



Working towards a Core Strategy for Wiltshire

Future Employment Needs in Wiltshire – Employment Floorspace and Land forecasts

April 2011

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Executive Summary

On 6th July 2010 the Secretary of State for Communities and Local Government (CLG) revoked Regional Spatial Strategies by way of an order laid down by parliament. This would in effect revoke the employment land and housing targets set within the RSS. In order to update forecasted job increases and corresponding employment land requirements Wiltshire Council commissioned further forecasting works from Cambridge Econometrics. This would also provide more up to date evidence given the recent recession.

This paper therefore identifies the basic employment land that is required across Wiltshire during the period 2006 to 2026 for the forecasted increase in job numbers. This paper takes the forecast job increases and decreases by sector for east, west and north Wiltshire and translates this into a forecast net employment land requirement. This is undertaken in five year increments for the 3 areas (north, west, east Wiltshire) in order to assist business support planning. This paper does not look at existing commitments (those sites with planning permission for employment use or built out for 2006) nor does it account for more qualitative factors that can increase demand for employment land. The findings of this paper are summarised below.

Overall employment land requirement if north, west and east Wiltshire 2006-2026

Business Use Class	North Wiltshire	West Wiltshire	East Wiltshire	Total	
B1 Business	13.53	7.47	7.07	28.1	
B2 General industrial	-14.0	0.54	-	0.16	-13.6
B8 Storage and distribution	0.65	0.78	-	0.26	1.2
Total (all B use classes)	0.19	8.79	6.65	15.6	

Overall north, west and east Wiltshire are forecast to need an addition 15.6 ha of employment land for the period 2006 – 2026 to meet the forecast growth in employment. In addition south Wiltshire is forecast to need an additional 20.4 ha¹ of new employment land resulting in a need across Wiltshire of an additional 36 ha of employment land for forecast job growth. This takes account of net gains and losses and is based on gross internal areas.

North Wiltshire

North Wiltshire is forecast to experience job growth within mainly the service sector activities, most significantly in hotels and catering, computing services, professional services and other services. construction, education and health and social work will also grow substantially. Fourteen sectors are forecast to experience a decline with the most significant losses likely to be experienced from agriculture, food textiles and wood, electronics and public admin and defence. Currently the sectors of education and health and other business services provide the most employment. By 2026 the dominance of other business services will have increased. Over the period 2006-2026 north Wiltshire is predicted to experience a large loss of B2 general industrial space (55,984 sq m) whilst needing a increase in B1 business space of 94,739 sq m and a very slight increased required in B8 floorspace of 2,600 sq m resulting in a net employment space need of 41,355 sq m. When translated into a land requirement this results in a slight increased land requirement of 0.2 ha. This is split into a need for additional B1 employment ha floorspace of 13.5 ha, additional B8 floorspace of 0.7 ha and a loss of B2 floorspace of 14 ha.

During the period **2006 to 2011** there is expected to be a net loss of B use employment floorspace of 58,413 sqm and 1,985 B use jobs in north Wiltshire, with the only use class experiencing growth in this period being B8 storage and distribution which experiences an increase of 12 jobs and 780 sq m net floorspace. The specific sectors that experience growth during this period are predominantly construction and education and health. Those experiencing the most decline are food, textiles and wood, metals and engineering, electronics and public admin and defence. This translates into a net loss of employment land of around 13.9 ha during this period.

During the period **2011 to 2016** there is expected to be a net gain of employment floorspace of 21,666 sqm and 1,100 B use jobs in north Wiltshire. Other business services and hotels and catering experience a large increase in job numbers with construction and misc services also experiencing a notable increase. The sectors experiencing most decline are education and health, public admin and defence and agriculture. The

¹ See document entitled Future Employment Needs in south Wiltshire – Employment and Land forecasts/projections – January 2011.

use class during this period requiring the most floorspace is B1 business, B8 use only requires a small additional increase in floorspace of 390 sq m. This translates into a net gain of employment land of around 3.4 ha during this period.

During the period **2016 to 2021** there is expected to be a net gain of employment floorspace of 46,344 sqm and B use 2,441 jobs in north Wiltshire. Other business services, hotels and catering, construction and education and health experience a large increase in job numbers. Only 5 sectors are forecast to experience decline during this period including agriculture, metals and engineering and electronics. The sectors experiencing most decline are education and health, public admin and defence and agriculture. The use class during this period requiring the most floorspace is B1 business with an additional requirement for an additional 44,530 sq m. B2 and B8 uses only require a small additional increase in floorspace of 385 sq m and 1,430 sq m respectively. This translates into a net gain of employment land of around 6.8 ha during this period.

During the period **2021 to 2026** there is expected to be a net gain of employment floorspace of 31,758 sqm and 1,856 jobs in north Wiltshire. Other business services, hotels and catering and construction experience a large increase in job numbers. 10 sectors are forecast to experience decline during this period with most decline forecast to be experienced in agriculture, metals and engineering and electronics. The use class during this period requiring the most floorspace is B1 business with an additional requirement for an additional 37,870sq m. B2 uses experience a decline in required floorspace of 6,112 sq m. B8 uses experience no increase or decline. This translates into a net gain of employment land of around 3.9 ha during this period.

West Wiltshire

West Wiltshire is forecast to experience job growth within mainly service sector activities, most significantly in hotels and catering, other business services and education and health, the sector within 'other business services' expected to see the most growth are computing services and professional services. Nine sectors are forecast to experience a decline with the most significant losses likely to be experienced from agriculture, food, textiles and wood, construction and chemicals and minerals. Currently the sectors of education and health and other business services provide the most employment. By 2026 the dominance of other business services and education and health will have increased, with hotels and catering also experiencing a substantial percentage increase in its dominance from 9.4% to 12.8%. Over the period 2006-2026 west Wiltshire is predicted to experience a net increase in B1 business space of 52,281 sq m and a small net increase in both B2 and B8 floorspace of 2,176 sq m and 3,120 sq m respectively.

Due to the different development density of different employment uses this results in a net increase in employment land required in west Wiltshire of 8.8 ha, split into 7.5 ha of B1 land, 0.5 ha of B2 land and 0.8 ha of B8 land.

During the period **2006 to 2011** there is expected to be a net loss of B use employment floorspace of 50,135 sqm and 2,007 jobs in west Wiltshire. No use class experiences growth during this period. However some one specific sector does experience growth during this period namely education and health. Those experiencing the most decline are food, textiles and wood, other business services and construction. This translates into a net loss of employment land of around 10.3 ha during this period.

During the period **2011 to 2016** there is expected to be a net gain of employment floorspace of 28,850 sqm and 1,239 B use jobs in west Wiltshire. Other business services and hotels and catering experience a large increase in job numbers with chemicals and minerals, manufacturing and misc services also experience a notable increase. The sectors experiencing most decline are education and health and agriculture. The use class during this period requiring the most floorspace is B1 business requiring 15,522 sq m with B2 requiring 12,288 sq m. B8 use only requires a small additional increase in floorspace of 1,040 sq m. This translates into a net gain of employment land of around 5.5 ha during this period.

During the period **2016 to 2021** there is expected to be a net gain of employment floorspace of 47,953 sqm and 2,188 B use jobs in west Wiltshire. Other business services, hotels and catering, and education and health experience a large increase in job numbers. Only 7 sectors are forecast to experience decline with most of these losses expected in agriculture. The use class during this period requiring the most floorspace is B1 business with an additional requirement for an additional 32,745 sq m. B8 uses only require a small additional increase in floorspace of 3,640 sq m. There is an additional requirement of 11,568 sq m of B2 floorspace. This translates into a net gain of employment land of around 8.5 ha during this period.

During the period **2021 to 2026** there is expected to be a net gain of employment floorspace of 30,910 sqm and 1,522 B use jobs in west Wiltshire. Other business services and hotels and catering are forecast to experience the most growth. Nine sectors are forecast to experience decline during this period with most decline forecast to be experienced in agriculture. The use class during this period requiring the most floorspace is B1 business with an additional requirement for an additional 25,290 sq m. B2 and B8 uses only require an additional increase in floorspace of 4,320 sq m and 1,300 sq m respectively. This translates into a net gain of employment land of around 5.0 ha during this period.

East Wiltshire

East Wiltshire is forecast to experience job growth within mainly service sector activities, most significantly in hotels and catering, other business services, professional services and education and health. The sector of other business services is the main growth area and the sectors within this area expected to see the most growth are computing services and professional services. Ten sectors are forecast to experience a decline with the most significant losses likely to be experienced from agriculture and public admin and defence. Metals and engineering, electronics and construction will also experience a decline. Currently the sectors of education and health, public admin and defence and other business services provide the most employment. By 2026 the dominance of other business services and education and health will have increased, with hotels and catering also experiencing a substantial percentage increase in its dominance from 6.6% to 9.9%. Over the period 2006-2026 east Wiltshire is predicted to experience a net increase in B1 business space of 47,488 sq m and a small net decrease in both B2 and B8 floorspace of 640 sq m and 1,040 sq m respectively.

Due to the different development density of different employment uses this results in a net increase in employment land required in east Wiltshire of 6.7 ha.

During the period **2006 to 2011** there is expected to be a net gain of employment floorspace of 1,401 sqm and 258 B use jobs in east Wiltshire. This growth is forecast to be within the B1 use class. Other business services and education and health experience a large increase in job numbers. The sectors experiencing most decline are construction and public admin and defence. The use class during this period requiring the most floorspace is B1 business requiring 8,399 sq m with B2 and B8 experiencing a decline of 5,568 sq m and 1,430 sq m respectively. This translates into a net loss of employment land of around 0.5 ha during this period.

During the period **2011 to 2016** there is expected to be a net gain of employment floorspace of 9,596 sqm and 459 B use jobs in east Wiltshire. Other business services experiences the greatest increase with misc services and manufacturing nes also experience quite large increases. The sectors experiencing most decline are education and health, public admin and defence and agriculture. The use class during this period requiring the most floorspace is B1 business requiring 6,956 sq m with B2 requiring 2,640 sq m. B8 use experiences no net increase during this period. This translates into a net gain of employment land of around 1.7 ha during this period.

During the period **2016 to 2021** there is expected to be a net gain of employment floorspace of 20,822 sqm and 1,090 B use jobs in east Wiltshire. Other business services, hotels and catering, and misc services experience a large increase in job numbers. Only 7 sectors are forecast to experience decline with most of these losses expected in public admin and defence and agriculture. The use class during this period requiring the most floorspace is B1 business with an additional requirement for an additional 19,536 sq m. B8 uses only require a small additional increase in floorspace of 390 sq m. There is an additional requirement of 896 sq m of B2 floorspace. This translates into a net gain of employment land of around 3.1 ha during this period.

During the period **2021 to 2026** there is expected to be a net gain of employment floorspace of 15,989 sqm and 833 B use jobs in east Wiltshire. Other business services and hotels and catering are forecast to experience the most growth. Seven sectors are forecast to experience decline during this period with most decline forecast to be experienced in agriculture. The use class during this period requiring the most floorspace is B1 business with an additional requirement for an additional 14,597 sq m. B2 uses only require an additional increase in floorspace of 1,392 sq m. B8 uses experience no net increase. This translates into a net gain of employment land of around 2.4 ha during this period.

1.0 Introduction

- 1.1 On 6 July 2010 the Secretary of State for Communities and Local government (CLG) revoked Regional Spatial Strategies by way of an order laid before parliament. In a letter from DCLG containing guidance to all Local Planning Authorities (6 July 2010) it was confirmed that 'Local Planning Authorities will be responsible for establishing the right level of housing provision in their area, and identifying long-term supply of housing land without the burden of regional housing targets'. As a result of this revocation Wiltshire Council felt it prudent to re-assess whether the correct level of both housing and employment was being planned for within the Wiltshire.
- 1.2 The draft Regional Spatial Strategy for the south West required Wiltshire to deliver around 34,400 jobs on 116 ha of employment land across the Salisbury (37ha), Chippenham (42 ha) and Trowbridge and Warminster (37 ha) Travel to Work Areas ('TTWA') (1991 TTWA's). This level of growth was determined by forecasting work undertaken by Cambridge Econometrics some 4 years ago in November 2006. Since these figures were forecast the UK (together with many other countries in the world) has fallen into recession and Wiltshire has not been immune to this impact with the area experiencing considerable job loss, for example Job Seekers allowance claimants have risen from 2,355 in January 2006, peaking at 7,315 in August 2009, to 5,840 at March 2011 (Source: Office for National Statistics, www.nomisweb.co.uk). It was therefore felt prudent to review the job numbers that were being planned for as well as housing numbers to ensure the correct level of employment land is being planned for.
- 1.3 Further forecasting has been commissioned by Wiltshire Council and been undertaken by Cambridge Econometrics to ensure up to date evidence is used in the preparation of the Wiltshire Core Strategy and the review of the South Wiltshire Core Strategy proposed submission draft. This approach is also supported by the Guidance Note on Employment Land Reviews as part of the Plan monitor and manage approach (para 5.41) Cambridge Econometrics have projected job growth with their Multi-Local Area Local Economy Forecasting Model (LEFM) model. The modelling was undertaken in September 2010. The modelling has been undertaken on the former district basis across Wiltshire for the former districts of Salisbury, Kennet, North Wiltshire and West Wiltshire (North, South, East and West Wiltshire) to aide directing employment to the correct geographical locations. The modelling has not been undertaken at a lower geographical level than the former district area as data is not available at a lower geography for example on a community area basis.
- 1.4 Employment numbers have been projected for Wiltshire for the inclusive years 2006-2026 based on industry sector projections. This papers now identifies the job sector distribution and employment land required for north, west and east Wiltshire and focuses on the B use classes, namely B1 (Business), B2 (General Industrial) and B8 (storage or Distribution). This paper translates the new projected job growth into a new employment land requirement. The paper then splits the job and land requirement into 5 year increments to support land use and business support planning. This provides a more frequent view of when the needs and / or surpluses of employment and corresponding land will take place, and which industries will be affected. This uses the same methodology as that used within the Salisbury District Employment Land Review (ELR). The Examination in Public into the South Wiltshire Core Strategy in the spring of 2010 implied that using the ELR would be a sound methodology to base employment land assumptions upon. In addition statements provided to the Examination by the Council confirmed that both the Salisbury Employment Land Review and the Wiltshire Workspace and Employment Land Strategy used industry standard job density and development density assumptions to translate predominantly B class employment uses to land take. This work has been undertaken for the whole period (2006 – 2026) as well as for 5 year increments to assist business planning.
- 1.5 This paper in effect replaces part of the Demand Forecasting and Apportionment section of the Wiltshire Workspace and Employment Land Strategy (August 2009). The sections it replaces are:
 - Para 6.2.2 Employment Projections and
 - para 6.2.2 Net Floorspace and Land Requirements

2.0 Employment Forecasts

2.1 The latest projection from Cambridge Econometrics indicates a growth of 27,570 jobs between 2006 and 2026 in Wiltshire (compared to 34,424 required by the RSS).

Table 1: Latest Employment Projections for Wiltshire 2006-2026

	2006	2026	Growth over period
South	61,020	71,450	10,430
East	33,690	37,270	3,580
North	61,250	69,690	8,440
West	59,130	64,250	5,120
Total	215,090	242,660	27,570

"Note rounding errors may occur.
Source: Cambridge Econometrics.

2.2 This represents a reduction in the forecast job growth across Wiltshire of 6,854 jobs compared to those job numbers that Wiltshire was required to deliver within the Regional Spatial Strategy Proposed Submission Draft and the amendments are shown below.

Table 2: Comparison of Draft SWRSS (2006) employment forecasts with updated job forecasts from Cambridge Econometrics

	Draft RSS job forecast (2006-2026)	Cambridge Econometrics job forecast for Wiltshire areas 2006-2026)	Difference to RSS
South	13,900	10,430	-3,470
East*	2,624	3,580	956
North	6,200	8,440	2,240
West	11,700	5,120	-6,580
Total	34,424	27,570	-6,854

*the former Kennet (East) area was not provided with a job figure within the RSS and fell within the Swindon TTWA. The economic study of Kennet district undertaken by Atkins in August 2006 identified that the former district should plan for an increase of 1312 jobs over just a 10 year period (2006 to 2026). To provide comparable data this figure has been doubled to cover a 20 year period (2006-2026).

2.3 Table 2 does however identify that two areas as a result of the removal of the RSS will now experience a slight increase in job numbers (compared to RSS) however this may not necessarily result in an increase land requirement due changing sector projections / forecasts. For example the RSS did not specifically identify any job requirement for the East Wiltshire area and the RSS figure expressed for East Wiltshire in table 2 was that expressed in the economic study undertaken for the former Kennet district Council for a ten year period from 2006-2016 and doubled in order to generate a comparable 20 year period. With respect to the north Wiltshire area, the increase can be explained by differing geographies. The RSS provided job numbers for the Chippenham Travel to Work Area (1991), which geographically consists of a much smaller area than that covered by the former North Wiltshire District Council Area. Therefore addition jobs can be partly explained by an extended time period of the Wiltshire Core Strategy (2006-2026) and different geographies that the data is based on.

3.0 Employment Sector Forecasts for the 20 year period 2006-2026

Please Note: The following section is split into the geographic areas of East, North and West Wiltshire. The workings for south Wiltshire can be found in the document STU/11 B (Future Employment Needs in south Wiltshire – Employment and Land forecasts/projections – January 2011).

4.0 Employment Sector Forecasts for the 20 year period 2006-2026 – North Wiltshire

4.1 The latest 20 year projection produced by Cambridge Econometrics, to 2026, is broken down into industry sectors (see Table 3 below). The annual data from Cambridge Econometrics from 2006 to 2026 for north Wiltshire is provided in Appendix 1. The same forecasts are broken down into 5 year increments to show how employment land needs to be delivered over time (Table 4).

Table 3: North Wiltshire - Employment sector forecasts in five year increments between 2006-2026

	Numbers in Employment 2006	% of employment 2006	Numbers in Employment 2026	% of employment 2026	Change in numbers 2006-2026
Agriculture etc	1,850	3.0%	1,300	1.9%	-550
Coal	-	0.0%	-	0.0%	0
Oil & natural gas etc	-	0.0%	-	0.0%	0
Other mining	160	0.3%	60	0.1%	-100
Food, drink & tobacco	1,340	2.2%	430	0.6%	-910
Text., cloth. & leather	160	0.3%	80	0.1%	-80
Wood & paper	370	0.6%	210	0.3%	-160
Printing & publish.	780	1.3%	640	0.9%	-140
Manufactured fuels	-	0.0%	-	0.0%	0
10 Pharmaceuticals	70	0.1%	140	0.2%	70
Chemicals & MM fibres	200	0.3%	60	0.1%	-140
Rubber & plastic products	1,110	1.8%	1,130	1.6%	20
Non-metal. mineral products	520	0.8%	340	0.5%	-180
Basic metals	50	0.1%	70	0.1%	20
Metal prod.	710	1.2%	370	0.5%	-340
Mechanical engineering	1,690	2.8%	1,060	1.5%	-630
Electronics	560	0.9%	450	0.6%	-110
Electrical Engineering & Instruments	1,380	2.3%	300	0.4%	-1080
Motor vehicles	60	0.1%	20	0.0%	-40
Other transport equip.	10	0.0%	10	0.0%	0
Other manufacturing	520	0.8%	920	1.3%	400
Electricity	40	0.1%	60	0.1%	20
Gas Supply	-	0.0%	-	0.0%	0
Water Supply	10	0.0%	10	0.0%	0
Construction	4,650	7.6%	7,360	10.6%	2710

	Numbers in Employment 2006	% of employment 2006	Numbers in Employment 2026	% of employment 2026	Change in numbers 2006-2026
Distribution	4,150	6.8%	4,350	6.2%	200
Retailing	4,950	8.1%	5,200	7.5%	250
Hotels & catering	3,990	6.5%	6,410	9.2%	2420
Land Transport	2,790	4.6%	2,520	3.6%	-270
Water Transport	-	0.0%	-	0.0%	0
Air Transport	10	0.0%	50	0.1%	40
Communications	690	1.1%	850	1.2%	160
Banking & finance	510	0.8%	780	1.1%	270
Insurance	60	0.1%	150	0.2%	90
Computing Services	2,190	3.6%	4,490	6.4%	2300
Professional Services	4,430	7.2%	7,330	10.5%	2900
Other business services	3,320	5.4%	3,400	4.9%	80
Public admin. & defence	4,580	7.5%	3,400	4.9%	-1180
Education	5,370	8.8%	6,120	8.8%	750
Health & Social Work	4,310	7.0%	4,930	7.1%	620
Other services	3,660	6.0%	4,690	6.7%	1030
Total	61,250	100.0%	69,690	100.0%	8440

Source: Cambridge Econometrics, September 2010

- 4.2 Major employment growth is therefore forecast in service sector activities, most significantly in hotels and catering, computing services, professional services and other services. There is also a large increase in jobs predicted in the construction sector. Fourteen sectors are forecast to experience decline in north Wiltshire between 2006 and 2026 with the most significant loss of jobs will be experienced in Agriculture, food drink and tobacco, public admin and defence, mechanical engineering and electrical engineering and instruments.
- 4.3 Table 4 below shows the above sector distribution broken down into 5 year increments which shows us when job growth is forecast to increase or decline within sectors. This shows that there will be very slow economic growth until 2016 at which point the economy should recover from the current recession at a faster rate. However it should be noted that between 2011 and 2016 hotels and catering and computing and professional services do experience an increase in job numbers.

Table 4: North Wiltshire - Employment sector forecasts in five year increments between 2006-2026

Industry Sector	Year					Change in numbers 2006-2026
	2006	2011	2016	2021	2026	
Agriculture etc	1,850	2,140	1,860	1,590	1,300	- 550
Coal	-	-	-	-	-	-
Oil & natural gas etc	-	-	-	-	-	-
Other mining	160	70	70	70	60	- 100
Food,drink & tobacco	1,340	590	560	510	430	- 910
Text., cloth. & leather	160	110	100	100	80	- 80
Wood & paper	370	250	240	230	210	- 160

Industry Sector	Year					Change in numbers 2006-2026	
	2006	2011	2016	2021	2026		
Printing & publish.	780	620	630	650	640	-	140
Manufactured fuels	-	-	-	-	-		-
10 Pharmaceuticals	70	130	130	150	140		70
Chemicals & MM fibres	200	80	80	70	60	-	140
Rubber & plastic products	1,110	1,040	1,120	1,140	1,130		20
Non-metal. mineral products	520	380	370	350	340	-	180
Basic metals	50	90	90	80	70		20
Metal prod.	710	500	460	420	370	-	340
Mechanical engineering	1,690	1,380	1,350	1,200	1,060	-	630
Electronics	560	540	530	500	450	-	110
Electrical Engineering & Instruments	1,380	610	500	410	300	-	1,080
Motor vehicles	60	30	30	20	20	-	40
Other transport equip.	10	10	10	10	10		-
Other manufacturing	520	550	670	800	920		400
Electricity	40	70	60	60	60		20
Gas Supply	-	-	-	-	-		-
Water Supply	10	10	10	10	10		-
Construction	4,650	6,030	6,360	7,030	7,360		2,710
Distribution	4,150	4,210	4,240	4,350	4,350		200
Retailing	4,950	5,290	5,170	5,270	5,200		250
Hotels & catering	3,990	4,120	4,790	5,640	6,410		2,420
Land Transport	2,790	2,490	2,530	2,540	2,520	-	270
Water Transport	-	-	-	-	-		-
Air Transport	10	20	30	40	50		40
Communications	690	790	810	860	850		160
Banking & finance	510	650	690	730	780		270
Insurance	60	100	120	140	150		90
Computing Services	2,190	2,370	2,850	3,600	4,490		2,300
Professional Services	4,430	4,600	5,340	6,380	7,330		2,900
Other business services	3,320	3,190	3,260	3,390	3,400		80
Public admin. & defence	4,580	3,730	3,380	3,430	3,400	-	1,180
Education	5,370	6,340	560	5,940	6,120		750
Health & Social Work	4,310	4,780	4,660	4,850	4,930		620
Other services	3,660	3,640	3,900	4,410	4,690		1,030
Total	61,250	61,550	62,760	66,970	69,690		8,440

Source: Cambridge Econometrics, September 2010

4.4 The Cambridge Econometrics projections undertaken in September 2010 for the Council has been provided in 41 separate sectors. However, in order to ensure a robust methodology and compare Industrial Classifications with the originally published Salisbury Employment Land Review 2007 and corresponding draft RSS sector classifications, these Industrial Classifications have been put into 20 Sector Industry Classifications. The table below identifies how the 41 sectors have been placed into the 20 sectors. Please note that the 2007 Salisbury Employment Land Review only has 19 sectors as it does not look specifically at retail jobs whereas the latest data from Cambridge Econometrics

includes this sector which is shown separately for transparency although specifically dealt with through other evidence. In addition, retail jobs are not expected to be located on employment land as this is provided for separately within the Wiltshire Core Strategy and informed by its own evidence in the form of the Retail Study. .

Table 5: North Wiltshire - Employment sector forecasts in five year increments between 2006-2026

Industry Sector	Salisbury Employment Land Review Sector Industrial Classifications
Agriculture etc	Agriculture etc
Coal	Mining and Quarrying
Oil & natural gas etc	
Other mining	
Food,drink & tobacco	Food, textiles and wood
Text., cloth. & leather	
Wood & paper	
Printing & publish.	Printing and publishing
Manufactured fuels	Chemicals and minerals
10 Pharmaceuticals	
Chemicals & MM fibres	
Rubber & plastic products	
Non-metal. mineral products	
Basic metals	Metals and Engineering
Metal prod.	
Mechanical engineering	
Electronics	Electronics
Electrical Engineering & Instruments	
Motor vehicles	Transport Equipment
Other transport equip.	
Other manufacturing	Manufacturing nes
Electricity	Electricity, gas and water
Gas Supply	
Water Supply	
Construction	Construction
Distribution	Distribution
Retailing	N/A Retail
Hotels & catering	Hotels and Catering
Land Transport	Transport and Communications
Water Transport	
Air Transport	
Communications	
Banking & finance	Banking and Insurance
Insurance	
Computing Services	Other Business Services
Professional Services	
Other business services	
Public admin. & defence	Public Admin and Defence
Education	Education and Health
Health & Social Work	

Industry Sector	Salisbury Employment Land Review Sector Industrial Classifications
Other services	Misc services

4.5 The forecast job growth has therefore been translated into the 20 sector requirement (see table 6) and shows the sectors with the greatest growth to be hotels and catering, other business services, education and health and misc services. The sectors experiencing the greatest decline are food, textiles and wood, electronics and public admin and defence.

Table 6: North Wiltshire - Employment sector forecasts between 2006-2026

	Numbers in Employment 2006	% of employment 2006	Numbers in Employment 2026	% of employment 2026	Change in numbers 2006-2026
Agriculture etc	1850	3.0%	1300	1.9%	-550
Mining and Quarrying	160	0.3%	60	0.1%	-100
Food, textiles and wood	1870	3.1%	720	1.0%	-1150
Printing and publishing	780	1.3%	640	0.9%	-140
Chemicals and minerals	1900	3.1%	1670	2.4%	-230
Metals and Engineering	2450	4.0%	1500	2.2%	-950
Electronics	1940	3.2%	750	1.1%	-1190
Transport Equipment	70	0.1%	30	0.0%	-40
Manufacturing nes	520	0.8%	920	1.3%	400
Electricity, gas and water	50	0.1%	70	0.1%	20
Construction	4650	7.6%	7360	10.6%	2710
Distribution	4150	6.8%	4350	6.2%	200
N/A (Retail)	4950	8.1%	5200	7.5%	250
Hotels and Catering	3990	6.5%	6410	9.2%	2420
Transport and Communications	3490	5.7%	3420	4.9%	-70
Banking and Insurance	570	0.9%	930	1.3%	360
Other Business Services	9940	16.2%	15220	21.8%	5280
Public Admin and Defence	4580	7.5%	3400	4.9%	-1180
Education and Health	9680	15.8%	11050	15.9%	1370
Misc services	3660	6.0%	4690	6.7%	1030
Total	61250	100.0%	69690	100.0%	8440

4.6 The 20 sector forecast has also been broken down into 5 year increments to show how jobs are projected to be delivered over time.

Table 7: North Wiltshire - Employment sector forecasts in five year increments between 2006-2026

	2006	2011	2016	2021	2026	Change
Agriculture etc	1850	2140	1860	1590	1300	-550
Mining and Quarrying	160	70	70	70	60	-100
Food, textiles and wood	1870	950	900	840	720	-1150
Printing and publishing	780	620	630	650	640	-140
Chemicals and minerals	1900	1630	1700	1710	1670	-230
Metals and Engineering	2450	1970	1900	1700	1500	-950
Electronics	1940	1150	1030	910	750	-1190
Transport Equipment	70	40	40	30	30	-40
Manufacturing nes	520	550	670	800	920	400
Electricity, gas and water	50	80	70	70	70	20
Construction	4650	6030	6360	7030	7360	2710
Distribution	4150	4210	4240	4350	4350	200
NA - Retail	4950	5290	5170	5270	5200	250
Hotels and Catering	3990	4120	4790	5640	6410	2420
Transport and Communications	3490	3300	3370	3440	3420	-70
Banking and Insurance	570	750	810	870	930	360
Other Business Services	9940	10160	11450	13370	15220	5280
Public Admin and Defence	4580	3730	3380	3430	3400	-1180
Education and Health	9680	11120	10420	10790	11050	1370
Misc services	3660	3640	3900	4410	4690	1030
Total	61250	61550	62760	66970	69690	8440

4.7 Forecast employment floorspace requirements 2006-2026 in north Wiltshire

4.8 Using the employment projections to 2026, assumptions can be made about the type of property (by planning use class) required for each industry sectors. This provides an indication of whether each particular industry will have an additional requirement for floorspace, or if there will be a surplus of floor space, by 2026.

4.9 'Employment density' is the number of square metres required per employee and differs for different categories of employment. For the purpose of this review standard employment density ratios have been used based on work undertaken by Arup Economics and Planning on behalf of English Partnerships in their study 'Employment Densities: A full Guide, July 2001 (available from <http://www.englishpartnerships.co.uk/researchreports.htm>). The government guidance entitled 'Employment Land Reviews: Guidance Note' recommends that this Employment Densities guide produced by Arups is an appropriate guide to use (Annex D). This guide has been used for consistency and comparison purposes as both the Salisbury Employment Land Review and the Wiltshire Workspace and Employment Land Strategy – Final Strategy Document (August 2009) uses this guide to determine employment densities. It was produced for the former English Partnerships agency. It should however be noted that the Homes and Communities Agency has recently updated this guidance with a new version entitled 'Employment Densities Guide – 2nd Edition 2010' available from <http://www.info4local.gov.uk/documents/publications/1789435>. Any differences between the documents and suggested floorspace per employee is explained in Appendix 4.

4.10 The Arup study considers a range of employment uses, which have been simplified for the purposes of this exercise and can be expressed as:

B1 Office - 18.5 sq m per employee (Gross Internal floorspace)
 B2 Industrial – 32 sq m per employee (Gross Internal floorspace)
 B8 Warehouse / storage / distribution – 85 sq m per employee (Gross External Area)

- 4.11 It is important to note that 'employment floorspace' represents built floorspace of potentially more than one storey in height. It does not indicate overall site size, or even a 'footprint'. Calculations to determine the actual land requirements are undertaken later in this document.
- 4.12 Table 8 and Table 9 below sets out the result of converting employment change to floorspace for the period 2006 to 2026, with Table 8 identifying additional floorspace requirement and Table 9 identifying any surplus floorspace with Table 6 identifying the overall floorspace requirement.
- 4.13 Please note that these forecasts above are all concerned only with employment that requires B1, B2 and B8 land and floorspace uses, and not all employment. Hence, for example in north Wiltshire the total forecast additional B employment to 2026 is 7,392, whereas the overall figure net for employment growth (requiring a variety of land uses including B1/2/8) is 8,440.

Table 8: Additional forecast employment floorspace requirements for north Wiltshire 2006-2026

Industry Sector	Forecast additional employment to 2026	Assumption of land use requirement, by planning use class	No. of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Manufacturing	400	100% B2 general industrial	400	32	12,800
Electricity, gas and water	20	10% B1 business 90% sui generis	2 N/A	18.5 N/A	37 N/A
Construction	2710	10% B2 general industrial 90% sui generis	271 N/A	32 N/A	8,672 N/A
Distribution	200	40% A1 retail 20% B1 business 20% B2 general industrial 20% B8 storage and distribution	N/A 40 40 40	N/A 18.5 32 65	N/A 740 1,280 2,600
NA - Retail	250	100% A1 Retail	N/A	N/A	N/A
Hotels and Catering	2420	30% A3 restaurants and cafes 20% A4 drinking establishments 40% C1 hotels 10% B2 general industrial	N/A N/A N/A 242	N/A N/A N/A 32	N/A N/A N/A 7,744
Banking and Insurance	360	80% B1 business 20% A2 financial and professional services	288 N/A	18.5 N/A	5,328 N/A
Other Business Services	5280	100% B1 business	5,280	18.5	97,680
Education and Health	1370	20% B1 business 40% C2 residential institutions 40% D1 Non-residential institutions	274 N/A N/A	18.5 N/A N/A	5,069 N/A N/A
Misc services	1030	50% B1 business 25% D2 assembly and leisure	515 N/A	18.5 N/A	9,528 N/A

		25%	sui generis	N/A	N/A	N/A
			B1 Jobs	6,399	B1 Floorspace	118,382
			B2 Jobs	953	B2 Floorspace	30,496
			B8 Jobs	40	B8 Floorspace	2,600
			TOTAL JOBS	7,392	TOTAL FLOORSPACE	151,478

4.14 Table 8 forecasts that overall 151,478 sq m of additional B use employment floorspace is required to 2026 with the majority of this being required in the B1 use class.

Table 9: Employment floorspace forecast to be surplus to requirements for north Wiltshire by 2026

Industry Sector	Forecast additional employment to 2026	Assumption of land use requirement, by planning use class			Number of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required
Agriculture etc	-550	100%		sui generis	N/A	N/A	N/A
Mining and Quarrying	-100	100%	B2	General Industrial	- 100	32	- 3,200
Food, textiles and wood	-1150	25%	B2	general industrial	- 288	32	- 9,200
		75%		sui generis	N/A	N/A	N/A
Printing and publishing	-140	50%	B1	business	- 70	18.5	- 1,295
		50%	B2	general industrial	- 70	32	- 2,240
Chemicals and minerals	-230	10%	B2	general industrial	- 23	32	- 736
		90%		sui generis	N/A	N/A	N/A
Metals and Engineering	-950	100%	B2	general industrial	- 950	32	- 30,400
Electronics	-1190	100%	B2	general industrial	- 1,190	32	- 38,080
Transport Equipment	-40	100%	B2	general industrial	- 40	32	- 1,280
Transport and Communications	-70	40%	B1	business	- 28	18.5	- 518
		60%	B2	general industrial	-42	32	- 1,344
Public Admin and Defence	-1180	100%	B1	business	- 1,180	18.5	- 21,830
				B1 Jobs	- 1,278	B1 Floorspace	- 23,643
				B2 Jobs	- 2,703	B2 Floorspace	- 86,480
				B8 Jobs	-	B8 Floorspace	-
				TOTAL JOBS	- 3,981	TOTAL FLOORSPACE	- 110,123

4.15 Calculations have also been done to estimate the employment floorspace that will be surplus to requirements by 2026, based on the forecast loss of employment in various industries. Table 9 forecasts that overall 110,123 sq m of B use employment floorspace will be surplus by 2026 with the majority of this surplus being in the B2 use class.

Table 10: Summary of balance of net employment floorspace requirements for north Wiltshire

Business Use Class	Additional Floorspace Requirement	Surplus floorspace	Overall change in requirement to 2026
B1 Business	118,382	- 23,643	94,739
B2 General industrial	30,496	- 86,480	- 55,984
B8 Storage and distribution	2,600	-	2,600
Total (all B use classes)	151,478	- 110,123	41,355

4.16 Table 10 identifies that a net B employment floorspace of 41,355 sq m is required in North Wiltshire from 2006-2026. Table 11 identifies a loss of floorspace from 2006-2011 with a gain after this time.

Table 11: Additional Floorspace requirement

Business Use Class	2006-2011	2011-2016	2016-2021	2021-2026	Additional floorspace requirement Total
B1 Business	- 6,457	18,796	44,530	37,870	94,739
B2 General industrial	- 52,736	2,480	384	- 6,112	- 55,984
B8 Storage and distribution	780	390	1,430	-	2,600
Total (all B use classes)	58,413	21,666	46,344	31,758	41,355

4.17 Table 12 identifies that over the period 2006-2026 north Wiltshire will experience a net gain in B use jobs of around 3,410 with other jobs on top of this being forecast in other use classes such as hotels and catering and construction.

Table 12: Summary of balance of net B use employment jobs for north Wiltshire

Business Use Class	2006-2011	2011-2016	2016-2021	2021-2026	Additional B job requirement
B1 Business	- 349	1,016	2,407	2,047	5,121
B2 General industrial	- 1,648	78	12	- 191	- 1,750
B8 Storage and distribution	12	6	22	-	40
Total (all B use classes)	1,985	1,100	2,441	1,856	3,412

4.18 Table 10 and 11 shows the balance of net floorspace requirements for north h Wiltshire as well as a summary, Table 12 shows how this relates to gains or losses in jobs. Table 10 identifies that overall 41,355 sq m of additional B use employment floorspace is required in north Wiltshire to 2026 with most of this being in the B1 use class with a large loss in B2 and a very small increase in B8.

4.19 Forecast employment floorspace requirements, five yearly increments

4.20 To support land use and business support planning, the additional and surplus employment floorspace predications have been calculated in five year increments between 2006 and 2026. This provides a more frequent view of when the needs and/or surpluses will take place, and which industries will be affected.

4.21 2006-2011

Table 13: Additional forecast employment floorspace requirements for north Wiltshire by 2006-2011

Industry Sector	Forecast additional employment to 2026	Assumption of land use requirement, by planning use class			Number of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Agriculture etc	290	100%		Sui generis	N/A	N/A	N/A
Manufacturing nes	30	100%	B2	General Industrial	30	32	960
Electricity, Gas and Water	30	10%	B1	Business	3	18.5	56
		90%		Sui Generis	N/A	N/A	N/A
Construction	1380	10%	B2	General Industrial	138	32	4,416
		90%		Sui Generis	N/A	N/A	N/A
Distribution	60	40%	A1	Retail	N/A	N/A	N/A
		20%	B1	Business	12	18.5	222
		20%	B2	General Industrial	12	32	384
		20%	B8	Storage and distribution	12	65	780
NA/Retail	340	100%	A1	Retail	N/A	N/A	N/A
Banking and Insurance	180	80%	B1	Business	144	18.5	2,664
		20%	A2	Financial and Professional Services	N/A	N/A	N/A
Other Business Services	220	100%	B1	Business	220	18.5	4,070
Hotels and Catering	130	30%	A3	restaurants and cafes	N/A	N/A	N/A
		20%	A4	drinking establishments	N/A	N/A	N/A
		40%	C1	hotels	N/A	N/A	N/A
		10%	B2	general industrial	13	32	416
Education and Health	1,440	20%	B1	Business	288	18.5	5,328
		40%	C2	Residential institutions	N/A	N/A	N/A
		40%	D1	Non-residential institutions	N/A	N/A	N/A
				B1 Jobs	667	B1 Floorspace	12,340
				B2 Jobs	193	B2 Floorspace	6,176
				B8 Jobs	12	B8 Floorspace	780
TOTAL JOBS					872	TOTAL FLOORSPACE	19,296

Table 14: Surplus forecast employment floorspace requirements for north Wiltshire by 2006-2011

Industry Sector	Forecast loss of employment to 2026	Assumption of land use requirement, by planning use class			Nor of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)	
Food Textiles and wood	-920	25%	B2	General Industrial	-230	32	- 7,360	
		75%		Sui Generis	N/A	N/A	N/A	
Printing and publishing	-160	50%	B1	Business	-80	18.5	- 1,480	
		50%	B2	General Industrial	-80	32	- 2,560	
Metals and Engineering	-480	100%	B2	General Industrial	-480	32	- 15,360	
Electronics	-790	100%	B2	General Industrial	-790	32	- 25,280	
Transport Equipment	-30	100%	B2	General Industrial	-30	32	- 960	
Mining and Quarrying	-90	100%	B2	General Industrial	-90	32	- 2,880	
Chemicals and Minerals	-270	10%	B2	General Industrial	-27	32	- 864	
		90%		Sui generis	N/A	N/A	N/A	
Public Admin and Defence	-850	100%	B1	Business	-850	18.5	- 15,725	
Transport and Communications	-190	40%	B1	Business	-76	18.5	- 1,406	
		60%	B2	General Industrial	-114	32	- 3,648	
Misc Services	-20	50%	B1	business	-10	18.5	- 185	
		25%	D2	assembly and leisure	N/A	N/A	N/A	
		25%		sui generis	N/A	N/A	N/A	
					B1 Jobs	- 1,016	B1 Floorspace	- 18,796
					B2 Jobs	- 1,841	B2 Floorspace	- 58,912
					B8 Jobs	0	B8 Floorspace	0
TOTAL JOBS					- 2,857	TOTAL FLOORSPACE	- 77,708	

Table 15: Summary of balance of net employment floorspace requirements for north Wiltshire

Business Use Class	Additional Floorspace Requirement	Surplus floorspace	Overall change in requirement to 2026
B1 Business	12,340	- 18,796	- 6,457
B2 General industrial	6,176	- 58,912	- 52,736
B8 Storage and distribution	780	-	780
Total (all B use classes)	19,296	- 77,708	- 58,413

2011-2016

Table 16: Additional forecast employment floorspace requirements for north Wiltshire - 2011-2016

Industry Sector	Forecast additional of employment to 2026	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
		Percentage	Use Class	Use Description			
Printing and publishing	10	50%	B1	Business	5	18.5	92.5
		50%	B2	General Industrial	5	32	160
Chemicals and Minerals	70	10%	B2	General Industrial	7	32	224
		90%		Sui Generis	N/A	N/A	N/A
Manufacturing	120	100%	B2	General Industrial	120	32	3840
Construction	330	10%	B2	General Industrial	33	32	1056
		90%		Sui Generis	N/A	N/A	N/A
Distribution	30	40%	A1	Retail	N/A	N/A	N/A
		20%	B1	Business	6	18.5	111
		20%	B2	General Industrial	6	32	192
		20%	B8	Storage and distribution	6	65	390
Hotels and Catering	670	30%	A3	Restaurants and cafes	N/A	N/A	N/A
		20%	A4	Drinking establishments	N/A	N/A	N/A
		40%	C1	Hotels	N/A	N/A	N/A
		10%	B2	General industrial	67	32	2144
Transport and Communication	70	40%	B1	Business	28	18.5	518
		60%	B2	General Industrial	42	32	1344
Banking and Insurance	60	80%	B1	Business	48	18.5	888
		20%	A2	Financial and Professional Services	N/A	N/A	N/A
Other Business Services	1290	100%	B1	Business	1290	18.5	23865
Misc Services	260	50%	B1	Business	130	18.5	2405
		25%	D2	Assembly and leisure	N/A	N/A	N/A
		25%		Sui generis	N/A	N/A	N/A
B1 Jobs					1,507	B1 Floorspace	27,880
B2 Jobs					280	B2 Floorspace	8,960
B8 Jobs					6	B8 Floorspace	390
TOTAL JOBS					1,793	TOTAL FLOORSPACE	37,230

Table 17: Surplus forecast employment floorspace requirements for north Wiltshire by 2011-2016

Industry Sector	Forecast surplus employment to 2026	Assumption of land use requirement, by planning use class			Number of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)	
Agriculture etc	-280	100%		Sui generis	N/A	N/A	N/A	
Food Textiles and wood	-50	25%	B2	General Industrial	-12.5	32	-	400
		75%		Sui Generis	N/A	N/A		N/A
Metals and Engineering	-70	100%	B2	General Industrial	-70	32	-2240	
Electronics	-120	100%	B2	General Industrial	-120	32	-3840	
Electricity, Gas and Water	-10	10%	B1	Business	-1	18.5	-	19
		90%		Sui Generis	N/A	N/A		N/A
N/A Retail	-120	100%	A1	Retail	N/A	N/A	N/A	
Public Admin and Defence	-350	100%	B1	Business	-350	18.5	-6475	
Education and Health	-700	20%	B1	Business	-140	18.5	-2590	
		40%	C2	Residential institutions	N/A	N/A	N/A	
		40%	D1	Non-residential institutions	N/A	N/A	N/A	
B1 Jobs					-	B1 Floorspace	-	9,084
B2 Jobs					491	B2 Floorspace	-	6,480
B8 Jobs					203	B8 Floorspace		0
B8 Jobs					0	B8 Floorspace		0
TOTAL JOBS					- 694	TOTAL FLOORSPACE	-	15,564

Table 18: Summary of balance of net employment floorspace requirements for north Wiltshire 2011-2016

Business Use Class	Additional Floorspace Requirement	Surplus floorspace	Overall change in requirement to 2026
B1 Business	27,880	- 9,084	18,796
B2 General industrial	8,960	- 6,480	2,480
B8 Storage and distribution	390	-	390
Total (all B use classes)	37,230	- 15,564	21,666

2016 – 2021

Table 19: Forecast additional employment floorspace requirements for north Wiltshire 2016-2021

Industry Sector	Forecast additional of employment to 2026	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Chemicals and Minerals	10	10%	B2	General Industrial	1	32	32
		90%		Sui generis	N/A	N/A	N/A
Printing and publishing	20	50%	B1	Business	10	18.5	185
		50%	B2	General Industrial	10	32	320
Manufacturing nes	130	100%	B2	General Industrial	130	32	4160
Construction	670	10%	B2	General Industrial	67	32	2144
		90%		Sui Generis	N/A	N/A	N/A
Distribution	110	40%	A1	Retail	N/A	N/A	N/A
		20%	B1	Business	22	18.5	407
		20%	B2	General Industrial Storage and distribution	22	32	704
		20%	B8		22	65	1430
NA/Retail	100	100%	A1	Retail	N/A	N/A	N/A
Hotels and Catering	850	30%	A3	restaurants and cafes	N/A	N/A	N/A
		20%	A4	drinking establishments	N/A	N/A	N/A
		40%	C1	hotels	N/A	N/A	N/A
		10%	B2	general industrial	85	32	2720
Transport and Communication	70	40%	B1	Business	28	18.5	518
		60%	B2	General Industrial	42	32	1344
Banking and Insurance	60	80%	B1	Business	48	18.5	888
		20%	A2	Financial and Professional Services	N/A	N/A	N/A
Other Business Services	1920	100%	B1	Business	1920	18.5	35520
Public Admin and Defence	50	100%	B1	Business	50	18.5	925
Education and Health	370	20%	B1	Business	74	18.5	1369
		40%	C2	Residential institutions	N/A	N/A	N/A
		40%	D1	Non-residential institutions	N/A	N/A	N/A
Misc Services	510	50%	B1	business	255	18.5	4717.5
		25%	D2	assembly and leisure	N/A	N/A	N/A
		25%		sui generis	N/A	N/A	N/A
B1 Jobs					2,407	B1 Floorspace	44,530
B2 Jobs					357	B2 Floorspace	11,424
B8 Jobs					22	B8 Floorspace	1430

TOTAL JOBS	2,786	TOTAL FLOORSPACE	57,384
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Table 20: Surplus forecast employment floorspace requirements for north Wiltshire 2016-2021

Industry Sector	Forecast surplus employment to 2026	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Agriculture etc	-270	100%		Sui generis	N/A	N/A	N/A
Food, textiles and wood	-60	25%	B2	General Industrial	-15	32	-480
		75%		Sui generis	N/A	N/A	N/A
Metals and Engineering	-200	100%	B2	General Industrial	-200	32	-6400
Electronics	-120	100%	B2	General Industrial	-120	32	-3840
Transport Equipment	-10	100%	B2	General Industrial	-10	32	-320
				B1 Jobs	-	B1 Floorspace	-
				B2 Jobs	-	B2 Floorspace	-
				B8 Jobs	345	B8 Floorspace	11,040
					0		0
TOTAL JOBS					- 345	TOTAL FLOORSPACE	- 11,040

Table 21: Summary of balance of net employment floorspace requirements for north Wiltshire 2016-2021

Business Use Class	Additional Floorspace Requirement	Surplus floorspace	Overall change in requirement to 2026
B1 Business	44,530	-	44,530
B2 General industrial	11,424	- 11,040	384
B8 Storage and distribution	1,430	-	1,430
Total (all B use classes)	57,384	- 11,040	46,344

2021-2026

Table 22: Forecast additional employment floorspace requirements for north Wiltshire 2021-2026

Industry Sector	Forecast additional of employment to 2026	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Manufacturing nes	120	100%	B2	General Industrial	120	32	3840
Construction	330	10%	B2	General Industrial	33	32	1056
		90%		Sui Generis	N/A	N/A	N/A
Hotels and Catering	770	30%	A3	restaurants and cafes	N/A	N/A	N/A
		20%	A4	drinking establishments	N/A	N/A	N/A
		40%	C1	hotels	N/A	N/A	N/A
		10%	B2	general industrial	77	32	2464
Banking and Insurance	60	80%	B1	Business	48	18.5	888
		20%	A2	Financial and Professional Services	N/A	N/A	N/A
Other Business Services	1850	100%	B1	Business	1850	18.5	34225
Education and Health	260	20%	B1	Business	52	18.5	962
		40%	C2	Residential institutions	N/A	N/A	N/A
		40%	D1	Non-residential institutions	N/A	N/A	N/A
Misc Services	280	50%	B1	Business	140	18.5	2590
		25%	D2	Assembly and leisure	N/A	N/A	N/A
		25%		Sui generis	N/A	N/A	N/A
B1 Jobs					2,090	B1 Floorspace	38,665
B2 Jobs					230	B2 Floorspace	7,360
B8 Jobs					0	B8 Floorspace	0
TOTAL JOBS					2,320	TOTAL FLOORSPACE	46,025

Table 23: Surplus forecast employment floorspace requirements for north Wiltshire 2021-2026

Industry Sector	Forecast surplus employment to 2026	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Agriculture etc	-290	100%		Sui generis	N/A	N/A	N/A
Food, textiles and wood	-120	25%	B2	General Industrial	-30	32	-960
		75%		Sui generis	N/A	N/A	N/A
Printing and publishing	-10	50%	B1	Business	-5	18.5	-92.5
		50%	B2	General Industrial	-5	32	-160
Chemicals and Minerals	-40	10%	B2	General Industrial	-4	32	-128
		90%		Sui generis	N/A	N/A	N/A
Metals and Engineering	-200	100%	B2	General Industrial	-200	32	-6400
Public Admin and Defence	-30	100%	B1	Business	-30	18.5	-555
Electronics	-160	100%	B2	General Industrial	-160	32	-5120
Transport Equipment	-10	100%	B2	General Industrial	-10	32	-320
N/A - Retail	-70	100%	A1	Retail	N/A	N/A	N/A
Transport and Communication	-20	40%	B1	Business	-8	18.5	-148
		60%	B2	General Industrial	-12	32	-384
				B1 Jobs	-	B1 Floorspace	-
				43			796
				B2 Jobs	-	B2 Floorspace	-
				421			13,472
				B8 Jobs	0	B8 Floorspace	0
				TOTAL JOBS	-	TOTAL FLOORSPACE	-
				464			14,268

Table 24: Summary of balance of net employment floorspace requirements for north Wiltshire 2021-2026

Business Use Class	Additional Floorspace Requirement (sqm)	Surplus floorspace (sqm)	Overall change in requirement to 2026 (sqm)
B1 Business	38,665	- 796	37,870
B2 General industrial	7,360	- 13,472	6,112
B8 Storage and distribution	-	-	-
Total (all B use classes)	46,025	- 14,268	31,758

4.21 A detailed breakdown of the five yearly changes in employment by industry sectors is therefore given in tables 13 to 24 above. The higher period of job (2,411 jobs) and floorspace growth is predicted to be between 2016 and 2021 when 46,344 sq m of additional floorspace is forecast to be required.

4.22 For the other 5 year increments between 2006 and 2011 jobs are expected to be lost resulting in a loss in employment space of 58,413 sq m. During the period 2011-2016 job growth is predicted to be around 1,100 requiring an additional 21,666 sq m of floorspace. During the 2021 to 2026 period

job growth again slows slightly with only 1,856 jobs being created requiring 31,758 sq m of floorspace.

4.23 Forecast employment land requirements

4.24 The employment floorspace predictions explained in the previous section represent built floorspace. This can now be taken a stage further using development density assumptions to forecast the actual amount of employment land that is required in the future.

4.25 The 'development density' is an assumption of site coverage that differing types of land use require. The average site coverage allows for a mix of development styles and number of building storeys. For example the site coverage for B1 office is taken as 70% and accounts for a mix of out of town and town/city centre developments, plus a mixed number of storeys. For the purpose of this review, standard development density assumptions have been used, based on work undertaken by DTZ for the South West of England Regional Development Agency. The average development densities that have been used for employment uses are:

B1 office – 70% Site coverage

B2 industrial – 40% site coverage

B8 – Warehouse/storage/distribution – 40% site coverage

4.26 The additional employment land requirement to 2026, for north Wiltshire is provided in Table 25 below. The forecasts show that given the loss of B2 floorspace, which is more land intensive than say B1 uses, there is little need for additional employment land when looked at statistically and in effect any new employment should be accommodated on existing sites. Discussion regarding delivery employment land based on more qualitative needs is provided in Topic Paper 8 Economy.

Table 25: North Wiltshire: Additional employment land requirement to 2026

Business Use Class	Additional floorspace requirement 2006-2026	Assumption of development density - site coverage	Therefore land space requirement is in sqm	Land requirement in hectares 2006-2026
B1 Business	94,739	70%	135,341	13.53
B2 General industrial	- 55,984	40%	- 139,960	- 14.00
B8 Storage and distribution	2,600	40%	6,500	0.65
Total (all B use classes)	41,355			0.19

Table 26: North Wiltshire: Additional employment land requirement 2006-2011

Business Use Class	2006-2011	Assumption of development density - site coverage	Therefore land space requirement is in sqm	Land requirement in hectares 2011-2016
B1 Business	- 6,457	70%	- 9,223.57	- 0.92
B2 General industrial	- 52,736	40%	- 131,840.00	- 13.18
B8 Storage and distribution	780	40%	1,950.00	0.20
Total (all B use classes)	-58412.5		-139113.6	-13.9

Table 27: North Wiltshire: Additional employment land requirement 2011-2016

Business Use Class	2011-2016	Assumption of development density - site coverage	Therefore land space requirement is in sqm	Land requirement in hectares 2011-2016
B1 Business	18,796	70%	26,851.43	2.69
B2 General industrial	2,480	40%	6,200.00	0.62
B8 Storage and distribution	390	40%	975.00	0.10
Total (all B use classes)	21,666		34026.4	3.4

Table 28: North Wiltshire: Additional employment land requirement 2016-2021

Business Use Class	2016-2021	Assumption of development density - site coverage	Therefore land space requirement is in sqm	Land requirement in hectares 2011-2016
B1 Business	44,530	70%	63,613.57	6.36
B2 General industrial	384	40%	960.00	0.10
B8 Storage and distribution	1,430	40%	3,575.00	0.36
Total (all B use classes)	3,378		68148.6	6.8

Table 29: North Wiltshire: Additional employment land requirement 2021-2026

Business Use Class	2021-2026	Assumption of development density - site coverage	Therefore land space requirement is in sqm	Land requirement in hectares 2011-2016
B1 Business	37,870	70%	54,099.29	5.41
B2 General industrial	- 6,112	40%	- 15,280.00	- 1.53
B8 Storage and distribution	-	40%	-	-
Total (all B use classes)	2,772		38819.3	3.9

4.27 Table 26 to 29 provides a breakdown of employment land requirements into five year periods from 2006 to 2026 for north Wiltshire. This identifies that no additional employment land is needed in the period 2006-2011 with north Wiltshire experiencing a heavy loss of jobs equating to around 14 ha of employment land. Demand increases after 2011. Between 2011 and 2016 around 3.4 ha is forecast to be needed rising to 6.8 ha forecast between 2016 and 2021 falling again to an increase of just 3.4 hectares between 2021 and 2026.

5.0 Employment Sector Forecasts for the 20 year period 2006-2026 – West Wiltshire

5.1 The latest 20 year projection produced by Cambridge Econometrics, to 2026, is broken down into industry sectors (see Table 3 below). The annual data from Cambridge Econometrics from 2006 to 2026 for west Wiltshire is provided in Appendix 2. The same forecasts are broken down into 5 year increments to show how employment land needs to be delivered over time (Table 4).

Table 30: West Wiltshire - Employment sector between 2006-2026

	Numbers in Employment 2006	% of employment 2006	Numbers in Employment 2026	% of employment 2026	Change in numbers 2006-2026
Agriculture etc	1,330	2.2%	400	0.6%	-930
Coal	-	0.0%	0	0.0%	0
Oil & natural gas etc	-	0.0%	0	0.0%	0
Other mining	30	0.1%	30	0.0%	0
Food, drink & tobacco	1,500	2.5%	1000	1.6%	-500
Text., cloth. & leather	210	0.4%	80	0.1%	-130
Wood & paper	380	0.6%	210	0.3%	-170
Printing & publish.	480	0.8%	440	0.7%	-40
Manufactured fuels	-	0.0%	0	0.0%	0
10 Pharmaceuticals	-	0.0%	0	0.0%	0
Chemicals & MM fibres	530	0.9%	590	0.9%	60
Rubber & plastic products	1,630	2.8%	1410	2.2%	-220
Non-metal. mineral products	280	0.5%	140	0.2%	-140
Basic metals	20	0.0%	10	0.0%	-10
Metal prod.	370	0.6%	220	0.3%	-150
Mechanical engineering	510	0.9%	460	0.7%	-50
Electronics	60	0.1%	30	0.0%	-30
Electrical Engineering & Instruments	290	0.5%	100	0.2%	-190
Motor vehicles	120	0.2%	130	0.2%	10
Other transport equip.	310	0.5%	300	0.5%	-10
Other manufacturing	1,970	3.3%	2380	3.7%	410
Electricity	100	0.2%	100	0.2%	0
Gas Supply	-	0.0%	10	0.0%	10
Water Supply	20	0.0%	0	0.0%	-20
Construction	3,250	5.5%	2860	4.5%	-390
Distribution	4,650	7.9%	4890	7.6%	240
Retailing	5,700	9.6%	5910	9.2%	210
Hotels & catering	5,570	9.4%	8200	12.8%	2630
Land Transport	1,480	2.5%	1630	2.5%	150
Water Transport	10	0.0%	10	0.0%	0
Air Transport	-	0.0%	10	0.0%	10
Communications	1,830	3.1%	1780	2.8%	-50
Banking & finance	560	0.9%	580	0.9%	20
Insurance	50	0.1%	80	0.1%	30
Computing Services	1,200	2.0%	1980	3.1%	780
Professional Services	5,010	8.5%	5830	9.1%	820

	Numbers in Employment 2006	% of employment 2006	Numbers in Employment 2026	% of employment 2026	Change in numbers 2006-2026
Other business services	3,720	6.3%	4430	6.9%	710
Public admin. & defence	2,110	3.6%	1910	3.0%	-200
Education	4,360	7.4%	4950	7.7%	590
Health & Social Work	5,950	10.1%	7110	11.1%	1160
Other services	3,540	6.0%	4050	6.3%	510
Total	59,130	100.0%	64,250	100.0%	5120

Source: Cambridge Econometrics, September 2010

5.2 Major employment growth is therefore forecast in service sector activities, most significantly in Hotels and Catering, Computing services, professional services and health and education. Seventeen sectors are forecast to experience decline in north Wiltshire between 2006 and 2026 with the most significant loss of jobs will be experienced in Agriculture, food drink and tobacco and construction.

Table 31: West Wiltshire - Employment sector forecasts in five year increments between 2006-2026

Industry Sector	Year					Change in numbers 2006-2026
	2006	2011	2016	2021	2026	
Agriculture etc	1,330	1,380	940	630	400	- 930
Coal	-	-	-	-	0	-
Oil & natural gas etc	-	-	-	-	0	-
Other mining	30	50	40	40	30	-
Food,drink & tobacco	1,500	920	1,020	960	1000	- 500
Text., cloth. & leather	210	110	100	90	80	- 130
Wood & paper	380	250	240	220	210	- 170
Printing & publish.	480	390	410	440	440	40
Manufactured fuels	-	-	-	-	0	-
10 Pharmaceuticals	-	-	-	-	0	-
Chemicals & MM fibres	530	810	730	660	590	60
Rubber & plastic products	1,630	1,110	1,330	1,410	1410	- 220
Non-metal. mineral products	280	180	160	150	140	- 140
Basic metals	20	20	10	10	10	- 10
Metal prod.	370	290	260	240	220	- 150
Mechanical engineering	510	600	590	520	460	- 50
Electronics	60	40	40	40	30	- 30
Electrical Engineering & Instruments	290	170	150	130	100	190
Motor vehicles	120	140	150	130	130	10
Other transport equip.	310	320	330	330	300	- 10
Other manufacturing	1,970	1,710	1,950	2,190	2380	410
Electricity	100	100	100	100	100	-
Gas Supply	-	20	20	10	10	10
Water Supply	20	10	10	-	0	20

Industry Sector	Year					Change in numbers 2006-2026
	2006	2011	2016	2021	2026	
Construction	3,250	2,680	2,750	2,850	2860	- 390
Distribution	4,650	4,430	4,510	4,790	4890	240
Retailing	5,700	6,000	5,860	5,990	5910	210
Hotels & catering	5,570	5,270	6,120	7,210	8200	2,630
Land Transport	1,480	1,640	1,660	1,650	1630	150
Water Transport	10	10	10	10	10	-
Air Transport	-	-	-	-	10	10
Communications	1,830	1,570	1,640	1,790	1780	- 50
Banking & finance	560	460	490	530	580	20
Insurance	50	50	60	70	80	30
Computing Services	1,200	1,160	1,350	1,650	1980	780
Professional Services	5,010	3,400	4,030	4,950	5830	820
Other business services	3,720	4,150	4,240	4,410	4430	710
Public admin. & defence	2,110	2,130	1,980	1,960	1910	- 200
Education	4,360	5,060	4,880	4,930	4950	590
Health & Social Work	5,950	6,640	6,370	6,820	7110	1,160
Other services	3,540	3,500	3,650	3,920	4050	510
Total	59,130	56,770	58,180	61,830	64,250	5,120

Source: Cambridge Econometrics, September 2010

- 5.3 Table 31 above shows the above sector distribution broken down into 5 year increments which shows us when job growth is forecast to increase or decline within sectors. This shows that there will be very slow economic growth until 2016 at which point the economy should recover from the current recession at a faster rate. However it should be noted that between 2011 and 2016 hotels and catering and computing and professional services do experience an increase in job numbers.
- 5.4 The Cambridge Econometrics forecasts undertaken in September 2010 for the Council has been provided in 41 separate sectors. However, in order to ensure a robust methodology and compare Industrial Classifications with the originally published Salisbury Employment Land Review 2007 and corresponding draft RSS sector classifications, these Industrial Classifications have been put into 20 Sector Industry Classifications. The table below identifies how the 41 sectors have been placed into the 20 sectors. Please note that the 2007 Salisbury Employment Land review only has 19 sectors as it does not look specifically at retail jobs whereas the latest data from Cambridge Econometrics includes this sector which is shown separately for transparency although specifically dealt with through other evidence. In addition, retail jobs are not expected to be located on employment land as this is provided for separately within the Wiltshire Core Strategy and informed by its own evidence in the form of the Retail Study.

Table 32: West Wiltshire - Forecast job growth translated into the 20 sector requirement

Industry Sector	Salisbury Employment Land Review Sector Industrial Classifications
Agriculture etc	Agriculture etc
Coal	Mining and Quarrying
Oil & natural gas etc	
Other mining	
Food,drink & tobacco	Food, textiles and wood

Industry Sector	Salisbury Employment Land Review Sector Industrial Classifications
Text., cloth. & leather	
Wood & paper	
Printing & publish.	Printing and publishing
Manufactured fuels	
10 Pharmaceuticals	
Chemicals & MM fibres	Chemicals and minerals
Rubber & plastic products	
Non-metal. mineral products	
Basic metals	
Metal prod.	Metals and Engineering
Mechanical engineering	
Electronics	Electronics
Electrical Engineering & Instruments	
Motor vehicles	Transport Equipment
Other transport equip.	
Other manufacturing	Manufacturing nes
Electricity	
Gas Supply	Electricity, gas and water
Water Supply	
Construction	Construction
Distribution	Distribution
Retailing	N/A Retail
Hotels & catering	Hotels and Catering
Land Transport	
Water Transport	Transport and Communications
Air Transport	
Communications	
Banking & finance	Banking and Insurance
Insurance	
Computing Services	
Professional Services	Other Business Services
Other business services	
Public admin. & defence	Public Admin and Defence
Education	Education and Health
Health & Social Work	
Other services	Misc services

Table 33: West Wiltshire - Employment sector forecasts in five year increments between 2006-2026

	2006	2011	2016	2021	2026	change
Agriculture etc	1330	1380	940	630	400	-930
Mining and Quarrying	30	50	40	40	30	0
Food, textiles and wood	2090	1280	1360	1270	1290	-800
Printing and publishing	480	390	410	440	440	-40
Chemicals and minerals	2440	2100	2220	2220	2140	-300
Metals and Engineering	900	910	860	770	690	-210
Electronics	350	210	190	170	130	-220
Transport Equipment	430	460	480	460	430	0
Manufacturing nes	1970	1710	1950	2190	2380	410
Electricity, gas and water	120	130	130	110	110	-10
Construction	3250	2680	2750	2850	2860	-390
Distribution	4650	4430	4510	4790	4890	240
NA - Retail	5700	6000	5860	5990	5910	210
Hotels and Catering	5570	5270	6120	7210	8200	2630
Transport and Communications	3320	3220	3310	3450	3430	110
Banking and Insurance	610	510	550	600	660	50
Other Business Services	9930	8710	9620	11010	12240	2310
Public Admin and Defence	2110	2130	1980	1960	1910	-200
Education and Health	10310	11700	11250	11750	12060	1750
Misc services	3540	3500	3650	3920	4050	510
Total	59130	56770	58180	61830	64250	5120

5.5 The forecast job growth has therefore been translated into the 20 sector requirement and shows the sectors with the greatest growth to be Hotels and Catering, Other Business Services and Education and Health. The sectors experiencing the greatest decline are agriculture, food, textiles and wood, electronics and public admin and defence.

5.6 The 20 sector forecast has also been broken down into 5 year increments to show how jobs are projected to be delivered over time.

Table 34: West Wiltshire - Employment sector forecasts between 2006-2026

	Numbers in Employment 2006	% of employment 2006	Numbers in Employment 2026	% of employment 2026	Change in numbers 2006-2026
Agriculture etc	1330	2.2%	400	0.6%	-930
Mining and Quarrying	30	0.1%	30	0.0%	0
Food, textiles and wood	2090	3.5%	1290	2.0%	-800
Printing and publishing	480	0.8%	440	0.7%	-40
Chemicals and minerals	2440	4.1%	2140	3.3%	-300
Metals and Engineering	900	1.5%	690	1.1%	-210
Electronics	350	0.6%	130	0.2%	-220
Transport Equipment	430	0.7%	430	0.7%	0
Manufacturing nes	1970	3.3%	2380	3.7%	410
Electricity, gas and water	120	0.2%	110	0.2%	-10
Construction	3250	5.5%	2860	4.5%	-390
Distribution	4650	7.9%	4890	7.6%	240
N/A (Retail)	5700	9.6%	5910	9.2%	210
Hotels and Catering	5570	9.4%	8200	12.8%	2630
Transport and Communications	3320	5.6%	3430	5.3%	110
Banking and Insurance	610	1.0%	660	1.0%	50
Other Business Services	9930	16.8%	12240	19.1%	2310
Public Admin and Defence	2110	3.6%	1910	3.0%	-200
Education and Health	10310	17.4%	12060	18.8%	1750
Misc services	3540	6.0%	4050	6.3%	510
Total	59130	100.0%	64250	100.0%	5120

5.7 Forecast employment floorspace requirements 2006-2026 in west Wiltshire

5.8 Using the employment projections to 2026, assumptions can be made about the type of property (by planning use class) required for each industry sectors. This provides an indication of whether each particular industry will have an additional requirement for floorspace, or if there will be a surplus of floor space, by 2026.

5.9 'Employment density' is the number of square metres required per employee and differs for different categories of employment. For the purpose of this review standard employment density ratios have been used based on work undertaken by Arup Economics and Planning on behalf of English Partnerships in their study 'Employment Densities: A full Guide, July 2001 (available from <http://www.englishpartnerships.co.uk/researchreports.htm>). The government guidance entitled 'Employment Land Reviews: Guidance Note' recommends that this Employment Densities guide produced by Arups is an appropriate guide to use (Annex D). This guide has been used for consistency and comparison purposes as both the Salisbury Employment Land Review and the Wiltshire Workspace and Employment Land Strategy – Final Strategy Document (August 2009) uses this guide to determine employment densities. It was produced for the former English Partnerships agency. It should however be noted that the Homes and Communities Agency has recently updated this guidance with a new version entitled 'Employment Densities Guide – 2nd Edition 2010' available from <http://www.info4local.gov.uk/documents/publications/1789435>. Any differences between the documents and suggested floorspace per employee is explained in Appendix 4.

5.10 The Arup study considers a range of employment uses, which have been simplified for the purposes of this exercise and can be expressed as:

B1 Office - 18.5 sq m per employee (Gross Internal floorspace)

B2 Industrial – 32 sq m per employee (Gross Internal floorspace)

B8 Warehouse / storage / distribution – 85 sq m per employee (Gross External Area)

- 5.11 It is important to note that 'employment floorspace' represents built floorspace of potentially more than one storey in height. It does not indicate overall site size, or even a 'footprint'. Calculations to determine the actual land requirements are undertaken later in this document.
- 5.12 Table 35 and Table 36 below sets out the result of converting employment change to floorspace for the period 2006 to 2026, with Table 35 identifying additional floorspace requirement and Table 36 identifying any surplus floorspace with Table 37 identifying the overall floorspace requirement.
- 5.13 Please note that these forecasts above are all concerned only with employment that requires B1, B2 and B8 land and floorspace uses, and not all employment. Hence, for example in west Wiltshire the total forecast additional employment to 2026 is 2,942, whereas the overall figure net for employment growth (requiring a variety of land uses including B1/2/8) is 5,120.

Table 35: Additional forecast employment floorspace requirements for west Wiltshire by 2026

Industry Sector	Forecast additional employment to 2026	Assumption of land use requirement, by planning use class			Number of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Manufacturing nes	410	100%	B2	general industrial	410	32	13,120
Distribution	240	40%	A1	retail	N/A	N/A	N/A
		20%	B1	business	48	18.5	888
		20%	B2	general industrial	48	32	1,536
		20%	B8	storage and distribution	48	65	3,120
NA - Retail	210	100%	A1	Retail	N/A	N/A	N/A
Hotels and Catering	2630	30%	A3	restaurants and cafes	N/A	N/A	N/A
		20%	A4	drinking establishments	N/A	N/A	N/A
		40%	C1	hotels	N/A	N/A	N/A
		10%	B2	general industrial	263	32	8,416
Transport and Communications	110	40%	B1	business	44	18.5	814
		60%	B2	general industrial	66	32	2,112
Banking and Insurance	50	80%	B1	business	40	18.5	740
		20%	A2	financial and professional services	N/A	N/A	N/A
Other Business Services	2310	100%	B1	business	2,310	18.5	42,735
Education and Health	1750	20%	B1	business	350	18.5	6,475
		40%	C2	residential institutions	N/A	N/A	N/A
		40%	D1	Non-residential institutions	N/A	N/A	N/A
Misc services	510	50%	B1	business	255	18.5	4,718
		25%	D2	assembly and leisure	N/A	N/A	N/A
		25%		sui generis	N/A	N/A	N/A
				B1 Jobs	3,047	B1 Floorspace	56,370
				B2 Jobs	787	B2 Floorspace	25,184
				B8 Jobs	48	B8 Floorspace	3,120
				TOTAL JOBS	3,882	TOTAL FLOORSPACE	84,674

5.14 Table 35 forecasts that overall 84,674 sq m of additional B use employment floorspace is required to 2026 with the majority of this being required in the B1 use class.

Table 36: Employment floorspace forecast to be surplus to requirements for west Wiltshire by 2026

	Forecast additional employment to 2026	Assumption of land use requirement, by planning use class			Number of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required
Agriculture etc	-930	100%		sui generis	N/A	N/A	N/A
Food, textiles and wood	-800	25%	B2	general industrial	- 200	32	- 6,400
		75%		sui generis	N/A	N/A	N/A
Printing and publishing	-40	50%	B1	business	- 20	18.5	- 370
		50%	B2	general industrial	- 20	32	- 640
Chemicals and minerals	-300	10%	B2	general industrial	- 30	32	- 960
		90%		sui generis	N/A	N/A	N/A
Metals and Engineering	-210	100%	B2	general industrial	- 210	32	- 6,720
Electronics	-220	100%	B2	general industrial	- 220	32	- 7,040
Electricity, gas and water	-10	10%	B1	business	- 1	18.5	- 19
		90%		sui generis	N/A	N/A	N/A
Construction	-390	10%	B2	general industrial	- 39	32	- 1,248
		90%		sui generis	N/A	N/A	N/A
Public Admin and Defence	-200	100%	B1	business	- 200	18.5	- 3,700
B1 Jobs					- 221	B1 Floorspace	- 4,089
B2 Jobs					- 719	B2 Floorspace	- 23,008
B8 Jobs					-	B8 Floorspace	-
TOTAL JOBS					- 940	TOTAL FLOORSPACE	- 27,097

5.15 Calculations have also been done to estimate the employment floorspace that will be surplus to requirements by 2026, based on the forecast loss of employment in various industries. Table 36 forecasts that overall 27,097 sq m of B use employment floorspace will be surplus to 2026 with the majority of this surplus being in the B2 use class.

Table 37: Summary of balance of net employment floorspace requirements for west Wiltshire

Business Use Class	Additional Floorspace Requirement	Surplus floorspace	Overall change in requirement to 2026
B1 Business	56,370	- 4,089	52,281
B2 General industrial	25,184	- 23,008	2,176
B8 Storage and distribution	3,120	-	3,120
Total (all B use classes)	84,674	- 27,097	57,577

Table 38: Additional Floorspace requirement

Business Use Class	2006-2011	2011-2016	2016-2021	2021-2026	Additional floorspace requirement Total
B1 Business	- 21,275	15,522	32,745	25,290	52,281
B2 General industrial	- 6,000	12,288	11,568	4,320	2,176
B8 Storage and distribution	- ,860	1,040	3,640	1,300	3,120
Total (all B use classes)	- 50,135	28,850	47,953	30,910	57,577

Table 39: Summary of balance of net B use employment jobs for west Wiltshire

Business Use Class	2006-2011	2011-2016	2016-2021	2021-2026	Additional B job requirement
B1 Business	- 1,150	839	1,770	1,367	2,826
B2 General industrial	- 813	384	362	135	68
B8 Storage and distribution	- 44	16	56	20	48
Total (all B use classes)	- 2,007	1,239	2,188	1,522	2,942

5.16 Table 37 and 38 shows the balance of net floorspace requirements for west Wiltshire as well as a summary, table 37 shows how this relates to gains or losses in jobs. Table 37 identifies that overall 57,577 sq m of additional B use employment floorspace is required in north Wiltshire to 2026 with most of this being in the B1 use class with a much smaller proportion in B2 and B8.

5.17 Forecast employment floorspace requirements, five yearly increments

5.18 To support land use and business support planning, the additional and surplus employment floorspace predications have been calculated in five year increments between 2006 and 2026. This provides a more frequent view of when the needs and/or surpluses will take place, and which industries will be affected.

2006-2011

Table 40: Additional forecast employment floorspace requirements for west Wiltshire by 2006-2011

Industry Sector	Forecast additional employment to 2026	Assumption of land use requirement, by planning use class			No. of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Agriculture etc	50	100%		Sui generis	N/A	N/A	N/A
Mining and Quarrying	20	100%	B2	General Industrial	20	32	640
Metals and Engineering	10	100%	B2	General Industrial	10	32	320
Transport Equipment	30	100%	B2	General Industrial	30	32	960
Electricity, Gas and Water	10	10%	B1	Business	1	18.5	19
		90%		Sui Generis	N/A	N/A	N/A
NA/Retail	300	100%	A1	Retail	N/A	N/A	N/A
Public Admin and Defence	20	100%	B1	Business	20	18.5	370
Education and Health	1,390	20%	B1	Business	278	18.5	5,143
		40%	C2	Residential institutions	N/A	N/A	N/A
		40%	D1	Non-residential institutions	N/A	N/A	N/A
				B1 Jobs	299	B1 Floorspace	5,532
				B2 Jobs	60	B2 Floorspace	1,920
				B8 Jobs	0	B8 Floorspace	0
				TOTAL JOBS	359	TOTAL FLOORSPACE	7,452

Table 41: Surplus forecast employment floorspace requirements for west Wiltshire by 2006-2011

Industry Sector	Forecast loss of employment to 2026	Assumption of land use requirement, by planning use class			Number of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Food Textiles and wood	-810	25%	B2	General Industrial	-202.5	32	- 6,480
		75%		Sui Generis	N/A	N/A	N/A
Printing and publishing	-90	50%	B1	Business	-45	18.5	- 833
		50%	B2	General Industrial	-45	32	- 1,440
Chemicals and Minerals	-340	10%	B2	General Industrial	-34	32	- 1,088
		90%		Sui generis	N/A	N/A	N/A
Other Business Services	-1220	100%	B1	Business	-1220	18.5	- 22,570
Electronics	-140	100%	B2	General Industrial	-140	32	- 4,480
Manufacturing nes	-260	100%	B2	General Industrial	-260	32	- 8,320
Construction	-570	10%	B2	General Industrial	-57	32	- 1,824
		90%		Sui Generis	N/A	N/A	N/A
Distribution	-220	40%	A1	Retail	N/A	N/A	N/A
		20%	B1	Business	-44	18.5	- 814
		20%	B2	General Industrial	-44	32	- 1,408
		20%	B8	Storage and distribution	-44	65	- 2,860
Hotels and Catering	-300	30%	A3	restaurants and cafes	N/A	N/A	N/A
		20%	A4	drinking establishments	N/A	N/A	N/A
		40%	C1	hotels	N/A	N/A	N/A
		10%	B2	general industrial	-30	32	- 960
Transport and Communications	-100	40%	B1	Business	-40	18.5	- 740
		60%	B2	General Industrial	-60	32	- 1,920
Banking and Insurance	-100	80%	B1	Business	-80	18.5	- 1,480
		20%	A2	Financial and Professional Services	N/A	N/A	N/A
Misc Services	-40	50%	B1	business	-20	18.5	- 370
		25%	D2	assembly and leisure	N/A	N/A	N/A
		25%		sui generis	N/A	N/A	N/A
B1 Jobs					-1,449	B1 Floorspace	- 26,807
B2 Jobs					- 873	B2 Floorspace	- 27,920
B8 Jobs					-44	B8 Floorspace	-2860
TOTAL JOBS					-2,366	TOTAL FLOORSPACE	- 57,587

Table 42: Summary of balance of net employment floorspace requirements for west Wiltshire

Business Use Class	Additional Floorspace Requirement	Surplus floorspace	Overall change in requirement to 2026
B1 Business	5,532	- 26,807	- 21,275
B2 General industrial	1,920	- 27,920	- 26,000
B8 Storage and distribution	-	- 2,860	- 2,860
Total (all B use classes)	7,452	- 57,587	- 50,135

2011-2016

Table 43: Additional forecast employment floorspace requirements for west Wiltshire by 2011-2016

Industry Sector	Forecast additional of employment to 2026	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Food Textiles and wood	80	25%	B2	General Industrial	20	32	640
		75%		Sui Generis	N/A	N/A	N/A
Printing and publishing	20	50%	B1	Business	10	18.5	185
		50%	B2	General Industrial	10	32	320
Chemicals and Minerals	120	10%	B2	General Industrial	12	32	384
		90%		Sui Generis	N/A	N/A	N/A
Transport Equipment	20	100%	B2	General Industrial	20	32	640
Manufacturing nes	240	100%	B2	General Industrial	240	32	7680
Construction	70	10%	B2	General Industrial	7	32	224
		90%		Sui Generis	N/A	N/A	N/A
Distribution	80	40%	A1	Retail	N/A	N/A	N/A
		20%	B1	Business	16	18.5	296
		20%	B2	General Industrial	16	32	512
		20%	B8	Storage and distribution	16	65	1040
Hotels and Catering	850	30%	A3	Restaurants and cafes	N/A	N/A	N/A
		20%	A4	Drinking establishments	N/A	N/A	N/A
		40%	C1	Hotels	N/A	N/A	N/A
		10%	B2	General industrial	85	32	2720
Transport and Communication	90	40%	B1	Business	36	18.5	666
		60%	B2	General Industrial	54	32	1728
Banking and Insurance	40	80%	B1	Business	32	18.5	592
		20%	A2	Financial and Professional Services	N/A	N/A	N/A
Other Business Services	910	100%	B1	Business	910	18.5	16835
Misc Services	150	50%	B1	Business	75	18.5	1387.5
		25%	D2	Assembly and leisure	N/A	N/A	N/A
		25%		Sui generis	N/A	N/A	N/A

B1 Jobs	1,079	B1 Floorspace	19,962
B2 Jobs	464	B2 Floorspace	14,848
B8 Jobs	16	B8 Floorspace	1040
TOTAL JOBS	1,559	TOTAL FLOORSPACE	35,850

Table 44: Surplus forecast employment floorspace requirements for west Wiltshire by 2011-2016

Industry Sector	Forecast surplus employment to 2026	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Agriculture etc	-440	100%		Sui generis	N/A	N/A	N/A
Mining and Quarrying	-10	100%	B2	General Industrial	-10	32	- 320
Metals and Engineering	-50	100%	B2	General Industrial	-50	32	-1600
Electronics	-20	100%	B2	General Industrial	-20	32	-640
N/A Retail	-140	100%	A1	Retail	N/A	N/A	N/A
Public Admin and Defence	-150	100%	B1	Business	-150	18.5	-2775
Education and Health	-450	20%	B1	Business	-90	18.5	-1665
		40%	C2	Residential institutions	N/A	N/A	N/A
		40%	D1	Non-residential institutions	N/A	N/A	N/A
				B1 Jobs	- 240	B1 Floorspace	- 4,440
				B2 Jobs	- 80	B2 Floorspace	- 2,560
				B8 Jobs	0	B8 Floorspace	0
TOTAL JOBS					- 320	TOTAL FLOORSPACE	- 7,000

Table 45: Summary of balance of net employment floorspace requirements for west Wiltshire 2011-2016

Business Use Class	Additional Floorspace Requirement	Surplus floorspace	Overall change in requirement to 2026
B1 Business	19,962	- 4,440	15,522
B2 General industrial	14,848	- 2,560	12,288
B8 Storage and distribution	1,040	-	1,040
Total (all B use classes)	35,850	- 7,000	28,850

2016 – 2021

Table 46: Forecast additional employment floorspace requirements for west Wiltshire 2016-2021

Industry Sector	Forecast additional of employment to 2026	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Printing and publishing	30	50%	B1	Business	15	18.5	277.5
		50%	B2	General Industrial	15	32	480
Manufacturing nes	240	100%	B2	General Industrial	240	32	7680
Construction	100	10%	B2	General Industrial	10	32	320
		90%		Sui Generis	N/A	N/A	N/A
Distribution	280	40%	A1	Retail	N/A	N/A	N/A
		20%	B1	Business	56	18.5	1036
		20%	B2	General Industrial	56	32	1792
		20%	B8	Storage and distribution	56	65	3640
NA/Retail	130	100%	A1	Retail	N/A	N/A	N/A
Hotels and Catering	1090	30%	A3	restaurants and cafes	N/A	N/A	N/A
		20%	A4	drinking establishments	N/A	N/A	N/A
		40%	C1	hotels	N/A	N/A	N/A
		10%	B2	general industrial	109	32	3488
Transport and Communication	140	40%	B1	Business	56	18.5	1036
		60%	B2	General Industrial	84	32	2688
Banking and Insurance	50	80%	B1	Business	40	18.5	740
		20%	A2	Financial and Professional Services	N/A	N/A	N/A
Other Business Services	1390	100%	B1	Business	1390	18.5	25715
Education and Health	500	20%	B1	Business	100	18.5	1850
		40%	C2	Residential institutions	N/A	N/A	N/A
		40%	D1	Non-residential institutions	N/A	N/A	N/A
Misc Services	270	50%	B1	business	135	18.5	2497.5
		25%	D2	assembly and leisure	N/A	N/A	N/A
		25%		sui generis	N/A	N/A	N/A

B1 Jobs	1,792	B1 Floorspace	33,152
B2 Jobs	514	B2 Floorspace	16,448
B8 Jobs	56	B8 Floorspace	3640
TOTAL JOBS	2,362	TOTAL FLOORSPACE	53,240

Table 47: Surplus forecast employment floorspace requirements for west Wiltshire 2016-2021

Industry Sector	Forecast surplus employment to 2026	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
		Percentage	Use Class	Use Class			
Agriculture etc	-310	100%		Sui generis	N/A	N/A	N/A
Food, textiles and wood	-90	25%	B2	General Industrial	-22.5	32	-720
		75%		Sui generis	N/A	N/A	N/A
Metals and Engineering	-90	100%	B2	General Industrial	-90	32	-2880
Public Admin and Defence	-20	100%	B1	Business	-20	18.5	-370
Electronics	-20	100%	B2	General Industrial	-20	32	-640
Electricity, Gas and Water	-20	10%	B1	Business	-2	18.5	- 37
		90%		Sui Generis	N/A	N/A	N/A
Transport Equipment	-20	100%	B2	General Industrial	-20	32	-640
				B1 Jobs	- 22	B1 Floorspace	- 407
				B2 Jobs	- 153	B2 Floorspace	- 4,880
				B8 Jobs	0	B8 Floorspace	0
				TOTAL JOBS	- 175	TOTAL FLOORSPACE	- 5,287

Table 48: Summary of balance of net employment floorspace requirements for west Wiltshire 2016-2021

Business Use Class	Additional Floorspace Requirement	Surplus floorspace	Overall change in requirement to 2026
B1 Business	33,152	- 407	32,745
B2 General industrial	16,448	- 4,880	11,568
B8 Storage and distribution	3,640	-	3,640
Total (all B use classes)	53,240	- 5,287	47,953

2021-2026

Table 49: Forecast additional employment floorspace requirements for west Wiltshire 2021-2026

Industry Sector	Forecast additional of employment to 2026	Assumption of land use requirement, by planning use class	No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
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Food, textiles and wood	20	25% 75%	B2	General Industrial Sui generis	5 N/A	32 N/A	160 N/A
Manufacturing nes	190	100%	B2	General Industrial	190	32	6080
Construction	10	10% 90%	B2	General Industrial Sui Generis	1 N/A	32 N/A	32 N/A
Distribution	100	40% 20% 20% 20%	A1 B1 B2 B8	Retail Business General Industrial Storage and distribution	N/A 20 20 20	N/A 18.5 32 65	N/A 370 640 1300
Hotels and Catering	990	30% 20% 40% 10%	A3 A4 C1 B2	restaurants and cafes drinking establishments hotels general industrial	N/A N/A N/A 99	N/A N/A N/A 32	N/A N/A N/A 3168
Banking and Insurance	60	80% 20%	B1 A2	Business Financial and Professional Services	48 N/A	18.5 N/A	888 N/A
Other Business Services	1230	100%	B1	Business	1230	18.5	22755
Education and Health	310	20% 40% 40%	B1 C2 D1	Business Residential institutions Non-residential institutions	62 N/A N/A	18.5 N/A N/A	1147 N/A N/A
Misc Services	130	50% 25% 25%	B1 D2	Business Assembly and leisure Sui generis	65 N/A N/A	18.5 N/A N/A	1202.5 N/A N/A
				B1 Jobs	1,425	B1 Floorspace	26,363
				B2 Jobs	315	B2 Floorspace	10,080
				B8 Jobs	20	B8 Floorspace	1300
				TOTAL JOBS	1,760	TOTAL FLOORSP ACE	37,743

Table 50: Surplus forecast employment floorspace requirements for west Wiltshire 2021-2026

Industry Sector	Forecast surplus employment to 2026	Assumption of land use requirement, by planning use class		No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Agriculture etc	-230	100%		Sui generis	N/A	N/A
Mining and Quarrying	-10	100%	B2	General Industrial	-10	32
Chemicals and Minerals	-80	10% 90%	B2	General Industrial Sui generis	-8 N/A	32 N/A
Metals and Engineering	-80	100%	B2	General Industrial	-80	32
Public Admin and Defence	-50	100%	B1	Business	-50	18.5
Electronics	-40	100%	B2	General Industrial	-40	32
Transport Equipment	-30	100%	B2	General Industrial	-30	32

N/A - Retail	-80	100%	A1	Retail	N/A	N/A	N/A
Transport and Communication	-20	40%	B1	Business	-8	18.5	-148
		60%	B2	0	-12	32	-384
				B1 Jobs	- 58	B1 Floorspace	- 1,073
				B2 Jobs	- 180	B2 Floorspace	- 5,760
				B8 Jobs	0	B8 Floorspace	0
				TOTAL JOBS	- 238	TOTAL FLOORSPACE	- 6,833

Table 51: Summary of balance of net employment floorspace requirements for west Wiltshire 2021-2026

Business Use Class	Additional Floorspace Requirement (sqm)	Surplus floorspace (sqm)	Overall change in requirement to 2026 (sqm)
B1 Business	26,363	- 1,073	25,290
B2 General industrial	10,080	- 5,760	4,320
B8 Storage and distribution	1,300	-	1,300
Total (all B use classes)	37,743	- 6,833	30,910

- 5.19 A detailed breakdown of the five yearly changes in employment by industry sectors is given in tables 40 to 51. The higher period of job and floorspace growth is predicted to be between 2016 and 2021 when 47,953 sq m of additional floorspace will be forecast to be required.
- 5.20 Between 2006 and 2011 jobs are expected to contract with a loss of 2007 jobs and 50,135 sq m of floorspace. During the period 2011-2016 jobs are projected to grow by 1239 requiring 28,850 sq m of floorspace split between B1 and B8 use. During the period 2021 to 2026 job growth again slows slightly with only 1,522 jobs being created requiring 30,910 sq m of floorspace.
- 5.21 Again it is important to note that these forecasts are concerned only with employment relating to B1/2/8 land uses, as and not all employment.

5.22 Forecast employment land requirements

- 5.23 The employment floorspace predictions explained in the previous section represent built floorspace. This can now be taken a stage further using development density assumptions to forecast the actual amount of employment land that is required in the future.
- 5.24 The 'development density' is an assumption of site coverage that differing types of land use require. The average site coverage allows for a mix of development styles and number of building storeys. For example the site coverage for B1 office is taken as 70% and accounts for a mix of out of town and town/city centre developments, plus a mixed number of storeys. For the purpose of this review, standard development density assumptions have been used, based on work undertaken by DTZ for the South West of England Regional Development Agency. The average development densities that have been used for employment uses are:
- B1 office – 70% Site coverage
B2 industrial – 40% site coverage
B8 – Warehouse/storage/distribution – 40% site coverage
- 5.25 The additional employment land requirement to 2026, for the four areas of Wiltshire is provided in Table 52 below. The forecasts show that an additional 8.8 hectares of employment land will be required (over and above that already operating/built out as of April 2006) by the year 2026. This employment land will be required mainly in the B1 use class. Any floorspace needed for B2 and B8 should come from existing units coming available.

5.26 Table 53 to 56 provides a breakdown of employment land requirements into five year periods from 2006 to 2026. This identifies that no employment land is needed in the period 2006-2011, with demand increasing after 2011. Between 2011 and 2016 around 5.3 ha is forecast to be needed rising to 9.4 ha forecast between 2016 and 2021 falling again to 6.9 hectares between 2021 and 2026.

Table 52: West Wiltshire: Additional employment land requirement to 2026

Business Use Class	Additional floorspace requirement 2006-2026	Assumption of development density - site coverage	Therefore land space requirement is in sqm	Land requirement in hectares 2006-2026
B1 Business	52,281	70%	74,687	7.47
B2 General industrial	2,176	40%	5,440	0.54
B8 Storage and distribution	3,120	40%	7,800	0.78
Total (all B use classes)	57,577			8.79

Table 53: West Wiltshire: Additional employment land requirement 2006-2011

Business Use Class	2006-2011	Assumption of development density - site coverage	Therefore land space requirement is in sqm	Land requirement in hectares 2011-2016
B1 Business	- 21,275	70%	- 30,392.86	-3.0
B2 General industrial	- 26,000	40%	- 65,000.00	-6.5
B8 Storage and distribution	- 2,860	40%	- 7,150.00	-0.7
Total (all B use classes)	-50,135.0		-102542.9	-10.3

Table 54: West Wiltshire: Additional employment land requirement 2011-2016

Business Use Class	2011-2016	Assumption of development density - site coverage	Therefore land space requirement is in sqm	Land requirement in hectares 2011-2016
B1 Business	15,522	70%	22,173.57	2.2
B2 General industrial	12,288	40%	30,720.00	3.1
B8 Storage and distribution	1,040	40%	2,600.00	0.3
Total (all B use classes)	28,850		55,493.6	5.5

Table 55: West Wiltshire: Additional employment land requirement 2016-2021

Business Use Class	2016-2021	Assumption of development density - site coverage	Therefore land space requirement is in sqm	Land requirement in hectares 2011-2016
B1 Business	32,745	70%	46,778.57	4.7
B2 General industrial	11,568	40%	28,920.00	2.9
B8 Storage and distribution	3,640	40%	9,100.00	0.9
Total (all B use classes)	47,953		84,798.6	8.5

Table 56: West Wiltshire: Additional employment land requirement 2021-2026

Business Use Class	2021-2026	Assumption of development density - site coverage	Therefore land space requirement is in sqm	Land requirement in hectares 2011-2016
B1 Business	25,290	70%	36,127.86	3.6
B2 General industrial	4,320	40%	10,800.00	1.1
B8 Storage and distribution	1,300	40%	3,250.00	0.3
Total (all B use classes)	30,910		50,177.9	5.0

6.1 Employment Sector Forecasts for the 20 year period 2006-2026 – East Wiltshire

6.2 The latest 20 year projection produced by Cambridge Econometrics, to 2026, is broken down into industry sectors (see Table 3 below). The annual data from Cambridge Econometrics from 2006 to 2026 for east Wiltshire is provided in Appendix 3. The same forecasts are broken down into 5 year increments to show how employment land needs to be delivered over time (Table 58).

Table 57: East Wiltshire - Employment sector forecasts in five year increments between 2006-2026

	Numbers in Employment 2006	% of employment 2006	Numbers in Employment 2026	% of employment 2026	Change in numbers 2006-2026
Agriculture etc	2440	7.2%	1070	2.9%	-1370
Coal	0	0.0%	0	0.0%	0
Oil & natural gas etc	10	0.0%	0	0.0%	-10
Other mining	0	0.0%	80	0.2%	80
Food,drink & tobacco	750	2.2%	880	2.4%	130
Text., cloth. & leather	50	0.1%	20	0.1%	-30
Wood & paper	270	0.8%	250	0.7%	-20
Printing & publish.	150	0.4%	140	0.4%	-10
Manufactured fuels	0	0.0%	0	0.0%	0
10 Pharmaceuticals	60	0.2%	50	0.1%	-10
Chemicals & MM fibres	0	0.0%	0	0.0%	0
Rubber & plastic products	60	0.2%	70	0.2%	10
Non-metal. mineral products	70	0.2%	60	0.2%	-10
Basic metals	210	0.6%	100	0.3%	-110
Metal prod.	280	0.8%	200	0.5%	-80
Mechanical engineering	260	0.8%	230	0.6%	-30
Electronics	20	0.1%	10	0.0%	-10
Electrical Engineering & Instruments	340	1.0%	120	0.3%	-220
Motor vehicles	260	0.8%	160	0.4%	-100
Other transport equip.	10	0.0%	20	0.1%	10
Other manufacturing	760	2.3%	1030	2.8%	270
Electricity	0	0.0%	0	0.0%	0
Gas Supply	0	0.0%	0	0.0%	0
Water Supply	0	0.0%	0	0.0%	0
Construction	2570	7.6%	2330	6.3%	-240
Distribution	1410	4.2%	1330	3.6%	-80
Retailing	2840	8.4%	2850	7.6%	10
Hotels & catering	2220	6.6%	3680	9.9%	1460
Land Transport	540	1.6%	650	1.7%	110
Water Transport	20	0.1%	10	0.0%	-10
Air Transport	0	0.0%	0	0.0%	0
Communications	180	0.5%	180	0.5%	0
Banking & finance	330	1.0%	260	0.7%	-70
Insurance	10	0.0%	10	0.0%	0
Computing Services	380	1.1%	570	1.5%	190

	Numbers in Employment 2006	% of employment 2006	Numbers in Employment 2026	% of employment 2026	Change in numbers 2006-2026
Professional Services	2380	7.1%	5210	14.0%	2830
Other business services	1480	4.4%	2680	7.2%	1200
Public admin. & defence	4400	13.1%	2360	6.3%	-2040
Education	3050	9.1%	3590	9.6%	540
Health & Social Work	3330	9.9%	3900	10.5%	570
Other services	2550	7.6%	3170	8.5%	620
Total	33,690	100.0%	37,270	100.0%	3,580

Source: Cambridge Econometrics, September 2010

6.3 Major employment growth is therefore forecast in service sector activities, most significantly in Hotels and Catering, professional services and other services. There is also a large increase in jobs predicted in education, health and social work and other services. Eighteen sectors are forecast to experience decline in north Wiltshire between 2006 and 2026 with the most significant loss of jobs will be experienced in Agriculture and public admin and defence.

6.4 Table 58 below shows the above sector distribution broken down into 5 year increments which shows us when job growth is forecast to increase or decline within sectors. This shows that there will be very slow economic growth until 2016 especially between 2011 and 2016 at which point the economy should recover from the current recession at a faster rate and slowing down again in the 2021 to 2026 period.

Table 58: East Wiltshire - Employment sector forecasts in five year increments between 2006-2026

Industry Sector	Year					Change in numbers 2006-2026
	2006	2011	2016	2021	2026	
Agriculture etc	2,440	2,350	1,850	1,430	1070	- 1,370
Coal	-	-	-	-	0	-
Oil & natural gas etc	10	10	10	-	0	- 10
Other mining	-	120	110	100	80	80
Food, drink & tobacco	750	810	890	840	880	130
Text., cloth. & leather	50	30	30	30	20	- 30
Wood & paper	270	290	280	270	250	- 20
Printing & publish.	150	140	140	140	140	- 10
Manufactured fuels	-	-	-	-	0	-
10 Pharmaceuticals	60	50	50	60	50	- 10
Chemicals & MM fibres	-	-	-	-	0	-
Rubber & plastic products	60	60	70	70	70	10
Non-metal. mineral products	70	70	70	60	60	- 10
Basic metals	210	120	130	110	100	- 110
Metal prod.	280	230	220	210	200	- 80
Mechanical engineering	260	280	270	250	230	- 30
Electronics	20	10	10	10	10	- 10
Electrical Engineering & Instruments	340	330	240	170	120	- 220
Motor vehicles	260	170	170	160	160	- 100
Other transport equip.	10	20	20	20	20	10

Other manufacturing	760	660	790	920	1030	270
Electricity	-	-	-	-	0	-
Gas Supply	-	-	-	-	0	-
Water Supply	-	-	-	-	0	-
Construction	2,570	2,170	2,230	2,310	2330	- 240
Distribution	1,410	1,300	1,300	1,330	1330	- 80
Retailing	2,840	2,880	2,800	2,870	2850	10
Hotels & catering	2,220	2,350	2,730	3,220	3680	1,460
Land Transport	540	670	670	660	650	110
Water Transport	20	10	10	10	10	- 10
Air Transport	-	-	-	-	0	-
Communications	180	170	170	180	180	-
Banking & finance	330	210	220	240	260	- 70
Insurance	10	10	10	10	10	-
Computing Services	380	460	490	530	570	190
Professional Services	2,380	3,430	3,920	4,590	5210	2,830
Other business services	1,480	1,480	1,550	2,700	2680	1,200
Public admin. & defence	4,400	3,660	3,410	2,360	2360	- 2,040
Education	3,050	3,680	3,430	3,510	3590	540
Health & Social Work	3,330	3,840	3,780	3,870	3900	570
Other services	2,550	2,380	2,560	2,940	3170	620
Total	33,690	34,450	34,630	36,180	37,270	3,580

Source: Cambridge Econometrics, September 2010

- 6.5 The Cambridge Econometrics forecast undertaken in September 2010 for the Council has been provided in 41 separate sectors. However, in order to ensure a robust methodology and compare Industrial Classifications with the originally published Salisbury Employment Land Review 2007 and corresponding draft RSS sector classifications, these Industrial Classifications have been put into 20 Sector Industry Classifications. The table below identifies how the 41 sectors have been placed into the 20 sectors. Please note that the 2007 Salisbury employment land review only has 19 sectors as it does not look specifically at retail jobs whereas the latest data from Cambridge Econometrics includes this sector which is shown separately for transparency although specifically dealt with through other evidence. In addition, retail jobs are not expected to be located on employment land as this is provided for separately within the Wiltshire Core Strategy and informed by its own evidence in the form of the Retail Study.

Table 59: East Wiltshire - Forecast job growth translated into the 20 sector requirement

Industry Sector	Salisbury Employment Land Review Sector Industrial Classifications
Agriculture etc	Agriculture etc
Coal	Mining and Quarrying
Oil & natural gas etc	
Other mining	
Food, drink & tobacco	Food, textiles and wood
Text., cloth. & leather	
Wood & paper	
Printing & publish.	Printing and publishing
Manufactured fuels	Chemicals and minerals
10 Pharmaceuticals	

Industry Sector	Salisbury Employment Land Review Sector Industrial Classifications
Chemicals & MM fibres	
Rubber & plastic products	
Non-metal. mineral products	
Basic metals	Metals and Engineering
Metal prod.	
Mechanical engineering	
Electronics	Electronics
Electrical Engineering & Instruments	
Motor vehicles	Transport Equipment
Other transport equip.	
Other manufacturing	Manufacturing nes
Electricity	Electricity, gas and water
Gas Supply	
Water Supply	
Construction	Construction
Distribution	Distribution
Retailing	N/A Retail
Hotels & catering	Hotels and Catering
Land Transport	Transport and Communications
Water Transport	
Air Transport	
Communications	
Banking & finance	Banking and Insurance
Insurance	
Computing Services	Other Business Services
Professional Services	
Other business services	
Public admin. & defence	Public Admin and Defence
Education	Education and Health
Health & Social Work	
Other services	Misc services

6.6 The forecast job growth has therefore been translated into the 20 sector requirement and shows the sectors with the greatest growth to be Hotels and Catering, Other Business Services, Education and Health. The sectors experiencing the greatest decline are agriculture and public admin and defence.

Table 60: East Wiltshire - Employment sector forecasts between 2006-2026

	Numbers in Employment 2006	% of employment 2006	Numbers in Employment 2026	% of employment 2026	Change in numbers 2006-2026
Agriculture etc	2440	7.2%	1070	2.9%	-1370
Mining and Quarrying	10	0.0%	80	0.2%	70
Food, textiles and wood	1070	3.2%	1150	3.1%	80
Printing and publishing	150	0.4%	140	0.4%	-10
Chemicals and minerals	190	0.6%	180	0.5%	-10
Metals and Engineering	750	2.2%	530	1.4%	-220
Electronics	360	1.1%	130	0.3%	-230
Transport Equipment	270	0.8%	180	0.5%	-90
Manufacturing nes	760	2.3%	1030	2.8%	270
Electricity, gas and water	0	0.0%	0	0.0%	0
Construction	2570	7.6%	2330	6.3%	-240
Distribution	1410	4.2%	1330	3.6%	-80
N/A (Retail)	2840	8.4%	2850	7.6%	10
Hotels and Catering	2220	6.6%	3680	9.9%	1460
Transport and Communications	740	2.2%	840	2.3%	100
Banking and Insurance	340	1.0%	270	0.7%	-70
Other Business Services	4240	12.6%	8460	22.7%	4220
Public Admin and Defence	4400	13.1%	2360	6.3%	-2040
Education and Health	6380	18.9%	7490	20.1%	1110
Misc services	2550	7.6%	3170	8.5%	620
Total	33690	100.0%	37270	100.0%	3580

The 20 sector forecast has also been broken down into 5 year increments to show how jobs are projected to be delivered over time.

Table 61: East Wiltshire - Employment sector changes in five year increments between 2006-2026

	Change 2006- 2011	Change 2001- 2016	Change 2016- 2021	Change 2021- 2026	change
Agriculture etc	-90	-500	-420	-360	-1370
Mining and Quarrying	120	-10	-20	-20	70
Food, textiles and wood	60	70	-60	10	80
Printing and publishing	-10	0	0	0	-10
Chemicals and minerals	-10	10	0	-10	-10
Metals and Engineering	-120	-10	-50	-40	-220
Electronics	-20	-90	-70	-50	-230
Transport Equipment	-80	0	-10	0	-90
Manufacturing nes	-100	130	130	110	270
Electricity, gas and water	0	0	0	0	0
Construction	-400	60	80	20	-240
Distribution	-110	0	30	0	-80
NA - Retail	40	-80	70	-20	10

Hotels and Catering	130	380	490	460	1460
Transport and Communications	110	0	0	-10	100
Banking and Insurance	-120	10	20	20	-70
Other Business Services	1130	590	1860	640	4220
Public Admin and Defence	-740	-250	-1050	0	-2040
Education and Health	1140	-310	170	110	1110
Misc services	-170	180	380	230	620
Total	760	180	1550	1090	3580

6.7 Forecast employment floorspace requirements 2006-2026 in east Wiltshire

- 6.8 Using the employment projections to 2026, assumptions can be made about the type of property (by planning use class) required for each industry sectors. This provides an indication of whether each particular industry will have an additional requirement for floorspace, or if there will be a surplus of floor space, by 2026.
- 6.9 'Employment density' is the number of square metres required per employee and differs for different categories of employment. For the purpose of this review standard employment density ratios have been used based on work undertaken by Arup Economics and Planning on behalf of English Partnerships in their study 'Employment Densities: A full Guide, July 2001 (available from <http://www.englishpartnerships.co.uk/researchreports.htm>). The government guidance entitled 'Employment Land Reviews: Guidance Note' recommends that this Employment Densities guide produced by Arups is an appropriate guide to use (Annex D). This guide has been used for consistency and comparison purposes as both the Salisbury Employment Land Review and the Wiltshire Workspace and Employment Land Strategy – Final Strategy Document (August 2009) uses this guide to determine employment densities. It was produced for the former English Partnerships agency. It should however be noted that the Homes and Communities Agency has recently updated this guidance with a new version entitled 'Employment Densities Guide – 2nd Edition 2010' available from <http://www.info4local.gov.uk/documents/publications/1789435>. Any differences between the documents and suggested floorspace per employee is explained in Appendix 4.
- 6.10 The Arup study considers a range of employment uses, which have been simplified for the purposes of this exercise and can be expressed as:
- B1 Office - 18.5 sq m per employee (Gross Internal floorspace)
B2 Industrial – 32 sq m per employee (Gross Internal floorspace)
B8 Warehouse / storage / distribution – 85 sq m per employee (Gross External Area)
- 6.11 It is important to note that 'employment floorspace' represents built floorspace of potentially more than one storey in height. It does not indicate overall site size, or even a 'footprint'. Calculations to determine the actual land requirements are undertaken later in this document.
- 6.12 Table 62 and Table 63 below sets out the result of converting employment change to floorspace for the period 2006 to 2026, with Table 62 identifying additional floorspace requirement and Table 63 identifying any surplus floorspace with Table 64 identifying the overall floorspace requirement.
- 6.13 Please note that these forecasts above are all concerned only with employment that requires B1, B2 and B8 land and floorspace uses, and not all employment. Hence, for example in east Wiltshire the total forecast additional employment to 2026 is 2,639, whereas the overall figure net for employment growth (requiring a variety of land uses including B1/2/8) is 3,580.

Table 62: Additional forecast employment floorspace requirements for east Wiltshire by 2026

Industry Sector	Forecast additional employment to 2026	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Mining and Quarrying	70	100%	B2	general industrial	70	32	2240
Food, textiles and wood	80	25%	B2	general industrial	20	32	640
		75%		sui generis	N/A	N/A	N/A
Manufacturing nes	270	100%	B2	general industrial	270	32	8,640
NA - Retail	10	100%	A1	Retail	N/A	N/A	N/A
Hotels and Catering	1460	30%	A3	restaurants and cafes	N/A	N/A	N/A
		20%	A4	drinking establishments	N/A	N/A	N/A
		40%	C1	hotels	N/A	N/A	N/A
		10%	B2	general industrial	146	32	4,672
Transport and Communications	100	40%	B1	business	40	18.5	740
		60%	B2	general industrial	60	32	1,920
Other Business Services	4220	100%	B1	business	4,220	18.5	78,070
Education and Health	1110	20%	B1	business	222	18.5	4,107
		40%	C2	residential institutions	N/A	N/A	N/A
		40%	D1	Non-residential institutions	N/A	N/A	N/A
Misc services	620	50%	B1	business	310	18.5	5,735
		25%	D2	assembly and leisure	N/A	N/A	N/A
		25%		sui generis	N/A	N/A	N/A
				B1 Jobs	4,792	B1 Floorspace	88,652
				B2 Jobs	566	B2 Floorspace	18,112
				B8 Jobs	-	B8 Floorspace	-
				TOTAL JOBS	5,358	TOTAL FLOORSPACE	106,764

6.14 Table 62 forecasts that overall 106,764 sq m of additional B use employment floorspace is required to 2026 with the majority of this being required in the B1 use class.

Table 63: Employment floorspace forecast to be surplus to requirements for east Wiltshire by 2026

Industry Sector	Forecast additional employment to 2026	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required
Agriculture etc	-1370	100%		sui generis	N/A	N/A	N/A
Printing and publishing		50%	B1	business	- 5	18.5	- 93
		50%	B2	general industrial	- 5	32	- 160
Chemicals and minerals		10%	B2	general industrial	- 1	32	- 32
		90%		sui generis	N/A	N/A	N/A
Metals and Engineering	-220	100%	B2	general industrial	- 220	32	- 7,040
Electronics	-230	100%	B2	general industrial	- 230	32	- 7,360
Transport Equipment	-90	100%	B2	general industrial	-90	32	- 2,880
Construction		10%	B2	general industrial	- 24	32	- 768
		90%		sui generis	N/A	N/A	N/A
Distribution		40%	A1	retail	N/A	N/A	N/A
		20%	B1	business	- 16	18.5	- 296
		20%	B2	general industrial	- 16	32	- 512
		20%	B8	storage and distribution	- 16	65	- 1,040
Banking and Insurance		80%	B1	business	- 56	18.5	- 1,036
		20%	A2	financial and professional services	N/A	N/A	N/A
Public Admin and Defence	-2040	100%	B1	business	- 2,040	18.5	- 37,740
B1 Jobs					-2,117	B1 Floorspace	- 39,165
B2 Jobs					- 586	B2 Floorspace	- 18,752
B8 Jobs					- 16	B8 Floorspace	- 1,040
TOTAL JOBS					- 2,719	TOTAL FLOORSPACE	- 58,957

6.15 Calculations have also been done to estimate the employment floorspace that will be surplus to requirements by 2026, based on the forecast loss of employment in various industries. Table 63 forecasts that overall 58,957 sq m of B use employment floorspace will be surplus to 2026 with the majority of this surplus being in the B2 use class.

Table 64: Summary of balance of net employment floorspace requirements for east Wiltshire

Business Use Class	Additional Floorspace Requirement	Surplus floorspace	Overall change in requirement to 2026
B1 Business	88,652	- 39,165	49,488
B2 General industrial	18,112	- 18,752	- 640
B8 Storage and distribution	-	- 1,040	- 1,040
Total (all B use classes)	106,764	- 58,957	47,808

Table 65: Additional Floorspace requirement

Business Use Class	2006-2011	2011-2016	2016-2021	2021-2026	Additional floorspace requirement Total
B1 Business	8,399	6,956	19,536	14,597	49,488
B2 General industrial	- 5,568	2,640	896	1,392	- 640
B8 Storage and distribution	- 1,430	-	390	-	- 1,040
Total (all B use classes)	1,401	9,596	20,822	15,989	47,808

Table 66: Summary of balance of net B use employment jobs for east Wiltshire

Business Use Class	2006-2011	2011-2016	2016-2021	2021-2026	Additional B job requirement
B1 Business	454	376	1,056	789	2,675
B2 General industrial	- 174	83	28	44	- 20
B8 Storage and distribution	- 22	-	6	-	- 16
Total (all B use classes)	258	459	1,090	833	2,639

6.16 Table 64 and 65 shows the balance of net floorspace requirements for east Wiltshire as well as a summary, Table 66 shows how this relates to gains or losses in jobs. Table 64 identifies that overall 47,808 sq m of additional B use employment floorspace is required in east Wiltshire to 2026 with all of this being in the B1 use class with losses experienced in B2 and B8 and a very small increase in B8.

6.17 Forecast employment floorspace requirements, five yearly increments

6.18 To support land use and business support planning, the additional and surplus employment floorspace predications have been calculated in five year increments between 2006 and 2026. This provides a more frequent view of when the needs and/or surpluses will take place, and which industries will be affected.

2006-2011

Table 67: Additional forecast employment floorspace requirements for east Wiltshire 2006 2011

Industry Sector	Forecast additional employment to 2026	Assumption of land use requirement, by planning use class			Nor of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Mining and Quarrying	120	100%	B2	general industrial	120	32	3840
Food, textiles and wood	60	25%	B2	general industrial	15	32	480
		75%		sui generis	N/A	N/A	N/A
NA - Retail	40	100%	A1	Retail	N/A	N/A	N/A
Hotels and Catering	130	30%	A3	restaurants and cafes	N/A	N/A	N/A
		20%	A4	drinking establishments	N/A	N/A	N/A
		40%	C1	hotels	N/A	N/A	N/A
		10%	B2	general industrial	13	32	416
Transport and Communications	110	40%	B1	business	44	18.5	814
		60%	B2	general industrial	66	32	2,112
Other Business Services	1130	100%	B1	business	1,130	18.5	20,905
Education and Health	1140	20%	B1	business	228	18.5	4,218
		40%	C2	residential institutions	N/A	N/A	N/A
		40%	D1	Non-residential institutions	N/A	N/A	N/A
				B1 Jobs	1,402	B1 Floorspace	25,937
				B2 Jobs	214	B2 Floorspace	6,848
				B8 Jobs	-	B8 Floorspace	-
				TOTAL JOBS	1,616	TOTAL FLOORSPACE	32,785

Table 68: Surplus forecast employment floorspace requirements for east Wiltshire 2011 2016

Industry Sector	Forecast additional employment to 2026	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required
Agriculture etc	-90	100%		sui generis	N/A	N/A	N/A
Printing and publishing	-10	50%	B1	business	- 5	18.5	- 93
		50%	B2	general industrial	-	32	- 160
Chemicals and minerals	-10	10%	B2	general industrial	- 1	32	- 32
		90%		sui generis	N/A	N/A	N/A
Metals and Engineering	-120	100%	B2	general industrial	-120	32	- 3,840

Electronics	-20	100%	B2	general industrial	- 20	32	- 640
Transport Equipment	-80	100%	B2	general industrial	-80	32	- 2,560
Manufacturing nes	-100	100%	B2	general industrial	- 100	32	- 3,200
Construction	-400	10%	B2	general industrial	-40	32	- 1,280
		90%		sui generis	N/A	N/A	N/A
Distribution	-110	40%	A1	retail	N/A	N/A	N/A
		20%	B1	business	-22	18.5	- 407
		20%	B2	general industrial	-22	32	- 704
		20%	B8	storage and distribution	-22	65	- 1,430
Banking and Insurance	-120	80%	B1	business	- 96	18.5	- 1,776
		20%	A2	financial and professional services	N/A	N/A	N/A
Public Admin and Defence	-740	100%	B1	business	- 740	18.5	- 13,690
Misc services	-170	50%	B1	business	- 85	18.5	- 1,573
		25%	D2	assembly and leisure	N/A	N/A	N/A
		25%		sui generis	N/A	N/A	N/A
B1 Jobs					- 948	B1 Floorspace	- 17,538
B2 Jobs					- 388	B2 Floorspace	- 12,416
B8 Jobs					- 22	B8 Floorspace	- 1,430
TOTAL JOBS					- 1,358	TOTAL FLOORSPACE	- 31,384

Table 69: Summary of balance of net employment floorspace requirements for east Wiltshire 2006-2011

Business Use Class	Additional Floorspace Requirement	Surplus floorspace	Overall change in requirement to 2026
B1 Business	25,937	- 17,538	8,399
B2 General industrial	6,848	- 12,416	5,568
B8 Storage and distribution	-	- 1,430	1,430
Total (all B use classes)	32,785	- 31,384	1,401

2011-2016

Table 70: Additional forecast employment floorspace requirements for east Wiltshire 2011 2016

Industry Sector	Forecast additional employment 2011-2016	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
		Percentage	Use Class	Description			
Food, textiles and wood	70	25%	B2	general industrial	18	32	560
		75%		sui generis	N/A	N/A	N/A
Chemicals and minerals	10	10%	B2	general industrial	1	32	32
		90%		sui generis	N/A	N/A	N/A
Manufacturing nes	130	100%	B2	general industrial	130	32	4,160
Construction	60	10%	B2	general industrial	6	32	192
		90%		sui generis	N/A	N/A	N/A
Hotels and Catering	380	30%	A3	restaurants and cafes	N/A	N/A	N/A
		20%	A4	drinking establishments	N/A	N/A	N/A
		40%	C1	hotels	N/A	N/A	N/A
		10%	B2	general industrial	38	32	1,216
Banking and Insurance	10	80%	B1	business	8	18.5	148
		20%	A2	financial and professional services	N/A	N/A	N/A
Other Business Services	590	100%	B1	business	590	18.5	10,915
Misc services	180	50%	B1	business	90	18.5	1,665
		25%	D2	assembly and leisure	N/A	N/A	N/A
		25%		sui generis	N/A	N/A	N/A
				B1 Jobs	688	B1 Floorspace	12,728
				B2 Jobs	193	B2 Floorspace	6,160
				B8 Jobs	-	B8 Floorspace	-
				TOTAL JOBS	881	TOTAL FLOORSPACE	18,888

Table 71: Surplus forecast employment floorspace requirements for east Wiltshire 2011 2016

Industry Sector	Forecast additional employment to 2026	Assumption of land use requirement, by planning use class			Number of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required
Agriculture etc	-500	100%		sui generis	N/A	N/A	N/A
Mining and Quarrying	-10	100%	B2	general industrial	-10	32	-320
Metals and Engineering	-10	100%	B2	general industrial	-10	32	-320
Electronics	-90	100%	B2	general industrial	-90	32	-2,880
NA - Retail	-80	100%	A1	Retail	N/A	N/A	N/A
Public Admin and Defence	-250	100%	B1	business	-250	18.5	-4,625
Education and Health	-310	20%	B1	business	-62	18.5	-1,147
		40%	C2	residential institutions	N/A	N/A	N/A
		40%	D1	Non-residential institutions	N/A	N/A	N/A
B1 Jobs					-312	B1 Floorspace	-5,772
B2 Jobs					-110	B2 Floorspace	-3,520
B8 Jobs					-	B8 Floorspace	-
TOTAL JOBS					-422	TOTAL FLOORSPACE	-9,292

Table 72: Summary of balance of net employment floorspace requirements for east Wiltshire 2011-2016

Business Use Class	Additional Floorspace Requirement	Surplus floorspace	Overall change in requirement to 2026
B1 Business	12,728	-5,772	6,956
B2 General industrial	6,160	-3,520	2,640
B8 Storage and distribution	-	-	-
Total (all B use classes)	18,888	-9,292	9,596

2016 – 2021

Table 73: Additional forecast employment floorspace requirements for east Wiltshire 2016-2021

Industry Sector	Forecast additional employment 2011-2016	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Manufacturing nes	130	100%	B2	general industrial	130	32	4,160
Construction	80	10%	B2	general industrial	8	32	256
		90%		sui generis	N/A	N/A	N/A
Distribution	30	40%	A1	retail	N/A	N/A	N/A
		20%	B1	business	6	18.5	111
		20%	B2	general industrial	6	32	192
		20%	B8	storage and distribution	6	65	390
NA - Retail	70	100%	A1	Retail	N/A	N/A	N/A
Hotels and Catering	490	30%	A3	restaurants and cafes	N/A	N/A	N/A
		20%	A4	drinking establishments	N/A	N/A	N/A
		40%	C1	hotels	N/A	N/A	N/A
		10%	B2	general industrial	49	32	1,568
Banking and Insurance	20	80%	B1	business	16	18.5	296
		20%	A2	financial and professional services	N/A	N/A	N/A
Other Business Services	1860	100%	B1	business	1,860	18.5	34,410
Education and Health	170	20%	B1	business	34	18.5	629
		40%	C2	residential institutions	N/A	N/A	N/A
		40%	D1	Non-residential institutions	N/A	N/A	N/A
Misc services	380	50%	B1	business	190	18.5	3,515
		25%	D2	assembly and leisure	N/A	N/A	N/A
		25%		sui generis	N/A	N/A	N/A
				B1 Jobs	2,106	B1 Floorspace	38,961
				B2 Jobs	193	B2 Floorspace	6,176
				B8 Jobs	6	B8 Floorspace	390
				TOTAL JOBS	2,305	TOTAL FLOORSPACE	45,527

Table 74: Surplus forecast employment floorspace requirements for east Wiltshire 2016 to 2021

Industry Sector	Forecast additional employment to 2026	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required
Agriculture etc	-420	100%		sui generis	N/A	N/A	N/A
Mining and Quarrying	-20	100%	B2	general industrial	-20	32	-640
Food, textiles and wood	-60	25%	B2	general industrial	-15	32	- 480
		75%		sui generis	N/A	N/A	N/A
Metals and Engineering	-50	100%	B2	general industrial	-50	32	- 1,600
Electronics	-70	100%	B2	general industrial	-70	32	- 2,240
Transport Equipment	-10	100%	B2	general industrial	-10	32	- 320
Public Admin and Defence	-1050	100%	B1	business	-1,050	18.5	- 19,425
B1 Jobs					-1,050	B1 Floorspace	- 19,425
B2 Jobs					- 165	B2 Floorspace	- 5,280
B8 Jobs					-	B8 Floorspace	-
TOTAL JOBS					- 1,215	TOTAL FLOORSPACE	- 24,705

Table 75: Summary of balance of net employment floorspace requirements for east Wiltshire 2016-2021

Business Use Class	Additional Floorspace Requirement	Surplus floorspace	Overall change in requirement to 2026
B1 Business	38,961	- 19,425	19,536
B2 General industrial	6,176	- 5,280	896
B8 Storage and distribution	390	-	390
Total (all B use classes)	45,527	- 24,705	20,822

2021-2026

Table 76: Additional forecast employment floorspace requirements for east Wiltshire 2021-2026

Industry Sector	Forecast additional employment 2011-2016	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required (sqm)
Manufacturing nes	110	100%	B2	general industrial	110	32	3,520
Food, textiles and wood	10	25%	B2	general industrial	3	32	80
		75%		sui generis	N/A	N/A	N/A
Construction	20	10%	B2	general industrial	2	32	64
		90%		sui generis	N/A	N/A	N/A
Hotels and Catering	460	30%	A3	restaurants and cafes	N/A	N/A	N/A
		20%	A4	drinking establishments	N/A	N/A	N/A
		40%	C1	hotels	N/A	N/A	N/A
		10%	B2	general industrial	46	32	1,472
Banking and Insurance	20	80%	B1	business	16	18.5	296
		20%	A2	financial and professional services	N/A	N/A	N/A
Other Business Services	640	100%	B1	business	640	18.5	11,840
Education and Health	110	20%	B1	business	22	18.5	407
		40%	C2	residential institutions	N/A	N/A	N/A
		40%	D1	Non-residential institutions	N/A	N/A	N/A
Misc services	230	50%	B1	business	115	18.5	2,128
		25%	D2	assembly and leisure	N/A	N/A	N/A
		25%		sui generis	N/A	N/A	N/A
				B1 Jobs	793	B1 Floorspace	14,671
				B2 Jobs	161	B2 Floorspace	5,136
				B8 Jobs	-	B8 Floorspace	-
				TOTAL JOBS	954	TOTAL FLOORSPACE	19,807

Table 77: Surplus forecast employment floorspace requirements for east Wiltshire 2021 to 2026

Industry Sector	Forecast additional employment to 2026	Assumption of land use requirement, by planning use class			No of jobs	Employment density as gross external floorspace (sqm)	Total Floorspace required
Agriculture etc	-360	100%		sui generis	N/A	N/A	N/A
Mining and Quarrying	-20	100%	B2	general industrial	-20	32	-640
Chemicals and minerals	-10	10%	B2	general industrial	-1	32	- 32
		90%		sui generis	N/A	N/A	N/A
Metals and Engineering	-40	100%	B2	general industrial	-40	32	- 1,280
Electronics	-50	100%	B2	general industrial	-50	32	- 1,600
NA - Retail	-20	100%	A1	Retail	N/A	N/A	N/A
Transport and Communications	-10	40%	B1	business	- 4	18.5	- 74
		60%	B2	general industrial	-6	32	- 192
B1 Jobs					- 4	B1 Floorspace	- 74
B2 Jobs					- 117	B2 Floorspace	- 3,744
B8 Jobs					-	B8 Floorspace	-
TOTAL JOBS					- 121	TOTAL FLOORSPACE	- 3,818

Table 78: Summary of balance of net employment floorspace requirements for east Wiltshire 2021-2026

Business Use Class	Additional Floorspace Requirement (sqm)	Surplus floorspace (sqm)	Overall change in requirement to 2026 (sqm)
B1 Business	14,671	- 74	14,597
B2 General industrial	5,136	- 3,744	1,392
B8 Storage and distribution	-	-	-
Total (all B use classes)	19,807	- 3,818	15,989

6.19 A detailed breakdown of the five yearly changes in employment by industry sectors is given in tables 67 to 78 above. The higher period of job and floorspace growth is predicted to be between 2016 and 2021 when 20,822 sq m of additional floorspace will be forecast to be required. Between 2006 and 2011 job growth is expected to be very slow with only 258 jobs being created and resulting in a small net increase in employment space of 1,401 sq m. During the period 2011-2016 job growth continues to be slow with only 459 additional jobs being forecast requiring an additional 9,596 sq m of floorspace being required. During the 2021 to 2026 period job growth again slows slightly with only 833 jobs being created requiring 15,989 sq m of floorspace.

6.20 Again it is important to note that these forecasts are concerned only with employment relating to B1/2/8 land uses, as and not all employment.

Forecast employment land requirements

6.21 The employment floorspace predictions explained in the previous section represent built floorspace. This can now be taken a stage further using development density assumptions to forecast the actual amount of employment land that is required in the future.

6.22 The 'development density' is an assumption of site coverage that differing types of land use require. The average site coverage allows for a mix of development styles and number of building storeys. For example the site coverage for B1 office is taken as 70% and accounts for a mix of out of town and town/city centre developments, plus a mixed number of storeys. For the purpose of this review, standard development density assumptions have been used, based on work undertaken by DTZ for the South West of England Regional Development Agency. The average development densities that have been used for employment uses are:

B1 office – 70% Site coverage
 B2 industrial – 40% site coverage
 B8 – Warehouse/storage/distribution – 40% site coverage

6.23 The additional employment land requirement to 2026, for east Wiltshire is provided in Table 79 below. The forecasts show that an additional 6.7 hectares of employment land will be required (over and above that already operating/built out as of April 2006) by the year 2026. This employment land will be required in the B1 use class. Any floorspace needed for B2 and B8 should come from existing units coming available.

6.24 Table 80 to 83 provides a breakdown of employment land requirements into five year periods from 2006 to 2026. This identifies that no employment land is needed in the period 2006-2011, with demand increasing after 2011. Between 2011 and 2016 around 1.7 ha is forecast to be needed rising to 3.1 ha forecast between 2016 and 2021 falling again to 2.4 hectares between 2021 and 2026.

Table 79: East Wiltshire: Additional employment land requirement to 2026

Business Use Class	Additional floorspace requirement 2006-2026	Assumption of development density - site coverage	Therefore land space requirement is in sqm	Land requirement in hectares 2006-2026
B1 Business	49,488	70%	70,696	7.07
B2 General industrial	- 640	40%	- 1,600	0.16
B8 Storage and distribution	- 1,040	40%	- 2,600	0.26
Total (all B use classes)	47,808		66,496	6.65

Table 80: East Wiltshire: Additional employment land requirement 2006-2011

Business Use Class	2006-2011	Assumption of development density - site coverage	Therefore land space requirement is in sqm	Land requirement in hectares 2011-2016
B1 Business	8,399	70%	11,998.57	1.20
B2 General industrial	- 5,568	40%	- 13,920.00	1.39
B8 Storage and distribution	- 1,430	40%	- 3,575.00	0.36
Total (all B use classes)	1401.0		-5,496.4	-0.5

Table 81: East Wiltshire: Additional employment land requirement 2011-2016

Business Use Class	2011-2016	Assumption of development density - site coverage	Therefore land space requirement is in sqm	Land requirement in hectares 2011-2016
B1 Business	6,956	70%	9,937.14	0.99
B2 General industrial	2,640	40%	6,600.00	0.66
B8 Storage and distribution	-	40%	-	-
Total (all B use classes)	9596.0		16,537.1	1.7

Table 82: East Wiltshire: Additional employment land requirement 2016-2021

Business Use Class	2016-2021	Assumption of development density - site coverage	Therefore land space requirement is in sqm	Land requirement in hectares 2011-2016
B1 Business	19,536	70%	27,908.57	2.79
B2 General industrial	896	40%	2,240.00	0.22
B8 Storage and distribution	390	40%	975.00	0.10
Total (all B use classes)	20,822		31,123.6	3.1

Table 83: East Wiltshire: Additional employment land requirement 2021-2026

Business Use Class	2021-2026	Assumption of development density - site coverage	Therefore land space requirement is in sqm	Land requirement in hectares 2011-2016
B1 Business	14,597	70%	20,852.14	2.09
B2 General industrial	1,392	40%	3,480.00	0.35
B8 Storage and distribution	-	40%	-	-
Total (all B use classes)	15,989		24,332.1	2.4

7.0 Conclusions

7.1 Overall employment land requirement if north, west and east Wiltshire 2006-2026

Business Use Class	North Wiltshire	West Wiltshire	East Wiltshire	Total
B1 Business	13.53	7.47	7.07	28.1
B2 General industrial	-14.0	0.54	-	0.16
B8 Storage and distribution	0.65	0.78	-	0.26
Total (all B use classes)	0.19	8.79	6.65	15.6

7.2 Overall north, west and east Wiltshire are forecast to need an addition 15.6 ha of employment land for the period 2006 – 2026 to meet the forecast growth in employment. In addition south Wiltshire is forecast to need an additional 20.4 ha² of new employment land resulting in a need across Wiltshire of an additional 36 ha of employment land for forecast job growth. This takes account of net gains and losses and is based on gross internal areas.

7.3 North Wiltshire

7.4 North Wiltshire is forecast to experience job growth within mainly the service sector activities, most significantly in hotels and catering, computing services, professional services and other services. construction, education and health and social work will also grow substantially. Fourteen sectors are forecast to experience a decline with the most significant losses likely to be experienced from agriculture, food textiles and wood, electronics and public admin and defence. Currently the sectors of education and health and other business services provide the most employment. By 2026 the dominance of other business services will have increased. Over the period 2006-2026 north Wiltshire is predicted to experience a large loss of B2 general industrial space (55,984 sq m) whilst needing a increase in B1 business space of 94,739 sq m and a very slight increased required in B8 floorspace of 2,600 sq m resulting in a net employment space need of 41,355 sq m. When translated into a land requirement this results in a slight increased land requirement of 0.2 ha. This is split into a need for additional B1 employment ha floorspace of 13.5 ha, additional B8 floorspace of 0.7 ha and a loss of B2 floorspace of 14 ha.

7.5 During the period **2006 to 2011** there is expected to be a net loss of B use employment floorspace of 58,413 sqm and 1,985 B use jobs in north Wiltshire, with the only use class experiencing growth in this period being B8 storage and distribution which experiences an increase of 12 jobs and 780 sq m net floorspace. The specific sectors that experience growth during this period are predominantly construction and education and health. Those experiencing the most decline are food, textiles and wood, metals and engineering, electronics and public admin and defence. This translates into a net loss of employment land of around 13.9 ha during this period.

7.6 During the period **2011 to 2016** there is expected to be a net gain of employment floorspace of 21,666 sqm and 1,100 B use jobs in north Wiltshire. Other business services and hotels and catering experience a large increase in job numbers with construction and misc services also experiencing a notable increase. The sectors experiencing most decline are education and health, public admin and defence and agriculture. The use class during this period requiring the most floorspace is B1 business, B8 use only requires a small additional increase in floorspace of 390 sq m. This translates into a net gain of employment land of around 3.4 ha during this period.

7.7 During the period **2016 to 2021** there is expected to be a net gain of employment floorspace of 46,344 sqm and B use 2,441 jobs in north Wiltshire. Other business services, hotels and catering, construction and education and health experience a large increase in job numbers. Only 5 sectors are forecast to experience decline during this period including agriculture, metals and engineering and electronics. The sectors experiencing most decline are education and health, public admin and defence and agriculture. The use class during this period requiring the most floorspace is B1 business with an additional requirement for an additional 44,530 sq m. B2 and B8 uses only require

² See document entitled Future Employment Needs in south Wiltshire – Employment and Land forecasts/projections – January 2011.

a small additional increase in floorspace of 385 sq m and 1,430 sq m respectively. This translates into a net gain of employment land of around 6.8 ha during this period.

- 7.8 During the period **2021 to 2026** there is expected to be a net gain of employment floorspace of 31,758 sqm and 1,856 jobs in north Wiltshire. Other business services, hotels and catering and construction experience a large increase in job numbers. 10 sectors are forecast to experience decline during this period with most decline forecast to be experienced in agriculture, metals and engineering and electronics. The use class during this period requiring the most floorspace is B1 business with an additional requirement for an additional 37,870sq m. B2 uses experience a decline in required floorspace of 6,112 sq m. B8 uses experience no increase or decline. This translates into a net gain of employment land of around 3.9 ha during this period.
- 7.9 West Wiltshire**
- 7.10 West Wiltshire is forecast to experience job growth within mainly service sector activities, most significantly in hotels and catering, other business services and education and health, the sector within 'other business services' expected to see the most growth are computing services and professional services. Nine sectors are forecast to experience a decline with the most significant losses likely to be experienced from agriculture, food, textiles and wood, construction and chemicals and minerals. Currently the sectors of education and health and other business services provide the most employment. By 2026 the dominance of other business services and education and health will have increased, with hotels and catering also experiencing an substantial percentage increase in its dominance from 9.4% to 12.8%. Over the period 2006-2026 west Wiltshire is predicted to experience a net increase in B1 business space of 52,281 sq m and a small net increase in both B2 and B8 floorspace of 2,176 sq m and 3,120 sq m respectively.
- 7.11 Due to the different development density of different employment uses this results in a net increase in employment land required in west Wiltshire of 8.8 ha, split into 7.5 ha of B1 land, 0.5 ha of B2 land and 0.8 ha of B8 land.
- 7.12 During the period **2006 to 2011** there is expected to be a net loss of B use employment floorspace of 50,135 sqm and 2,007 jobs in west Wiltshire. No use class experiences growth during this period. However some one specific sector does experience growth during this period namely education and health. Those experiencing the most decline are food, textiles and wood, other business services and construction. This translates into a net loss of employment land of around 10.3 ha during this period.
- 7.13 During the period **2011 to 2016** there is expected to be a net gain of employment floorspace of 28,850 sqm and 1,239 B use jobs in west Wiltshire. Other business services and hotels and catering experience a large increase in job numbers with chemicals and minerals, manufacturing nes and misc services also experience a notable increase. The sectors experiencing most decline are education and health and agriculture. The use class during this period requiring the most floorspace is B1 business requiring 15,522 sq m with B2 requiring 12,288 sq m. B8 use only requires a small additional increase in floorspace of 1,040 sq m. This translates into a net gain of employment land of around 5.5 ha during this period.
- 7.14 During the period **2016 to 2021** there is expected to be a net gain of employment floorspace of 47,953 sqm and 2,188 B use jobs in west Wiltshire. Other business services, hotels and catering, and education and health experience a large increase in job numbers. Only 7 sectors are forecast to experience decline with most of these losses expected in agriculture. The use class during this period requiring the most floorspace is B1 business with an additional requirement for an additional 32,745 sq m. B8 uses only require a small additional increase in floorspace of 3,640 sq m. There is an additional requirement of 11,568 sq m of B2 floorspace. This translates into a net gain of employment land of around 8.5 ha during this period.
- 7.15 During the period **2021 to 2026** there is expected to be a net gain of employment floorspace of 30,910 sqm and 1,522 B use jobs in west Wiltshire. Other business services and hotels and catering are forecast to experience the most growth. Nine sectors are forecast to experience decline during this period with most decline forecast to be experienced in agriculture. The use class during this period requiring the most floorspace is B1 business with an additional requirement for an additional 25,290 sq m. B2 and B8 uses only require an additional increase in floorspace of 4,320 sq m and

1,300 sq m respectively. This translates into a net gain of employment land of around 5.0 ha during this period.

7.16 East Wiltshire

- 7.17 East Wiltshire is forecast to experience job growth within mainly service sector activities, most significantly in hotels and catering, other business services, professional services and education and health. The sector of other business services is the main growth area and the sectors within this area expected to see the most growth are computing services and professional services. Ten sectors are forecast to experience a decline with the most significant losses likely to be experienced from agriculture and public admin and defence. Metals and engineering, electronics and construction will also experience a decline. Currently the sectors of education and health, public admin and defence and other business services provide the most employment. By 2026 the dominance of other business services and education and health will have increased, with hotels and catering also experiencing a substantial percentage increase in its dominance from 6.6% to 9.9%. Over the period 2006-2026 east Wiltshire is predicted to experience a net increase in B1 business space of 47,488 sq m and a small net decrease in both B2 and B8 floorspace of 640 sq m and 1,040 sq m respectively.
- 7.18 Due to the different development density of different employment uses this results in a net increase in employment land required in east Wiltshire of 6.7 ha.
- 7.19 During the period **2006 to 2011** there is expected to be a net gain of employment floorspace of 1,401 sqm and 258 B use jobs in east Wiltshire. This growth is forecast to be within the B1 use class. Other business services and education and health experience a large increase in job numbers. The sectors experiencing most decline are construction and public admin and defence. The use class during this period requiring the most floorspace is B1 business requiring 8,399 sq m with B2 and B8 experiencing a decline of 5,568 sq m and 1,430 sq m respectively. This translates into a net loss of employment land of around 0.5 ha during this period.
- 7.20 During the period **2011 to 2016** there is expected to be a net gain of employment floorspace of 9,596 sqm and 459 B use jobs in east Wiltshire. Other business services experiences the greatest increase with misc services and manufacturing nes also experience quite large increases. The sectors experiencing most decline are education and health, public admin and defence and agriculture. The use class during this period requiring the most floorspace is B1 business requiring 6,956 sq m with B2 requiring 2,640 sq m. B8 use experiences no net increase during this period. This translates into a net gain of employment land of around 1.7 ha during this period.
- 7.21 During the period **2016 to 2021** there is expected to be a net gain of employment floorspace of 20,822 sqm and 1,090 B use jobs in east Wiltshire. Other business services, hotels and catering, and misc services experience a large increase in job numbers. Only 7 sectors are forecast to experience decline with most of these losses expected in public admin and defence and agriculture. The use class during this period requiring the most floorspace is B1 business with an additional requirement for an additional 19,536 sq m. B8 uses only require a small additional increase in floorspace of 390 sq m. There is an additional requirement of 896 sq m of B2 floorspace. This translates into a net gain of employment land of around 3.1 ha during this period.
- 7.23 During the period **2021 to 2026** there is expected to be a net gain of employment floorspace of 15,989 sqm and 833 B use jobs in east Wiltshire. Other business services and hotels and catering are forecast to experience the most growth. Seven sectors are forecast to experience decline during this period with most decline forecast to be experienced in agriculture. The use class during this period requiring the most floorspace is B1 business with an additional requirement for an additional 14,597 sq m. B2 uses only require an additional increase in floorspace of 1,392 sq m. B8 uses experience no net increase. This translates into a net gain of employment land of around 2.4 ha during this period.

Appendix 1: Employment in North Wiltshire (thousands) – September 2010



	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Agriculture etc	1.85	1.8	2.26	2.25	2.2	2.14	2.1	2.04	1.97	1.91	1.86	1.81	1.75	1.7	1.65	1.59	1.53	1.48	1.42	1.36	1.3
Coal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Oil & natural gas etc	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other mining	0.16	0.17	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.06	0.06
Food, drink & tobacco	1.34	0.9	0.6	0.59	0.59	0.59	0.58	0.59	0.58	0.57	0.56	0.56	0.56	0.55	0.54	0.51	0.49	0.47	0.45	0.44	0.43
Text., cloth. & leather	0.16	0.13	0.11	0.11	0.11	0.11	0.11	0.11	0.11	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.09	0.09	0.09	0.09	0.08
Wood & paper	0.37	0.44	0.28	0.27	0.25	0.25	0.25	0.25	0.24	0.24	0.24	0.24	0.23	0.23	0.23	0.23	0.22	0.22	0.22	0.22	0.21
Printing & publish.	0.78	0.58	0.66	0.64	0.6	0.62	0.62	0.62	0.62	0.63	0.63	0.63	0.64	0.65	0.65	0.65	0.65	0.65	0.65	0.65	0.64
Manufactured fuels	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10 Pharmaceuticals	0.07	0.08	0.15	0.14	0.13	0.13	0.13	0.13	0.13	0.13	0.13	0.14	0.14	0.15	0.15	0.15	0.15	0.14	0.14	0.14	0.14
Chemicals & MM fibres	0.2	0.06	0.09	0.09	0.08	0.08	0.08	0.08	0.08	0.08	0.08	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.06
Rubber & plastic products	1.11	1.04	1.15	1.08	1.03	1.04	1.05	1.07	1.1	1.12	1.12	1.13	1.14	1.14	1.15	1.14	1.14	1.14	1.13	1.13	1.13
Non-metal. mineral products	0.52	0.43	0.49	0.42	0.37	0.38	0.4	0.39	0.38	0.37	0.37	0.37	0.36	0.36	0.36	0.35	0.35	0.35	0.34	0.34	0.34
Basic metals	0.05	0.14	0.13	0.11	0.1	0.09	0.09	0.09	0.1	0.1	0.09	0.09	0.09	0.08	0.08	0.08	0.08	0.08	0.08	0.07	0.07
Metal prod.	0.71	0.8	0.73	0.61	0.53	0.5	0.51	0.49	0.48	0.47	0.46	0.45	0.44	0.43	0.43	0.42	0.41	0.4	0.39	0.38	0.37
Mechanical engineering	1.69	1.38	1.44	1.35	1.33	1.38	1.46	1.52	1.45	1.4	1.35	1.27	1.23	1.21	1.21	1.2	1.18	1.16	1.13	1.09	1.06
Electronics	0.56	0.6	0.65	0.59	0.55	0.54	0.56	0.56	0.55	0.54	0.53	0.52	0.52	0.52	0.52	0.5	0.49	0.48	0.47	0.46	0.45
Electrical Engineering & Instruments	1.38	0.76	0.75	0.66	0.62	0.61	0.6	0.58	0.55	0.52	0.5	0.48	0.47	0.46	0.44	0.41	0.39	0.37	0.35	0.33	0.3
Motor vehicles	0.06	0.05	0.04	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.02	0.02	0.02	0.02	0.02	0.02	0.02
Other transport equip.	0.01	0.02	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01
Other manufacturing	0.52	0.56	0.65	0.57	0.52	0.55	0.57	0.6	0.63	0.65	0.67	0.68	0.7	0.73	0.76	0.8	0.83	0.87	0.89	0.9	0.92
Electricity	0.04	0.05	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Gas Supply	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Water Supply	0.01	0	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01
Construction	4.65	5.83	7.19	6.72	6.1	6.03	6.07	6.12	6.17	6.26	6.36	6.5	6.66	6.82	6.98	7.03	7.08	7.14	7.21	7.28	7.36
Distribution	4.15	4.23	4.4	4.28	4.2	4.21	4.21	4.21	4.21	4.22	4.24	4.26	4.29	4.32	4.34	4.35	4.35	4.36	4.35	4.35	4.35
Retailing	4.95	5.17	5.28	5.19	5.19	5.29	5.28	5.21	5.16	5.14	5.17	5.2	5.23	5.26	5.29	5.27	5.24	5.22	5.21	5.2	5.2
Hotels & catering	3.99	3.94	4.34	4.18	4.07	4.12	4.25	4.37	4.51	4.66	4.79	4.94	5.1	5.28	5.44	5.64	5.8	5.97	6.13	6.25	6.41
Land Transport	2.79	2.41	2.39	2.39	2.43	2.49	2.52	2.54	2.54	2.54	2.53	2.53	2.54	2.54	2.55	2.54	2.54	2.53	2.53	2.53	2.52
Water Transport	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Air Transport	0.01	0.04	0.04	0.03	0.03	0.02	0.02	0.02	0.03	0.03	0.03	0.03	0.03	0.04	0.04	0.04	0.04	0.05	0.05	0.05	0.05
Communications	0.69	0.68	0.83	0.8	0.79	0.79	0.8	0.81	0.81	0.81	0.81	0.83	0.85	0.86	0.86	0.86	0.85	0.85	0.85	0.85	0.85
Banking & finance	0.51	0.55	0.69	0.67	0.65	0.65	0.66	0.66	0.67	0.68	0.69	0.69	0.7	0.71	0.72	0.73	0.75	0.76	0.77	0.77	0.78
Insurance	0.06	0.06	0.1	0.1	0.1	0.1	0.11	0.11	0.11	0.11	0.12	0.12	0.13	0.13	0.13	0.14	0.14	0.14	0.14	0.15	0.15
Computing Services	2.19	2.13	2.34	2.35	2.27	2.37	2.46	2.54	2.63	2.73	2.85	2.98	3.13	3.29	3.45	3.6	3.76	3.93	4.11	4.29	4.49
Professional Services	4.43	4.76	4.79	4.58	4.42	4.6	4.73	4.84	4.98	5.15	5.34	5.53	5.74	5.98	6.21	6.38	6.56	6.74	6.94	7.15	7.33
Other business services	3.32	3.49	3.24	3.17	3.18	3.19	3.16	3.18	3.2	3.23	3.26	3.3	3.33	3.36	3.39	3.39	3.39	3.4	3.4	3.41	3.4
Public admin. & defence	4.58	3.96	3.72	3.73	3.77	3.73	3.65	3.56	3.47	3.38	3.38	3.39	3.41	3.43	3.44	3.43	3.42	3.42	3.41	3.4	3.4
Education	5.37	5.52	5.86	6.08	6.34	6.34	6.24	6.09	5.91	5.77	5.76	5.78	5.82	5.87	5.89	5.94	5.99	6.04	6.07	6.09	6.12
Health & Social Work	4.31	4.35	4.51	4.65	4.77	4.78	4.75	4.72	4.69	4.66	4.66	4.7	4.74	4.79	4.83	4.85	4.87	4.89	4.9	4.92	4.93
Other services	3.66	3.92	3.6	3.62	3.59	3.64	3.71	3.77	3.81	3.84	3.9	4.01	4.12	4.21	4.33	4.41	4.48	4.58	4.63	4.66	4.69

Appendix 2: Employment in West Wiltshire (thousands) – September 2010



	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Agriculture etc	1.33	1.3	1.6	1.58	1.48	1.38	1.31	1.2	1.09	1.01	0.94	0.87	0.81	0.74	0.69	0.63	0.58	0.53	0.49	0.44	0.4
Coal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Oil & natural gas etc	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other mining	0.03	0.03	0.05	0.05	0.05	0.05	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.03	0.03	0.03	0.03	0.03
Food, drink & tobacco	1.5	1.24	0.95	0.91	0.91	0.92	0.94	0.97	0.99	1.01	1.02	1.01	1	0.99	0.98	0.96	0.96	0.96	0.96	0.97	1
Text., cloth. & leather	0.21	0.11	0.12	0.12	0.11	0.11	0.11	0.11	0.11	0.11	0.1	0.1	0.1	0.1	0.1	0.09	0.09	0.09	0.08	0.08	0.08
Wood & paper	0.38	0.41	0.29	0.28	0.26	0.25	0.25	0.25	0.25	0.24	0.24	0.24	0.24	0.23	0.23	0.22	0.22	0.22	0.22	0.21	0.21
Printing & publish.	0.48	0.54	0.46	0.42	0.37	0.39	0.4	0.4	0.4	0.4	0.41	0.41	0.42	0.43	0.43	0.44	0.44	0.44	0.44	0.44	0.44
Manufactured fuels	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10 Pharmaceuticals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Chemicals & MM	0.53	0.52	0.87	0.83	0.81	0.81	0.8	0.78	0.77	0.75	0.73	0.71	0.7	0.68	0.67	0.66	0.65	0.63	0.62	0.6	0.59
fibres	1.63	1.56	1.43	1.21	1.08	1.11	1.13	1.17	1.25	1.31	1.33	1.37	1.39	1.39	1.41	1.41	1.41	1.41	1.39	1.4	1.41
Rubber & plastic	0.28	0.27	0.27	0.2	0.17	0.18	0.19	0.18	0.17	0.17	0.16	0.16	0.16	0.16	0.16	0.15	0.15	0.15	0.15	0.15	0.14
products	0.02	0.02	0.03	0.02	0.02	0.02	0.02	0.02	0.02	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01
Non-metal. mineral	0.37	0.4	0.41	0.35	0.31	0.29	0.29	0.28	0.28	0.27	0.26	0.26	0.26	0.25	0.25	0.24	0.24	0.23	0.23	0.22	0.22
products	0.51	0.45	0.63	0.59	0.58	0.6	0.63	0.66	0.63	0.61	0.59	0.55	0.54	0.53	0.53	0.52	0.52	0.51	0.49	0.48	0.46
Basic metals	0.06	0.07	0.05	0.05	0.04	0.04	0.04	0.05	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.04	0.03
Metal prod.	0.29	0.38	0.18	0.18	0.17	0.17	0.16	0.16	0.15	0.15	0.15	0.14	0.14	0.14	0.13	0.13	0.12	0.12	0.11	0.11	0.1
Mechanical	0.12	0.18	0.2	0.16	0.14	0.14	0.16	0.17	0.17	0.16	0.15	0.14	0.14	0.14	0.13	0.13	0.14	0.14	0.14	0.13	0.13
engineering	0.31	0.3	0.35	0.34	0.32	0.32	0.33	0.33	0.34	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.32	0.32	0.31	0.3
Electronics																					
Electrical Engineering																					
& Instruments																					
Motor vehicles																					
Other transport equip.																					

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Other manufacturing	1.97	1.92	1.92	1.77	1.66	1.71	1.76	1.82	1.88	1.92	1.95	1.98	2.02	2.07	2.13	2.19	2.25	2.3	2.34	2.36	2.38
Electricity	0.1	0.1	0.11	0.11	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Gas Supply	0	0.04	0.03	0.03	0.03	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01
Water Supply	0.02	0	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0	0	0	0	0	0
Construction	3.25	3.31	3.57	3.15	2.71	2.68	2.69	2.7	2.71	2.73	2.75	2.77	2.79	2.82	2.85	2.85	2.85	2.85	2.86	2.86	2.86
Distribution	4.65	4.77	4.88	4.54	4.43	4.43	4.44	4.45	4.46	4.48	4.51	4.57	4.64	4.7	4.75	4.79	4.83	4.86	4.88	4.88	4.89
Retailing	5.7	5.67	5.99	5.89	5.9	6	6	5.91	5.86	5.84	5.86	5.9	5.94	5.98	6.01	5.99	5.95	5.93	5.92	5.91	5.91
Hotels & catering	5.57	5.48	5.55	5.34	5.2	5.27	5.43	5.59	5.76	5.96	6.12	6.32	6.52	6.75	6.95	7.21	7.41	7.64	7.83	8	8.2
Land Transport	1.48	1.57	1.61	1.61	1.62	1.64	1.65	1.66	1.66	1.66	1.66	1.65	1.65	1.66	1.66	1.65	1.65	1.64	1.64	1.63	1.63
Water Transport	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01
Air Transport	0	0.01	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.01
Communications	1.83	2.85	1.69	1.62	1.56	1.57	1.6	1.64	1.64	1.62	1.64	1.71	1.75	1.78	1.8	1.79	1.77	1.77	1.77	1.77	1.78
Banking & finance	0.56	0.56	0.49	0.48	0.46	0.46	0.46	0.47	0.47	0.48	0.49	0.5	0.5	0.51	0.52	0.53	0.54	0.55	0.56	0.57	0.58
Insurance	0.05	0.07	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.06	0.06	0.06	0.06	0.07	0.07	0.07	0.07	0.07	0.07	0.08
Computing Services	1.2	1.07	1.15	1.15	1.12	1.16	1.2	1.23	1.27	1.31	1.35	1.41	1.47	1.53	1.59	1.65	1.71	1.77	1.84	1.91	1.98
Professional Services	5.01	3.37	3.56	3.38	3.24	3.4	3.51	3.6	3.72	3.87	4.03	4.2	4.38	4.59	4.79	4.95	5.11	5.28	5.47	5.66	5.83
Other business services	3.72	3.87	4.21	4.12	4.13	4.15	4.11	4.13	4.16	4.21	4.24	4.29	4.33	4.37	4.41	4.41	4.41	4.42	4.43	4.43	4.43
Public admin. & defence	2.11	4.07	2.1	2.12	2.14	2.13	2.09	2.06	2.02	1.99	1.98	1.98	1.98	1.98	1.97	1.96	1.95	1.94	1.93	1.92	1.91
Education	4.36	4.32	4.91	4.98	5.06	5.06	5.03	4.99	4.93	4.89	4.88	4.89	4.91	4.92	4.93	4.93	4.94	4.95	4.95	4.95	4.95
Health & Social Work	5.95	6.07	6.04	6.36	6.63	6.64	6.58	6.51	6.45	6.38	6.37	6.45	6.57	6.68	6.76	6.82	6.89	6.95	7	7.05	7.11
Other services	3.54	3.71	3.48	3.49	3.47	3.5	3.54	3.57	3.6	3.62	3.65	3.71	3.77	3.83	3.89	3.92	3.96	4.01	4.03	4.04	4.05
Total	59.13	60.6	59.24	57.43	56.3	56.73	57.05	57.28	57.47	57.73	58.17	58.9	59.71	60.54	61.32	61.86	62.34	62.87	63.34	63.76	64.24

Appendix 3: Employment in East Wiltshire (thousands) – September 2010



	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Agriculture etc	2.44	2.26	2.57	2.55	2.46	2.35	2.27	2.15	2.04	1.94	1.85	1.76	1.68	1.6	1.52	1.43	1.36	1.29	1.21	1.14	1.07
Coal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Oil & natural gas etc	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0	0	0	0	0	0
Other mining	0	0.06	0.13	0.13	0.13	0.12	0.12	0.12	0.12	0.11	0.11	0.11	0.11	0.1	0.1	0.1	0.09	0.09	0.09	0.09	0.08
Food,drink & tobacco	0.75	0.83	0.84	0.8	0.8	0.81	0.82	0.85	0.87	0.89	0.89	0.89	0.88	0.87	0.86	0.84	0.84	0.84	0.85	0.86	0.88
Text., cloth. & leather	0.05	0.04	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.02	0.02	0.02	0.02
Wood & paper	0.27	0.31	0.32	0.31	0.3	0.29	0.29	0.29	0.28	0.28	0.28	0.28	0.27	0.27	0.27	0.27	0.26	0.26	0.26	0.25	0.25
Printing & publish.	0.15	0.16	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14
Manufactured fuels	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10 Pharmaceuticals	0.06	0.05	0.06	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.06	0.06	0.06	0.06	0.06	0.06	0.05	0.05	0.05
Chemicals & MM fibres	0	0	0.01	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Rubber & plastic products	0.06	0.06	0.07	0.06	0.05	0.06	0.06	0.06	0.06	0.06	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07
Non-metal. mineral products	0.07	0.1	0.08	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06
Basic metals	0.21	0.17	0.18	0.15	0.13	0.12	0.12	0.13	0.13	0.13	0.13	0.12	0.12	0.11	0.11	0.11	0.11	0.1	0.1	0.1	0.1
Metal prod.	0.28	0.27	0.27	0.25	0.24	0.23	0.23	0.23	0.23	0.22	0.22	0.22	0.22	0.22	0.22	0.21	0.21	0.21	0.21	0.2	0.2
Mechanical engineering	0.26	0.27	0.29	0.27	0.27	0.28	0.29	0.3	0.29	0.28	0.27	0.26	0.26	0.25	0.25	0.25	0.25	0.25	0.24	0.24	0.23
Electronics	0.02	0.02	0.02	0.02	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01
Electrical Engineering & Instruments	0.34	0.31	0.42	0.38	0.34	0.33	0.32	0.3	0.27	0.26	0.24	0.23	0.21	0.2	0.19	0.17	0.16	0.15	0.14	0.13	0.12
Motor vehicles	0.26	0.24	0.23	0.18	0.16	0.17	0.18	0.2	0.2	0.19	0.17	0.17	0.16	0.16	0.16	0.16	0.16	0.16	0.16	0.16	0.16
Other transport equip.	0.01	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02
Other manufacturing	0.76	0.7	0.77	0.69	0.64	0.66	0.69	0.72	0.75	0.77	0.79	0.8	0.82	0.85	0.88	0.92	0.95	0.98	1	1.02	1.03

Electricity	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Gas Supply	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Water Supply	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Construction	2.57	2.49	2.89	2.55	2.19	2.17	2.18	2.19	2.2	2.21	2.23	2.24	2.27	2.29	2.31	2.31	2.31	2.31	2.32	2.33	2.33
Distribution	1.41	1.39	1.34	1.31	1.29	1.3	1.3	1.3	1.3	1.3	1.3	1.31	1.31	1.32	1.33	1.33	1.33	1.33	1.33	1.33	1.33
Retailing	2.84	2.84	2.87	2.82	2.82	2.88	2.87	2.83	2.8	2.79	2.8	2.82	2.85	2.86	2.88	2.87	2.86	2.85	2.85	2.84	2.85
Hotels & catering	2.22	2.42	2.48	2.39	2.32	2.35	2.42	2.49	2.57	2.66	2.73	2.82	2.91	3.01	3.1	3.22	3.31	3.42	3.51	3.58	3.68
Land Transport	0.54	0.64	0.67	0.67	0.67	0.67	0.67	0.67	0.67	0.67	0.67	0.67	0.67	0.66	0.66	0.66	0.66	0.66	0.65	0.65	0.65
Water Transport	0.02	0.02	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01
Air Transport	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Communications	0.18	0.17	0.18	0.17	0.17	0.17	0.17	0.17	0.17	0.17	0.17	0.18	0.18	0.18	0.18	0.18	0.18	0.18	0.18	0.18	0.18
Banking & finance	0.33	0.25	0.22	0.22	0.21	0.21	0.21	0.21	0.21	0.22	0.22	0.22	0.22	0.23	0.23	0.24	0.24	0.25	0.25	0.26	0.26
Insurance	0.01	0.02	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01
Computing Services	0.38	0.38	0.46	0.46	0.45	0.46	0.46	0.47	0.48	0.48	0.49	0.5	0.51	0.52	0.53	0.53	0.54	0.55	0.56	0.56	0.57
Professional Services	2.38	3.29	3.55	3.41	3.31	3.43	3.51	3.59	3.68	3.79	3.92	4.04	4.18	4.33	4.48	4.59	4.71	4.83	4.96	5.09	5.21
Other business services	1.48	1.7	1.53	1.46	1.47	1.48	1.45	1.47	1.48	1.52	1.55	1.58	1.62	1.65	1.68	2.7	2.7	2.7	2.69	2.69	2.68
Public admin. & defence	4.4	3.87	3.61	3.65	3.7	3.66	3.61	3.55	3.49	3.42	3.41	3.41	3.41	3.4	3.4	2.36	2.36	2.36	2.36	2.35	2.36
Education	3.05	3.16	3.47	3.57	3.67	3.68	3.63	3.57	3.5	3.44	3.43	3.44	3.46	3.48	3.49	3.51	3.53	3.55	3.57	3.58	3.59
Health & Social Work	3.33	3.45	3.7	3.78	3.83	3.84	3.82	3.81	3.8	3.78	3.78	3.8	3.82	3.85	3.86	3.87	3.88	3.88	3.89	3.9	3.9
Other services	2.55	2.24	2.35	2.36	2.34	2.38	2.43	2.47	2.5	2.52	2.56	2.65	2.73	2.8	2.88	2.94	3	3.08	3.12	3.14	3.17
Total	33.6	34.1	35.7	34.9	34.2	34.4	34.4	34.4	34.4	34.4	34.6	34.9	35.2	35.6	35.9	36.4	36.6	36.8	37.0	37.2	
	5	9	7	2	9	2	8	5	1	4	1	1	6	2	7	36.2	1	7	8	6	7

Appendix 4 – Employment densities

Employment density' is the number of square metres required per employee and differs for different categories of employment. For the purpose of this review standard employment density ratios have been used based on work undertaken by Arup Economics and Planning on behalf of English Partnerships in their study 'Employment Densities: A full Guide, July 2001 (available from <http://www.englishpartnerships.co.uk/researchreports.htm>). The government guidance entitled 'Employment Land Reviews: Guidance Note' recommends that this Employment Densities guide produced by Arups is an appropriate guide to use (Annex D). This guide has been used for consistency and comparison purposes as both the Salisbury Employment Land Review and the Wiltshire Workspace and Employment Land Strategy – Final Strategy Document (August 2009) uses this guide to determine employment densities. It was produced for the former English Partnerships agency. It should however be noted that the Homes and Communities Agency has recently updated this guidance with a new version entitled 'Employment Densities Guide – 2nd Edition 2010' available from <http://www.info4local.gov.uk/documents/publications/1789435>.

The Arup study that this review uses considers a range of employment uses, which have been simplified for the purposes of this exercise and can be expressed as:

- B1 Office - 18.5 sq m per employee (Gross Internal floorspace)
- B2 Industrial – 32 sq m per employee (Gross Internal floorspace)
- B8 Warehouse / storage / distribution – 85 sq m per employee (Gross External Area)

In comparison to the more up to date figures, the updated study generally sets slightly lower employment densities (sq m per employee) for B1 uses. However it should be noted that this latest guide is based on Net Internal Areas (NIA) rather than Gross Internal Areas (GIA) for B1 uses. GIA calculations produces a larger area as it includes more communal areas than NIA.

With respect to B2 the new guidance suggests an area of 36 sq m per employee GIA but comments that variation can occur and there is a range of between 18 and 60 sq m per employee. 32 sq m used in this study is well within that range. In addition para 3.2 of the document 'Employment Densities Guide, 2nd Edition' (the new guide) stipulates that 'Where appraisers are using significantly different figures (i.e. +/- 10%) from those set out, they should specify the reasons for the variable and justify them in the specific context of the project. The figure of 32 sq m per employee compared to 36 sq m is only just outside of the 10% range and therefore still felt appropriate.

With respect to B8 uses the updated guidance suggests a figure of 70 or 80 sq m depending on the type of B8 uses with a variable range of between 25 and 115 sq m, again 85sq m is well within this range and within the +/- 10% range suggested in the paragraph above.

Therefore the employment densities used in this review are still felt to be appropriate.

Section 4 of the document 'Employment Densities Guide, 2nd Edition 2010' also details a wide range of factors that can affect employment density. Factors include:

- Type of activity within use type
- Working practices
- Size of premises
- Location and region
- Economic cycle
- Building age
- Energy efficiency
- Reliance on technology and Changing working practices
- Length of occupation and type of tenure

Therefore confirming that there are many factors that affect employment densities and these may change over time depending on occupiers requirements.