing Craven's economy. Craven is performing well in terms of labour market structure and presents a strong business base with positive dynamic swings. However, the modest overall economic performance needs to be interpreted in relation to the district's relatively small size (characterised by low population levels that affect overall employment levels).

The LEAM analysis sets out a number of implications in relation to the Craven local economy and future business growth:

- Despite Craven's knowledge based services showing below the national benchmark its current level is higher than regional and sub-regional benchmarks. Its sector structure presents an imbalance compared to the national average. However, this relative weakness appears to be a characteristic of North Yorkshire as a whole. There is a clear opportunity to develop further the knowledge based service sector and build on the benefits that result from this;

- Craven is characterised by an above national and regional average business population rate, and considerably high levels of business density and self employment (almost twice the national average). However, the district suffers from low levels of business formation, which weighs down Craven's overall entrepreneurial spirit. Arguably, a business support network particularly around new business start up could help maximise this potential.

4.0 THE CRAVEN LOCAL ECONOMY

4.1 Introduction

The previous section provided an analysis of the overall performance and profile of the Craven economy using the LEAM model. The LEAM analysis suggests that the economic profile of Craven is distinctive in a number of key regards when compared to the rest of the country: in respect of its economic prospects, labour market structure and its high levels of entrepreneurship and small business performance. In this section we have focused in greater detail on specific aspects and/or dimensions of Craven's economy.

4.2 Population

In order to provide an overall context, it is necessary to understand the demographic profile of the area. In terms of population growth, Craven has experienced similar growth to that found in South Lakeland, Yorkshire and the Humber and GB between 1999 and 2003, i.e. between 1-1.5%. However, in comparison to Richmondshire, population growth in Craven has been low; between 2000 – 2003 there was no population growth in Craven (Table 4.1).

Table 4.1: Population change 1999-03

Area	*1999*	*2001*	*2003*	*% Change 99-03*
Great Britain	57005400	57424200	57851100	+1.5
Yorkshire and The Humber	4956300	4976600	5009300	+1.1
Craven	53000	53700	53700	+1.3
South Lakeland	101400	102400	102400	+1.0
Richmondshire	45200	47100	49900	+10.4

Source: NOMIS, Mid-Year Population Estimates

Table 4.2 below shows the population of the various sub-areas. The total population of Craven is some 54,000. Skipton is the largest sub-area (population 21,000) followed by South Craven (13,000).

Table 4.2: Population broken down by Sub- Area

Sub-Area	**Population (2001)**
Skipton	20877
Dales	5176
Settle	7319
North Craven	7298
South Craven	12953

Source: ONS, 2001

4.3 Business Base

The economic base of Craven is comprised predominately of micro-businesses. Of the total number of registered businesses, 84% employ between 1-10 employees, with a further 13% employing between 11-40 employees. This characteristic is comparable to the national average and also for that of Yorkshire and is supported by the demand analysis that was undertaken in Section 6.

Table 4.3: Business Base – size of businesses

	1-10 employees	11-49 employees	50-199 employees	200 or more employees
Great Britain	83.3%	12.9%	3.1%	0.7%
Yorkshire and The Humber	80.8%	14.9%	3.5%	0.8%
Craven	84.6%	13.0%	1.9%	0.4%
Richmondshire	83.8%	14.2%	1.8%	0.2%
South Lakeland	84.1%	13.8%	2.0%	0.2%
Dales	86.7%	12.0%	1.3%	0.0%
North Craven	86.7%	12.2%	1.1%	0.0%
Settle	87.6%	10.4%	1.7%	0.2%
Skipton	82.8%	14.1%	2.3%	0.7%
South Craven	83.6%	13.9%	2.1%	0.4%

Source: Annual Business Inquiry, Workplace Analysis 2003

4.3.1 Broad Industrial Breakdown of Business Groups

Table 4.4 refers to the percentage of businesses by broad industrial groups. It can be concluded that, at a national level (GB) it is evident that distribution, hotels and restaurants and banking finance and insurance account for the majority of businesses, representing a third of businesses respectively. In the next bracket down representing between 7 to 9% of all businesses are manufacturing, construction, public administration, education and health and other services.

Craven, like Yorkshire and the Humber and the local comparators, has slightly higher representation in the distribution, hotels and restaurants group and less in banking, finance and insurance. At the sub area level Skipton along with North Craven has the highest level of employment based in distribution, hotels and restaurants, whereas the Dales area shows the highest level of employment in banking, finance and insurance. In comparison to the rest of the district, Settle has the highest level of industries within the transport and communications.

Table 4.4: Broad industrial breakdown of businesses in Craven and the sub-areas

Industry	Great Britain	Yorkshire and The Humber	Craven	Richmondshire	South Lakeland	Dales	North Craven	Settle	Skipton	South Craven
Agriculture & fishing	0.5%	0.5%	0.9%	1.2%	0.8%	1.6%	1.4%	1.0%	0.7%	0.6%
Energy & water	0.2%	0.2%	0.4%	0.6%	0.3%	0.6%	0.8%	0.7%	0.1%	0.2%
Manufacturing	7.8%	9.3%	7.9%	6.5%	6.5%	6.2%	7.4%	6.7%	7.2%	12.2%
Construction	9.0%	9.4%	10.5%	10.2%	10.4%	9.1%	12.7%	10.4%	8.8%	14.1%
Distribution, hotels & restaurants	29.5%	33.3%	35.5%	36.3%	38.4%	32.5%	39.1%	32.0%	37.7%	32.1%
Transport & communications	4.7%	5.6%	6.3%	5.8%	3.7%	4.9%	7.1%	12.7%	4.5%	5.5%
Banking, finance and insurance, etc	30.5%	24.1%	23.2%	19.3%	22.8%	28.6%	19.3%	20.1%	24.4%	21.8%
Public admin, education & health	8.7%	9.4%	8.0%	8.3%	9.9%	7.5%	5.9%	8.4%	8.5%	8.0%
Other services	9.2%	8.3%	7.5%	11.8%	7.2%	9.1%	6.2%	7.9%	8.1%	5.5%

Source: Annual Business Inquiry, Workplace Analysis 2003

4.3.2 Industrial structure

A detailed sector breakdown of the local business base using the Annual Business Inquiry (2 digit SIC) reveals the breakdown of business, which fall within the B1, B2 and B8 use classification. As demonstrated in Table 4.4, analysis of businesses locally by industry reveals that key sectors include manufacturing, construction and financial intermediation. Manufacturing of food and beverages, textiles and publishing and printing is high in Craven and in some sub areas is beyond the national (GB) average. Again the construction sector (10.5%) is above the national average of 9.0%. Both North and South Craven have the highest levels of businesses involved in the construction sector.

4.3.3 Business Density

In comparison to its comparators, the district is characterised by high levels of business density per head of population with the exception of South Lakeland. This supports the analysis undertaken by LEAM which demonstrated a high rate of business density.

Table 4.5: Business Density (Number of Business per 1,000 of the population.

Area	**1998**	**2000**	**2002**
Great Britain	36.3	37.8	37.8
Yorkshire and The Humber	32.0	32.8	32.9
Craven	49.4	50.8	50.4
Richmondshire	38.9	39.7	37.0
South Lakeland	47.9	48.6	50.5

Nomis Mid Year Population estimates and business numbers

Table 4.6: Businesses in Craven and sub-areas by 2-digit SIC codes

Industry	Great Britain	Yorkshire and The Humber	Craven	Richmondshire	South Lakeland	Dales	North Craven	Settle	Skipton	South Craven
15 : Manufacturing of food and beverages	0.4%	0.7%	0.8%	0.5%	0.5%	0.6%	0.6%	0.7%	1.1%	0.6%
16 : Manufacture of tobacco products	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
17 : Manufacture of textiles	0.2%	0.4%	0.4%	0.3%	0.2%	0.0%	0.0%	0.7%	0.3%	1.1%
18 : Manufacture of wearing apparel; dressing and dyeing of fur	0.2%	0.2%	0.1%	0.2%	0.1%	0.3%	0.0%	0.0%	0.2%	0.0%
19 : Tanning and dressing of leather; manufacture of luggage, handbags, saddlery, harness and footwear	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%
20 : Manufacture of wood and products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	0.4%	0.5%	0.5%	0.5%	0.5%	0.6%	0.3%	0.7%	0.6%	0.2%
21 : Manufacture of pulp, paper and paper products	0.1%	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	0.7%	0.1%	0.0%
22 : Publishing, printing and reproduction of recorded media	1.4%	1.2%	1.7%	0.6%	0.9%	2.3%	1.4%	1.7%	1.4%	2.1%
23 : Manufacture of coke, refined petroleum products and nuclear fuel	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
24 : Manufacture of chemicals and chemical products	0.2%	0.3%	0.2%	0.2%	0.2%	0.6%	0.0%	0.0%	0.2%	0.2%
25 : Manufacture of rubber and plastic products	0.3%	0.4%	0.3%	0.1%	0.2%	0.0%	0.6%	0.0%	0.4%	0.2%
26 : Manufacture of other non-	0.3%	0.4%	0.2%	0.6%	0.4%	0.0%	0.3%	0.2%	0.3%	0.0%

Industry	Great Britain	Yorkshire and The Humber	Craven	Richmondshire	South Lakeland	Dales	North Craven	Settle	Skipton	South Craven
metallic mineral products										
27 : Manufacture basic metals	0.1%	0.2%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
28 : Manufacture of fabricated metal products, except machinery and equipment	1.3%	1.8%	1.1%	1.0%	1.0%	0.3%	1.1%	0.2%	0.7%	3.4%
29 : Manufacture of machinery and equipment not elsewhere classified	0.6%	0.9%	0.7%	0.6%	0.4%	0.3%	1.7%	0.2%	0.3%	1.7%
30 : Manufacture of office machinery and computers	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
31 : Manufacture of electrical machinery and apparatus not elsewhere classified	0.3%	0.3%	0.1%	0.3%	0.2%	0.0%	0.0%	0.2%	0.0%	0.6%
32 : Manufacture of radio, television and communication equipment and apparatus	0.1%	0.1%	0.2%	0.0%	0.1%	0.0%	0.0%	0.0%	0.2%	0.4%
33 : Manufacture of medical, precision and optical instruments, watches and clocks	0.3%	0.3%	0.2%	0.2%	0.1%	0.0%	0.3%	0.0%	0.2%	0.2%
34 : Manufacture of motor vehicles, trailers and semi-trailers	0.1%	0.2%	0.0%	0.1%	0.1%	0.0%	0.0%	0.2%	0.0%	0.0%
35 : Manufacture of transport equipment	0.1%	0.1%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%
36 : Manufacture of furniture; manufacturing not elsewhere classified	0.9%	1.1%	0.9%	0.7%	1.0%	1.0%	1.1%	0.7%	0.7%	1.5%
37 : Recycling	0.1%	0.1%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
40 : Electricity, gas, steam and hot water supply	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
41 : Collection, purification	0.0%	0.0%	0.2%	0.1%	0.1%	0.3%	0.0%	0.5%	0.1%	0.2%

Industry	Great Britain	Yorkshire and The Humber	Craven	Richmondshire	South Lakeland	Dales	North Craven	Settle	Skipton	South Craven
and distribution of water										
45 : Construction	9.0%	9.4%	10.5%	10.2%	10.4%	9.1%	12.7%	10.4%	8.8%	14.1%
50 : Sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel	3.6%	4.2%	4.1%	5.0%	3.8%	3.2%	4.8%	4.0%	3.2%	6.3%
51 : Wholesale trade and commission trade, except of motor vehicles and motorcycles	5.8%	6.2%	6.0%	5.0%	4.5%	2.6%	5.9%	4.7%	6.4%	8.2%
60 : Land transport; transport via pipelines	2.2%	3.2%	4.3%	4.7%	1.8%	3.6%	5.4%	9.4%	2.4%	4.4%
61 : Water transport	0.1%	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.2%	0.0%
62 : Air transport	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%
64 : Post and telecommunications	1.1%	1.1%	0.8%	0.4%	0.7%	0.3%	0.8%	1.0%	0.7%	0.8%
65 : Financial intermediation, except insurance and pension funding	1.1%	1.1%	1.0%	1.0%	0.9%	1.0%	0.6%	1.0%	1.2%	1.1%
66 : Insurance and pension funding, except compulsory social security	0.2%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
67 : Activities auxiliary to financial intermediation	0.7%	0.6%	0.4%	0.3%	0.5%	0.6%	0.0%	0.2%	0.4%	0.4%
71 : Renting of machinery and equipment without operator and of personal and household goods	0.9%	1.0%	0.9%	0.9%	0.6%	0.6%	1.1%	1.2%	0.8%	1.1%
72 : Computer and related activities	5.5%	3.5%	3.8%	3.0%	3.5%	4.9%	3.1%	2.5%	4.0%	4.2%
73 : Research and development	0.2%	0.1%	0.1%	0.2%	0.1%	0.0%	0.3%	0.5%	0.0%	0.0%

Industry	Great Britain	Yorkshire and The Humber	Craven	Richmondshire	South Lakeland	Dales	North Craven	Settle	Skipton	South Craven
74 : Other business activities	17.5%	13.6%	12.0%	10.2%	12.9%	13.0%	11.0%	11.9%	12.8%	10.3%
75 : Public administration and defence; compulsory social security	1.3%	1.4%	1.1%	1.5%	1.3%	1.0%	0.3%	1.0%	1.3%	1.5%
90 : Sewage and refuse disposal, sanitation and similar activities	0.2%	0.3%	0.2%	0.3%	0.2%	0.0%	0.0%	0.2%	0.4%	0.0%

Source: Annual Business Inquiry, Workplace Analysis 2003

4.3.4 Employment Structure

Looking at the percentage of employees by broad industrial group in Table 4.6, it can be seen that at the national level, despite representing just fewer than 9% of businesses, public administration, education and health represents the largest percentage of employees. Just below this is distribution, hotels and restaurants representing just under one-quarter of all employees. Other significant employers in GB include banking, finance and insurance (19.8%) and manufacturing (12.6%).

Craven like Yorkshire and the Humber has a higher percentage of its workforce employed in manufacturing than found in GB, and a higher percentage than found in the comparator authorities. Craven and the local comparators have an above average percentage of employees represented in distribution, hotels and restaurants, when compared to Yorkshire and the Humber and GB figures. This is reflective of the high number of tourists visiting the districts of North Yorkshire and Cumbria. This figure is reflected across all of the sub areas within Craven, although Skipton and South Craven are slightly behind the other 4 sub areas.

Looking at banking, finance and insurance, Craven is slightly above the national average. However, unlike GB and Yorkshire and the Humber, Craven falls behind in employees represented in public administration, education and health.

4.3.5 Employment Breakdown by sector

A detailed sector breakdown of the local business base using the Annual Business Inquiry (2 digit SIC) reveals the breakdown of employment, which fall within the B1, B2 and B8 use classification. As demonstrated in Table 4.7, analysis of businesses locally by industry reveals that key employment sectors include manufacturing, construction, wholesale trade, financial intermediation and other business related activities. Employment in the manufacturing of food and beverages, textiles and publishing and printing is high in Craven and in some sub areas is beyond the national (GB) average. For example Settle and South Craven have higher levels of employment in food and drink manufacturing. Again the construction sector (5.4%) is above the national average of 4.4%. Both North and South Craven have the highest levels of employment involved in the construction sector. Craven (4.7%) has slightly above the national average (4.3%) of employment within the wholesale trade. South Craven and North Craven have high levels of employment is this sector (7.1% & 7.3% respectively). Craven scores (3.6%) above national average (2.4%) for employment financial intermediation. Skipton has the highest level of employment in this sector at 5.8%.

Table 4.7 Employment in Craven and sub-areas by broad industrial group

Industry	Great Britain	Yorkshire and The Humber	Craven	Richmondshire	South Lakeland	Dales	North Craven	Settle	Skipton	South Craven
Agriculture & fishing	0.9%	0.7%	1.7%	4.4%	1.7%	0.7%	0.2%	0.2%	0.3%	0.1%
Energy & water	0.7%	0.6%	0.4%	0.9%	0.5%	2.5%	1.7%	0.8%	0.0%	0.1%
Manufacturing	12.6%	15.8%	13.5%	5.7%	13.0%	6.0%	11.5%	12.9%	12.8%	22.4%
Construction	4.4%	4.9%	5.4%	6.2%	4.0%	4.0%	7.9%	4.1%	4.7%	9.1%
Distribution, hotels & restaurants	24.7%	24.4%	28.8%	34.5%	38.7%	39.7%	36.9%	30.7%	27.0%	27.8%
Transport & communications	6.0%	6.1%	3.5%	3.8%	3.4%	9.5%	5.5%	4.8%	2.2%	4.2%
Banking, finance & insurance, etc	19.8%	15.7%	22.7%	9.9%	9.8%	12.2%	12.4%	9.2%	32.1%	8.8%
Public admin, education & health	25.8%	27.1%	21.4%	28.8%	23.0%	22.7%	21.0%	34.1%	18.3%	25.9%
Other services	5.2%	4.6%	2.5%	5.8%	5.8%	2.7%	2.9%	3.0%	2.7%	1.5%

Source: Annual Business Inquiry, Employee Analysis 2003

Table 4.8: Employment in Craven and sub-areas by 2-digit SIC code

Industry	Great Britain	Yorkshire & The Humber	Craven	Richmondshire	South Lakeland	Dales	North Craven	Settle	Skipton	South Craven
15 : Manufacturing of food and beverages	1.7%	2.8%	1.9%	1.3%	1.7%	0.4%	1.3%	6.7%	1.1%	2.6%
16 : Manufacture of tobacco products	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
17 : Manufacture of textiles	0.4%	0.7%	0.5%	0.2%	0.7%	0.0%	0.0%	0.2%	0.4%	1.6%
18 : Manufacture of wearing apparel; dressing and dyeing of fur	0.2%	0.2%	0.2%	0.1%	0.1%	0.2%	0.0%	0.0%	0.2%	0.0%
19 : Tanning and dressing of leather; manufacture of luggage, handbags, saddlery, harness and footwear	0.0%	0.0%	0.1%	0.2%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%
20 : Manufacture of wood and products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	0.3%	0.4%	0.2%	0.6%	0.5%	0.2%	0.0%	0.2%	0.2%	0.5%
21 : Manufacture of pulp, paper and paper products	0.3%	0.4%	0.4%	0.0%	1.4%	0.0%	0.0%	3.7%	0.0%	0.0%
22 : Publishing, printing and reproduction of recorded media	1.3%	1.4%	1.8%	0.2%	1.4%	0.6%	0.6%	1.3%	2.0%	2.7%
23 : Manufacture of coke, refined petroleum products and nuclear fuel	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
24 : Manufacture of chemicals and chemical products	0.8%	1.0%	3.5%	0.1%	2.0%	1.8%	0.0%	0.0%	5.8%	0.1%
25 : Manufacture of rubber and plastic products	0.8%	1.0%	1.1%	0.1%	0.1%	0.0%	6.9%	0.0%	0.8%	0.7%
26 : Manufacture of other non-metallic mineral products	0.4%	0.7%	0.1%	1.0%	0.7%	0.0%	0.7%	0.0%	0.1%	0.0%
27 : Manufacture basic metals	0.3%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
28 : Manufacture of fabricated metal	1.3%	1.9%	1.7%	1.2%	0.7%	0.1%	0.6%	0.2%	0.2%	10.1%

Industry	Great Britain	Yorkshire & The Humber	Craven	Richmondshire	South Lakeland	Dales	North Craven	Settle	Skipton	South Craven
products, except machinery and equipment										
29 : Manufacture of machinery and equipment not elsewhere classified	1.1%	1.3%	0.6%	0.1%	0.9%	0.1%	0.5%	0.1%	0.7%	1.0%
30 : Manufacture of office machinery and computers	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
31 : Manufacture of electrical machinery and apparatus not elsewhere classified	0.5%	0.4%	0.1%	0.1%	1.0%	0.0%	0.0%	0.1%	0.0%	0.6%
32 : Manufacture of radio, television and communication equipment and apparatus	0.3%	0.2%	0.1%	0.0%	0.4%	0.0%	0.0%	0.0%	0.2%	0.1%
33 : Manufacture of medical, precision and optical instruments, watches and clocks	0.5%	0.3%	0.1%	0.0%	0.1%	0.0%	0.1%	0.0%	0.2%	0.0%
34 : Manufacture of motor vehicles, trailers and semi-trailers	0.8%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
35 : Manufacture of transport equipment	0.6%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
36 : Manufacture of furniture; manufacturing not elsewhere classified	0.7%	1.2%	1.0%	0.2%	1.1%	2.6%	0.8%	0.5%	0.7%	2.4%
37 : Recycling	0.1%	0.1%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
40 : Electricity, gas, steam and hot water supply	0.3%	0.3%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
41 : Collection, purification and distribution of water	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.0%	0.2%	0.0%	0.1%
45 : Construction	4.4%	4.9%	5.4%	6.2%	4.0%	4.0%	7.9%	4.1%	4.7%	9.1%
50 : Sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel	2.1%	2.3%	2.6%	3.6%	2.5%	2.2%	3.4%	2.7%	1.5%	6.6%

Industry	Great Britain	Yorkshire & The Humber	Craven	Richmondshire	South Lakeland	Dales	North Craven	Settle	Skipton	South Craven
51 : Wholesale trade and commission trade, except of motor vehicles and motorcycles	4.3%	4.5%	4.7%	3.8%	4.1%	1.2%	7.3%	3.0%	4.5%	7.1%
60 : Land transport; transport via pipelines	2.0%	2.5%	2.3%	2.5%	1.3%	7.7%	4.2%	3.2%	0.9%	3.5%
61 : Water transport	0.1%	0.0%	0.2%	0.0%	0.1%	0.0%	0.0%	0.0%	0.3%	0.0%
62 : Air transport	0.3%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
64 : Post and telecommunications	2.0%	1.7%	0.6%	0.6%	1.1%	0.6%	0.4%	0.9%	0.5%	0.6%
65 : Financial intermediation, except insurance and pension funding	2.4%	2.5%	3.6%	0.7%	1.1%	0.3%	0.6%	0.8%	5.8%	0.9%
66 : Insurance and pension funding, except compulsory social security	0.8%	0.7%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.3%
67 : Activities auxiliary to financial intermediation	1.0%	0.5%	0.2%	0.1%	0.4%	0.5%	0.0%	0.2%	0.2%	0.3%
71 : Renting of machinery and equipment without operator and of personal and household goods	0.6%	0.5%	0.4%	0.7%	0.3%	0.1%	0.4%	0.5%	0.3%	0.6%
72 : Computer and related activities	1.9%	1.1%	1.1%	0.7%	0.6%	1.7%	0.8%	1.3%	1.0%	1.5%
73 : Research and development	0.4%	0.2%	0.1%	0.1%	0.4%	0.0%	0.8%	0.1%	0.0%	0.0%
74 : Other business activities	11.2%	8.9%	12.4%	6.1%	5.1%	3.8%	5.6%	4.7%	18.7%	2.9%
75 : Public administration and defence; compulsory social security	5.4%	5.1%	1.5%	10.8%	3.2%	0.8%	0.0%	1.0%	2.3%	0.2%
99 : Extra-territorial organisation and bodies	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: Annual Business Inquiry, Employee analysis 2003

4.4 VAT Registrations, Deregistrations and Stock

Table 4.9 (below) refers to the number of registrations, deregistrations and stock, as well as registrations as a percentage of stock. These figures provide us with an insight into the relative health of the business community at each geographical level. Looking at each indicator in turn the following trends can be identified.

4.4.1 Registrations

It is evident that the number of business registrations in GB as a whole has declined between 1998-02 by some 6%. At the regional level there has been a slight increase, while in Craven registrations have increased by 15% over the same time period. South Lakeland has also recorded the highest increase at 20.3%, while Richmondshire has seen a 14% decline in business registrations over the same time period.

4.4.2 Deregistrations

Over the same time period there has been a 15% increase in deregistrations in GB, compared to 12% in Yorkshire and the Humber. The number of deregistrations in Craven has increased over the same time period (+9%), but not at the regional and national levels. South Lakeland by comparison has seen a 7.7% increase in deregistrations, while in Richmondshire deregistrations have remained constant.

Although there has been a net increase in the number of businesses in GB and Yorkshire and the Humber (1998-02), in both areas there was a net loss of businesses in 2002 i.e. more deregistrations than registrations.

In Craven and South Lakeland the stock has also grown over the four years, while there have also been more registrations in 2002. Richmondshire on the other hand has seen a slight decline in stock, as well as a net loss of businesses in 2002.

4.4.3 Stock

The growth in stock in Craven has been at a similar level to that found in GB as a whole i.e. around 2-3% (1998-02). The highest level of growth can be found in South Lakeland, where stock has grown by almost 5%, compared to 0.5% in Yorkshire and the Humber and a slight loss in Richmondshire (-0.2%) over same time period.

Looking at registrations as a percentage of stock (registration rate); around one tenth of total stock can be attributed to registrations in GB. In Yorkshire and the Humber the registration rate is slightly below that (9.8% in 2002), while in Craven the registration rate is at or around 7%. In South Lakeland the registration rate is similar to that found regionally (8% in 2002), with Richmondshire recording the lowest rate of all (5.7% in 2002).

4.4.4 Summary

In summary, between 1998 and 2002 the level of registrations in Craven has been above the level in GB and Yorkshire and the Humber, while deregistrations have been below the national and regional levels.

Stock has grown at a similar level to that in GB, yet the registration rate is below that in GB and Yorkshire and the Humber. This would suggest that the business stock in Craven is more settled i.e. survival rates are higher. Although (the latest) survival rate figures only go up to 2001, the indication is that businesses in North Yorkshire have a greater 1 and 3 year survival rate.

Table 4.9: VAT Registrations, Deregistrations and Stock

Indicator	***Great Britain***			***Yorkshire and The Humber***			***Craven***			***South Lakeland***			***Richmondshire***		
	1998	***2000***	***2002***	***1998***	***2000***	***2002***	***1998***	***2000***	***2002***	***1998***	***2000***	***2002***	***1998***	***2000***	***2002***
Registrations	183755	180560	172340	12100	12180	12135	165	185	190	320	350	385	135	130	115
Deregistrations	150235	161760	172870	10975	11550	12345	165	140	180	260	280	280	140	140	140
Stock	1659425	1699180	1706010	123765	124960	124405	2665	2740	2725	4610	4685	4830	2035	2050	2030
Registrations as a % of stock	11.1	10.6	10.1	9.8	9.7	9.8	6.2	6.8	7.0	6.9	7.5	8.0	6.6	6.3	5.7

Source: NOMIS, VAT Registrations, Deregistrations and Stock

4.5 Summary and Implications

The overview of the local economy supports the analysis produced by the LEAM model in the previous section. Craven's economic base is comprised of small businesses employing between 1- 10, and 11-49 people. This characteristic is supported by the business survey analysis that was undertaken in Section 6. In Craven there are a number of SME companies but very few large companies employing 200 or more people. The district's business base and employment structure is predominately distribution, hotels and restaurants and banking, finance and insurance. Manufacturing and construction form a major part of the local economy.

Building on the overview of the local economy and the LEAM analysis there are a number of implications in relation to the local business and employment base:

- The local economy is weighted towards small businesses, employing less than 50 people. This suggests that the majority of businesses tend to be indigenous with low level of employers moving into the area. The needs of small businesses such as these will need to be reflected the provision of future employment land and premises.

- The largest business and employment base in Craven is distribution and hotels and banking & finance. The tourism sector is outside the scope of this study, however in relation to banking & finance; adequate provision will need to be made for office and B1 use developments to accommodate the growth in this sector. Again this reinforces the need to allocate land and premises which provides flexibility and choice.

- Of relevance to the study, Craven has a high level of businesses and employment based in manufacturing and construction. Businesses engaged in such activities are likely to require reasonably large size premises with adequate access to major transport corridors. Ensuring a an adequate supply of developable land along major road networks will be an important factor in determining the scale, the amount and the future location of land to be allocated within the district.

5.0 SUPPLY ANALYSIS

5.1 Introduction

This section provides a supply analysis of existing sites and premises in Craven, which was based upon a review of employment land currently available within the Local Plan[23]. Consultations were undertaken with key stakeholders to consider the suitability of the employment land supply and gaps in current provision.

5.2 Employment Land Analysis

An analysis of available employment land contained with the Local Plan was undertaken in December 2004, which enabled us to determine the supply of business land in the district, to identify where gaps in provision currently lie and the future implications of this. For each of the sites reviewed, consideration was given to the location of the site, in terms of its location within the district as well as general accessibility, the size and quality of the site, whether the site had any existing consents in place, potential end uses for the site and the prospects of the site coming forward for development. When considering the likelihood of any sites coming forward for development, the discussions that were undertaken with local agents were taken into account, to determine the likely demand for the site and any constraints likely to be experienced in bringing sites forward.

The sites that were reviewed were identified and allocated within the Local Plan as Existing Employment Land Commitments (Policy EMP2) and Employment Land Allocations/Lapsed Permissions (Policy EMP3). In accordance with the Employment Land Take up Monitoring Report these sites have remained undeveloped[24]. The analysis of each site was grouped into three geographical locations and was based upon the categories that were used in the Land Take up Monitoring report– South Craven, Skipton and North Craven and Settle.

Not unsurprisingly, there are few sites employment sites currently remaining within the district. Based on the most recent Monitoring Report[25], a total of 11 sites remained in Craven with an additional site in Grassington, situated within the Yorkshire Dales National Park area. Table 5.1 sets out the criteria under which each site was reviewed and the assessment made.

[23] Craven District Council, Local Plan, 1991 - 2006
[24] Craven District Council, Employment Land Take up Monitoring Report, March 2004
[25] Craven District Council, Employment Land Take up Monitoring Report, March 2004

Table 5.1: Craven District Council – Allocated Employment Land Analysis undertaken

Site Name & Location	Size (ha)	Use class allocation	Amount of Land Readily available		Current planning status /subject to other non B related developments	Access to road, rail, public transport	Constraints	Time Available	Prospect of site coming forward
			Yes	No					
South Craven									
Part of site formerly occupied by Silent Night Holdings Skipton Road, Sutton In Craven	1.88	B1 use only, proposed site for mixed residential and industrial use.	1.88		Site received planning consent for erection of 60 bed care home in January 2004. (66/2003/3771)	Close to Sutton in Craven Centre and public transport network	Former factory site located in a predominately residential area close to Sutton In Craven centre. Location to residential area is reflected in its mixed use – B1 allocation	Allocated since 1995 and will come forward for development as Care Home if not already	Planning consent in place since January 2004 and construction has commenced.
Skipton									
Land West of Ings lane Ings Lane, Skipton	0.38	Land committed to employment use with consent in place for B1 – B8 uses		0.38	Land previously had planning permission for industrial – business use.	Vehicular access to site is difficult and there is no public transport system. No direct access to A629 Skipton Bypass	Site located within a flood risk area. Access constrained, Site currently used for external storage.	Site allocated since 1995.	Due to site constraints and current use it is unlikely that the site will come forward and whether it is realistically suitable as an employment site for future plan allocation.
OS Field no. 5600 Adjacent to A629 Skipton Bypass, Ings lane, Skipton	1.65	Land identified for industrial or business development		1.65	Land allocated for business /industrial use.	Vehicular access to site is difficult and there is no public transport system. No direct access to A629 Skipton Bypass	Site located within a flood risk area. Currently used as a vacant Greenfield site	Site allocated since 1995	Due to site constraints it is unlikely that this site will come forward for development in the short /medium term.
Land Adjacent to Leeds &	0.03	Land		0.03	Land allocated for	Site on the edge of existing	Small site which is tightly	Allocated in plan	Unlikely to come forward for

Site Name & Location	Size (ha)	Use class allocation	Amount of Land Readily available		Current planning status /subject to other non B related developments	Access to road, rail, public transport	Constraints	Time Available	Prospect of site coming forward
Liverpool Canal Firth Street, Skipton		identified for industrial or business development			industrial/Business use	small industrial estate. Vehicular access reasonable and local bus service nearby.	located on the edge of an aging industrial estate. Part of the site is adjacent to residential area and Hospital. Site appears to be used for external storage in connection with adjacent business use and part vacant.	since 1995.	development in short term. Proposals for redevelopment of the adjacent business estate have failed to materialise
Land Adjacent to former Skipton-Bolton Abbey Railway line, Firth Street, Skipton	0.12	As above		0.12	As above				As above
Land adjacent to Craven Nursery Park, Snaygill Industrial Estate Skipton	0.12	Site allocated for industrial /employment use		0.12	Planning consent in place but potentially could have lapsed	Located on the Snaygill Industrial Estate – good vehicular access to the Skipton Bypass but limited public transport	Electricity sub-station situated on the site. .	Allocated since 1995	Based on current demand for land in the Skipton area, particularly in relation to small business units development is likely to come forward in the near future. Subject to the relocation of the substation
Land south of the sewage works adjacent to the Western bypass, Snaygill Industrial Estate, Skipton	0.9	Site allocated for industrial/employment use.	0.9		Site allocated for business and industrial use. Some recent development appears to have taken place with a few plots still available. Possible that less than 0.9 ha of land remains available for development	Vehicular access good as well as access to Skipton Bypass.	None visible	Site allocated in 1995 as part of the Snaygill Industrial Estate. Majority of the site has been developed already	Highly likely that the remaining site will be developed in the short term. based upon the current level of demand in the area and the take up of sites to date.
Former Highways Depot	0.2	Site allocated	0.2		Planning Consent in place for	Vehicular access restricted	Proximity to residential area	Site allocated	Planning consent in place so

Site Name & Location	Size (ha)	Use class allocation	Amount of Land Readily available		Current planning status /subject to other non B related developments	Access to road, rail, public transport	Constraints	Time Available	Prospect of site coming forward
adjacent to Industrial Estate, Gargrave		for B1 related uses.			employment related development.	to access from Industrial Estate entrance. Site has no frontage and at rear of industrial units and residential development	restricts use.	since 1995.	presumption that the site will be developed in short – medium term.
North Craven & Settle									
Land East of Sowarth Field Industrial Estate Settle	0.29	Allocated for industrial/business related development	0.29		No current planning status	Vehicular access to industrial estate well served	Adjacent sites when released to the market were developed quickly demonstrating demand for small business units in Settle.	Site allocated in 1995	Vacant plots could potentially come forward for development in the short term. Owner is currently considering options for a mixed use development.
Land to South West of existing Industrial Estate, New Road New Road, Ingleton	0.54	Land allocated for employment uses relating to industrial/business development		0.54	No current planning status	Access to site is from existing industrial estate	Vacant site requires servicing. Site acquired for future expansion plans of existing company on the Industrial Estate.	Site allocated in 1995	Unlikely that the site will come forward in the short term and the current plan period.
OS Field No. 2533 and part 1826 & 3327, adjacent to southern edge of existing Industrial Estate, New Road New Road, Ingleton	1.17	As above		1.17	As above	Access to site from Industrial Estate, dependant upon adjacent site above being developed to allow site frontage to be opened.	Vacant site which requires servicing. Land ownership constraints restrict the site coming forward for development	As above	Unlikely that the site will come forward for development in the short term and current plan period. Low demand for development sites in Ingleton plus ownership constraints

Site Name & Location	**Size (ha)**	**Use class allocation**	**Amount of Land Readily available**		**Current planning status /subject to other non B related developments**	**Access to road, rail, public transport**	**Constraints**	**Time Available**	**Prospect of site coming forward**
Grassington (Yorkshire Dales National Park)									
Threshfield Quarry Grassington	4.96	Employment use B1, B2 & B8			No current planning consents on the site other than for its previous use.		Worked - out quarry site available for employment uses. It is an unattractive and isolated site which may limit potential employment usage. However the site is hidden from the main centres and residential area therefore making it appropriate to businesses related to noise and nuisance. Any proposed development proposals will require infrastructure to be installed including water supply and servicing.	Allocated in Yorkshire Dales Local Plan Second Deposit, May 2003.	Limits to future uses and will require infrastructure development. Unlikely to come forward in the short term.

5.2.1 South Craven Employment Land Analysis

In South Craven, one employment site remains in Sutton in Craven. The site received planning consent for an employment related use in January 2004; and is currently under construction.

5.2.2 Skipton Employment Land Analysis

Within the Skipton area, a total of seven employment sites remained undeveloped in March 2004. The analysis that was undertaken in December 2004 showed that 6 of the sites still remained undeveloped. Land referred to in the Local Plan as “Land South of the Sewage Works adjacent to the Western by pass” on the Snaygill Industrial Estate at Skipton had undergone some recent development and had potentially two plots of land remaining. Based on the level of activity that had been undertaken on this site and the general location of the site, it is assumed that the remaining land would be developed in the short term.

An additional site has been allocated on the Snaygill Industrial Estate, land adjacent to the Craven Nursery. This site has had a previous planning consent for an employment related use, which has since lapsed. However, due to the site’s location, within Skipton, it is again assumed that it is likely to come forward for development in the near future.

The remaining 5 sites within Skipton are situated within 3 locations – Engine Shed Lane, Firth Street and Gargrave. Two sites are currently available and located on the Engine Shed Lane Estate – Land to the West of Ings Lane and OS Field No 5600. Both sites are adjacent to the Skipton by pass, however there is no direct access to the by pass from either of the sites. Consultations with local agents and developers revealed a low demand for sites situated at Engine Shed Lane. This is on the grounds of poor access as well as the land, including the above sites, being located in a flood risk area, which would require significant investment to take place. One developer confirmed that the costs associated with developing land located within the flood risk area were high and therefore a disincentive to most investors. Based on this evidence, it has been assumed that development is unlikely to take place on either of these sites in the near future and the sites are likely to remain available throughout the current plan period. One would also question the suitability of these sites in future if poor access and potential flooding are constraints to development.

A further two employments sites are located off Firth Street in Skipton on the edge of the town centre. Both sites are in the region of 0.12ha each and appear to be used for external storage in relation to some of the businesses who are currently operating on adjacent land. Consultations with Yorkshire Forward, suggest that proposals were being considered for the development of a Business Park on Firth Street as part of the Skipton Renaissance Plan[26] however discussions have gone quiet over the past 12 months. A feasibility study has been undertaken for the site to consider its suitability for the development of a multi media centre. It is the assumption that the development of the two sites off Firth Street are likely to be part of some wider redevelopment plans for the overall site and this is unlikely to be in the short term.

[26] Skipton Renaissance Partnership: Skipton Renaissance Vision, 2004

The remaining site within Skipton is a former highways depot adjacent to the Gargrave Industrial Estate. Again this site is a relatively small piece of land (0.2ha) and has limited access with no frontage to the main access road. The site is located in a predominantly residential area, which restricts its potential business use. However, information contained within the Employment Land Monitoring report suggests that the site currently has a planning consent in place for an employment related use.

5.2.3 North Craven and Ingleton

Moving on to North Craven and Ingleton, there are currently three employment sites allocated in the area, which are still, in some cases, available for development. One site is situated on the Sowarth Field Industrial Estate in Settle and the two remaining sites are located on the New Road Industrial Estate Ingleton.

Land at Sowarth Industrial Estate underwent some development in early 2000, which has seen the provision of a new access road; individual plots for industrial use, and servicing to the local foodstore. Part of the site is still remaining and consultation with a local agent, who was engaged in bringing the site forward for development; suggests that demand exists for the further development of the site for industrial use. The owner of this site is considering development options and it is likely that this site will be developed quickly once it is released.

The remaining employment sites are located adjacent to the New Road Industrial Estate in Ingleton. Both sites are vacant and would require new infrastructure and servicing if any development was likely to come forward. One site is owned by an existing company on the estate to accommodate its business expansion. The remaining site has constraints around land ownership, which restrict its availability for development. Consultations with a number of agents have suggested that the demand for employment land in Ingleton is low and there is little chance of any speculative development coming forwarding this area. It is assumed that the two sites are unlikely to be developed during the current plan period.

5.3 Sites and Premises Register

A review was undertaken of the Craven District Council Sites and Premises Register[27], to determine the supply of land and premises available on the market and in addition to the employment land review discussed above. The register of available sites and premises was updated in January 2005. However the document was in draft form and it was not clear whether information from the previous register had been updated.

Based on the details contained on the register, there appears to be a limited availability of industrial land on the market. The register refers to one site (totalling 1.14acres) close to Settle at Horton in Ribblesdale in the Yorkshire Dales National Park area. Details of the site were contained on a previous register dated January 2001 and it is therefore assumed that the site may no longer be available on the market.

[27] Craven District Council Sites and Premises Register, Draft, January 2005

The availability of industrial premises providing over 5,000 sq ft of floorspace is limited. The register refers to only one unit being available which can accommodate floorspace of 29,000 sq ft.; the remaining premises can accommodate a maximum of 15,000 sq ft. The number of industrial premises providing floorspace below 5,000 sq ft is higher; approximately 14 units are recorded on the register. However some of the units appear to have been on the market for some time and again may no longer be available or may not be suited to business requirements.

The availability of office accommodation currently on the market appears to have reduced in comparison to the previous Sites and Premises register. The register refers to a number of properties providing office accommodation within the 1,000 – 2,000 sq ft range. With the exception of developments such as Broughton Hall, there appears to be a limited availability of accommodation over 2,000 sq ft.

5.4 Summary and Implicationsand

Based upon the employment land analysis set out above, it is envisaged that during the current plan period approximately 5 out of the 11 sites reviewed have a reasonable chance of coming forward for development in the short term and within the current plan period.

There are 6 sites which are considered as unlikely to come forward for some considerable time, these being land off Ings Lane situated on the Engine Shed Lane Estate in Skipton, land at Firth Street in Skipton and Land at New Road Ingleton. Out of the total amount of employment land that remained undeveloped (7.2ha) in March 2004, these 6 sites account for 4.18 ha of employment land.

In addition to the above sites, employment land allocated with the Yorkshire Dales National Plan at Grassington providing 4.9ha of employment land provision. However, consultations that were undertaken indicated no demand for the Grassington area.

The supply of land and premises currently available on the market appears to be limited and as discussed further in Section 6, does not meet with modern business requirements in terms of floorspace provision.

There are a number of implications in terms of current employment land supply:

- The availability of suitable and developable employment land is limited in the areas showing the highest demand - Skipton, South Craven and Settle. During the current plan period, development is likely to take place on the remaining land in Settle and South Craven.

- The majority of developable sites in Skipton have been developed. It is likely that development will take place during the current plan period of some of the remaining land located within the areas of demand. However, a number of constraints on the remaining sites will affect the likelihood of development coming forward.

- It is anticipated that constraints around land ownership will affect land coming forward for development in Ingleton for some considerable time.

- Business premises currently available on the market provide limited choice and flexibility in meeting modern day business floorspace requirements.

6.0 DEMAND ANALYSIS

6.1 Introduction

In order to understand the needs of existing and future businesses and the constraints that are currently experienced, a demand analysis was carried out. The analysis took into account the level employment land take up since 1995 (during the current Local Plan period), consultation with key stakeholders and a survey of businesses currently operating in the Craven area.

6.2 Employment Land Take – up 1995 – 2004

6.2.1 Overview

Craven District Council publishes a monitoring report in respect of employment land take up and policy[28]. The first monitoring report showed land take up between 1995 – 1999 and the second between 1999 – 2000. The most recent monitoring report dated March 2004 provides the picture from 2000 – 2004.

Over a period of 11 years (1995 – 2006) the Local Plan identified a total of 30 hectares of land for employment uses. In March 2004, 7.2ha of the allocated land remained available in for development (see table 6.1). It is anticipated that this figure has slightly reduced due to development activity taking place between April – December 2004.

The distribution and take up of employment land varies within the district. For the purposes of monitoring, the local authority has split the district into three areas:

- Skipton,
- South Craven
- Settle & North Craven.

Land at Threshfield Quarry, Grassington is within the Yorkshire Dales National Park's boundary and has therefore been excluded from Craven District Council's figures.

The overall level of development activity within the district has increased in recent years (see Table 6.1). From 1995 to 2000 the total amount of allocated employment land developed was 9.02ha, representing a figure of 1.80ha per annum. The level of land take up between 2000 – 2004 significantly increased to 10.98ha, with an average of 2.2ha per annum. The District Council's explanation for the increasing trend is due to large committed sites coming forward for development at Crossings Business Park in Crosshills and Sowarth Fields Industrial Estate in Settle.

[28] Craven District Council, Employment Land Take up Monitoring Report, March 2004

Table 6.1: Craven District Local Plan – Employment Land Take up – 1995 – 2004

Dates	Committed Sites (HA)	Allocated sites/sites with lapsed consent (HA)	Total land developed (HA)	Total allocated land available (HA)	Average land developed per annum (HA)	Total land developed between 1995 – 2004 (HA)
April 1995	-	-	-	30.34	-	-
April 1995 March 1999	4.37	3.77	8.14	22.2	1.57	-
April 1999 – March 2000	0.88	0	0.88	21.32	0.88	-
April 2000 – March 2004	8.67	2.41	10.98	7.2	2.2	19.66

Source: Craven District Council, Employment Land Take up Monitoring Report, March 2004

6.2.2 Skipton Employment Land Take up

At the outset of the Local Plan a total of 12.18ha of land was allocated in Skipton. In March 1999 6.3ha of land had been developed providing an annual take up rate of 1.57ha. From 1999 onwards the level of land take up has reduced, during 2000 to 2004 only 2.32ha of land was developed in comparison to higher levels of activity witnessed in South Craven.

Table 6.2: Craven District Local Plan - Employment Land Take up in Skipton

Dates	Total land developed (HA)	Total allocated land available (HA)	Average land developed per annum (HA)	Total land developed between 1995 – 2004 (HA)
April 1995	-	12.18	-	-
April 1995 – March 1999	6.3	5.88	1.57	-
April 1999 – March 2000	0.16	5.72	0.16	-
April 2000 – March 2004	2.32	3.4	0.58	8.78

Source: Craven District Council, Employment Land Take up Monitoring Report, March 2004

6.2.3 South Craven Employment Land Take up

As the figures suggest in Table 6.3 the rate of allocated employment land take up has been highest in South Craven with a total of 7.67 ha developed between 2000 – 2004. This is in comparison to 2.32 ha in Skipton (Table 6.2) and 0.99ha in North Craven (Table 6.4).
A total of 7.4ha of land was developed between 2000 – 2004 at the Crossings Business Park in Crosshills. This site was fully developed by March 2004. The only remaining allocated site in South Craven, as of March 2004, was a 1.8ha site in Sutton in Craven; this site received planning consent in January 2004 and is therefore likely to come forward for development during the current plan period.

Table 6.3: Craven District Local Plan - Employment Land Take up in South Craven

Dates	Total land developed (HA)	Total allocated land available (HA)	Average land developed per annum (HA)	Total land developed between 1995 – 2004 (HA)
April 1995	-	13.65	-	-
April 1995 – March 1999	1.41	12.24	-	-
April 1999 – March 2000	0.66	11.58	0.66	-
April 2000 – March 2004	7.67	1.8	1.91	11.85

Source: Craven District Council, Employment Land Take up Monitoring Report, March 2004

6.2.4 Settle & North Craven Employment Land Take up

North Craven has experienced the lowest take up of employment land within the district. As with Skipton there are a number of sites experiencing constraints, in relation to Settle and North Craven issues around land ownership and low demand will affect the likelihood of the sites coming forward for development in the short term.

Table 6.4: Craven District Local Plan - Employment Land Take up in Settle & North Craven

Dates	Total land developed (HA)	Total allocated land available (HA)	Average land developed per annum (HA)	Total land developed between 1995 – 2004 (HA)
April 1995	-	3.48	-	-
April 1995 – March 1999	0.43	3.05	-	-
April 1999 – March 2000	0.062	2.98	0.062	-
April 2000 – March 2004	0.99	2.0	0.25	1.48

Source: Craven District Council, Employment Land Take up Monitoring Report, March 2004

6.2.5 Land at Threshfield Quarry, Grassington

In addition to the employment land allocations discussed above, there has been no take up of the employment land allocated at Threshfield Quarry in Grassington.

6.2.6 Summary

Consultations undertaken with agents and developers illustrated the general demand for employment land in and around the South Craven and Skipton area. This has been reflected in the level of employment land take up. It should also be noted that a significant portion of land that is still available for development within the Skipton area is physically constrained due to potential flood risk. This constraint will affect the likelihood of any sites coming forward in the immediate future. In addition, the Council's monitoring report acknowledges that the majority of the remaining sites are used for external storage and it is therefore questionable whether such sites are realistically available for development as previously discussed in Section 5.

6.3 Inward Investment Enquiries

A number of agencies were approached to determine the number of investment enquiries received. Limited information was available as Yorkshire Forward, Business Link and North Yorkshire County Council do not record or deal with enquires and refer them directly to Craven District Council. Craven District Council does not retain information on the level and nature of enquiries received.

To determine the nature of some of the enquiries that local authorities receive in the area surrounding Craven a number of local authorities were approached. South Lakeland District Council were unable to provide any information however Pendle Borough Council had received 68 enquiries in 2004 from businesses seeking land and premises of which a total of 12 had successfully located in the Borough. The Council did not have any record of the businesses' individual requirements.

Given the limited information available, it is challenging to take a comprehensive view of the nature of enquiries with in the local area. Consultations with local agents and the Craven & Harrogate Business Development Centre revealed that enquiries were regularly received from businesses requiring new sites and premises. This is discussed in more detail in the analysis of stakeholder consultations.

6.4 Key Stakeholder Consultation

6.4.1 Introduction

In order to better understand the current and future demand for sites and premises in Craven, a series of consultation took place with key agents operating in the area. The purpose of the consultations was to reinforce the findings of the supply-side and demand side of the analysis, by ascertaining the perspectives of the key players. The following section is a summary of the interviews that were undertaken and provides an overview of the views and opinions expressed by the stakeholders.

6.4.2 Overview of Strengths and Weaknesses of Craven

The majority of the Stakeholders consulted felt that Craven's main strength is that people want to live in the district; therefore businesses want to locate there. Evidence suggests that there is a steady stream of people moving from London who want to establish themselves and their company in Craven. Developments at Broughton Hall and Fleets Farm have demonstrated the demand from some companies who are looking to downsize their business and locate the regional HQ outside of major cities to Craven.

It was considered that the communication and transport infrastructure within the district were generally weak. The south of the district is located close to the Leeds and Bradford City Region where opportunities exist to build upon these transport corridors. It is envisaged that Broadband connections will be enabled across the majority of district by the end of 2005; this will significantly improve prospects for consultancy/digital type businesses in the more rural parts of the area. Yorkshire Forward is currently working with the Fleets Farm development to bring forward funding to enable broadband connectivity.

The majority felt that a key limitation of Craven was the lack of developable land generally, but in particular for larger businesses. Most of the land that is available for development is located close to the river which is subjected to flood risk. The shortage of suitable land is likely to impact upon where new and existing businesses locate, with the possibility that some locate outside Craven and within the Bradford and Leeds region.

6.4.3 Recent and Current Developments

It was considered that recent development activity within the area has been low, and there is little in terms of proposals coming forward. Yorkshire Forward has been involved in discussions to develop a potential incubator scheme for the digital cluster as part of the Settle Renaissance Plan; this proposal is at a very early stage. Initially it had been hoped to develop a scheme within an existing building, however it has since been decided that existing premises are not suited to the digital sector and that a new build is likely to be needed. As part of the Renaissance Towns initiative there have been some discussions over plans to convert some existing car parks to create new retail and office space. These plans are in their very early stages and could be some way off development.

6.4.4 Businesses Needs and Gaps

Discussion with stakeholders' representative of the public sector agencies demonstrated that there is generally a lack of good quality space for small businesses across North Yorkshire. Digital businesses in particular require premises which are "ready to go", i.e. kitted out with fixtures, fittings and network points. There is also a need to provide accommodation for the skilled and semi skilled businesses that require accommodation for equipment and small batch work. The arts and craft based businesses have different requirements in terms of small (60 sq ft) low rental workspace units.

In terms of future trends in business sectors, there will be a continued development of the arts and craft sector. However efforts need to be made to encourage higher value activity. The digital cluster is particularly appropriate to Craven as well as the food and drink cluster, given the rural nature of the district. One of the main drawbacks with food and drink industries is that they usually require large premises, which are expensive to develop.

It is not known how many people work from home within Craven, but it is assumed that the figures are relativity high. The key challenges faced by these businesses come when they need/want to establish premises away from home. In addition to having to pay business rates, a major challenge is posed by the length of leases, which generally run for 6, 8 or 10 years. This is often a frightening prospect for businesses that have only been established for a few years. Efforts should be made to encourage some people who currently work from home to move into premises; this may require small units in managed premises probably with shared meeting room space that can be hired by the businesses as and when required. This type of development needs to be convenient to those who work from home; Grassington, Settle and Skipton are considered attractive locations for such development.

There are a number of examples of facilities that exist within and outside of Craven. In Harrogate, the Craven and Harrogate Business Development Centre has established an "easy in, easy out" incubator space facility. Units ranging from 110 sq ft to 7000 sq ft are available for leases of just 3 months; businesses occupying the units are required to pay 2 months' rent as a deposit. Interest in this facility has been good even though the premises have not been formally advertised. There is a need for this type of facility in Skipton or in the corridor from Skipton to Crosshills, the key element being short leases and a range of accommodation units.

The success of Broughton Hall Estate demonstrates that there is demand for high quality space for professional service businesses. The Business Park has in the region of 38 businesses currently operating from its premises and covering a range of business types – consultancy services, digital based companies, distribution, design and publishing. The premises meet businesses' requirements with the provision of on site parking, state of the art communications technology, flexibility in terms of business space requirements, flexible leases and terms and the opportunity to relocate and expand within the Park.

The south of Craven is focussed fairly heavily on industry and manufacturing. There is little demand for premises from the manufacturing sector, as the bulk of this work is now moving towards outsourcing overseas and the finished product being brought back into the country. The majority of new companies in the area are involved in logistical operations which require warehouse/distributional facilitates to accommodate larger vehicles. There is scope to build on this given the area's proximity to Leeds and Bradford and the major transport networks.

6.4.5 Current Demand – Business Type, Size and Geographical Area.

For all businesses types each stakeholder felt that the greatest area of demand is the Skipton to Crosshills area. Demand for premises and land reduces towards Settle where industrial units are taking longer to let and there is no speculative development taking place. However, one agent involved in a development on the Sowarth Industrial Estate to develop small plots of land for industrial units was confident that demand exists for similar units from small businesses operating in the Settle area.

Further north of the district, in Ingleton and Bentham, there is very little demand. Consultation with agents operating in Bentham confirmed that there was difficulty in marketing any sites and premises in the area. There has been some interest for commercial properties with B1 uses particularly barn conversions but no demand for modern workspace units.

The majority of commercial agents reported that current demand was for industrial units or land on the edge of Skipton. There were a number of individual enquiries currently on their books and the broad size requirements were as follows;

- Employment Land — up to 1.5 acres (0.6ha)
- New industrial units — 10,000 – 30,000 sq ft
- Office Space — 2,000 – 4,000 sq ft
- Individual small industrial units — 800 – 1,000 sq ft
- Individual small industrial units (in Settle) — 400 – 800 sq ft

Enquiries for land and premises in the Skipton area have been received from companies who are currently operating within Craven and are seeking new premises, and companies looking to locate to the area. One agent confirmed that they were currently dealing with six 'live' enquiries at present for land in the region of 1.5 acres. Three agents had dealt with enquiries over the past 12 months from companies currently operating in the Bradford and Leeds area, who were looking to relocate around Skipton. The main demand was for land or new “shed style” premises within the Skipton – Crosshill area close to the main road networks A6068/A629. Each agent stressed that due to the lack of current supply many of the enquiries had effectively given up and looked elsewhere in the region as far as south as Wakefield.

Three agents were able to confirm that they were aware of at least four companies currently operating in the Skipton area, who were looking to relocate in the next few years to larger new build premises. Each company was experiencing difficulty finding suitable land, and one company in particular may have to look at an alternative location, possibly outside of North Yorkshire, potentially losing in the region of 200 jobs to the Craven area. One agent was currently acting for three clients who were seeking to locate to Craven; again the shortage of suitable land and premises may mean that these companies will start to look elsewhere.

When asked about business enquiries, the Harrogate and Craven Business Development Centre confirmed that they received approximately 12 enquiries per year from micro businesses looking to relocate to Skipton, but were unable to because of the lack of small premises.

Each agent operating in the Skipton area confirmed that demand for office accommodation was particularly low and they didn’t envisage this increasing significantly over the next few years as many companies were looking to minimise that side of their operation.

6.4.6 Key Sectors and Future Demand

The key growth areas were considered to be B1 and other industrial uses to accommodate the service industries and logistics/distribution. The majority of service based companies operated at the micro level and employed in the region of 7 people. There is evidence to suggest that many companies were downsizing their regional and headquarter facilities and outsourcing the bulk of their services. Many such companies are moving out of the cities and relocating to smaller premises in areas around Skipton. Companies operating in both Broughton Hall and Fleets Farm are examples of where this has happened, as well as new companies being established. However many of these companies do rely upon state of the art telecommunications and IT connections to allow their businesses to operate.

Each commercial agent and two developers were asked in order to satisfy demand, how much new industrial/employment land should be allocated as part of the emerging Local Development Framework. Based on the level and location of current supply and land take up in recent years, each anticipated that in the region of 5 acres (2ha) of developable land is required per annum and to be allocated in areas of greatest demand – this being Skipton and South Craven. The timescales for land allocation varied between 5 years and 10 years, but it was made clear that the allocation of new employment land should be made available as soon as possible, in order to satisfy the level of demand that was currently experienced and if possible in advance of the LDF process.

One agent suggested that in order to meet future demand requirements, the forthcoming LDF should locate land to accommodate three business parks of similar size to the Crossing Business Park in Crosshills. These should be located in South Craven, Settle and Skipton. One interviewee suggested that the Threshfield Quarry site could be a potential employment site allocation once the quarrying operation had ceased and that there may be some opportunities for land to the west of Skipton to be identified. This site has been identified as an employment site in the current Yorkshire Dales Local Plan.

6.4.7 Role of Craven District Council

When asked about the role of Craven District Council, some consultees felt that there is little publicity and marketing of business/employment opportunities across all North Yorkshire authorities. Craven District Council should work with neighbouring authorities in promoting and marketing opportunities in the area. In addition it would be beneficial if the Council kept an up to date sites and premises register and a record of companies who contacted them for advice on sites and premises and details of referrals.

6.5 Business Demand Analysis

6.5.1 Introduction

In order to determine the needs of existing businesses, a postal survey of companies currently operating in the Craven area was undertaken. A questionnaire was sent to 359 companies operating in the district whose business was classified under the B1, B2 & B8 use class order. The questionnaire sought to explore the needs of businesses in the area in terms of existing and future land and property requirements. Of the 359 businesses, 106 completed (30%) and returned the survey. The survey encompassed 6 key areas for investigation; background, previous premises, current premises, future requirements, linkages and support and other information on changes to the business over the past 4 years. A copy of the questionnaire has been included in the appendices to this report.

6.5.2 Background

This section focus on the general characteristics of the sample:

The majority (59%) of businesses that responded to the questionnaire were private limited companies. Sole/independent traders accounted for around a fifth of respondents followed by partnerships (13%) and public limited companies (3.8%).

In terms of business type, many businesses (40%) did not fit into any of the categories listed in the questionnaire, i.e. office, general industrial, light industrial, storage or distribution or research and development. Many of those businesses that selected the ‘other’ category were in the building or motor trades. The second largest portion (22%) of businesses classed themselves in the ‘office’ category. General industrial, light industrial and storage or distribution businesses were reasonably well represented among the respondents accounting for 13%, 9% and 9% respectively.

The vast majority of businesses (74%) had been operating for more than 5 years. Very few businesses at the 'younger' end of the scale responded; just 3 of the 106 respondents had been in operation for less than a year. Most (58%) of the respondents were micro-businesses employing less than 10 people. SMEs accounted for a further 37% of businesses. Over half of respondents had no other sites from which their business operated. Of those businesses that did operate from other locations, the largest number had sites elsewhere in the UK.

Almost half of respondents' had seen an increased in their business since 2000; just 16 businesses reported a downturn in this respect. For most respondents (70%) turnover had also increased since 2000.

6.5.3 Previous Premises

In terms of previous premises, a total of 82% of the businesses had not moved in the past three years and could not answer the section on previous premises. In total 19 of the 106 businesses that responded to the survey had moved in the past 3 years. The following findings relate only to these 19 businesses:

- Out of the total 19 businesses who responded to this part of the survey, 10 or more of the businesses who had moved were previously based in the same town and all in this category were based in the Skipton area. Most of the businesses that had moved in the past 3 years are now based around Skipton.

- When asked the reasons for their re-location, half of the businesses cited an expansion or reduction in their business size. However the evidence suggested that businesses expansion was more common than reduction.

- When considering a suitable location for business premises most businesses who responded considered other locations before arriving at their final decision. Almost half of these businesses looked elsewhere in the same town or village. The fact that most of the re-locating businesses chose Skipton suggests the area is a popular choice.

6.5.4 Current Premises

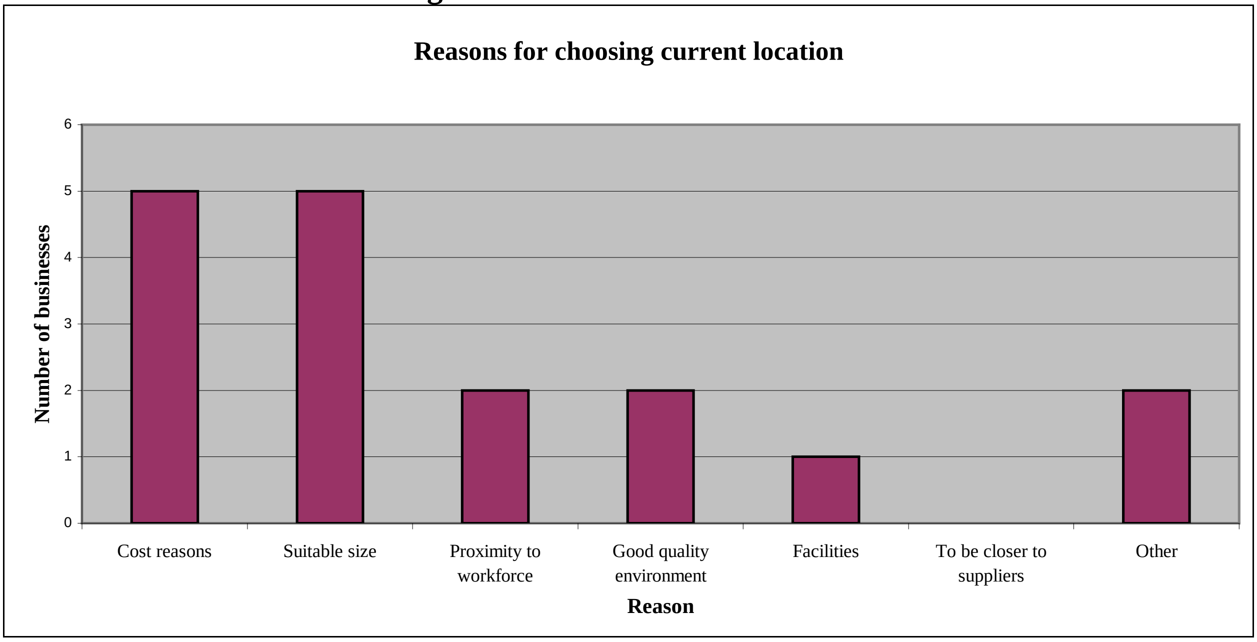
In respect of current premises respondents were asked to confirm what factors had influenced their choice of current location:

- The largest number of businesses chose their current location for cost and/or size reasons. This was particularly true for Skipton based businesses.

- None of the businesses chose their current site to be close to suppliers and very few stated that proximity to workforce was the reason for their decision.

- In terms of suppliers and customers, 46% of businesses had customers across the county and 63% of businesses said their suppliers were spread across the country. Very few businesses had either customers or suppliers based local to Craven.

Chart 6.1 – Reasons for choosing current location



Base: 19.

6.5.5 Size of sites and premises

Businesses were then asked to confirm the approximate size of their site and the floorspace of the current premises. Of those who responded to the question, 80% stated that the size of their site ranged between 0 and 1 acre, (see table 6.5 below) indeed none of the businesses had sites of more than 5 acres. Half of those businesses that stated that their sites were between 1.1 and 5 acres were storage and distribution companies.

Table 6.5 Size of site and premises and number of businesses

Approximate size of current site	No	%
0 - 1 acres (<0.5ha)	32	80.0
1.1 – 2 acres (0.5 - 1ha)	2	5.0
2.1 – 5 acres (1.1 - 2ha)	2	5.0
5.1 - 10 acres (2.1 - 4ha)	0	0.0
10.1 - 20 acres (4.1 - 8ha)	0	0.0
20.1 - 50 acres (8.1 - 20ha)	0	0.0
50.1 + acres (>20ha)	0	0.0
Not applicable	4	10.0

Base: 40

Businesses were asked to provide details on the approximate floor space area of their current premises (see table 6.6 below). Almost 30% of businesses that responded to this question classed their floor space within the smallest sizeband of 1-500 sq ft. Those businesses within this sizeband tended to be office based companies.

Table 6.6 Size of Floorspace and of number of businesses

Approximate floor space of current premises	No	%
1- 500 sq ft (<50m^2)	17	29.8
501 – 1000 sq ft (51-93m^2)	12	21.1
1001 - 2500 sq ft (94-235m^2)	9	15.8
2501 - 5000 sq ft (236-465m^2)	8	14.0
5001 - 10,000 sq ft (466-930m^2)	4	7.0
10,001 - 20,000 sq ft (931-1860m^2)	4	7.0
Not applicable	3	5.3

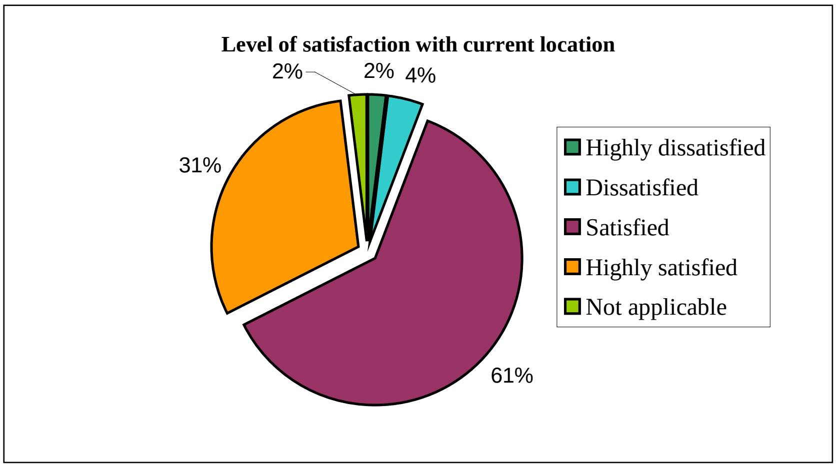
Base: 57

A further analysis revealed that those businesses that selected the two largest sizebands were, with one exception, either general industrial companies or engaged in the building trade. The general industrial businesses made a range of products including rubber mouldings, paperboard products and metal bars.

6.5.6 Degree of Satisfaction with Current Location and Premises

When asked about the level of satisfaction with their current premises and location, 92% of respondents confirmed that they were satisfied with their current location. Just 6% stated that they were dissatisfied in respect of location (see Chart 6.2 below)

Chart 6.2: Level of satisfaction with current location



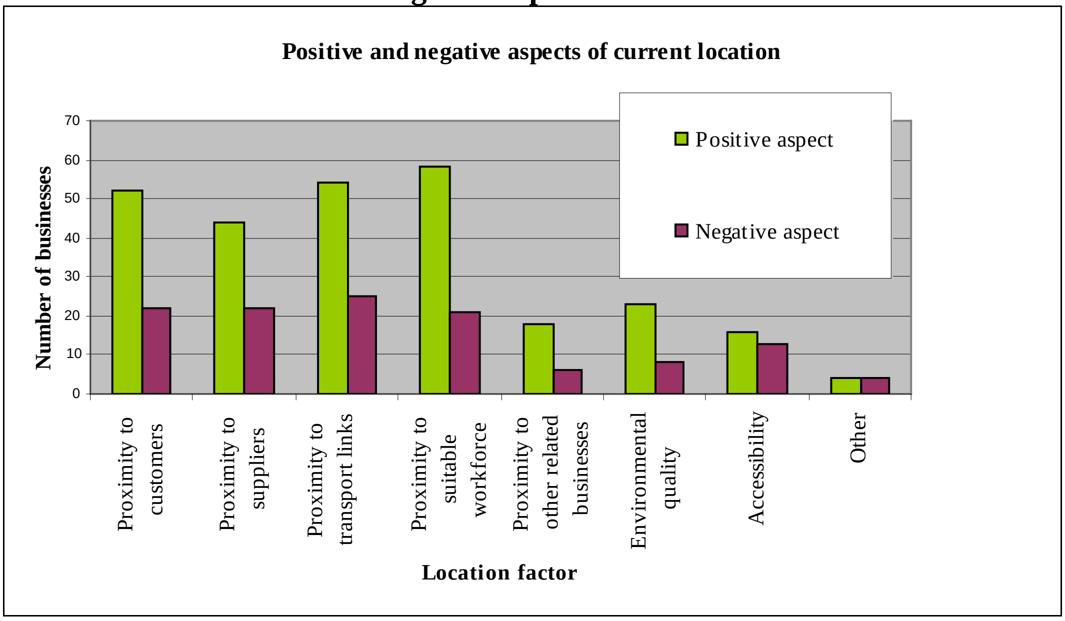
Respondents were asked to explore the positive and negative aspects of their current location, the results of which are displayed in the chart below (Chart 6.3). The responses to this question provide us with some key findings in relation to the overall study.

Perhaps reflecting to some extent on the overall levels of satisfaction with regards to the location of current premises, the positives outnumber the negatives for each location factor. The factor that was most frequently seen as a positive one was proximity to suitable workforce. The businesses who saw this as a positive aspect of their current location (72%) had been in operation for more than 5 years.

The most frequently mentioned negative aspect was proximity to transport links, perhaps unsurprising in what is a largely rural district. The majority of respondents who saw this as a problem were based in or around Skipton.

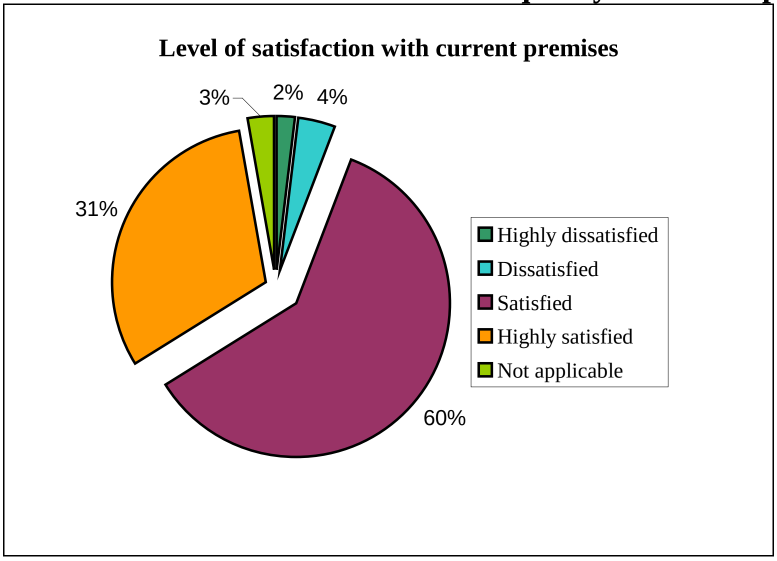
Significant proportions of respondents saw proximity to customers, suppliers and suitable workforce as negative aspects of their current location – again complaints that are symptomatic of a degree of isolation.

Chart 6.3: Positive and Negative aspects of current location



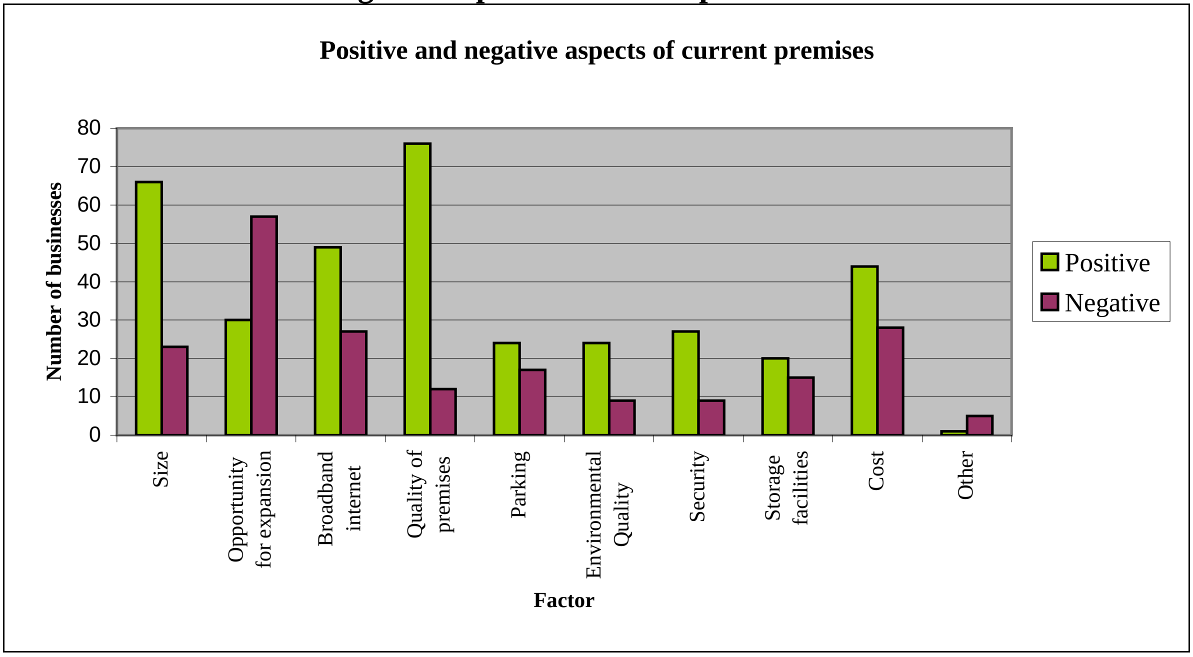
Following on from questions exploring the levels of satisfaction in relation to the location of businesses premises, respondents were asked to indicate their levels of satisfaction in relation to their current businesses premises. As with the previous question, regarding the location of premises, 90% of respondents indicated that they were content with the quality their premises

Chart 6.4: Levels of satisfaction with quality of current premises



Respondents were then asked to elaborate on their reasons for satisfaction or discontent, with their current premises. Chart 6.5 sets out the response to this question. In relation to the opportunity that current premises offered for expansion, the negative responses outnumbered the positives. Over half of the businesses saw lack of expansion potential to be a negative aspect of their current premises. Businesses who were either dissatisfied or highly dissatisfied with their current premises mentioned lack of room to grow as a drawback of their current buildings. The relatively small proportion of businesses that saw size in general as a problem suggests that, for most companies, their current premises are of adequate size for their operation as it stands but perhaps would be too small if they were to expand much further. A large number of businesses (72%) saw the quality of their premises as a positive aspect.

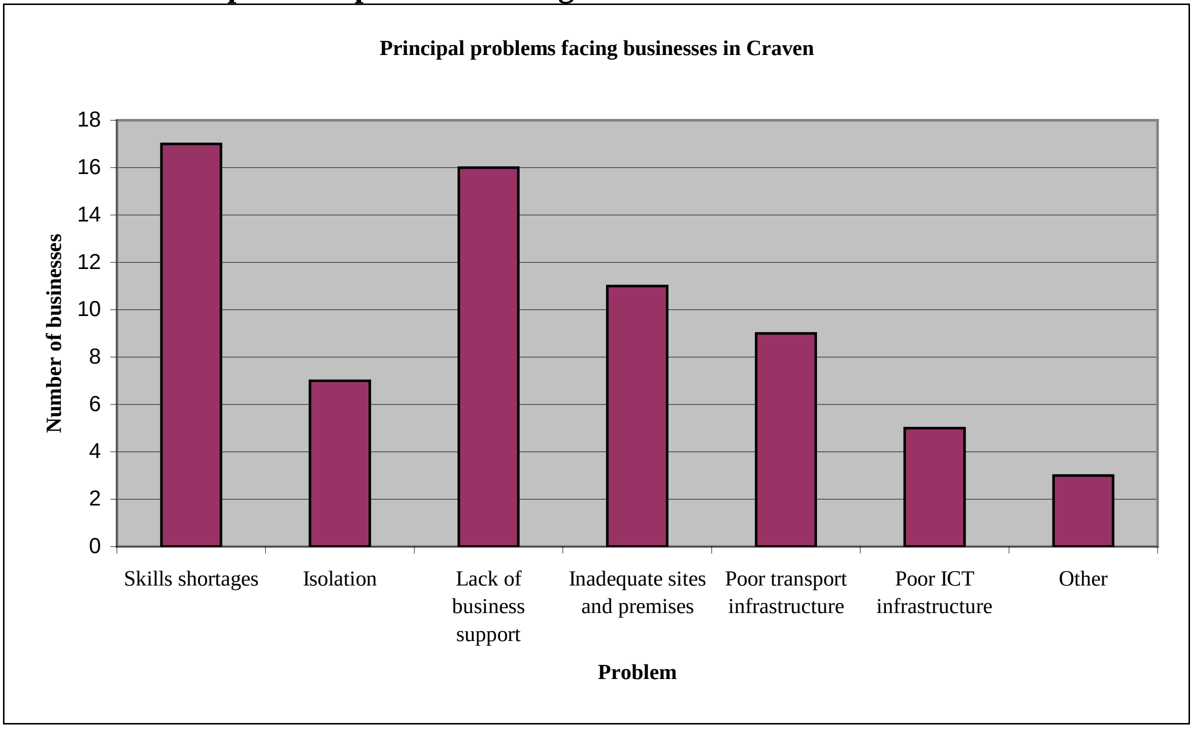
Chart 6.5: Positive and negative aspects of current premises



6.5.7 Perceptions of Problems Facing Businesses in Craven

Chart 6.6 below shows respondents' perceptions of the principal problems facing businesses in Craven. Skills shortages and lack of business support were the most frequently mentioned problems. A small but significant number of businesses saw inadequate sites and premises as an important problem. All but one of these businesses was based around the Skipton area. One Skipton building trade business added that this was *'a major problem'*; indeed, anecdotal evidence from a local company suggests that a number of building trade businesses are '*struggling to find new premises in Craven.'*

Chart 6.6: Perceptions of problems facing businesses in Craven



Base: 33

6.5.8 Future Demand

In order to determine the level and type demand for future sites and premises, businesses were asked what their future plans were. In total 27% of the businesses survey reported that they were considering re-locating in the near future. The majority of these businesses were those who reported that they were satisfied with both their site and location in previous questions. To explore this further, those (29) businesses that were considering a re-location were asked the principal reasons for this decision.

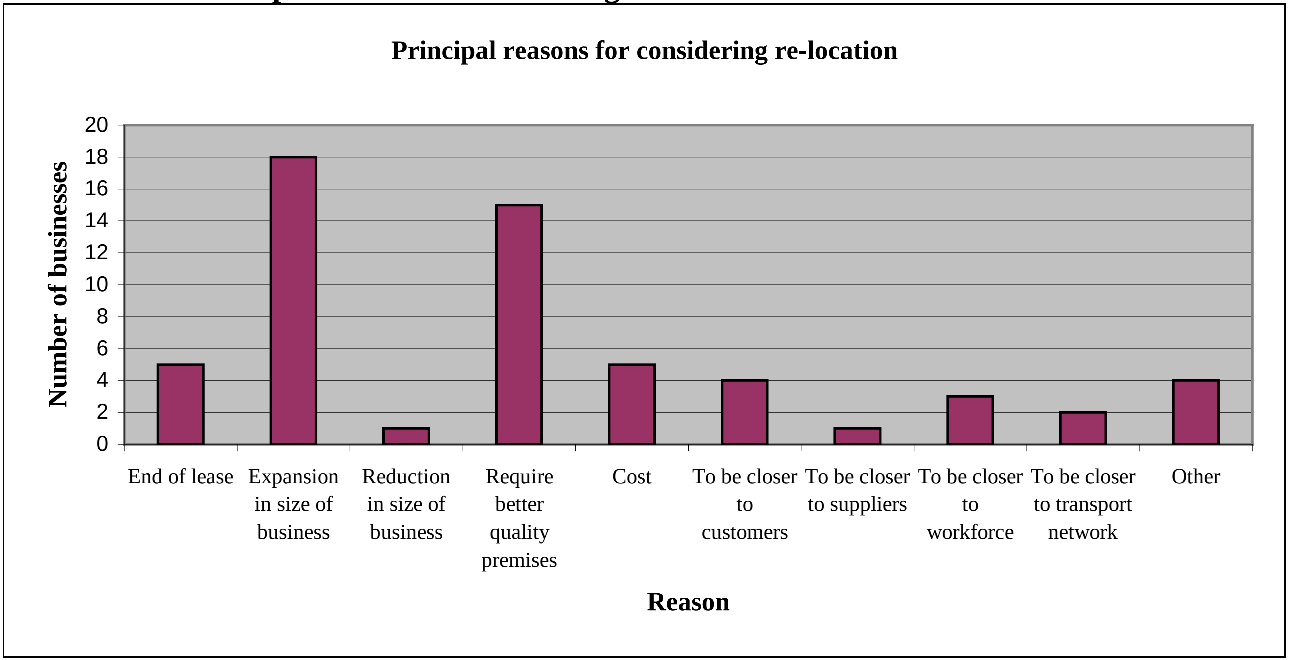
6.5.9 Reasons for Relocation

The most frequently mentioned reason for considering re-location was an expansion in size of business followed by the requirement for better quality premises (see chart overleaf). This reflects the problem of inadequate sites and premises mentioned above and also the fact that lack of opportunity to expand was the most mentioned problem identified with current premises. For the purpose of the study, it is important to explore further the size of sites and premises businesses require and where they want to be located. This information can shed light on any shortfalls in supply of suitable sites and premises:

- In terms of location the largest number of businesses selected either ‘within the same town/village’ or ‘Skipton’ as their preferred options. All but one of the businesses that wanted to remain in the same town or village were based in or around Skipton making it by far the most popular choice. Settle came second, in total, 7 businesses wished to relocate there. Very few businesses were looking to locate outside of the Craven district.

- In terms of site size requirements, none of the businesses that were considering re-location required a site of more than 5 acres. Of the 15 businesses that responded to the question on size requirements, 8 businesses required sites within the smallest sizeband of 0-1 acres. Half of these 8 required sites in Skipton and all but one required a site within Craven. One of the 2 businesses requiring larger sites of between 2.1 and 5 acres has experienced difficulties commenting *'we are looking for a new site between Ingleton/Kendal and Lancaster and are finding no good development sites'*.

Chart 6.7 Principal reasons for relocating



6.5.10 Future Size Requirements

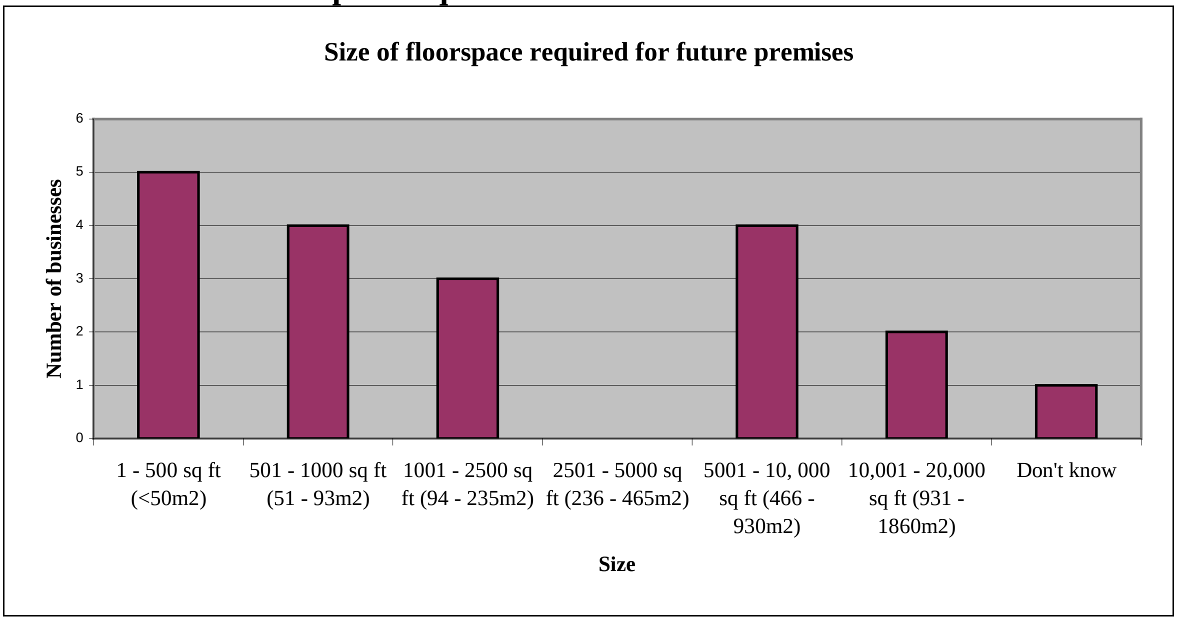
Those businesses that had indicated that they were looking to re-locate were asked to identify their floorspace requirements. As illustrated in Table 6.8 below the largest proportion of businesses required floorspace within the smallest sizeband of 1 – 500 sq ft. A significant number of respondents, all currently located in the Skipton area, stated that they needed floorspace of between 5001 and 20,000 square feet.

Anecdotal evidence based on comments from businesses suggests that finding premises at the larger end of the scale could be problematic. One general industrial business, currently located in premises of between 5,001 and 10,000 sq ft is *'Bulging at the seams and struggling to find new premises.'*

Two businesses, both industrial, reported that they would ideally like premises outside of the 10,001-20,000 sq ft sizeband. One of these could find no sites in excess of 50,000 sq ft in

Craven; the other needed an extra 25,000 sq ft and had purchased a plot of land on a flood plain to move to. Their application for planning consent was rejected and is under appeal.

Chart 6.8: Future floorspace requirements



Base: 17

6.6 Summary and Implications

The consultations with key stakeholders provided an important overview of current and future business needs in relation to sites and premises. The views of stakeholders' support and reinforce the findings that were undertaken to determine the current supply and demand analysis.

Craven has many key strengths which appeal to new businesses wishing to locate in the areas. The analysis that was undertaken of the local economy suggest that the area is performing well and has a strong business base with the potential to develop new and expanded businesses around the knowledge based sector including high technology manufacturing businesses. A key limitation to the Craven economy is the lack of developable land available around Skipton and South Craven and good quality and flexible employment premises for small businesses. Based upon the current level of demand and previous land take up rates the majority of stakeholders felt that in the region of 2ha of land was required over the next 5 – 10 years. This would equate to approximately 20ha of new developable employment land to be allocated ideally in advance of the LDF.

The analysis that was undertaken has many implications in relation to future business needs:

- Lack of broadband connectivity is hampering business growth in the consultancy and digital based sectors within the more rural parts of the district;

- The area lacks a supply of good quality space for small businesses which restricts the number of companies potentially relocating to the area;

- Lack of developable land is affecting the ability of new businesses to locate into the area or for existing companies to expand. This will have an economic impact upon the area as some companies may look to locate elsewhere;

- The key areas of demand for employment land are Skipton and South Craven close to the main transport networks. Employment land allocation as part of the LDF process should look to identify a range of developable sites to suit the different demands arising from businesses.

- Key growth areas were for B1 related uses and industrial uses to accommodate service industries and logistics/distribution. Again the supply of land and premises will need to reflect the different requirements.

- A broad analysis of business enquiries suggested that size requirements for land and premises were in the region of:

▪ Employment Land	up to 1.5 acres (0.6ha)
▪ New industrial units	10,000 – 30,000 sq ft
▪ Office Space	2,000 – 4,000 sq ft
▪ Individual small industrial units	800 – 1,000 sq ft
▪ Individual small industrial units (Settle)	400 – 800 sq ft

The survey that was undertaken again provided a useful analysis of the needs of businesses currently operating in Craven. The majority of businesses were small businesses employing less than 10 people which reflect the business base within Craven. This is also reflected in the size of the site and premises that they occupied, with most companies occupying less that 1 acre, and with some storage and distribution businesses occupying between 1 and 5 acres. The majority of businesses included in the sample were based in Skipton which would play an important factor in any future relocation. In relation to sites and premises some businesses saw the lack of expansion potential to be a negative aspect of their business premises. Those businesses that were looking to expand or relocate required sites in the region of 1acre or less than 500sq ft but many were experiencing difficulties locating suitable land or premises. This factor became more difficult as the size requirements increased.

The survey responses revealed a number of implications around future sites and floorspace requirements:

- The majority of businesses who were looking to expand or relocate required sites of less than 1 acre or premises in the region of 500sq ft or 20,000 sq ft. The lack of suitable space, particularly in Skipton, is a serious constraint to future business needs.

- Skills shortages and lack of business support were issues facing some businesses. Such perceptions support the analysis undertaken by the LEAM Model, which suggest that opportunities around business support measures, particularly for new business start ups, should be explored.

7.0 CONCLUSIONS AND RECOMMENDATIONS

7.1 Introduction

This section sets out the conclusions and recommendations in relation to our key findings and specific actions in relation to the overall study. Based on the findings that have emerged throughout the report and the gap analysis set out below, a number of recommendations have emerged. The conclusions draw together and answer (where possible) the requirements set out in the original study brief.

7.2 Conclusions

The research and analysis that has been undertaken to assess the business and employment needs in the Craven district have identified many key issues, which if not addressed are likely to hamper future business growth.

There are significant issues in relation to the current lack of suitable employment sites and premises, which will impact upon future business needs and growth. National and regional policies clearly identify the role of the planning system in ensuring sufficient land is made available to meet business needs.

In line with regional priorities, there is an emphasis for local areas such as Craven to develop a new economic base and to support business growth, in high growth sectors and clusters and to ensure higher business start up and survival rates. Craven's proximity to regional growth centres such as Leeds and Bradford is regarded as an ideal opportunity to harness the dynamism of these two economies. The economic analysis undertaken suggests clear opportunities exist in Craven, to further develop its knowledge based service sector and build upon the benefits resulting from its high-tech manufacturing businesses.

However, the limited land supply and choice currently within the district is having a knock effect on business expansion and relocation. The analysis of existing employment land, allocated within the Local Plan, suggests that the majority of key sites have been brought forward for development and the remaining key sites are likely to be developed in the near future. Sites that remain are located in areas of low demand or have constraints, (in terms of access, site constraints or ownership), which make it difficult or expensive to bring sites forward. In view of the location of these sites and the constraints associated with them, it was considered that none of the sites lend themselves to any recommendations for suggested alternative uses other than for external storage or as part of the wider redevelopment of the adjacent area.

Demand for employment land and premises falls predominantly within the Skipton and South Craven area, and along major transport networks. An element of demand for small business space exists in Settle but there is little demand further north. These characteristics will place pressure upon the District Council to identify and allocate an adequate number of developable sites to satisfy the varying needs and demands from businesses in its forthcoming LDF.

The majority of consultations that were undertaken suggested that demand mainly existed for newly built premises as these lend themselves to modern day requirements. However, based upon the type of schemes proposed as part of the Craven Objective 2 IDP and the success of developments such as Broughton Hall and Fleets Farm, there would appear to be some scope for conversion of existing premises, to provide small units, offices and workspaces. The most suitable locations for such schemes would appear to be around the centres of Skipton, Settle and in the rural parts of the district such as Grassington. The success and demand for such schemes is heavily reliant upon the availability of modern telecommunications such as Broadband accessibility, particularly in the more rural areas.

As well as requirements around sites and premises and ICT infrastructure, the analysis of existing business suggested that some companies were currently experiencing issues around skills shortages and a lack of business support.

7.3 Gap Analysis

Having analysed the extent of the supply and demand for business premises we have been able to identify a number of gaps in provision:

- **Gaps by Geographical location**: **–** research undertaken has identified a current gap in the provision of land and premises to the area in and around Skipton and South Craven. Consultations clearly identified the Skipton – Crosshills corridor, with access to the A6068/A629, as the area of greatest demand both currently and in the future.

  Settle was the second location identified as having future demand requirements for business space.

- **Gaps by business type and size: –** A number of gaps specific to different business types were identified from the demand analysis that was undertaken. It was clear from the consultation with agents that there is little demand for office space accommodation in the area.

  The main areas of demand include:

  - sites and high quality premises to accommodate small businesses. Premises providing high quality serviced accommodation, incubator and managed workspace as well as small business units were all referred to as examples. The size of premises ranged from 800 – 1,000 sq ft for small industrial units in and around Skipton and South Craven to 400 – 800 sq ft in Settle. In terms of managed and serviced workspace demand exists for individual units in the region of 110sq ft to 800 sq ft.

  - new industrial units to accommodate B1 related employment uses and other industrial uses including service industries and logistics and distribution.

The broad size band requirements are in the region of 1.5 acres of land or 10,000 – 30,000sq ft.

- **Gaps by type of premises:** The demand analysis identified a need for new high quality premises for both industrial and business use. Changes to the area's business base and the diversification of some industries mean than many existing premises do not lend themselves to the requirements of new businesses. In addition access to 'state of the art' telecommunications were considered as an increasing requirement for many businesses that were operating outside of the main towns. This is an important consideration to companies operating from small business premises in the more rural parts of the district, including parts of North Craven, Settle and the Dales area.

7.4 Recommendations

Set out below are a number of recommendations stemming from the research and consultations that were undertaken and the gap analysis set out above:

7.4.1 Future Demand Requirements:

Based on the consultations that were undertaken it is recommended that:

- In identifying new land allocations, the District Council should develop a criteria based policy tool which will inform the process of identifying sites which are best suited to modern requirements;

- In the region of 25/31 ha of employment land should be allocated, of which 20 hectares of developable land should be made available to be built out over a ten year timeframe;

- In view of the existing demand for employment land, new land allocations should be made in advance of the LDF process.

- The majority of land to be allocated should fall within the areas of key demand – Skipton, South Craven and parts of Settle;

- Land should look to be allocated where it is easily accessible to major transport corridors;

- Provision should allow for choice and flexibility in accommodating the varying needs of existing and future businesses.

7.4.2 Business Support Infrastructure

Based upon the requirements of existing business needs it is recommended:

- The District Council should work with partners to ensure that all employment land and premises have suitable access to modern IT communications;

- The District Council through its Economic Development Strategy, should look to promote and support development proposals for new workspace units and incubator facilities, to ensure that the needs of small and new businesses are accommodated;

- Where possible the District Council should work with partners to ensure a strong business network is put in place, particularly for business start ups;

7.4.3 Monitoring and Review

Based upon the research that was undertaken and the availability of information it is recommended that:

- The District Council continues to produce its current Employment Land Take up Monitoring Report;

- The District Council undertakes to establish a system that adequately monitors and records all enquires relating to investment, employment, and requirements for land and premises;

- An up to date register of all available sites and premises is maintained;

- An annual survey of existing businesses is undertaken to monitor the needs and future requirements of all existing business, to inform economic development strategies and the LDF;

- That the District Council undertakes to produce a yearly economic positioning paper;

- As part of its LDF preparation and ongoing monitoring, the District Council establishes a Forum to bring together key stakeholders to establish business needs and employment land requirements.

8.0 MONITORING AND REVIEW

8.1 Introduction

Effective monitoring is essential to plan making and their subsequent review. Building upon the recommendations that were set out in Section 7 around monitoring and review, the following section establishes ways and suggestions in which the District Council may wish to build upon and take forward the recommendations.

8.2 Employment Land Take Up Monitoring Report

The current report provides a useful and informative overview of the annual take up of employment land and the level of activity over the plan period. This provides an effective tool in monitoring employment land take up and in determining areas of demand and supply.

Ways to build upon and improve the current report would be to link the monitoring of employment land take up with the type of development that has taken place and how this might relate to any business enquiries received. For example, the report could incorporate details of any planning applications relating to a particular site/premise, the status of the application and the type of business use i.e. B1, B2 B8 or sui generis. Over time the monitoring report will be able to track the current status of any development that has taken place as well as monitor the main business uses coming forward during plan period. Assuming the District Council maintains an up to date business enquiries and sites & premises register the monitoring report will be able to establish how business needs are being met or where gaps may lie.

8.3 Business Enquiries Report

Craven District Council currently has no mechanism in place to monitor business enquires. In the absence of such a system it is difficult to monitor the level of enquiries received and the trend in terms of business types and requirements.

A number of suggestions as to how the Council look to develop a system of monitoring enquires have been put forward in the attached appendices. To summarise it is suggested that the Council adopts a standard system that captures the following information:

Number of enquiries received
Potential number of jobs – safeguarded or new jobs
Source of enquiry
Enquiries place of place of origin
Enquiry by sector
Reason for enquiry
Enquiries by preferred location
Property requirements

Requirement by size
Other requirements

Information should be collated on a quarterly basis to keep information up to date and to allow comparison to previous quarters to assess enquiry and requirement patterns. This system should then track the level of success in capturing the number of enquires where an investment has been made and the number of jobs that were either created or safeguarded. The production of a quarterly report and a more detailed annual report will enable a detailed overview of business requirements and successes to be achieved.

8.4 Sites and Premises Database

There is limited information within the district providing details of available sites and premises. It is suggested that the District Council should establish a system that allows for a regular up date of its sites and premises database to be maintained. Once a database has been established a more effective way of updating this would be to establish a standard template, possibly using an excel spreadsheet, which could be emailed to an individual contact based within key agencies operating in the district. In order to maintain details of sites and premises, the database would need to be up dated every 4 to 6 weeks.

8.5 Annual Business Survey

To maintain and build upon the information that has been collated, as part of this study, it is recommended that the District Council undertake an annual business survey. This will enable the District Council to monitor and identify how businesses are performing, to determine the key business sectors and size of companies' operating in the area. An annual survey will update existing and future business needs in relation to land and premises, business support and skills requirements. It will also enable progress to be monitored around how the future LDF and economic development strategies and priorities are performing in relation to achieving business needs requirements.

8.6 Economic Positioning Paper

Again building upon the baseline data that has been collated as part of this study, it is recommended that the District Council produces a yearly economic positioning paper. Using sources such as the Annual Business Enquiry database, the paper should aim to update the economic baseline position and activity of key business and employment sectors within the district.

8.7 Establishment of Land & Property Forum

Finally in order to supplement the annual business needs survey; it is recommended that the District Council establishes a Land and Property Forum. It is suggested that the forum may need to meet bi annually in the lead up to the development of the LDF and annually from then on. The remit of the group would be to act as a focus group to explore issues relating to particular employment sectors and existing and future employment land and property requirements, as well as giving consideration to matters around support infrastructure.

The West Midlands Regional Development Agency, Advantage West Midlands, has established a similar approach through its Regeneration Zone programme. In the West Midlands six Regeneration Zones have been established as key delivery mechanism. Within each of the Zones, property forums have been established comprising of public and private sector organisations and businesses. The role of the group is to establish the needs of businesses, to identify gaps in provision and set the priorities to be taken forward by the Regeneration Zone and its partners.

APPENDICES

LEAM Data Source Table

Glossary

	Indicator	Interpretation and Rationale	Source and Date
Scale	Population	Resident population	Census, 2001
	Business Ratable Value	Represents a professional view (by the Valuation Office) of the annual rent non-domestic (business) properties in an area would command if available on the open market. Is a good proxy measure for the aggregate commercial value of business floorspace in an area or local economy.	Valuation Office, 2000
	Employment	Total number employed	ABI employee analysis, NOMIS, 2002
Dynamism	Employment Change	Employment change over time.	ABI employee analysis, NOMIS, 1998-2002
	Change in Business Stock	Rate of growth or decline in the business base over time. The number of enterprises registered for VAT at the end of the year. Measure of entrepreneurial dynamism	VAT registrations/deregistrations by industry, NOMIS, 1998-2003
	Projected population change	Estimated population for 2008	Office of national statistics, 2003
Sector structure	Employment in Consumer Services	Percentage of local jobs in tourist/ consumer-based employment (SIC 52,55,92). Tourism and Consumer Services have been at the forefront of recent growth nationally. Particularly in many rural areas, tourism and consumer services are likely to continue to play a crucial role in underpinning future economic prosperity.	ABI employee analysis, NOMIS, 2002
	Employment in High Technology Manufacturing	Percentage employed in High Technology Manufacturing (defined by SIC codes 22, 244, 30, 32).	ABI employee analysis, NOMIS, 2002

	Employment in Knowledge Based Services	Percentage employed in 'knowledge based employment' (defined by SIC codes, 65, 66, 67, 72, 73, 74). Typically higher wage and higher value added, many of these sectors are at the forefront of national economic growth. Often closely correlated with presence of skilled Knowledge Workers.	ABI employee analysis, NOMIS, 2002
Enterprise	Business Formation rate	Number of business start-ups as a percentage of business stock. Average for two years. Rate of new business development.	VAT registrations/deregistrations by industry, NOMIS, 2002 - 2003
	Business Density	Number of businesses per 10,000 resident adults. A commonly used measure of enterprise and a high business density is a crude indicator of economic health.	VAT registrations/deregistrations by industry, NOMIS, 2003
	Self Employment	Employed individuals (who are not classified as employees) as a proportion of the total labour force (%). Often used as an indicator of entrepreneurial dynamism – though, high levels of self employment may also reflect the particulars of local industrial structure.	Census of Population, 2001
	Business population rate	Number of business start-ups per 10,000 working age population	VAT registrations/deregistrations by industry, NOMIS, 2002
Workforce	Knowledge workers	Proportion of the employed workforce engaged in managerial, professional or technical occupations (%). Knowledge Workers primarily produce, distribute or manipulate information. Typically, these are higher wage, higher skill occupations.	Census of Population, 2001
	Unskilled/ semi-skilled workers	Proportion of the employed workforce engaged in unskilled or semi-skilled occupations (%). Typically lower wage and lower skill, these occupations are primarily engaged in the manufacture of physical products or the delivery of tangible services.	Census of Population, 2001

	NVQ Level 4/5	Percentage of all working age population with NVQ Level qualifications (%). National Vocational Qualifications are work-related and competence based qualifications. NVQ Level 4/5 relates to: First degree, Higher degree, HNC, HND, Qualified Teacher status, Qualified Medical Doctor, Qualified Dentist, Qualified Nurse, Midwife, and Health Visitor.	Census of Population, 2001
	NVQ Level 1 or no qualifications	Percentage of all working age population with NVQ Level qualifications (%). National Vocational Qualifications are work-related and competence based qualifications. Level 1 relates to 1+ 'O' level passes, 1+ CSE/GCSE any grades, Foundation GNVQ.	Census of Population, 2001
	Economic Activity Rate	Percentage of the working age population who are economically active. Standard labour market performance measure.	NOMIS, 2002

Questionnaire

CONFIDENTIAL

Self-completion business questionnaire

ECOTEC Research and Consulting Ltd has been commissioned by **Craven District Council** to undertake a survey of businesses in Craven. The aim of this survey is to explore the needs of businesses in Craven District in terms of existing and future land and property requirements. . The information will inform Craven District Council of employers' requirements, and will be used to help determine the area's future employment land needs

We would be very grateful if you could spare 5-10 minutes to complete this questionnaire and **return it in the FREEPOST envelope provided no later than Friday 10th December 2004.** Your answers will be treated in the strictest confidence and will not be passed on to any third party.

Contact details

Name...
Position ………………………………………...
Name of business...
Contact Telephone number...

Background

1. Which of these best describes your business?

   Sole trader/ independent o
   Partnership o
   Private Limited Company o
   Public Limited Company o
   Other (Please Specify) ....

2. Which of the following categories does your business fall into?

   Office o
   Light industrial o
   Research and Development o
   General industrial o
   Storage or distribution o
   Other…………………………………………… o

3. How long has your business been in operation?

0-1 years	o
1-2 years	o
2-5 years	o
More than 5 years	o

4. How many people does your business employ?

5. Does your business operate from any other sites:

   a) Within Craven?
   b) Within Yorkshire?
   c) Within the UK?
   d) Elsewhere (please specify)

Previous Premises

If your business has moved during the past three years, please complete this section. If not, please go straight to the next section on "Current Premises".

6. If your business has moved during the past 3 years, where were you previously located?

Elsewhere within the same town/ village	o
Elsewhere in Craven District	o
Elsewhere in Yorkshire	o
Outside Yorkshire (please specify)………..	o

7. What were the reasons for your re-location? (tick any that apply)

End of lease	o
Expansion/ reduction in size of business	o
Required better quality premises	o
Cost	o
To be closer to customers	o
To be closer to suppliers	o
To be closer to workforce	o
To be closer to transport network	o

Other……………………………………………………….
Other………………………………………………………..

8. When you re-located, did you consider any locations other than the one you currently occupy?

    Yes o
    No o

9. If yes, which other locations did you consider?

    Elsewhere within the same town/ village o
    Elsewhere in Craven District o
    Elsewhere in Yorkshire o
    Outside Yorkshire o

10. Why did you choose your current location?

    Cost reasons o
    Suitable size o
    Proximity to workforce o
    Good quality environment o
    Facilities o
    To be closer to suppliers o
    Other………………………………………………………….
    Other…………………………………………………………..

Current Premises

11. What is the approximate size of your current site?

    0-1 acres (<0.5ha) o
    1.1- 2 acres (0.5-1 ha) o
    2.1- 5 acres (1.1- 2 ha) o
    5.1- 10 acres (2.1- 4 ha) o
    10.1- 20 acres (4.1- 8 ha) o
    20.1- 50 acres (8.1- 20 ha) o
    50.1 + acres (>20ha) o

12. What is the approximate area of floorspace of your current premises?

    1-500 sq ft (< 50m^2) o
    501-1000 sq ft (51- 93m^2) o
    1001- 2500 sq ft (94- 235m^2) o
    2501- 5000 sq ft (236- 465m^2) o
    5001- 10,000 sq ft (466- 930m^2) o

10,001- 20,000 sq ft (931- 1860m^2)	o

13. How long has your business been at its current location? (   ) years, (   ) months

0-1 years	o
1-2 years	o
2-5 years	o
More than 5 years	o

14. How satisfied are you with your current location?

Highly dissatisfied	Dissatisfied	Satisfied	Highly satisfied
o	o	o	o

15. Which of the following location factors do you consider to be either a positive or a negative aspect of your current premises?

	Positive Aspect	Negative Aspect
Proximity to customers	o	o
Proximity to suppliers	o	o
Proximity to transport links	o	o
Proximity to suitable workforce	o	o
Proximity to other related businesses	o	o
Environmental quality	o	o
Accessibility	o	o
Other……………………	o	o
Other……………………	o	o

16. How satisfied are you with the quality of your current premises?

Highly dissatisfied	Dissatisfied	Satisfied	Highly satisfied
o	o	o	o

17. Which of the following factors do you consider to be either a positive or a negative aspect of your current premises?

	Positive Aspect	Negative Aspect

Size	o	o
Opportunity for expansion	o	o
Broadband internet	o	o
Quality of premises	o	o
Parking	o	o
Environmental quality	o	o
Security	o	o
Storage facilities	o	o
Cost	o	o
Other……………………	o	o
Other……………………	o	o

18. What do you see as the principal problems facing businesses in Craven?

Skills shortages	o
Isolation	o
Lack of business support	o
Inadequate sites and premises	o
Poor transport infrastructure	o
Poor ICT infrastructure	o

Other……………………………………………………….

Other………………………………………………………..

The Future

18. Are you considering re-locating in the near future?

Yes	o
No	o

19. Where are you considering re-locating to?

Within the town/ village where you are based	o
Skipton	o
Settle	o
Bentham	o
Elsewhere within Craven District (please specify)	o
Within Yorkshire	o
Nationwide (please specify)	o

20. What are the principal reasons for you to consider relocating?

End of lease	o
Expansion in size of business	o
Reduction in size of business	o
Require better quality premises	o
Cost	o
To be closer to customers	o
To be closer to suppliers	o
To be closer to workforce	o
To be closer to transport network	o

Other……………………………………………………….

Other………………………………………………………..

21. Approximately what size of site are you looking to relocate to?

0-1 acres (<0.5ha)	o
1.1- 2 acres (0.5-1 ha)	o
2.1- 5 acres (1.1- 2 ha)	o
5.1- 10 acres (2.1- 4 ha)	o
10.1- 20 acres (4.1- 8 ha)	o
20.1- 50 acres (8.1- 20 ha)	o
50.1 + acres (>20ha)	o

22. Approximately what size of floorspace will you require?

1-500 sq ft (< 50m^2)	o
501-1000 sq ft (51- 93m^2)	o
1001- 2500 sq ft (94- 235m^2)	o
2501- 5000 sq ft (236- 465m^2)	o
5001- 10,000 sq ft (466- 930m^2)	o
10,001- 20,000 sq ft (931- 1860m^2)	o

Linkages and support

23. Where are your customers/ clients principally based?

Within the town/ village where you are based	o
Within Craven District	o
Within Yorkshire	o
Nationwide	o

Elsewhere (please specify)…………..   o

24. Where are your suppliers principally based?

Within the town/ village where you are based   o
Within Craven District   o
Within Yorkshire   o
Nationwide   o
Elsewhere (please specify)…………..   o

Other Information

How has employment at your business changed since 2000? …….

Increased   o
Remained the same   o
Decreased   o

25. How has your turnover changed since 2000?

Increased   o
Remained the same   o
Decreased   o

26. Are there any major factors that have affected your turnover and/ or staff numbers in the last four years?
....
....
....
....
....
....
....

Thank you for your assistance.

Please return your completed questionnaire in the FREEPOST envelope provided
no later than Friday 10th December-2004 .

If you have any questions, please contact David Eiser at ECOTEC on 0113 244 9845.

Key Stakeholder Consultations undertaken

	Economic Development Department, North Yorkshire County Council
	Yorkshire & Humber Business Link
James Stammer	Yorkshire Forward
Peter Stockton	Yorkshire Dales National Park
John Kennet	Harrogate and Craven Business Development Centre
Alistair McDowell	Westlakes & Co
Jeff Crabtree	Dacre, Sons & Hartley
Mike Wormauld	Philip Turners
Simon Butcher	Fleets Farm
Trevor Graveson	Graveson's Estate Agency
Roget Tempest	Rural Solutions
Amanda May	Broughton Hall Business Park
Richard Taylor	Pielle & Co
Joe Steele	Steele Properties
	Turners Estate Agent

Business Enquiries Register

Business Details

Date of Enquiry……………………………………………………………………….
Name of Company ....
Place of Origin...
Contact Name and Telephone number ....

Nature of Business

1 Number of people currently/looking to employ

2 Which of the following sectors does the business fall into

Call Centre o
Agricultural, Hunting. Fishing o
Manufacturing o
Distribution o
Construction o
Service Industry o
ICT o
Tourism & Leisure o
Retail o
Other Business Activities o
Sector unknown (Please Specify)
Other (Please Specify) ....

Nature of Enquiry

3 What is the nature of the enquiry?

Information only required o
Expansion o
New Start Up o
Relocation ……….. o
UK Start Up o
Other (Please specify) o

4 Details of enquiry?

Information Pack o

Sites & Premises Register	o
Signposting	o
Require development site	o
Require premises	o

Other……………………………………………………….

5 Development land enquiries (size of site required?)

0-1 acres	o
1.1 – 2 acres	o
2.1 – 5 acres	o
5.1 – 10 acres	o
10.1 – 20 acres	o
20.1 – 50 acres	o

6 Premise enquiries (amount of floorspace required?)

1-500 sq ft	o
501-1000 sq ft	o
1001- 2500 sq ft	o
2501- 5000 sq ft	o
5001- 10,000 sq ft	o
10,001- 20,000 sq ft	o

7 What type of property is required?

Industrial	o
Barn	o
Managed workspace	o
Office	o
Warehouse	o
Craft Workshop	o
Leisure & Retail	o
Land	o
Investment Property	o
Other Commercial	o

8 What is the preferred location?

Skipton	o
South Craven	o

Dales	o
Settle	o
North Craven	o

9 What is the company's timescale?

10 Any other requirements (specify)?

Source of Enquiry

11 Where was the enquiry generated from?

Yorkshire Forward	o
North Yorkshire CC	o
Direct Contact	o
Exhibition	o
Internal contact	o
Sub regional partner	o
Website	o
Marketing & publicity	o
Unspecified	o

Other Information