Bournemouth, Dorset and Poole Workspace Study Employment Land Projections 2012 update

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March 2012

Bournemouth, Dorset and Poole Workspace Study
Employment Land Projections: evidence update 2012

Commissioned by the Dorset local authorities:

Christchurch Borough Council
East Dorset District Council
North Dorset District Council
Purbeck District Council
West Dorset District Council
Weymouth & Portland Borough Council
Bournemouth Borough Council
Poole Borough Council

Anne Gray, Dorset County Council

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Executive Summary

1 Introduction

This quantitative evidence base update follows the process established in the 2008 Workspace Strategy (by GVA Grimley consultants). This 2012 update includes the following changes:

- Updated employment/economic projections;
- Industrial sectors and definitions have been changed from SIC 2003 to SIC 2007 incorporating some revision of allocation to land use class as appropriate based on new SIC 2007 codes;
- There has been a change of geography from Travel to Work Areas (TTWAs), to the Strategically Significant Cities and Towns geographies (SSCTs);
- Employment densities have been updated;
- Plot ratios have been updated;
- An allowance for flexibility has been added in the 2012 revision;
- Phasing is in two ten year periods.

How this report should be used

This study applies a standard methodology to provide estimates that can be used alongside other tools for determining future employment land requirements. The projections assume a return to stable, positive employment and economic growth: no allowance is made for the possibility of a return to recession in the immediate future or of any future downturn or boom in the economy. Similarly, no account can be taken of potential changes in local policy that may affect land requirement.

Local authorities are expected to co-operate in the provision of employment land in line with the Localism Act 2011.

2 Methodology for Estimating Employment Land Demand

The employment land requirement by land use class for the period 2011-2031 is estimated for the Bournemouth, Dorset and Poole area (BDP); the Strategically Significant Cities and Towns of Bournemouth & Poole and Weymouth & Dorchester; and the Rural Dorset area.

A: Projections for employment growth 2011-2031 give **employment demand:** the latest Autumn 2011 projections from Experian (for the South West Observatory) have been used in this exercise.

B: Employment demand is converted to **Land Use Class (LUC)** (Office, Other business, Warehousing) using a matrix based on that used in the 2008 Workspace Strategy (updated to SIC 2007).

C: Employment demand by LUC is converted to **floorspace requirement** using worker densities by LUC (FTE per sq m) from Drivers Jonas Deloitte:
- The employment density for office use is higher than that used in 2008: this would result in a lower baseline estimate for this LUC.
- The employment densities for both other business and warehousing are lower: this would result in a higher baseline estimate for these LUCs.

D: This floorspace requirement is converted to a **baseline land requirement (ha)** using plot ratios by LUC: plot ratios are calculated from employment land completions data (including outstanding commitments) from the Bournemouth, Dorset and Poole local authorities.

Allowances are then added:

E: Windfall losses
Employment land that could potentially be lost to non-B use is projected based on the median over the last six years.

F: Churn
Vacant land required for smooth market function is estimated using the annual average net take-up of employment land: two year allowance.

G: Flexibility
A margin is allowed for competition in market at 10% of baseline requirement (standard) or 20% of baseline requirement (for additional flexibility).

This baseline land requirement plus allowances gives:

H: Final land requirement

3 Baseline Results

Overall it is estimated that around 180 ha is required as a baseline projection over 2011-2031 in BDP before any allowance for windfall, churn or flexibility.

About three-fifths of the total projected requirement is for office uses (106 ha accounting for 59% of the overall requirement) and two-fifths for industrial (75 ha). Growth is expected predominantly in the Bournemouth & Poole SSCT (72%)

Comparing this with the 2008 Workspace Strategy, the figures are much higher. For BDP as a whole, the earlier baseline total was 70.3 ha made up of 70.9 ha Office and -0.6 ha Industrial (Other business plus Warehouse). With the current less buoyant economy, lower productivity is projected and this results in the requirement for a greater number of employees to produce even a lower amount of GVA. More details can be found in Appendix A. The source of the projections should also be taken into consideration as they are from different forecasting houses and should not really be compared.

Baseline projections:

2011-2031	Bournemouth & Poole SSCT	Weymouth & Dorchester SSCT	Rural Dorset Area	BDP
Baseline Office Use	76.3	12.1	17.1	105.5
Baseline Industrial (Other business use and Warehouse)	53.8	4.1	16.9	74.8
Baseline total:	**130.2**	**16.2**	**34.0**	**180.3**

Source: Dorset County Council

In the Bournemouth & Poole SSCT, 59% of baseline demand is for office employment land. The highest proportional requirement is in the Weymouth & Dorchester SSCT where office use accounts for 75% of demand. In Rural Dorset, 50% of baseline demand is for office employment land.

Regarding industrial employment land, in the Bournemouth & Poole SSCT, 41% of baseline demand is for industrial employment land. The highest proportional requirement is in the Rural Dorset area where industrial use accounts for 50% of demand. In the Weymouth & Dorchester SSCT, 25% of baseline demand is for industrial employment land.

4 Allowances

Three allowances are added to the baseline results:

- **Windfall** – this takes account of the likelihood of some employment land being lost to other uses and gives an estimated requirement for an additional 50 ha in total over 2011-2031. In 2008, a windfall allowance of 79 ha over 2006-2026 was included.

- **Churn** – a further 29 ha is required for smooth market function. In 2008, a churn allowance of 35 ha was included.

- **Flexibility at 10% or 20%** – this results in a further demand for 18-36 ha of employment land. No flexibility allowance was made in the 2008 Workspace Strategy.

5 Final Results

The final results are given in three sets:
1) with no allowance for flexibility giving the nearest match to the 2008 Workspace Strategy;
2) with a flexibility allowance of 10 per cent;
3) with a flexibility allowance of 20 per cent.

With windfall and churn added to the baseline projection, there is an estimated requirement for 260 ha of employment land over 2011-2031 in BDP. This is considerably higher than the 184 ha indicated in the 2008 strategy for 2006-2026.

With flexibility at 10%, the requirement rises to 278 ha.

With flexibility at 20%, the requirement rises to 296 ha.

6 Demand by Phased Years

In line with the pattern of projected employment growth, the greatest demand for employment land is expected to occur in the first ten year period (2011-2021) – about two-thirds of the total in BDP as a whole (67%). The Rural Dorset area has a slightly higher weighting to the first decade (71%).

Office demand stays fairly even across the two decades across BDP.

Industrial demand falls off in the second decade across BDP. The Weymouth & Dorchester SSCT and the Rural Dorset area both see a projected negative requirement in the second decade whereas the Bournemouth & Poole SSCT continues to have a positive demand for industrial employment land, but this demand is considerably lower than in 2011-21.

Demand was also front-loaded in the 2008 strategy.

7 Employment Land Supply

About 277 ha of employment land will be made available over 2011-2031. More than two-thirds of this will come forward in the short-medium term ie over the next ten years (68%). In the Bournemouth & Poole SSCT, 55% of employment land supply is expected to be available in the first decade compared with 73% in the Weymouth & Dorchester SSCT and 84% in Rural Dorset. 120 ha of available employment land is on large sites of 10 ha or more (43% of the total supply).

In the 2008 strategy, over 2006-2026 a total supply of about 216 ha of consolidated available land was identified with about three-quarters of this coming forward in the short-medium term (within the next five years). 50 ha of available land consisted of very large sites of over 10 ha (23% of total supply).

On the whole, in the 2011-31 period in Bournemouth, Dorset and Poole there appears to be the potential for a shortage in the supply of available land to meet demand, with a projected demand for 260-296 ha, depending on the level of flexibility, against the available supply of 277ha. Any potential shortfall is likely to be most noticeable in the Bournemouth & Poole SSCT, particularly in the short-medium term. However, local issues of phasing and geography will be relevant, especially in the SSCTs. Infrastructure constraints may also need to be addressed in order to bring forward key sites which have been identified as part of the available supply.

In the 2008 strategy, overall in the period 2006-2026 the supply of employment land in BDP as a whole was expected to exceed demand with 216 ha of available land against demand for 184 ha. However, there were imbalances over the decade with a shortage of supply in the first five years; an excess over 2011-2016; and a very small gap in 2016-2026. Over 2011-2016, 89 ha of employment land were projected to come forward across BDP but this has now been increased to 128 ha in the current study. Similarly, over 2016-2026 53 ha were expected to come forward, but this has been revised upward to 134 ha.

Bournemouth, Dorset and Poole Workspace Study
List of figures and tables

Bournemouth, Dorset and Poole Workspace Study
Employment land projections update 2012

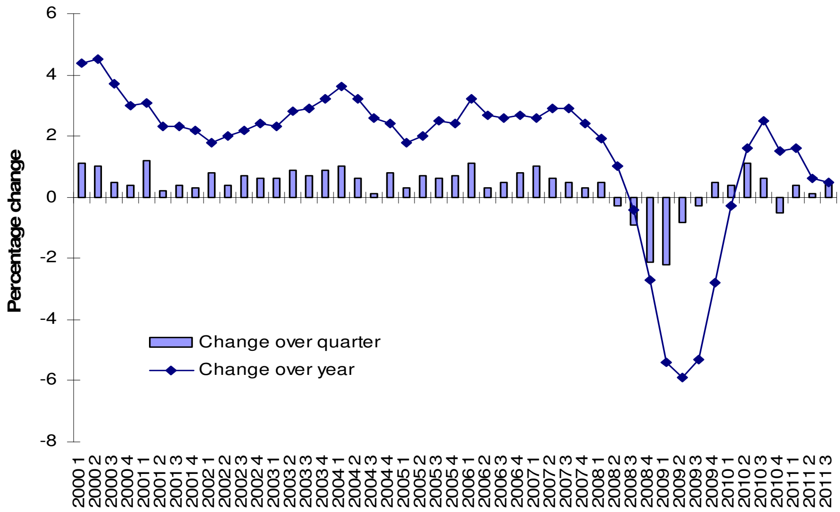
1 Introduction

1.1 This evidence base update is a quantitative exercise following a set process based on the projections used in the 2008 Workspace Strategy[1]. The findings are not prescriptive and should be looked upon as a tool to aid decision making in conjunction with more subjective qualitative data that may be available, rather than a statement of what those decisions should be.

1.2 In 2008, GVA Grimley consultants were commissioned by the South West Regional Development Agency (SWRDA), in co-operation with the local authorities within the Bournemouth, Dorset and Poole area (BDP)[2], to review and update the earlier 2003 Workspace Strategy. Part of the review was to provide employment land projections in hectares (ha) for each of the eight local authorities for the period 2006 to 2026 with a view to addressing the delivery of sufficient appropriate employment land and quality employment premises in line with business requirements and the aim of sustainable economic growth in the sub-region. Projections were also prepared at travel to work area (TTWA). Business requirement was in line with the higher economic growth scenario[3] for the South West region and the associated projected jobs growth, as referred to in the Regional Spatial Strategy (RSS) for the South West. A number of changes have led to the need to update the GVA Grimley study including:

- The change in the economic context: the earlier projections were compiled when the national economy was comparatively buoyant, as seen in the chart following. The recession and less stable economic conditions have led to revision of the employment projections.

Figure 1 – GDP growth in the UK



Source: Gross Domestic Product to Q3 2011, 2011, ONS

[1] 'Bournemouth, Dorset and Poole Workspace Strategy', 2008, GVA Grimley for Dorset Authorities and SWRDA http://www.dorsetforyou.com/394149
[2] Note: Bournemouth, Dorset and Poole comprise the new Dorset Local Enterprise Partnership (LEP) area
[3] 3.2% per annum growth in gross value added across the South West over 2006-2026.

- The availability of revised employment density ratios from Drivers Jonas Deloitte[4]. These ratios are lower than those previously used in the GVA Grimley study (see chapter two, section C in this report).

1.3 One of the issues facing the planning authorities at the time of commissioning GVA Grimley's work was that there were four existing employment land forecasts[5]. The role of the strategy review and update was to provide a single set of projections.

Table 1 – 2008 Workspace Strategy employment land forecasts, 2006-26

	Office	Industrial	Windfall losses	Churn	Total
Christchurch	2.0	-5.0	4.6	2.1	3.6
East Dorset	3.6	11.1	5.6	1.2	21.5
North Dorset	5.0	-2.6	15.0	8.0	25.3
Purbeck	3.9	-2.7	8.5	1.8	11.5
West Dorset	9.3	2.0	18.1	10.2	39.6
Weymouth & Portland	1.4	2.1	2.0	0.1	5.6
DCC Dorset	**25.2**	**4.9**	**53.8**	**23.4**	**107.1**
Bournemouth	21.9	4.1	12.1	2.1	40.2
Poole	23.9	-9.6	13.2	9.5	36.9
BDP	**70.9**	**-0.6**	**79.0**	**34.9**	**184.2**
Bournemouth TTWA	28.8	10.5	22.2	5.3	66.8
Poole TTWA	24.4	-11.5	21.6	11.3	45.9
Dorchester & Weymouth TTWA	9.3	2.4	20.1	10.3	42.1
Rural Dorset	8.5	-2.0	15.0	8.0	29.4

Source: 'Bournemouth Dorset Poole Workspace Strategy and Delivery Plan', October 2008, GVA Grimley Ltd, Table 16 and Appendix D

1.4 The need for this 2012 revised evidence base for the workspace study has arisen from the changes outlined above and the consequent requirement for local authorities to update and inform their Core Strategies. This study does not specifically look at availability, other than a brief look at supply and demand in Chapter 7.

1.5 The earlier GVA Grimley study identified employment land requirements at district level and travel to work area. However, the Bournemouth TTWA includes some areas outside of Bournemouth, Dorset and Poole and parts of the northern West Dorset district fall within the Yeovil and Chard TTWA. This current review, undertaken by Bournemouth, Poole and Dorset councils, makes use of the Strategically Significant Cities and Towns (SSCTs) definition used in the South West Regional Spatial Strategy 2006-2026. In the BDP area, two SSCTs were identified: the Bournemouth & Poole SSCT and the Weymouth & Dorchester SSCT, as shown in the map and table following. Whilst the Regional Spatial Strategy is no longer part of the planning framework, the evidence behind the SSCT geographies is still valid for use as an approximation for functional economic market areas.

[4] 'Employment Densities Guide', 2nd edition 2010, Drivers Jonas Deloitte
[5] 1) extract from the Demand and Supply of Employment Land, Sites and Premises in South West England study (January 2007) by DTZ for South West RDA,
2) projections by Dorset County Council, Bournemouth Borough and the Borough of Poole as part of the Employment Land Review process undertaken by the Districts,
3) projections by Dorset County Council, Bournemouth Borough and the Borough of Poole on which the RSS Panel Report is assumed to be based, and
4) a forecast by Roger Tym & Partners as part of their commission by the Regional Assembly.

Figure 2 – SSCTs in Bournemouth, Dorset and Poole

Strategically significant cities and towns - Bournemouth, Dorset and Poole

DORSET County Council

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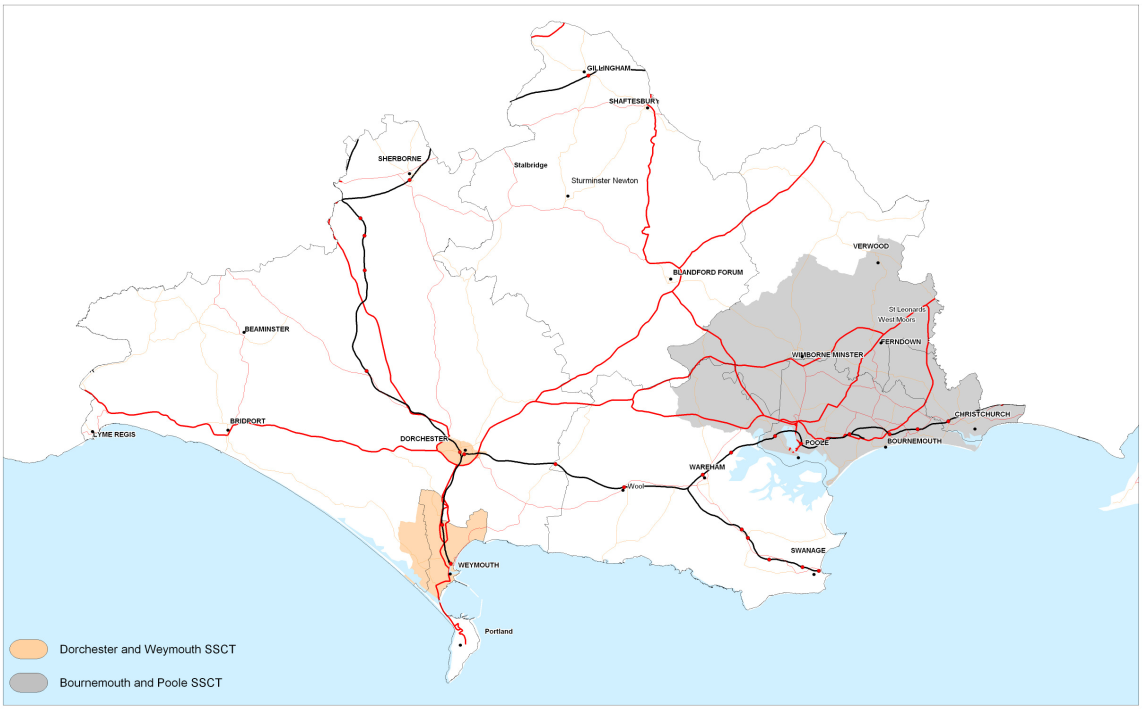


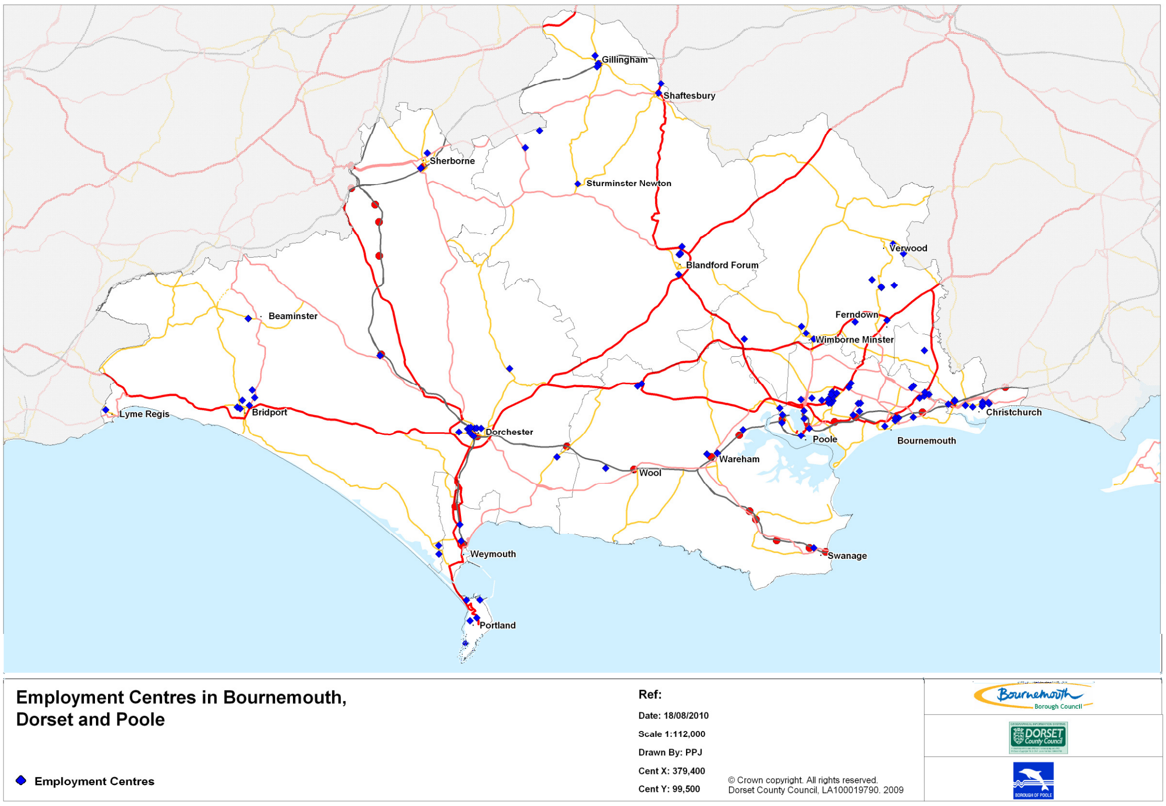
Source: Dorset County Council

	Bournemouth & Poole SSCT	**Weymouth & Dorchester SSCT**	**Rural Dorset**
Bournemouth	All	-	-
Poole	All	-	-
Christchurch	All	-	-
East Dorset	Ameysford; Colehill; Corfe Mullen; Ferndown; Holt; Longham; Parley; St Leonards & St Ives; Stapehill; Stour	-	Alderholt; Crane; Handley Vale
North Dorset		-	All
Purbeck	Lytchett Matravers; Lytchett Minster and Upton	-	Rest of Purbeck
West Dorset		Chickerell; Dorchester	Rest of West Dorset
Weymouth & Portland		Weymouth	Portland

1.6 These two SSCTs, together with the Rural Dorset area reflect the broad functional economic areas of BDP.

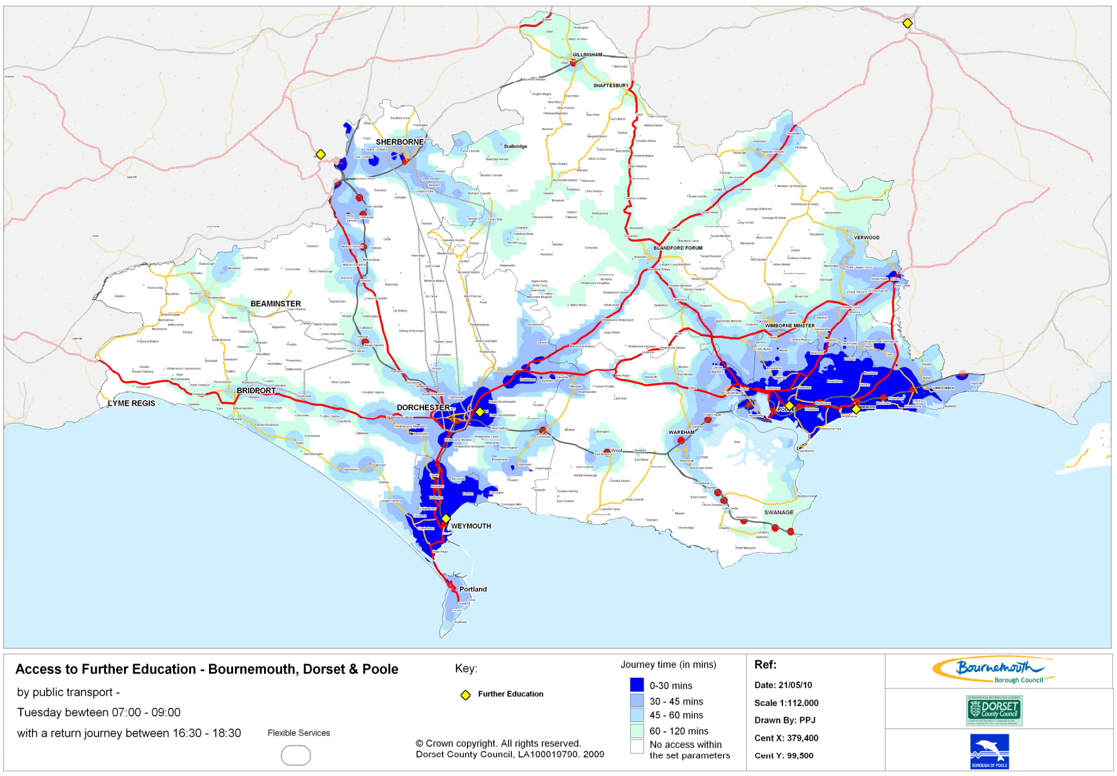
1.7 This division of the sub-region into two functional economic market areas plus the remainder is a preferred approach facilitating more flexibility between local authorities. The approximate SSCT division is also echoed in a range of variables, for example, in the distribution of employment centres or in access to Further Education, see maps following.

Figure 3 – Employment centres in Bournemouth, Dorset and Poole



Source: Dorset County Council, Business Register and Employment Survey 2009 ONS

Figure 4 – Access to Further Education in Bournemouth, Dorset and Poole



Source: Dorset County Council

1.8 The ODPM (DCLG) guidance on employment land reviews (2004) discusses a range of employment land demand forecasting approaches. However, it does not recommend a preferred methodology. This has resulted in a range of different forecasting approaches being used.

1.9 The 2011 review in Bournemouth, Dorset and Poole follows the methodology used by GVA Grimley in the production of the 2008 study with some revisions including the following:

1.9.1 Updated employment/economic projections.

1.9.2 Industrial sectors and definitions have been changed from SIC 2003 to SIC 2007 incorporating some revision of allocation to land use class as appropriate based on new SIC 2007 codes.

1.9.3 There has been a change of geography from TTWA to SSCT.

1.9.4 Historic employment land loss data has been revised (as appropriate) and updated, with the inclusion of data for Purbeck.

1.9.5 Employment densities have been updated.

1.9.6 Plot ratios have been updated.

1.9.7 An allowance for flexibility has been added in the 2011 revision.

1.9.8 Phasing is in two ten year periods.

1.10 Comparisons to the findings of the 2008 Workspace Strategy, or changes in methodology, are highlighted in blue through the document.

1.11 The methodology is summarised overleaf with further detail following.

Figure 5

Summary of Methodology for Estimating Employment Land Demand

A: Projections for employment growth 2011-2031 give
employment demand

↓

B: Employment demand is converted to **Land Use Class (LUC)**
(Office, Other business, Warehousing)

↓

C: Employment demand by LUC is converted to
floorspace requirement
using worker densities by LUC (FTE per sq m)

↓

D: Floorspace requirement is converted to a
baseline land requirement (ha)
using plot ratios by LUC

↓

Allowances are then added:

E: Windfall losses
Employment land likely to be lost to non-B use
is projected based on the median over the last six years
+
F: Churn
Vacant land required for smooth market function is estimated using the
annual average net take-up of employment land: two year allowance
+
G: Flexibility
A margin is allowed for competition in market at
10% of baseline requirement (standard) or
20% of baseline requirement (additional)
(no negative flexibility allowance is made)

Baseline land requirement plus allowances

=

H: Final land requirement

How the study should be used

1.12 This study provides an updated evidence base for the 2008 Workplace Strategy: no change has been made to the strategy itself.

1.13 The study is intended for use as one of a range of tools for determining future employment land provision. The findings are the result of the application of a standard methodology which assumes that employment and GVA growth will return to a positive and stable level and that other variables will reflect the historic trend. A continuing (or future) downturn in the economy may affect the findings and no account has been made for any change in local policy which would similarly affect trends.

1.14 Whilst the findings have largely been disaggregated by land use class, this classification is simply an indicator derived from projections of full time equivalent employment. Each authority will have its own local circumstances which dictate how Class B employment land is allocated or used and in many cases there will be some flexibility of use on allocated sites between different B class employment uses. Consequently this study should not be seen as a definitive reason either for a reduction or an increase of land at specific B class use level. The total figures are the most useful guide as these relate to overall Class B employment land needs.

1.15 In using this study, local knowledge and circumstances are key and must be taken into account. They may provide evidence of a need to move away from these projected figures, for example as a result of specific known needs of local companies, the choice or immediate availability of suitable employment sites, or opportunities to co-operate with neighbouring local authority areas in meeting land requirements.

1.16 For strategic planning purposes, the employment land requirement derived from the projections of FTE employment must be taken a step further collectively by the local authorities in each of the SSCTs and the Rural Dorset area to determine the amount of employment land to come forward in each district. It is expected that there will be co-operation among local authorities for this purpose. The Localism Act 2011 contains a new duty for local authorities to co-operate regarding the planning of sustainable development, including the preparation of development plans and other local development documents relating to a strategic matter[6]. A strategic matter includes the use of land that would have a significant impact on at least two planning areas, in particular, sustainable development or use of land for or in connection with infrastructure that is strategic and would have a significant impact on at least two planning areas.

1.17 It can be the case that the level of supply will not meet the projected level of demand within a single district/borough. By co-operation, it is expected that the total requirement will be met within each SSCT as a whole functional economic area rather than in individual districts. In the past, as an example, land allocated at Bournemouth Airport and Winfrith Technology Park was apportioned to meet the land requirements of adjoining districts. It is expected that this process will continue.

1.18 Additionally, it should be recognised that employment land demand may be met not just through the provision of new sites, but also through recycling – the bringing back into use of under-utilised or unused sites and buildings, especially in urban areas.

[6] Details can be found at http://www.legislation.gov.uk/ukpga/2011/20/section/110/enacted

2 Methodology for Estimating Employment Land Demand

Time Horizon

2.1 This study looks at the projected requirement for employment land over the revised time scale of 2011-2031. This period of time matches that used in the Strategic Housing Market Assessment review and also matches the plan periods of most local authorities in Bournemouth, Dorset and Poole.

Geographies

2.2 The study area (BDP) comprises the two unitary authorities of Bournemouth and Poole together with the Dorset County Council area (DCC Dorset). The DCC Dorset area contains six local authority areas:

- Christchurch Borough
- East Dorset District
- North Dorset District
- Purbeck District
- West Dorset District
- Weymouth & Portland Borough

2.3 This study uses three wider geographical groupings, not previously used in the 2008 Workspace Strategy but allowing more flexibility between the local authorities within functional economic areas. These comprise the Bournemouth & Poole SSCT and the Weymouth & Dorchester SSCT and Rural Dorset.

Employment land and land use classes

2.4 The focus of the workspace study is employment land defined as:

- Office (B1a),
- Research and Development (B1b),
- Light Industry (B1c),
- General Industry (B2) and
- Warehouses (B8).

2.5 These are grouped in three land use classes (LUC) for consistency in the calculations:

- Office (B1a, B1b),
- Other business space (B1c, B2),
- Warehousing (B8).

Other business and Warehousing are then normally grouped as 'Industrial'.

2.6 There is also a significant amount of employment in sectors which do not take up B-use class workspace, for example the retail sector, education, health & social work. These sectors are referred to collectively as 'non B-use'.

2.7 The demand for employment land for non B-use employment growth will have a spatial implication but this is not included in this study. The reasons this study has not included non-B uses are two-fold.

- First, there is no established methodology for determining the land requirements for non-B uses. The South West Regional Development Agency (SWRDA) did consider undertaking such a study but unfortunately no progress was made.

° Second, most B-uses have quite specific land requirements and often developments have issues relating to amenity, impact and access which can be achieved and managed through business park locations. There are also more constraints for B-uses regarding where they can locate as they are not always welcome or appropriate neighbours to other uses. An industrial estate location is therefore often needed meaning that B uses can be less flexible. Whilst some non-B uses may also be subject to restrictions or policy restraints, mostly there are no such issues and they can be located in a number of different locations subject to the usual planning considerations.

Methodology

2.8 The employment land demand is based on four main elements:

1) Economic growth scenarios: how will changes in the volume and pattern of employment affect the demand for employment land?
2) Allowance for windfall losses: based on historic trends, how much employment land might be lost to 'non B' class uses?
3) Allowance for churn: how much employment land might be needed to facilitate redevelopment and relocation?
4) Further allowance for flexibility.

A: Projections for employment growth 2011-2031 give employment demand

2.9 At national and regional level, forecasts of future growth are made and these are used together with historic trend data to generate projections by industrial sector and sub-regional economy. Economic and employment projections at sub-regional level are therefore a more mechanical process than the higher level forecasts.

2.10 The 2008 Workspace Strategy used a set of economic growth projections based on a high GVA[7] growth scenario over 2006-2026 of 3.2% per annum across the South West region[8].

2.11 In line with the changed economic situation, the scenarios and projections for growth have been updated for the 2011 Workspace Study. The new scenario uses the Autumn 2011 set of projections for Bournemouth, DCC Dorset and Poole prepared by Experian for the South West Observatory (SWO) and made available to the Local Information Network of local authorities co-ordinated by them. The projections are a best estimate of what the future might bring based on conditions at the time of formulating them. As such, there is a lot of uncertainty but the aim is to give an indication of the amount of employment land that will be required.

2.12 Corresponding figures at SSCT level have been developed by Dorset County Council based on district estimates. For each district, growth by individual sector corresponds with that in the wider geography most akin to historic growth (the South West, Bournemouth, Poole or DCC as a whole). These distinctions are retained when the overall district projections are rebalanced to match the DCC Dorset total as projected by Experian. Projections by district and by sector are then apportioned to SSCTs based on percentage of employment by sector.

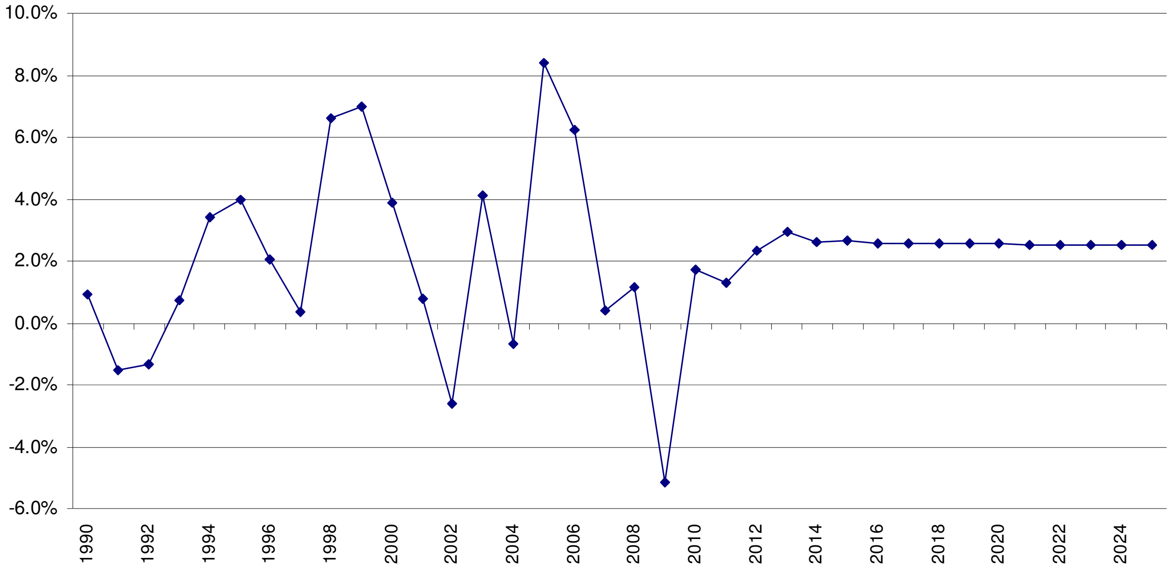
2.13 This set of projections broadly gives GVA growth of 2.5% per annum over 2011-2031 across Bournemouth, Dorset and Poole and an increase of 82,600 full time equivalent employees (FTEs) which equates to growth of 1.2% per annum on average. In the

[7] Gross Value Added: GVA measures the contribution of each individual producer, or sector, to the economy by estimating the value of its gross outputs (goods and services), less purchases and less net spending taxes.
[8] Projections sourced from Cambridge Econometrics.

present economic climate, this projected growth seems high, but it is not out of the question. Over 1989-1999 – the period including the previous 1990-91 recession – Bournemouth is estimated to have seen GVA growth of 2.8% per annum, above the average of 1.8% in Poole and 2.0% in DCC Dorset. This gives a BDP average of 2.2% pa, a little lower than the projection for the next twenty years. Figure 6 below shows considerable economic growth in the BDP area in the emergence from the recession of the nineties followed by far from steady growth. As the future is unknown, projected growth is assumed to be relatively smooth once we pull out of recession but, in reality, a pattern of peaks and troughs is again likely to be encountered and the extent of these will affect overall economic growth.

2.14 Broad differences between the Autumn 2011 set of projections and those used in the 2008 Strategy are examined in Appendix A together with further information about the projections in general.

Figure 6 – Growth in GVA per annum, Bournemouth, Dorset and Poole



Source: Experian Autumn 2011 projections dataset and Dorset County Council - GVA at constant 2005 prices

2.15 Further to this, looking at the relationship between housing and employment growth, it is important that sufficient new homes are built to ensure an adequate labour supply to meet projected labour demand. However, in reality, most imbalances arising in the labour market, (such as people who cannot find suitable jobs; vacancies which cannot be filled), normally resolve through adjustments that occur to allow the labour market to function – people retrain, move or commute to/from another area; the specification of a vacancy is adjusted or more pay is offered to attract applicants from another area. Regarding housing growth, a review of the Strategic Housing Market Assessment (SHMA) has been undertaken by the local authorities of Bournemouth, Dorset and Poole.

2.16 All projections should be used with caution.

B: Employment demand is allocated to Land Use Class (Office, Other business, Warehousing)

2.17 The employment projections provide a level of full time equivalent employment in 14 industrial sectors projected over the twenty year period, 2011-31.

2.18 Converting the employment changes in each economic sector into land use classes is the first step for the employment land demand forecast. This gives the change in labour demand on B use land.

2.19 For this conversion from industrial sector to land use class, a revised matrix, similar to that used by GVA Grimley in the 2008 Workspace Strategy, was used. The original matrix was based on the ODPM Employment Land Review Guidance. The revised matrix correlates the original 2003 Standard Industrial Classification (SIC) codes to SIC 2007 and incorporates a number of refinements based on 4-digit-SIC analysis of current employment for each district[9].

2.20 Figure 7 following shows the 2010 distribution of total employees in employment based on land use class[10].

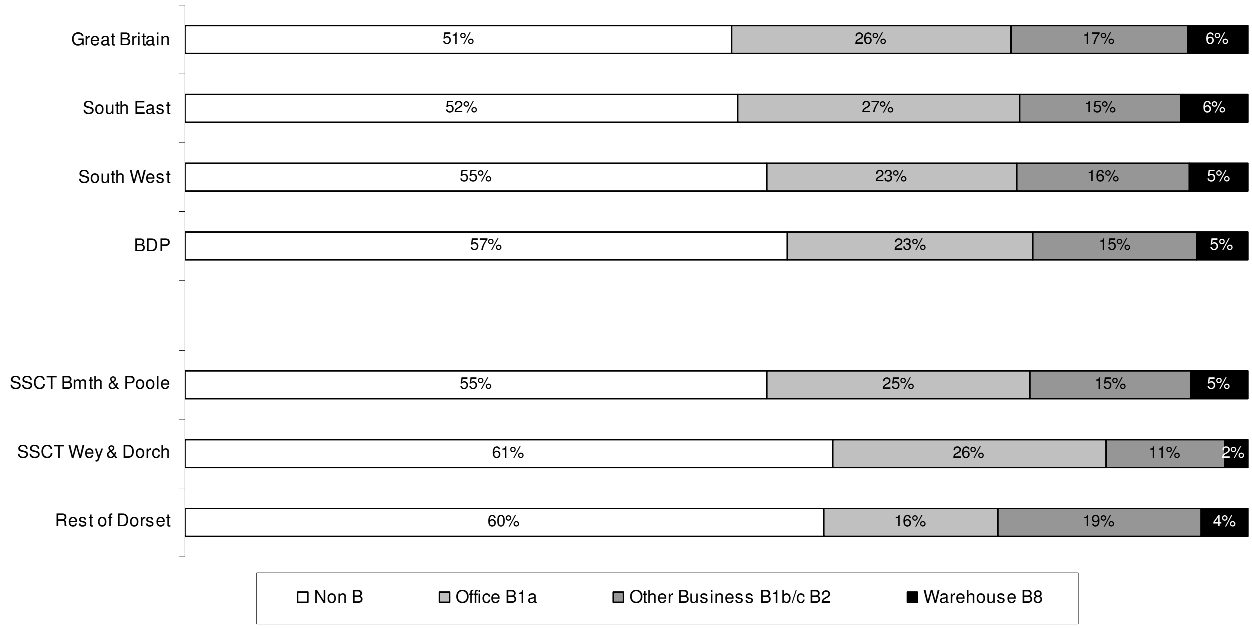
2.21 It can be seen that in BDP as a whole, more than half of employment is in the non-B class and that BDP has an above average percentage of non-B employment, with the highest level of representation outside the Bournemouth & Poole SSCT.

2.22 The proportion of Office type employment is below the national average in BDP but this is due to particularly low representation in the area of Dorset outside the two SSCTs.

2.23 Other business employment is just under the GB average on the whole but is above the average in the Rural Dorset area.

2.24 Warehouse type employment is about in line with the national average but with particularly low representation in the Weymouth & Dorchester SSCT.

Figure 7 – 2010 Employment by Land Use Class



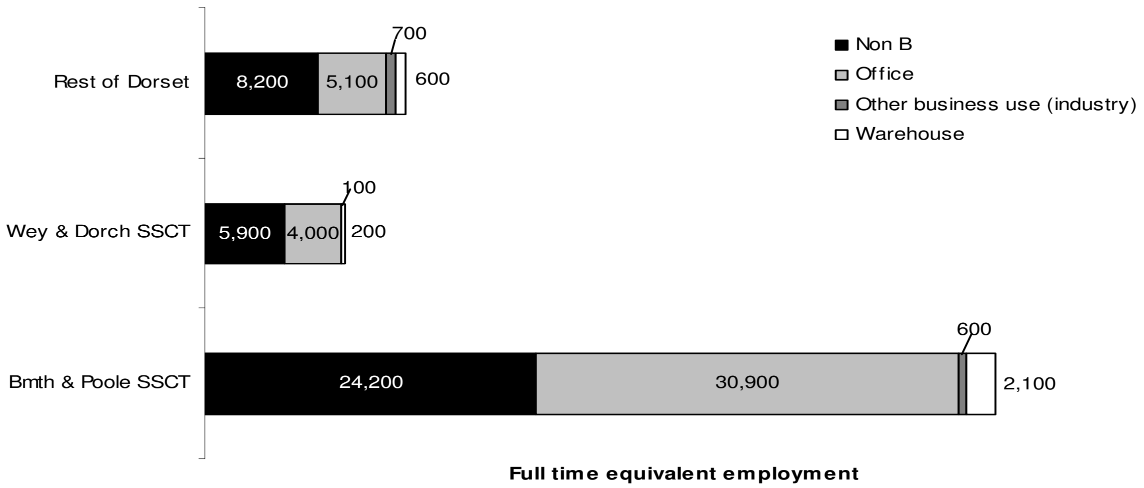
Source: Business Register and Employment Survey, 2010, ONS

2.25 The employment projections for the period 2011 to 2031, for the two SSCT areas and Rural Dorset were also converted to land use class.

2.26 Figure 8 following, shows how employment in the office and non-B use land classes contributes the most to future employment growth.

[9] A list of the sectors assigned to each of the land use classes is provided in Appendix B.
[10] From the Business Register and Employment Survey 2010, ONS

Figure 8 – Employment change 2011-2031 by Land Use Class, Autumn 2011



Source: Experian Autumn 2011 projections dataset and Dorset County Council

C: Employment demand is converted to floorspace requirement using worker densities by LUC (FTE per sq m)

2.27 Having allocated employment change in each of the 14 sectors to a 'typical' employment land use class (office, other business use and warehousing), the 'Employment Densities Guide' 2010[11] giving **worker density** (square metres per full-time equivalent (FTE) workers) was used to translate the additional number of employees to **a floorspace requirement**. The guide provides up to date densities for all use classes within A (Retail), B (industrial, office, warehouses and distribution), C (hotels) and D (visitor attractions). Densities for the standard classes of B1a Office (12 m^2/FTE); B2 General industrial (36 m^2/FTE); and B8 Warehousing general (70 m^2/FTE) have been used and applied across BDP.

Table 2 – Comparison of worker densities

Land use	GVA 2008 study[12]	Employment Densities Guide 2010	*Employment Densities Guide 2001*
	m^2 per FTE	m^2 per FTE	*m^2 per FTE*
Office	18	**12**	*19*
Other business space	32	**36**	*34*
Warehousing	55	**70**	*50*

Sources: GVA and Drivers Jonas Deloitte

2.28 The density figures provided in the 2010 guide differ significantly from those used by GVA for office and warehousing, as shown in the table above, echoing differences evident in the updating of the Employment Densities Guide to the 2010 version.

2.29 Employment density for office workers is higher using the new guide (ie less floorspace is required for the same number of employees – more people can be accommodated in the same space) – 12 m^2 per full time equivalent employee instead of 18 m^2 – which would therefore give a lower requirement for employment land. 12 m^2 is the average requirement for general office use (including HQ, administration and 'client-facing' office types), but there is variation by type ranging from an average of 8 m^2 per FTE for call centres to 47 m^2 per FTE in IT/data centres. With regard to offices, the 2010 guide

[11] 'Employment Densities Guide' 2nd edition 2010, Drivers Jonas Deloitte for OffPAT and HCA
[12] In line with the ODPM Employment Land Review Guidance

notes that since the publication of the first edition of this guide in 2001, “occupational densities for all office types have increased significantly …… This is supported by anecdotal evidence that shows there is now much greater awareness amongst occupiers of the relationship between space efficiency and cost of occupation. Higher densities are achieved through more efficient space planning, new ways of working and improved communications technology.” In the earlier edition of the guide, the density for office workers was 19 m^2 per FTE, similar to the 18 m^2 per FTE density used in the 2008 Workspace Strategy.

2.30 The lower density for industrial workers (ie lower employment density arising from an increase in the amount of floorspace needed per FTE) would result in a higher requirement for employment land. 36 m^2 per FTE is the average for general industry, but a range of 18-60 m^2 per FTE is given. Average employment density in this class is expected to become lower over time with an increased amount of floorspace per head required as a result of technological development and restructuring. In the earlier edition of the guide, the density for industrial workers was 34 m^2 per FTE, just over the 32 m^2 per FTE density used in the 2008 Workspace Strategy.

2.31 The lower density for warehousing workers (ie lower employment density arising from an increase in the amount of floorspace needed per FTE) would result in a higher requirement for employment land. 70 m^2 per FTE is the average for general warehousing, but a range of 25-115 m^2 per FTE is given with the wide variation arising from small amounts of very low density warehousing. In the earlier edition of the guide, the density for warehousing workers was 50 m^2 per FTE, below the 55 m^2 per FTE density used in the 2008 Workspace Strategy.

D: Floorspace requirement is converted to a baseline land requirement (ha) using plot ratios by LUC

2.32 The floorspace required is translated to **plot ratios**[13] for each B use. Plot ratio information has been calculated for office, industry, warehouse, mixed, total (all uses) and industry and warehousing for each local authority using employment land completions between 1 April 1994 and 31 March 2010 together with outstanding commitments (under construction, unimplemented applications and outstanding land allocations) as at 1 April 2010. Appendix C contains the detailed plot ratios for each district.

2.33 From this, a **baseline land requirement**, in hectares, for the period 2011-2031 is provided. In addition, the total figure has been split into the three B land use classes: office, other business space and warehouses.

2.34 To the baseline requirement, three **allowances** are then applied: the allowance for windfall losses; the allowance for churn; and the allowance for flexibility, see Chapter 4 Allowances. The final figures for employment land take account of these allowances.

2.35 Whereas the 2008 Workspace Strategy used one set of average plot ratios across the sub-region, (the average for Bournemouth, Dorset and Poole – see below), in this 2011 update individual plot ratios have been calculated for every local authority based on historic trends. This should give a more accurate picture. The ratios used in 2008 are shown below together with the current average ratios for the BDP area as a whole. Note: using the BDP average across the sub-region as an alternative methodology would result in a slightly lower baseline figure for BDP (down by about six hectares).

[13] Plot ratios 1994 to 2010, Dorset authorities, July 2011

Table 3 – Comparison of plot ratios

	2008 plot ratios	2011 estimate for BDP
Office	0.41	0.44
Other business	0.32	0.32
Warehousing	0.44	0.41

E: An allowance for windfall losses is applied

2.36 The allowance for windfall losses takes into account the expectation that a proportion of designated employment land may not be used entirely for B use class employment and this creates a replacement demand. Land uses such as recycling, waste management, combined heat and power plants and bus depots can, under certain circumstances and where appropriate, be developed on employment land. Employment land can also be lost to residential use

2.37 A significant part of the projected employment growth arises from sectors which have traditionally not been located on employment land such as health care, education, hotels and leisure. Recent planning experience has shown that under specific circumstances, and where appropriate, such uses might locate on employment land. However this has to be monitored carefully to ensure there remains sufficient available land for B use employment on employment land. In some circumstances the development of non-B uses might be a catalyst for employment development to come forward.

2.38 The allowance for windfall losses has been calculated as far as possible in the same way as in the 2008 Workspace Strategy using historic employment land loss data and median loss, although data are now available for a greater number of years and Purbeck district has been included[14]. Note: GVA Grimley also incorporated the current stock of B use floorspace by district into their calculations but there is no explanation how this was done. Replication of the exercise using the original figures suggests that this methodology may have had a tendency to reweight total windfall more towards the urban areas.

2.39 It should be noted that the windfall allowance is based solely on historic employment land losses[15] and there is no margin included to cover any future change of policy regarding employment land use.

2.40 It should also be noted that whilst most local authorities include both change to residential use and change to non-B use in their historic employment land loss data, this is not the case for **West Dorset** or **Weymouth & Portland** where losses only to residential use are included. These losses are not limited to allocated and established employment estates, but include losses of all premises that previously had a B class use. This relates to the windfall figure for both the Weymouth & Dorchester SSTC and the Rural Dorset area.

[14] Revisions to the losses recorded in the 2008 Strategy include: North Dorset – a minor 0.02 revision upwards in 2006/07; Weymouth & Portland – 2005/06 figure revised from 0.00 to 1.18; figures are provided for Purbeck.

[15] Note: There are differences in the way employment land losses are monitored by local authority. Where policy requires, losses from non-allocated sites are included as these would need to be replaced and therefore need to be accounted for in windfall losses. Also, see paragraph 2.40.

F: An allowance for churn is applied

2.41 The location and premises needs of businesses change over time and sometimes this will result in the business moving away. In other circumstances, an existing business might cease its operations and a new business could take over a site for redevelopment. For this to happen smoothly, there is a need for a certain level of vacant land. This type of demand has been called 'churn' demand or 'frictional vacancy'.

2.42 Typically, GVA Grimley considered, it takes around two years to achieve a planning consent, undertake the site preparation and construct the development after a site has changed hands. Therefore, to estimate the churn demand for each area the annual average net take-up of employment land for the period 2004 to 2010 has been multiplied by two[16].

2.43 The allowance for churn was calculated in the same way as in the 2008 Workspace Strategy.

G: An allowance for flexibility is applied

2.44 To give an additional degree of flexibility to employment land allocations, a further percentage has been added to the baseline amount for each area.

2.45 Two flexibility scenarios have been calculated: one at ten per cent and one at 20% of the baseline figure.

2.46 No allowance for flexibility was made in the 2008 Workspace Strategy.

2.47 Further details of the calculation of allowances are given in chapter 4.

H: Adding allowances to the baseline projection gives the final requirement

2.48 The final requirement comprises the baseline projection plus the adjustment for allowances.

[16] In the 2008 Workspace Strategy, the annual average for 2004/05 and 2005/06 was multiplied by two to give the churn allowance for 2006-2026.

3 Baseline Results

3.1 Table 4 below shows the baseline projection for each area for the Autumn 2011 economic growth scenario before making any allowance for windfall, churn or flexibility. For information, the figures are disaggregated by two land use classes.

Table 4 – Baseline projection by area, 2011-31

	Office	Industrial (Other business plus Warehouse)	Baseline Total
Bmth & Poole SSCT	76.3	53.8	**130.2**
Wey & Dorch SSCT	12.1	4.1	**16.2**
Rural Dorset	17.1	16.9	**34.0**
BDP	**105.5**	**74.8**	**180.3**

Source: Dorset County Council

3.2 The increase in employment demand, particularly for office land requirements, results in an additional demand for 180 ha of employment land in the BDP area.

3.3 Almost three-quarters (72%) of the projected increase in baseline demand for employment land is expected to take place in the Bournemouth & Poole SSCT area.

3.4 In terms of land use class, there is substantial growth over 2011-2031 in the office land requirement of 106 ha. Growth in industrial land requirements is slightly lower at 75 ha.

3.5 The Bournemouth & Poole SSCT sees a projected increase in the demand for office space as well as substantial demand for industrial space.

3.6 In the Weymouth & Dorchester SSCT there is also increased demand for office space and warehousing and a smaller increase in the demand for industrial employment land of four hectares overall.

3.7 In the Rural Dorset area, much the same pattern is shown. However, office demand is relatively less important than in the other two areas with industrial demand of matching significance.

3.8 Comparing this with the 2008 Workspace Strategy, these baseline figures are much higher. For BDP as a whole, the earlier baseline total was 70.3 ha made up of 70.9 ha Office and with -0.6 ha Industrial (Other business plus Warehouse). In this update, the new projections for employment growth are higher with projected growth of 82,600 FTEs (growth of 1.2% pa) rather than 54,800 (0.7% pa). At the same time, lower GVA growth is projected in the new scenario and this reflects changing productivity. In the new projections, productivity increases at a slower rate and this means that more employees are needed to achieve the same, or even a lower, level of growth. More details can be found in Appendix A. The source of the projections should also be taken into consideration as they come from different forecasting houses and should not really be compared.

4 Allowances

4.1 To these baseline figures, the three adjustments (windfall, churn and flexibility) have been made. Because of the complexity of attempting to estimate the allowances for each of the land use classes, only a single figure for each adjustment has been calculated.

Allowance for windfall losses

4.2 This is the allowance for the likelihood of a proportion of designated employment land being used for other than B use class employment, eg for recycling, waste management, combined heat and power plants, bus depots, health care, education, leisure use etc, or for residential use.

4.3 This alternative use of employment land needs careful monitoring to ensure there is enough available land for B use employment on employment land based on historic data. No allowance is included to cover any future change of policy regarding employment land use.

4.4 To estimate the amount of land needed to replace losses through windfall development, the level of historic loss for each area for the period 2004/05 to 2009/10 has been used as a guideline.

4.5 Table 5 shows the historic losses of employment land to other uses by district over the last six years.

4.6 It should be noted that whilst most local authorities include both change to residential use and change to non-B use in their historic employment land loss data, this is not the case for **West Dorset** or **Weymouth & Portland** where losses only to residential use are included. These losses are not limited to allocated and established employment estates, but include losses of all premises that previously had a B class use.

Table 5 – Historic employment land losses (hectares)

	2004/ 2005	2005/ 2006	2006/ 2007	2007/ 2008	2008/ 2009	2009/ 2010	Total over 6 years	Projected loss 2011-31
Christchurch	0.54	0.00	0.00	0.00	0.00	0.00	0.5	0.7
East Dorset	0.32	0.00	0.00	0.00	0.42	0.47	1.2	1.6
North Dorset	3.23	3.61	1.56	1.30	0.45	0.27	10.4	13.4
Purbeck	0.00	0.00	0.00	0.00	0.00	1.00	1.0	1.3
West Dorset	3.30	5.87	0.00	0.07	0.04	0.01	9.3	11.9
Weymouth & Portland	0.00	1.18	0.00	0.00	4.29	0.00	5.5	7.0
DCC Dorset	**7.39**	**10.66**	**1.56**	**1.37**	**5.20**	**1.75**	**27.9**	**35.9**
Bournemouth	1.08	0.72	2.83	1.34	0.49	0.68	7.1	9.2
Poole	0.31	0.74	0.76	0.76	1.52	0.07	4.2	5.3
BDP	**8.78**	**12.12**	**5.15**	**3.47**	**7.21**	**2.50**	39.2	**50.4**

Source: Dorset Borough and District Monitoring Reports

4.7 The median of the employment land losses across the eight districts/boroughs over the six historic years is 0.32 ha.

4.8 This 0.32 ha median loss has then been multiplied by eight (for the number of districts and boroughs) and then by twenty to give the expected total loss for the twenty years 2011 to 2031 (50.4 ha across BDP) and then apportioned to each district based on their proportion of historic losses. The figure in the final column of Table 5 shows the projected loss for each district, which is then apportioned to SSCT based on employment distribution. This gives 16.8 ha in the Bournemouth & Poole SSCT, 11.6 ha in the Weymouth & Dorchester SSCT and 22.0 ha in Rural Dorset.

4.9 Comparing this with the 2008 Workspace Strategy, this allowance is lower. In 2008, a windfall allowance of 79 ha (86 ha less seven ha already accounted for) over 2006-2026 was calculated based on the median (0.54 ha) from three years of losses across BDP[17] in six districts providing data. However, if the 2008 windfall calculation is reworked using the figures newly made available but for the same time period,[18] the windfall allowance would have been 52 ha rather than 79.

Allowance for churn

4.10 For the property market to operate smoothly, a certain level of vacant land is required[19]. This demand for vacant land has been called demand for churn or frictional vacancy. To estimate the level of demand for churn we have referred back to historic take-up rates.

4.11 To estimate the churn demand for each area, the annual average net take-up of employment land for the period 2004 to 2010 has been multiplied by two. This is based on the assumption that it takes about two years to achieve planning consent, prepare the site and construct the development.

Table 6 – Allowance for churn demand

	Employment land completions							
	2004/ 2005	**2005/ 2006**	**2006/ 2007**	**2007/ 2008**	**2008/ 2009**	**2009/ 2010**	**Total**	**Two year average**
Christchurch	1.59	0.46	0.00	0.19	0.94	2.04	5.2	1.7
East Dorset	0.52	0.63	0.62	1.76	0.15	0.86	4.5	1.5
North Dorset	2.18	4.76	3.68	2.09	2.97	1.06	16.7	5.6
Purbeck	0.10	1.74	1.00	0.91	1.30	0.51	5.6	1.9
West Dorset	5.61	3.96	2.59	3.63	4.62	3.31	23.7	7.9
Weymouth & Portland	0.13	0.00	0.00	1.77	0.39	0.22	2.5	0.8
DCC Dorset	**10.13**	**11.55**	**7.89**	**10.35**	**10.37**	**8.00**	**58.3**	**19.4**
Bournemouth	1.19	0.17	2.10	0.96	0.49	0.07	5.0	1.7
Poole	6.82	2.65	1.87	8.37	3.04	1.49	24.2	8.1
BDP	**18.14**	**14.37**	**11.86**	**19.68**	**13.90**	**9.56**	**87.5**	**29.2**

Source: Dorset Borough and District Monitoring Reports

4.12 The final column in Table 6 shows the amount of churn which has been calculated for each district/borough based on the two year average over six years resulting in a requirement for an additional 29.2 ha across BDP as a whole. This is then apportioned to SSCT based on employment distribution. This gives 13.1 ha in the Bournemouth & Poole SSCT, 4.6 ha in the Weymouth & Dorchester SSCT and 11.5 ha in Rural Dorset.

4.13 Comparing this with the 2008 Workspace Strategy, this allowance is lower. In 2008, a churn allowance of 35 ha was calculated based on take-up over just two years' worth of data[20]. Note: revisions to the historic figures would result in a lower allowance of 32.5 ha for the same two years.

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[17] Note: some amendments have since been made to the employment land losses data used in the 2008 report.
[18] Revisions to the losses recorded in the 2008 Strategy include: North Dorset – a minor 0.02 revision upwards in 2006/07; Weymouth & Portland – 2005/06 figure revised from 0.00 to 1.18; figures are provided for Purbeck.
[19] 'Bournemouth Dorset Poole Workspace Strategy and Delivery Plan', October 2008, GVA Grimley Ltd, reference 07A800547

[20] Note: some amendments have since been made to the employment land completions figures used in the 2008 report.

Allowance for flexibility

4.14 In this revision of the Workspace Strategy, a flexibility allowance has been added to the baseline employment land allocations for each area.

4.15 No flexibility allowance was made in the 2008 Workspace Strategy.

4.16 Two flexibility scenarios have been calculated: one at 10% and one at 20% of the baseline figure. The 10% set is given for consistency since generally this has been the figure used to provide flexibility in past employment land policies in structure and local plans. The 20% set has been prepared to show the projected land requirements should local authorities wish to give additional flexibility.

4.17 To allow flexibility in line with changing demand over time, the allowance is calculated on two phased ten year periods which are then summed to give the total over 2011-31 rather than using a percentage of the expected requirement over 2011-31 as a whole. This means that adequate flexibility is given across the period when it is needed.

4.18 This results in two potential sets of final figures.

Table 7 – Allowances for 10% and 20% flexibility

	Baseline Scenario:	**Flexibility at 10%:**	***Flexibility at 20%:***
Bmth & Poole SSCT	130.2	13.0	26.0
Wey & Dorch SSCT	16.2	1.6	3.2
Rural Dorset	34.0	3.4	6.8
BDP	**180.3**	**18.1**	**36.2**

Source: Dorset County Council

5 Final results

5.1 The final results are given in three sets:

i) with no allowance for flexibility giving the nearest match to the 2008 Workspace Strategy;
ii) with a flexibility allowance of 10 per cent;
iii) with a flexibility allowance of 20 per cent.

Set 1: with no allowance for flexibility

5.2 Table 8 provides a summary for 2011-2031 of the land requirement for the Autumn 2011 growth scenario excluding the allowance for flexibility. This is the nearest equivalent to figures produced in the 2008 Workspace Strategy.

5.3 The baseline figure is split into Office use and Industrial use (warehousing and other business). To the baseline figures for each area, the allowances for churn and windfall losses have been added to give a final figure which is the nearest equivalent to the requirement figure produced in the 2008 BDP Workspace Strategy for 2006-2026.

5.4 The BDP area sees an overall demand for 259.9 ha of employment land, mostly in the Bournemouth & Poole SSCT which accounts for 62% of the BDP total.

5.5 This requirement for employment land is considerably higher than that shown in the 2008 Strategy (184 ha).

5.6 The allowance for windfall loss is lower in the new 20 year scenario: 50 ha in BDP compared to 79 ha in the previous study.

5.7 The allowance for churn is also lower in the new 20 year scenario: 29 ha in BDP compared to 35 ha in the previous study.

5.8 However, baseline demand based on economic growth is considerably higher in the new study than in the 2008 Strategy. This is because the projections for employment growth are higher with projected growth of 82,600 FTEs (growth of 1.2% pa) rather than 54,800 (0.7% pa). At the same time, lower GVA growth is projected in the new scenario and this reflects changing productivity. In the new projections, productivity increases at a slower rate and this means that more employees are needed to achieve the same, or even a lower, level of growth. More details can be found in Appendix A.

Table 8 – Baseline requirement, allowances (excluding flexibility) and final requirement, 2011-2031

	Bmth & Poole SSCT	Wey & Dorch SSCT	Rural Dorset	BDP
Office baseline	76.3	12.1	17.1	105.5
Industrial baseline	53.8	4.1	16.9	74.8
Baseline B use land requirement (ha) 2011-2031	**130.2**	**16.2**	**34.0**	**180.3**
Allowance for windfall losses	16.8	11.6	22.0	50.4
Allowance for churn	13.1	4.6	11.5	29.2
Total B use land requirement (ha) 2011-31	**160.1**	**32.3**	**67.5**	**259.9**
2008 Workspace Strategy requirement 2006-26 (ha)[21]	**98.1**	**22.7**	**63.7**	**184.2**

Source: Dorset County Council

[21] Note: estimates for SSCT areas made by Dorset County Council

Set 2: with a flexibility allowance of 10 per cent

5.9 To these figures, an allowance for flexibility can be added. Table 9 provides a summary for 2011-2031 of the land requirement including a ten per cent allowance for flexibility.

5.10 With the additional requirement of 18 ha for flexibility, the BDP area sees an overall demand for 278.0 ha of employment land, mostly in the Bournemouth & Poole SSCT which accounts for 62% of the BDP total.

5.11 The addition of flexibility further widens the gap to the figures in the 2008 Strategy.

Table 9 – Baseline requirement, allowances (including flexibility at 10%) and final requirement, 2011-2031

2011-2031	Bmth & Poole SSCT	Wey & Dorch SSCT	Rural Dorset	BDP
Office baseline	76.3	12.1	17.1	105.5
Industrial baseline	53.8	4.1	16.9	74.8
Baseline B use land requirement (ha) 2011-2031	**130.2**	**16.2**	**34.0**	**180.3**
Allowance for windfall losses	16.8	11.6	22.0	50.4
Allowance for churn	13.1	4.6	11.5	29.2
Flexibility at 10%	13.0	1.6	3.4	18.1
Total B use land requirement (ha) with 10% flexibility	**173.2**	**33.9**	**70.9**	**278.0**
2008 Workspace Strategy requirement 2006-26 (ha)	**98.1**	**22.7**	**63.7**	**184.2**

Source: Dorset County Council

Set 3: with a flexibility allowance of 20 per cent

5.12 Table 10 provides a summary for 2011-2031 of the land requirement including a 20 per cent allowance for flexibility.

5.13 With the additional requirement of 36 ha for flexibility, the BDP area sees an overall demand for 296.1 ha of employment land, again mostly in the Bournemouth & Poole SSCT which accounts for 63% of the BDP total.

5.14 The addition of a higher flexibility allowance further widens the gap to the figures in the 2008 Strategy.

Table 10 – Baseline requirement, allowances (including flexibility at 20%) and final requirement, 2011-2031

2011-2031	**Bmth & Poole SSCT**	**Wey & Dorch SSCT**	**Rural Dorset**	**BDP**
Office baseline	76.3	12.1	17.1	105.5
Industrial baseline	53.8	4.1	16.9	74.8
Baseline B use land requirement (ha) 2011-2031	**130.2**	**16.2**	**34.0**	**180.3**
Allowance for windfall losses	16.8	11.6	22.0	50.4
Allowance for churn	13.1	4.6	11.5	29.2
Flexibility at 20%	26.0	3.2	6.8	36.2
Total B use land requirement (ha) with 20% flexibility	**186.2**	**35.5**	**74.3**	**296.1**
2008 Workspace Strategy requirement 2006-26 (ha)	**98.1**	**22.7**	**63.7**	**184.2**

Source: Dorset County Council

6 Demand by phased years

6.1 In addition to looking at the twenty year period, 2011-2031, demand can be phased in ten year periods based on the projections for employment change. To set the scene, a commentary of the change in full time equivalent employment in these periods according to the Autumn 2011 SWO/Experian projections[22] follows, looking at BDP together with the wider geographies of the South West and UK.

Table 11 – FTE growth over ten year phased periods: national, regional and sub-region

	UK	South West	Bournemouth, Dorset & Poole
2011-2031	° Overall growth of about 6.5 million FTEs (1.1% pa). ° This growth is largely in Business services. ° Other significant growth sectors include Health & social; Financial services; Transport & communication. ° Most significant sectors in decline: Manufacturing; Construction	° Overall growth of about 626,100 FTEs (1.2% pa). ° This growth is largely in Business services. ° Other significant growth sectors include Health & social; Distribution; Financial services; Transport & communication. ° Most significant sectors in decline: Manufacturing; Construction.	° Overall growth of about 82,600[23] FTEs (1.2% pa). ° This growth is largely in Business services. ° Other significant growth sectors include Health & social; Financial services; Distribution. ° Most significant sectors in decline: Manufacturing; Construction.
2011-2021	° Overall growth of about 3.5 million FTEs (1.2% pa giving 54% of all growth 2011-31). ° This growth is largely in Business services. ° Other significant growth sectors include Health & social; Financial services; Transport & communication. ° Employees are shed in manufacturing. ° Most significant sector in decline: Public admin & defence.	° Overall growth of about 366,400 FTEs (1.5% pa giving 59% of all growth 2011-31). ° 41% of growth is in Business services. ° Other significant growth sectors include Health & social; Distribution; Financial services. ° Some growth is evident in the Manufacturing sector in this period. ° Sectors in decline: Public admin & defence; Utilities.	° Overall growth of about 48,700 FTEs (1.5% pa giving 59% of total growth 2011-31). ° This growth is significant in Business services. ° Other significant growth sectors include Health & social; Financial services; Distribution. ° Some growth is evident in the Manufacturing sector in this period. ° Sector in decline: Public admin & defence.
2021-2031	° Overall growth of about 3.0 million FTEs (0.9% pa giving 46% of all growth 2011-31). ° Almost two-thirds is in Business services. ° Other significant growth sectors include Health & social; Transport & communication; Financial services. ° Most significant sectors in decline: Manufacturing; Construction.	° Overall growth of about 259,600 FTEs (1.0% pa giving 41% of all growth 2011-31). ° 60% of growth is in Business services. ° Other significant growth sectors include Health & social; Financial services; Transport & communication; Distribution. ° Most significant sectors in decline: Manufacturing; Construction.	° Overall growth of about 33,900 FTEs (0.9% pa giving 41% of all growth 2011-31). ° 52% of this growth is in Business services. ° Other significant growth sectors include Health & social; Financial services; Transport & communication; Distribution. ° Most significant sectors in decline: Manufacturing; Construction.

Source: Dorset County Council, Experian Autumn 2011 projections dataset

[22] With a Dorset County Council estimate for 2031
[23] This Dorset County Council estimate is slightly higher than the Experian original due to extrapolation and summing of districts.

6.2 The following table looks at FTE employment growth in the phased year periods in the two SSCT areas and Rural Dorset:

Table 12 – FTE growth over ten year phased periods: local areas

	Bournemouth & Poole SSCT	Weymouth & Dorchester SSCT	Rural Dorset
2011-2031	° Overall growth of about 57,900 FTEs (1.4% pa) – about 70% of total BDP growth. ° This growth is largely in Business services. ° Other significant growth sectors include Financial services; Health & social. ° Most significant sectors in decline: Manufacturing; Construction.	° Overall growth of about 10,200 FTEs (1.2% pa) – about an eighth of total BDP growth. ° This growth is largely in Business services and Health & social. ° Most significant sectors in decline: Manufacturing; Construction; Public admin and Defence.	° Overall growth of about 14,500 FTEs (0.9% pa) – almost a fifth of total BDP growth. ° This growth is largely in Business services and Health & social. ° Other significant growth sectors include Distribution; Hotels & catering; and Transport & communications. ° Most significant sectors in decline: Manufacturing; Construction; Agriculture; Public admin and Defence.
2011-2021	° Overall growth of about 33,500 FTEs (1.7% pa giving 69% of total BDP growth). ° This growth is largely in Business services. ° Other significant growth sectors include Financial services; Health & social; Distribution; Hotels & catering; Transport & communication. ° Some growth is evident in the Manufacturing sector in this period. ° Sectors in decline: Public admin & defence; Utilities.	° Overall growth of about 5,800 FTEs (1.5% pa giving about an eighth of total BDP growth). ° This growth is largely in Business services and Health & social. ° Minor growth is evident in the Manufacturing sector in this period. ° Sector in decline: Public admin & defence.	° Overall growth of about 9,400 FTEs (1.2% pa giving about a fifth of BDP growth). ° This growth is largely in Business services. ° Other significant growth sectors include Health & social; Distribution; Hotels & catering. ° Some growth is evident in the Manufacturing sector in this period. ° Sector in decline: Public admin & defence.
2021-2031	° Overall growth of about 24,400 FTEs (1.1% pa giving 72% of BDP total growth). ° Almost half of this growth is in Business services. ° Other significant growth sectors include Financial services; Health & social; Transport & communication; Distribution, Hotels & catering. ° Most significant sectors in decline: Manufacturing; Construction.	° Overall growth of about 4,400 FTEs (1.0% pa giving about an eighth of BDP growth). ° Just over half of this growth is in Business services. ° The other significant growth sector is Health & social. ° Most significant sectors in decline: Manufacturing; Construction.	° Overall growth of about 5,100 FTEs (0.6% pa giving 15% of BDP growth). ° almost three-quarters of this growth is in Business services. ° The other significant growth sector is Health & social. ° Most significant sectors in decline: Manufacturing; Construction; Agriculture; Public admin.

Source: Dorset County Council, Experian Autumn 2011 projections dataset

6.3 The following table looks at FTE employment growth based on land use class in the phased year periods across BDP.

6.4 Overall, more than half the projected FTE growth occurs in the first ten years (59%).

6.5 By land use class, about 60% of non-B type employment growth occurs in the first ten years (22,600 FTEs) with further growth in the second decade (15,500 FTEs).

6.6 The picture is much the same for B1-B8 employment with most growth in the first decade (26,000 FTEs) and lower growth in the second ten year period (18,400 FTEs).

6.6.1 Office type FTEs: growth is almost evenly split across the two decades.

6.6.2 Warehousing FTEs: almost 60% of growth occurs in the first decade with lower growth in the second ten year period.

6.6.3 Other business FTEs: growth is wholly in the first decade with decline in the second decade.

6.6.4 The change in the B1-B8 split, as well as the lower overall growth in the second decade, affects the demand for employment land.

Table 13 – FTE growth over ten year phased periods in the BDP area by land use class

2011-2031	2011-2021	2021-2031
° Total FTE employment growth over 2011-2031 of 82,600, more than half of this is projected to be in B1-B8 employment sectors (44,400 FTEs). ° The majority of this B1-B8 growth is in office type employment (40,000 FTEs) with this sector growing at 2.3% per annum. ° Other business FTEs grow by almost 1,500 with growth of 0.1% pa. ° Warehousing FTEs grow by about 2,900 (1.2% pa). ° B1-B8 FTEs grow at 1.3% pa compared to 1.1% pa non-B employment growth. ° This leads to a demand for 278-296 ha of employment land in the 20 year period in BDP, with more than three-fifths of this required in the Bournemouth & Poole SSCT.	° Three-fifths of the 2011-2031 FTE growth occurs in the first ten years (59%). ° Total FTE employment growth over 2011-2021 is 48,700: 54% of this is projected to be in B1-B8 employment sectors (26,000 FTEs). ° B1-B8 growth is largely in office type employment with some additional growth in other business and warehousing employment. ° B1-B8 FTEs grow at 1.7% pa compared to 2.5% pa non-B employment growth. ° This leads to a demand for 185-198ha of employment land in the ten year period in BDP, with three-fifths of this required in the Bournemouth & Poole SSCT.	° Total FTE employment growth over 2021-2031 is 33,900 with more than half of this expected in B1-B8 sectors (18,400 FTEs). ° B1-B8 growth is predominantly in office type employment (20,000 FTEs) with this sector growing at 2.0% per annum. ° Other business FTEs are projected to decline by about 3,000. ° Warehousing FTEs increase by about 1,300. ° B1-B8 FTEs grow at 1.0% pa compared to 0.9% pa non-B employment change. ° This leads to a demand for 93-98 ha of employment land in the ten year period in BDP, with more than three-fifths of this required in the Bournemouth & Poole SSCT.

Source: Dorset County Council, Experian Autumn 2011 projections dataset

6.7 These changes result in the following picture of phased demand for employment land over 2011-2031. Table 14 shows the baseline demand by phased years; Table 15 shows a summary with a no allowance for flexibility and tables 16 and 17 give an allowance for 10 per cent and 20 per cent flexibility respectively.

Table 14 – Baseline demand by phased periods

	2011-21	**2021-31**	***2011-31***	**% of growth in 2011-21 period**
Bmth & Poole SSCT	89.9	40.3	*130.2*	69%
Wey & Dorch SSCT	12.1	4.1	*16.2*	74%
Rural Dorset	30.2	3.8	*34.0*	89%
BDP	**132.1**	**48.2**	**180.3**	**73%**

Source: Dorset County Council

Table 15 – Final demand by phased periods: with no allowance for flexibility

	2011-2021	**2021-2031**	***2011-2031***
	ha	**ha**	***Total ha***
Bmth & Poole SSCT	104.8	55.3	160.1
Wey & Dorch SSCT	20.1	12.2	32.3
Rural Dorset	47.0	20.5	67.5
BDP	**171.9**	**88.0**	***259.9***

Source: Dorset County Council

Table 16 – Final demand by phased periods: 10% flexibility

	2011-2021	**2021-2031**	***2011-2031***
	ha	**ha**	***Total ha***
Bmth & Poole SSCT	113.8	59.3	173.2
Wey & Dorch SSCT	21.3	12.6	33.9
Rural Dorset	50.0	20.9	70.9
BDP	**185.1**	**92.9**	**278.0**

Source: Dorset County Council

Table 17 – Final demand by phased periods: 20% flexibility

	2011-2021	**2021-2031**	***2011-2031***
	ha	**ha**	***Total ha***
Bmth & Poole SSCT	122.8	63.4	186.2
Wey & Dorch SSCT	22.5	13.0	35.5
Rural Dorset	53.0	21.3	74.3
BDP	**198.4**	**97.6**	**296.1**

Source: Dorset County Council

6.8 As was found in the 2008 Strategy, employment growth is front-loaded with more than half of the projected growth across BDP occurring in the first decade. Two-thirds of the final demand for employment land is evident in the initial ten years. The reason for this is most likely to be a smoothing out of trends in the employment projections for the later period: the future is uncertain so whilst the short-medium term scenario might build in recovery from recession with high growth rates in some sectors, the longer term is presented as a more stable picture.

Summary of demand for employment land:

6.9 Overall, it is estimated that between 2011 and 2031 there will be gross demand for 260-296 ha of employment land across BDP with the range reflecting the overall estimated requirement and the different degrees of flexibility.

6.10 Baseline demand from the economic projections is 180 ha with almost three-quarters (72%) of this demand in the Bournemouth & Poole SSCT area.

6.11 Almost three-quarters of this growth in baseline demand is expected to occur in the first ten years with this weighting being higher in Rural Dorset and the Weymouth & Dorchester SSCT.

6.12 Baseline demand for employment land over the twenty year period is driven by growth in office type employment which accounts for almost 60% of the increase over 2011-31 in BDP, (75% in the Weymouth & Dorchester SSCT area).

6.13 However, the picture is very different between the two ten year periods, as shown in tables 18 and 19 following.

6.13.1 Over 2011-21, 60% of the projected 132 ha baseline employment land demand in the BDP area is for industrial land with a requirement for 79 ha compared to 53 ha of office type employment land.

6.13.2 However in 2021-31, whilst baseline office land demand remains much the same in BDP as a whole, there is a reduction in the requirement for industrial land overall. In the Bournemouth & Poole SSCT area, demand remains positive despite falling considerably over the decade. In other parts of BDP, baseline industrial demand becomes negative in the second decade.

6.14 This falling off of industrial demand may suggest a need to renovate or replace more traditional industrial sites to meet the changing needs of employers.

6.15 In both periods, the demand for office space is focused on the Bournemouth & Poole SSCT area.

6.16 The demand for office space is higher in Rural Dorset than in the Weymouth & Dorchester SSCT area.

6.17 Over 2011-21, the demand for industrial space is also focused on the Bournemouth & Poole SSCT.

Table 18 – Baseline demand by phased periods: office demand is fairly even

Office baseline	**2011-21**	**2021-31**	***2011-31***
Bmth & Poole SSCT	38.4	37.9	*76.3*
Wey & Dorch SSCT	5.9	6.2	*12.1*
Rural Dorset	8.5	8.6	*17.1*
BDP	**52.8**	**52.7**	***105.5***

Source: Dorset County Council

Table 19 – Baseline demand by phased periods: industrial demand falls off

Industrial baseline	**2011-21**	**2021-31**	***2011-31***
Bmth & Poole SSCT	51.4	2.4	*53.8*
Wey & Dorch SSCT	6.2	-2.0	*4.1*
Rural Dorset	21.7	-4.9	*16.9*
BDP	**79.3**	**-4.5**	***74.8***

Source: Dorset County Council

7 Employment land supply

7.1 Table 20 gives a summary of the supply of employment land in BDP in the short-medium term and medium-long term by looking at ten year phased periods by area. The definition of 'available employment land supply' includes existing allocations, allocations currently being taken through the Local Development Framework (LDF), and sites with planning permissions. Some local authorities also include the remaining potential for existing employment sites (non-allocated but employment is existing lawful use), see Appendix D for details.

7.2 This suggests that about 277 ha of employment land will be made available over 2011-2031. More than two-thirds of this will come forward in the short-medium term ie over the next ten years (68%). In the Bournemouth & Poole SSCT, 55% of employment land supply is expected to be available in the first decade and 73% is expected to come forward then in the Weymouth & Dorchester SSCT. In Rural Dorset, a higher proportion is expected to come forward in the first decade: more than four-fifths (84%).

7.3 Just over two-fifths of the total supply of available employment land consists of very large sites of over 10 ha (120 ha in total). Of all the identified sites, just five[24] across BDP are over 10 ha in size representing 43% of the total 277 ha of available land.

7.4 Three of the five available sites of 10 ha or more are situated in the Bournemouth & Poole SSCT where they represent 59% of all available land (88 out of 150 ha). These sites are located in Christchurch (Aviation Park East and Aviation Park West) and East Dorset (Blunt's Farm, Ferndown - potential).

7.5 In the Weymouth & Dorchester SSCT, there are no very large sites of over ten hectares available.

7.6 In Rural Dorset there are two available sites of over ten hectares situated at North Dorset (Brickfields Business Park, Gillingham) and Purbeck (Dorset Green Technology Park). These represent 30% of the total 105 ha of available land.

7.7 In the 2008 strategy, over 2006-2026 a total supply of about 216 ha of consolidated available land was identified with about three-quarters of this coming forward in the short-medium term (within the next five years). 50 ha of available land consisted of very large sites of over 10 ha (23% of total supply).

Table 20 – Supply of employment land by phased periods

	Phasing: 2011-21	**Phasing: 2021-31**	***Total: 2011-31***
	ha	**ha**	***ha***
Bournemouth & Poole SSCT	82.9	67.3	150.1
Weymouth & Dorchester SSCT	16.4	6.2	22.6
Rural Dorset	88.2	16.5	104.7
BDP	**187.4**	**90.0**	**277.4**

Source: Bournemouth, Poole and Dorset Borough and District Councils

Comparing demand with supply

7.8 On the whole, in the 2011-31 period in Bournemouth, Dorset and Poole, the balance between the demand for employment land and its supply depends largely on the degree of flexibility built in to the calculations: with no allowance for flexibility there is a

[24] Including one potential site in East Dorset

small degree of over-supply in BDP as a whole; at 10% flexibility, demand and supply are almost in balance overall; and at 20% flexibility there is an under-supply of employment land. The two SSCTs see a projected shortfall of employment land in all three scenarios.

7.9 Broadly, any shortage of employment land over 2011-31, with demand outstripping supply, is likely to be most severe in the Bournemouth & Poole SSCT area, even with no allowance for flexibility. However, this potential shortage does not take account of under-utilised or unused sites and buildings where there are, and will be, significant opportunities to make up the shortfall. A shortage is most likely to occur in the first period with the tail off in demand for industrial land making the longer term picture more positive. The Weymouth & Portland SSCT may well see a small shortfall in both periods.

With no allowance for flexibility

7.10 With no allowance for flexibility, over 2011-31 the BDP area sees demand for 260 ha of employment land which is more than adequately met by supply across the sub-region in this period.

7.11 If demand and supply in BDP are disaggregated by phased periods, the potential over-supply with no allowance for flexibility is heaviest in the short-medium term. However, the over-supply is not consistent across the BDP area with the two SSCTs likely to be short of employment land, particularly in the short-medium term in the Bournemouth & Poole SSCT.

Table 21 – comparing demand with supply with no allowance for flexibility			
	Phasing: 2011-21	**Phasing: 2021-31**	***Total: 2011-31***
BDP	**ha**	**ha**	**ha**
Demand	171.9	88.0	*259.9*
Supply	187.4	90.0	*277.4*
Balance BDP	15.5	2.0	*17.5*
	Phasing: 2011-21	**Phasing: 2021-31**	***Total: 2011-31***
Bournemouth & Poole SSCT	**ha**	**ha**	**ha**
Demand	104.8	55.3	*160.1*
Supply	82.9	67.3	*150.1*
Balance Bmth & Poole SSCT	-21.9	12.0	*-10.0*
	Phasing: 2011-21	**Phasing: 2021-31**	***Total: 2011-31***
Weymouth & Dorchester SSCT	**ha**	**ha**	**ha**
Demand	20.1	12.2	*32.3*
Supply	16.4	6.2	*22.6*
Balance Wey & Dorch SSCT	-3.7	-6.0	*-9.7*
	Phasing: 2011-21	**Phasing: 2021-31**	***Total: 2011-31***
Rural Dorset	**ha**	**ha**	**ha**
Demand	47.0	20.5	*67.5*
Supply	88.2	16.5	*104.7*
Balance Rural Dorset	41.2	-4.0	*37.2*

Source: Bournemouth, Poole and Dorset Borough and District Councils

7.12 In the Bournemouth & Poole SSCT, with demand for 160 ha of employment land, there is overall a shortfall of 10 ha. The phasing exercise suggests the shortfall occurs in 2011-21 with a projected over-supply in the second decade. The under-supply in the short-medium term is of concern as it is less easy to be clear about land availability in the longer term.

7.13 In the Weymouth & Dorchester SSCT, with overall demand for 32 ha of employment land, there is an under-supply of 10 ha. The phasing exercise suggests an under-supply of four hectares of employment land in the first ten years and a slightly larger under-supply of six hectares in the second period.

7.14 The Rural Dorset area sees considerable over-supply in the first decade followed by a small shortfall in the 2021-31 period.

With 10% flexibility

7.15 With 10% flexibility, over 2011-31 the BDP area sees demand for 278 ha of employment land which is approximately in balance with supply across the sub-region in this period.

7.16 However, when disaggregating demand and supply in BDP by phased periods, the indication is that there may be a small over-supply in the first period and an under-supply of much the same size in the second decade. An under-supply is projected in both phased periods in the Weymouth & Dorchester SSCT, but just in the first decade in the Bournemouth & Poole SSCT. In the Rural Dorset area, under-supply is indicated in the second decade, but this is more than compensated for by the projected over-supply in the first decade.

Table 22 – comparing demand with supply with 10% flexibility

	Phasing: 2011-21	Phasing: 2021-31	*Total: 2011-31*
BDP	**ha**	**ha**	**ha**
Demand	185.1	92.9	*278.0*
Supply	187.4	90.0	*277.4*
Balance BDP	2.3	-2.9	*-0.7*
	Phasing: 2011-21	**Phasing: 2021-31**	***Total: 2011-31***
Bournemouth & Poole SSCT	**ha**	**ha**	**ha**
Demand	113.8	59.3	*173.2*
Supply	82.9	67.3	*150.1*
Balance Bmth & Poole SSCT	-30.9	8.0	-23.0
	Phasing: 2011-21	**Phasing: 2021-31**	***Total: 2011-31***
Weymouth & Dorchester SSCT	**ha**	**ha**	**ha**
Demand	21.3	12.6	*33.9*
Supply	16.4	6.2	*22.6*
Balance Wey & Dorch SSCT	-4.9	-6.4	*-11.3*
	Phasing: 2011-21	**Phasing: 2021-31**	***Total: 2011-31***
Rural Dorset	**ha**	**ha**	**ha**
Demand	50.0	20.9	*70.9*
Supply	88.2	16.5	*104.7*
Balance Rural Dorset	38.2	-4.4	*33.8*

Source: Bournemouth, Poole and Dorset Borough and District Councils

7.17 In the Bournemouth & Poole SSCT, with demand for 173 ha of employment land, there is overall a shortfall of 23 ha. The phasing exercise suggests the shortfall occurs in 2011-21 with a projected small over-supply in the second decade. The under-supply in the short-medium term is of concern as it is less easy to be clear about land availability in the longer term.

7.18 In the Weymouth & Dorchester SSCT, with overall demand for 34 ha of employment land, there is an under-supply of 11 ha. The phasing exercise suggests an under-supply of five hectares of employment land in the first ten years and a slightly larger under-supply of six hectares in the second period.

7.19 The Rural Dorset area sees over-supply in the first decade followed by a small shortfall in the 2021-31 period.

With 20% flexibility

7.20 With 20% flexibility, over 2011-31 the BDP area sees demand for 296 ha of employment land which appears unlikely to be met by supply across the sub-region in this period.

7.21 When disaggregating demand and supply in BDP further by phased periods, the indication is that there is a potential under-supply in the short-medium term and a further shortfall in the longer term. The under-supply is in both phased periods in the Weymouth & Dorchester SSCT, but just in the first decade in the Bournemouth & Poole SSCT. In the Rural Dorset area, under-supply is indicated in the second decade, but this is more than compensated for by the projected over-supply in the first decade.

Table 23 - comparing demand with supply with 20% flexibility			
	Phasing: 2011-21	**Phasing: 2021-31**	***Total: 2011-31***
BDP	**ha**	**ha**	**ha**
Demand	198.4	97.7	*296.1*
Supply	187.4	90.0	*277.4*
Balance BDP	-11.0	-7.8	*-18.8*
	Phasing: 2011-21	**Phasing: 2021-31**	***Total: 2011-31***
Bournemouth & Poole SSCT	**ha**	**ha**	**ha**
Demand	122.8	63.4	*186.2*
Supply	82.9	67.3	*150.1*
Balance Bmth & Poole SSCT	-39.9	3.9	*-36.1*
	Phasing: 2011-21	**Phasing: 2021-31**	***Total: 2011-31***
Weymouth & Dorchester SSCT	**ha**	**ha**	**ha**
Demand	22.5	13.0	*35.5*
Supply	16.4	6.2	*22.6*
Balance Wey & Dorch SSCT	-6.1	-6.8	*-12.9*
	Phasing: 2011-21	**Phasing: 2021-31**	***Total: 2011-31***
Rural Dorset	**ha**	**ha**	**ha**
Demand	53.0	21.3	*74.3*
Supply	88.2	16.5	*104.7*
Balance Rural Dorset	35.2	-4.8	*30.4*

Source: Bournemouth, Poole and Dorset Borough and District Councils

7.22 In the Bournemouth & Poole SSCT, with demand for 186 ha of employment land, 2011-31 overall sees a shortfall of 36 ha. The phasing exercise suggests this shortfall occurs in 2011-21 with a small over-supply projected for 2021-31. The under-supply in the short-medium term is of concern as it is less easy to be clear about land availability in the longer term.

7.23 In the Weymouth & Dorchester SSCT, with demand for 36 ha of employment land, there is overall an under-supply of 13 ha. The phasing exercise suggests an under-supply of six hectares of employment land in the first ten years and much the same again in the second period.

7.24 In the Rural Dorset area, an over-supply is projected for the first decade with a small shortfall in the second period.

7.25 In the 2008 strategy, overall in the period 2006-2026 the supply of employment land in BDP as a whole was expected to exceed demand with 216 ha of available land against demand for 184 ha. However, there were imbalances over the decade with a shortage of supply in the first five years; an excess over 2011-2016; and a very small gap in 2016-2026.

7.26 Over 2011-2016, 89 ha of employment land were projected to come forward across BDP but the current study indicates that this has now increased to 128 ha. Similarly, over 2016-2026 53 ha were expected to come forward, but this has been revised upward to 134 ha.

8 Sources

'Bournemouth Dorset Poole Workspace Strategy and Delivery Plan',
October 2008, GVA Grimley Ltd, reference 07A800547

'Employment Densities Guide' 2nd edition 2010, Drivers Jonas Deloitte

Plot ratios 1994 to 2010, Dorset authorities, July 2011

Autumn 2011 economic projections (Experian), South West Observatory

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9 Appendices

Appendix A: economic growth scenario

SWO/Experian projections at higher tier geographical level with Dorset County Council estimates for lower tier authorities

9.1 This set of projections broadly gives a stable and positive level of growth across Bournemouth, Dorset and Poole with a 2.5% GVA increase per annum over 2011-2031 and an increase of 82,600 full time equivalent employees (FTEs) which equates to 1.2% per annum.

9.2 The Bournemouth, Poole and DCC Dorset projections have been taken from the original SWO/Experian set[25], Autumn 2011.

9.3 District projections were then estimated by Dorset County Council. Based on the 2009 Business Register and Employment Survey (ONS) with a Dorset County Council estimate for self-employment, a sector growth rate is applied for each district depending on how closely they match sector growth in the larger geographies (Bournemouth, Poole, DCC Dorset or the South West). The resulting figures are then re-aligned to the SWO/Experian projection for DCC Dorset.

9.4 Projections by sector for each district were then apportioned to the SSCTs by the percentage of employees according to the Business Register and Employment Survey 2009 (ONS)[26]. For example, looking at Manufacturing employment, for the West Dorset estimates, 0.0% was allocated to the Bournemouth & Poole SSCT; 47.7% to the Weymouth & Dorchester SSCT and 52.3% to Rural Dorset; but for North Dorset 100% was allocated to Rural Dorset.

How do the projections compare with those used in the 2008 Workspace Strategy?

9.5 **GVA growth is lower over 2006-2026 in the new set.** Compared to the projections used in the 2008 Workspace Strategy, GVA growth over 2006-2026 in the South West is lower at 1.9% per annum in this new set rather than 3.2% pa as found in the earlier study.

9.6 By sector, the biggest difference is evident in Public admin & defence where GVA growth was previously projected at 2.7% pa and in the new set is -0.6% pa. Construction and Manufacturing also see sizeable downward revision.

9.7 **FTE employment growth is marginally higher in the new set.** In contrast, the projection of full time equivalent employment growth is marginally higher in the Autumn 2011 set of projections at 1.0% pa over 2006-2026 compared with 0.7% pa previously.

9.8 GVA decline with corresponding FTE employment growth reflects changes in productivity. In the 2008 projections, GVA per FTE was projected to increase at a higher rate over 2006-2026 than in the 2011 set. In the later set, some sectors even see declining productivity (Financial & business services and Transport & communications). This lower productivity growth may be a reflection of a slowing of the economy where technological advance may be held back due to poor economic conditions. The result is that to achieve the same level of GVA (or even lower) over the same period of time, a greater number of employees is required.

9.9 By sector, the biggest difference in FTE change is in the Primary/utilities sector which swings from average decline of 1.5% pa to growth of 1.1% pa. In contrast, Construction and Miscellaneous services swing from projected growth to decline.

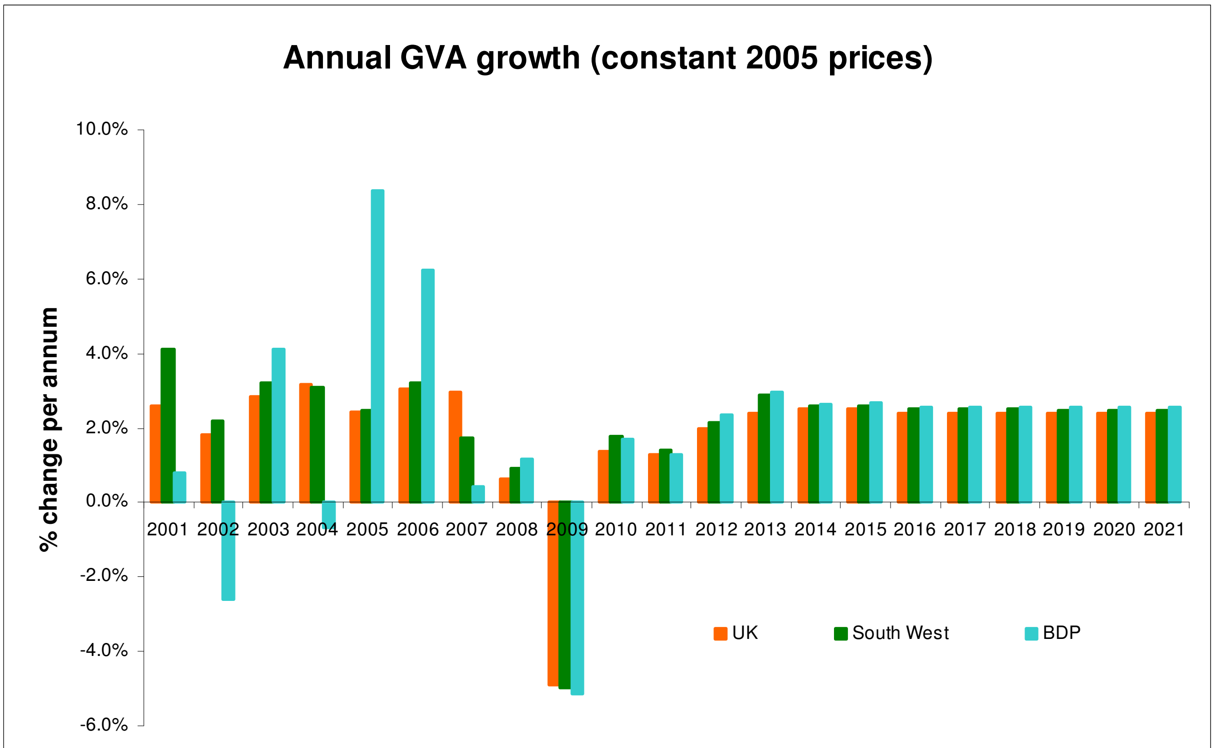
[25] Minor differences may be evident where, in the DCC model, figures have been converted to different formats or sectors.
[26] The latest confirmed dataset at time of writing.

Higher growth than originally projected is shown in Financial & business services and in Transport & communications.

How do the current projections reflect recent change in the economy?

9.10 The Autumn 2011 projections show that growth in GVA (at constant 2005 prices) slumped between 2008 and 2009 as the economy went into recession. Previous to this, over 2001-2008, GVA growth was at 2.4% per annum on average in the UK, the South West and the BDP area, with year to year growth more erratic in the latter (as high as 8.4% over 2004-2005).

9.11 The projections then show a return to growth in 2010, a shrinking in 2011, and stabilisation by about 2019 at 2.5% pa in the South West and BDP and at 2.4% pa in the UK as a whole. The projected level of growth in 2010 and 2011 may be a little optimistic given the current level of economic uncertainty with the UK economy growing more slowly than previously anticipated.



Source: Dorset County Council, Experian Autumn 2011 projections dataset

9.12 Growth summary tables are shown in the following table.

Autumn 2011 projections			
	GVA % growth per annum 2011-2031	**FTEs % growth per annum 2011-2031**	**FTEs growth in actual number 2011-2031**
UK	2.4%	1.1%	6,544,200
South West	2.5%	1.2%	626,100
Bournemouth	2.7%	1.7%	27,000
Poole	2.5%	1.2%	19,400
DCC Dorset	2.5%	1.0%	36,100
BDP	**2.5%**	**1.2%**	**82,600**
Bournemouth & Poole SSCT		1.4%	57,900
Weymouth & Dorchester SSCT		1.2%	10,200
Rural Dorset		0.9%	14,500
Christchurch		1.3%	4,900
East Dorset		1.0%	6,500
North Dorset		0.8%	4,400
Purbeck		1.1%	4,300
West Dorset		1.0%	11,200
Weymouth & Portland		1.2%	4,900

Source: Dorset County Council, Experian Autumn 2011 projections dataset

Appendix B: Matrix assigning sectors by SIC to land use class

The Standard Industrial Classification (SIC) used by the Office for National Statistics provides a framework for the collection, presentation and analysis of data and facilitates a consistent approach. It undergoes regular revision to reflect change in products and industries over time and shifting structure or emphasis in existing industries. SIC 2007 represents a major revision in the UK, as opposed to the partial revision of 2003. It became effective from 1st January 2008.

The UK SIC is a hierarchical five digit system. At the four digit level it matches the Eurostat NACE system but the fifth digit has been added to form a sub-class where deemed necessary. The UK SIC 2007 is structured as follows:

21 sections denoted by a single letter A to U;
88 divisions denoted by a two digit number;
272 groups denoted by a three digit number;
615 classes denoted by a four digit number; and
191 sub-classes denoted by a five digit number.

In assigning the SIC 2007 codes to land use classes, a number of the broad sections can be allocated directly to a class, but others need to be sub-divided. Whole sections have been assigned as follows:

Conversion of SIC 2007 broad sections matching directly to a land use class

Section:	Description:	SIC divisions included:	Land use class:
A	AGRICULTURE, FORESTRY AND FISHING	01 02 03	non B
B	MINING AND QUARRYING	05 06 07 08 09	non B
C	MANUFACTURING	10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33	Other business space 'B1b/c, B2'
E	WATER SUPPLY; SEWERAGE, WASTE MANAGEMENT AND REMEDIATION ACTIVITIES	36 37 38 39	non B
F	CONSTRUCTION	41 42 43	Other business space 'B1b/c, B2'
I	ACCOMMODATION AND FOOD SERVICE ACTIVITIES	55 56	non B
J	INFORMATION AND COMMUNICATION	58 59 60 61 62 63	office B1a
K	FINANCIAL AND INSURANCE ACTIVITIES	64 65	office B1a
L	REAL ESTATE ACTIVITIES	68	office B1a
P	EDUCATION	85	non B
Q	HUMAN HEALTH AND SOCIAL WORK ACTIVITIES	86 87 88	non B
R	ARTS, ENTERTAINMENT AND RECREATION	90 91 92 93	non B
T	ACTIVITIES OF HOUSEHOLDS AS EMPLOYERS; UNDIFFERENTIATED GOODS-AND SERVICES-PRODUCING ACTIVITIES OF HOUSEHOLDS FOR OWN USE	97 98	non B
U	ACTIVITIES OF EXTRATERRITORIAL ORGANISATIONS AND BODIES	99	office B1a

The following sections comprise more than one land use:

SIC 2007 broad sections matching to more than one land use class

Section:	Description:	SIC divisions included:
D	ELECTRICITY, GAS, STEAM AND AIR CONDITIONING SUPPLY	35
G	WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTOR CYCLES	45 46 47
H	TRANSPORT AND STORAGE	49 50 51 52 53
M	PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	69 70 71 72 73 74 75
N	ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES	77 78 79 80 81 82
O	PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY SOCIAL SECURITY	84
S	OTHER SERVICE ACTIVITIES	94 95 96

For the above sections, the full four digit matrix can be used, as follows:

Conversion of SIC 2007 four digit codes to land use class

Section:	Class	Land use	Description
A	01.00	non B	DEFRA emp data
A	01.11	non B	Growing of cereals (except rice), leguminous crops and oil seeds
A	01.12	non B	Growing of rice
A	01.13	non B	Growing of vegetables and melons, roots and tubers
A	01.14	non B	Growing of sugar cane
A	01.15	non B	Growing of tobacco
A	01.16	non B	Growing of fibre crops
A	01.19	non B	Growing of other non-perennial crops
A	01.21	non B	Growing of grapes
A	01.22	non B	Growing of tropical and subtropical fruits
A	01.23	non B	Growing of citrus fruits
A	01.24	non B	Growing of pome fruits and stone fruits
A	01.25	non B	Growing of other tree and bush fruits and nuts
A	01.26	non B	Growing of oleaginous fruits
A	01.27	non B	Growing of beverage crops
A	01.28	non B	Growing of spices, aromatic, drug and pharmaceutical crops
A	01.29	non B	Growing of other perennial crops
A	01.30	non B	Plant propagation
A	01.41	non B	Raising of dairy cattle
A	01.42	non B	Raising of other cattle and buffaloes
A	01.43	non B	Raising of horses and other equines
A	01.44	non B	Raising of camels and camelids
A	01.45	non B	Raising of sheep and goats
A	01.46	non B	Raising of swine/pigs
A	01.47	non B	Raising of poultry
A	01.49	non B	Raising of other animals
A	01.50	non B	Mixed farming
A	01.61	non B	Support activities for crop production
A	01.62	non B	Support activities for animal production
A	01.63	non B	Post-harvest crop activities

Section:	Class	Land use	Description
A	01.64	non B	Seed processing for propagation
A	01.70	non B	Hunting, trapping and related service activities
A	02.10	non B	Silviculture and other forestry activities
A	02.20	non B	Logging
A	02.30	non B	Gathering of wild growing non-wood products
A	02.40	non B	Support services to forestry
A	03.11	non B	Marine fishing
A	03.12	non B	Freshwater fishing
A	03.21	non B	Marine aquaculture
A	03.22	non B	Freshwater aquaculture
B	05.10	non B	Mining of hard coal
B	05.20	non B	Mining of lignite
B	06.10	non B	Extraction of crude petroleum
B	06.20	non B	Extraction of natural gas
B	07.10	non B	Mining of iron ores
B	07.21	non B	Mining of uranium and thorium ores
B	07.29	non B	Mining of other non-ferrous metal ores
B	08.11	non B	Quarrying of ornamental and building stone, limestone, gypsum, chalk and slate
B	08.12	non B	Operation of gravel and sand pits; mining of clays and kaolin
B	08.91	non B	Mining of chemical and fertiliser minerals
B	08.92	non B	Extraction of peat
B	08.93	non B	Extraction of salt
B	08.99	non B	Other mining and quarrying n.e.c.
B	09.10	non B	Support activities for petroleum and natural gas extraction
B	09.90	non B	Support activities for other mining and quarrying
C	10.11	Other business space 'B1b/c, B2'	Processing and preserving of meat
C	10.12	Other business space 'B1b/c, B2'	Processing and preserving of poultry meat
C	10.13	Other business space 'B1b/c, B2'	Production of meat and poultry meat products
C	10.20	Other business space 'B1b/c, B2'	Processing and preserving of fish, crustaceans and molluscs
C	10.31	Other business space 'B1b/c, B2'	Processing and preserving of potatoes
C	10.32	Other business space 'B1b/c, B2'	Manufacture of fruit and vegetable juice
C	10.39	Other business space 'B1b/c, B2'	Other processing and preserving of fruit and vegetables
C	10.41	Other business space 'B1b/c, B2'	Manufacture of oils and fats
C	10.42	Other business space 'B1b/c, B2'	Manufacture of margarine and similar edible fats
C	10.51	Other business space 'B1b/c, B2'	Operation of dairies and cheese making
C	10.52	Other business space 'B1b/c, B2'	Manufacture of ice cream
C	10.61	Other business space 'B1b/c, B2'	Manufacture of grain mill products
C	10.62	Other business space 'B1b/c, B2'	Manufacture of starches and starch products
C	10.71	Other business space 'B1b/c, B2'	Manufacture of bread; manufacture of fresh pastry goods and cakes
C	10.72	Other business space 'B1b/c, B2'	Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes
C	10.73	Other business space 'B1b/c, B2'	Manufacture of macaroni, noodles, couscous and similar farinaceous products

Section:	Class	Land use	Description
C	10.81	Other business space 'B1b/c, B2'	Manufacture of sugar
C	10.82	Other business space 'B1b/c, B2'	Manufacture of cocoa, chocolate and sugar confectionery
C	10.83	Other business space 'B1b/c, B2'	Processing of tea and coffee
C	10.84	Other business space 'B1b/c, B2'	Manufacture of condiments and seasonings
C	10.85	Other business space 'B1b/c, B2'	Manufacture of prepared meals and dishes
C	10.86	Other business space 'B1b/c, B2'	Manufacture of homogenised food preparations and dietetic food
C	10.89	Other business space 'B1b/c, B2'	Manufacture of other food products n.e.c.
C	10.91	Other business space 'B1b/c, B2'	Manufacture of prepared feeds for farm animals
C	10.92	Other business space 'B1b/c, B2'	Manufacture of prepared pet foods
C	11.01	Other business space 'B1b/c, B2'	Distilling, rectifying and blending of spirits
C	11.02	Other business space 'B1b/c, B2'	Manufacture of wine from grape
C	11.03	Other business space 'B1b/c, B2'	Manufacture of cider and other fruit wines
C	11.04	Other business space 'B1b/c, B2'	Manufacture of other non-distilled fermented beverages
C	11.05	Other business space 'B1b/c, B2'	Manufacture of beer
C	11.06	Other business space 'B1b/c, B2'	Manufacture of malt
C	11.07	Other business space 'B1b/c, B2'	Manufacture of soft drinks; production of mineral waters and other bottled waters
C	12.00	Other business space 'B1b/c, B2'	Manufacture of tobacco products
C	13.10	Other business space 'B1b/c, B2'	Preparation and spinning of textile fibres
C	13.20	Other business space 'B1b/c, B2'	Weaving of textiles
C	13.30	Other business space 'B1b/c, B2'	Finishing of textiles
C	13.91	Other business space 'B1b/c, B2'	Manufacture of knitted and crocheted fabrics
C	13.92	Other business space 'B1b/c, B2'	Manufacture of made-up textile articles, except apparel
C	13.93	Other business space 'B1b/c, B2'	Manufacture of carpets and rugs
C	13.94	Other business space 'B1b/c, B2'	Manufacture of cordage, rope, twine and netting
C	13.95	Other business space 'B1b/c, B2'	Manufacture of non-wovens and articles made from non-wovens, except apparel
C	13.96	Other business space 'B1b/c, B2'	Manufacture of other technical and industrial textiles
C	13.99	Other business space 'B1b/c, B2'	Manufacture of other textiles n.e.c.
C	14.11	Other business space 'B1b/c, B2'	Manufacture of leather clothes
C	14.12	Other business space 'B1b/c, B2'	Manufacture of workwear
C	14.13	Other business space 'B1b/c, B2'	Manufacture of other outerwear
C	14.14	Other business space 'B1b/c, B2'	Manufacture of underwear
C	14.19	Other business space 'B1b/c, B2'	Manufacture of other wearing apparel and accessories
C	14.20	Other business space 'B1b/c, B2'	Manufacture of articles of fur
C	14.31	Other business space 'B1b/c, B2'	Manufacture of knitted and crocheted hosiery

Section:	Class	Land use	Description
C	14.39	Other business space 'B1b/c, B2'	Manufacture of other knitted and crocheted apparel
C	15.11	Other business space 'B1b/c, B2'	Tanning and dressing of leather; dressing and dyeing of fur
C	15.12	Other business space 'B1b/c, B2'	Manufacture of luggage, handbags and the like, saddlery and harness
C	15.20	Other business space 'B1b/c, B2'	Manufacture of footwear
C	16.10	Other business space 'B1b/c, B2'	Sawmilling and planing of wood
C	16.21	Other business space 'B1b/c, B2'	Manufacture of veneer sheets and wood-based panels
C	16.22	Other business space 'B1b/c, B2'	Manufacture of assembled parquet floors
C	16.23	Other business space 'B1b/c, B2'	Manufacture of other builders' carpentry and joinery
C	16.24	Other business space 'B1b/c, B2'	Manufacture of wooden containers
C	16.29	Other business space 'B1b/c, B2'	Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials
C	17.11	Other business space 'B1b/c, B2'	Manufacture of pulp
C	17.12	Other business space 'B1b/c, B2'	Manufacture of paper and paperboard
C	17.21	Other business space 'B1b/c, B2'	Manufacture of corrugated paper and paperboard and of containers of paper and paperboard
C	17.22	Other business space 'B1b/c, B2'	Manufacture of household and sanitary goods and of toilet requisites
C	17.23	Other business space 'B1b/c, B2'	Manufacture of paper stationery
C	17.24	Other business space 'B1b/c, B2'	Manufacture of wallpaper
C	17.29	Other business space 'B1b/c, B2'	Manufacture of other articles of paper and paperboard
C	18.11	Other business space 'B1b/c, B2'	Printing of newspapers
C	18.12	Other business space 'B1b/c, B2'	Other printing
C	18.13	Other business space 'B1b/c, B2'	Pre-press and pre-media services
C	18.14	Other business space 'B1b/c, B2'	Binding and related services
C	18.20	Other business space 'B1b/c, B2'	Reproduction of recorded media
C	19.10	Other business space 'B1b/c, B2'	Manufacture of coke oven products
C	19.20	Other business space 'B1b/c, B2'	Manufacture of refined petroleum products
C	20.11	Other business space 'B1b/c, B2'	Manufacture of industrial gases
C	20.12	Other business space 'B1b/c, B2'	Manufacture of dyes and pigments
C	20.13	Other business space 'B1b/c, B2'	Manufacture of other inorganic basic chemicals
C	20.14	Other business space 'B1b/c, B2'	Manufacture of other organic basic chemicals
C	20.15	Other business space 'B1b/c, B2'	Manufacture of fertilisers and nitrogen compounds
C	20.16	Other business space 'B1b/c, B2'	Manufacture of plastics in primary forms
C	20.17	Other business space 'B1b/c, B2'	Manufacture of synthetic rubber in primary forms
C	20.20	Other business space 'B1b/c, B2'	Manufacture of pesticides and other agrochemical products
C	20.30	Other business space 'B1b/c, B2'	Manufacture of paints, varnishes and similar coatings, printing ink and mastics
C	20.41	Other business space 'B1b/c, B2'	Manufacture of soap and detergents, cleaning and polishing preparations

Section:	Class	Land use	Description
C	20.42	Other business space 'B1b/c, B2'	Manufacture of perfumes and toilet preparations
C	20.51	Other business space 'B1b/c, B2'	Manufacture of explosives
C	20.52	Other business space 'B1b/c, B2'	Manufacture of glues
C	20.53	Other business space 'B1b/c, B2'	Manufacture of essential oils
C	20.59	Other business space 'B1b/c, B2'	Manufacture of other chemical products n.e.c.
C	20.60	Other business space 'B1b/c, B2'	Manufacture of man-made fibres
C	21.10	Other business space 'B1b/c, B2'	Manufacture of basic pharmaceutical products
C	21.20	Other business space 'B1b/c, B2'	Manufacture of pharmaceutical preparations
C	22.11	Other business space 'B1b/c, B2'	Manufacture of rubber tyres and tubes; retreading and rebuilding of rubber tyres
C	22.19	Other business space 'B1b/c, B2'	Manufacture of other rubber products
C	22.21	Other business space 'B1b/c, B2'	Manufacture of plastic plates, sheets, tubes and profiles
C	22.22	Other business space 'B1b/c, B2'	Manufacture of plastic packing goods
C	22.23	Other business space 'B1b/c, B2'	Manufacture of builders' ware of plastic
C	22.29	Other business space 'B1b/c, B2'	Manufacture of other plastic products
C	23.11	Other business space 'B1b/c, B2'	Manufacture of flat glass
C	23.12	Other business space 'B1b/c, B2'	Shaping and processing of flat glass
C	23.13	Other business space 'B1b/c, B2'	Manufacture of hollow glass
C	23.14	Other business space 'B1b/c, B2'	Manufacture of glass fibres
C	23.19	Other business space 'B1b/c, B2'	Manufacture and processing of other glass, including technical glassware
C	23.20	Other business space 'B1b/c, B2'	Manufacture of refractory products
C	23.31	Other business space 'B1b/c, B2'	Manufacture of ceramic tiles and flags
C	23.32	Other business space 'B1b/c, B2'	Manufacture of bricks, tiles and construction products, in baked clay
C	23.41	Other business space 'B1b/c, B2'	Manufacture of ceramic household and ornamental articles
C	23.42	Other business space 'B1b/c, B2'	Manufacture of ceramic sanitary fixtures
C	23.43	Other business space 'B1b/c, B2'	Manufacture of ceramic insulators and insulating fittings
C	23.44	Other business space 'B1b/c, B2'	Manufacture of other technical ceramic products
C	23.49	Other business space 'B1b/c, B2'	Manufacture of other ceramic products
C	23.51	Other business space 'B1b/c, B2'	Manufacture of cement
C	23.52	Other business space 'B1b/c, B2'	Manufacture of lime and plaster
C	23.61	Other business space 'B1b/c, B2'	Manufacture of concrete products for construction purposes
C	23.62	Other business space 'B1b/c, B2'	Manufacture of plaster products for construction purposes
C	23.63	Other business space 'B1b/c, B2'	Manufacture of ready-mixed concrete
C	23.64	Other business space 'B1b/c, B2'	Manufacture of mortars
C	23.65	Other business space 'B1b/c, B2'	Manufacture of fibre cement

Section:	Class	Land use	Description
C	23.69	Other business space 'B1b/c, B2'	Manufacture of other articles of concrete, plaster and cement
C	23.70	Other business space 'B1b/c, B2'	Cutting, shaping and finishing of stone
C	23.91	Other business space 'B1b/c, B2'	Production of abrasive products
C	23.99	Other business space 'B1b/c, B2'	Manufacture of other non-metallic mineral products n.e.c.
C	24.10	Other business space 'B1b/c, B2'	Manufacture of basic iron and steel and of ferro-alloys
C	24.20	Other business space 'B1b/c, B2'	Manufacture of tubes, pipes, hollow profiles and related fittings, of steel
C	24.31	Other business space 'B1b/c, B2'	Cold drawing of bars
C	24.32	Other business space 'B1b/c, B2'	Cold rolling of narrow strip
C	24.33	Other business space 'B1b/c, B2'	Cold forming or folding
C	24.34	Other business space 'B1b/c, B2'	Cold drawing of wire
C	24.41	Other business space 'B1b/c, B2'	Precious metals production
C	24.42	Other business space 'B1b/c, B2'	Aluminium production
C	24.43	Other business space 'B1b/c, B2'	Lead, zinc and tin production
C	24.44	Other business space 'B1b/c, B2'	Copper production
C	24.45	Other business space 'B1b/c, B2'	Other non-ferrous metal production
C	24.46	Other business space 'B1b/c, B2'	Processing of nuclear fuel
C	24.51	Other business space 'B1b/c, B2'	Casting of iron
C	24.52	Other business space 'B1b/c, B2'	Casting of steel
C	24.53	Other business space 'B1b/c, B2'	Casting of light metals
C	24.54	Other business space 'B1b/c, B2'	Casting of other non-ferrous metals
C	25.11	Other business space 'B1b/c, B2'	Manufacture of metal structures and parts of structures
C	25.12	Other business space 'B1b/c, B2'	Manufacture of doors and windows of metal
C	25.21	Other business space 'B1b/c, B2'	Manufacture of central heating radiators and boilers
C	25.29	Other business space 'B1b/c, B2'	Manufacture of other tanks, reservoirs and containers of metal
C	25.30	Other business space 'B1b/c, B2'	Manufacture of steam generators, except central heating hot water boilers
C	25.40	Other business space 'B1b/c, B2'	Manufacture of weapons and ammunition
C	25.50	Other business space 'B1b/c, B2'	Forging, pressing, stamping and roll-forming of metal; powder metallurgy
C	25.61	Other business space 'B1b/c, B2'	Treatment and coating of metals
C	25.62	Other business space 'B1b/c, B2'	Machining
C	25.71	Other business space 'B1b/c, B2'	Manufacture of cutlery
C	25.72	Other business space 'B1b/c, B2'	Manufacture of locks and hinges
C	25.73	Other business space 'B1b/c, B2'	Manufacture of tools
C	25.91	Other business space 'B1b/c, B2'	Manufacture of steel drums and similar containers
C	25.92	Other business space 'B1b/c, B2'	Manufacture of light metal packaging

Section:	Class	Land use	Description
C	25.93	Other business space 'B1b/c, B2'	Manufacture of wire products, chain and springs
C	25.94	Other business space 'B1b/c, B2'	Manufacture of fasteners and screw machine products
C	25.99	Other business space 'B1b/c, B2'	Manufacture of other fabricated metal products n.e.c.
C	26.11	Other business space 'B1b/c, B2'	Manufacture of electronic components
C	26.12	Other business space 'B1b/c, B2'	Manufacture of loaded electronic boards
C	26.20	Other business space 'B1b/c, B2'	Manufacture of computers and peripheral equipment
C	26.30	Other business space 'B1b/c, B2'	Manufacture of communication equipment
C	26.40	Other business space 'B1b/c, B2'	Manufacture of consumer electronics
C	26.51	Other business space 'B1b/c, B2'	Manufacture of instruments and appliances for measuring, testing and navigation
C	26.52	Other business space 'B1b/c, B2'	Manufacture of watches and clocks
C	26.60	Other business space 'B1b/c, B2'	Manufacture of irradiation, electromedical and electrotherapeutic equipment
C	26.70	Other business space 'B1b/c, B2'	Manufacture of optical instruments and photographic equipment
C	26.80	Other business space 'B1b/c, B2'	Manufacture of magnetic and optical media
C	27.11	Other business space 'B1b/c, B2'	Manufacture of electric motors, generators and transformers
C	27.12	Other business space 'B1b/c, B2'	Manufacture of electricity distribution and control apparatus
C	27.20	Other business space 'B1b/c, B2'	Manufacture of batteries and accumulators
C	27.31	Other business space 'B1b/c, B2'	Manufacture of fibre optic cables
C	27.32	Other business space 'B1b/c, B2'	Manufacture of other electronic and electric wires and cables
C	27.33	Other business space 'B1b/c, B2'	Manufacture of wiring devices
C	27.40	Other business space 'B1b/c, B2'	Manufacture of electric lighting equipment
C	27.51	Other business space 'B1b/c, B2'	Manufacture of electric domestic appliances
C	27.52	Other business space 'B1b/c, B2'	Manufacture of non-electric domestic appliances
C	27.90	Other business space 'B1b/c, B2'	Manufacture of other electrical equipment
C	28.11	Other business space 'B1b/c, B2'	Manufacture of engines and turbines, except aircraft, vehicle and cycle engines
C	28.12	Other business space 'B1b/c, B2'	Manufacture of fluid power equipment
C	28.13	Other business space 'B1b/c, B2'	Manufacture of other pumps and compressors
C	28.14	Other business space 'B1b/c, B2'	Manufacture of other taps and valves
C	28.15	Other business space 'B1b/c, B2'	Manufacture of bearings, gears, gearing and driving elements
C	28.21	Other business space 'B1b/c, B2'	Manufacture of ovens, furnaces and furnace burners
C	28.22	Other business space 'B1b/c, B2'	Manufacture of lifting and handling equipment
C	28.23	Other business space 'B1b/c, B2'	Manufacture of office machinery and equipment (except computers and peripheral equipment)
C	28.24	Other business space 'B1b/c, B2'	Manufacture of power-driven hand tools
C	28.25	Other business space 'B1b/c, B2'	Manufacture of non-domestic cooling and ventilation equipment
C	28.29	Other business space 'B1b/c, B2'	Manufacture of other general-purpose machinery n.e.c.

Section:	Class	Land use	Description
C	28.30	Other business space 'B1b/c, B2'	Manufacture of agricultural and forestry machinery
C	28.41	Other business space 'B1b/c, B2'	Manufacture of metal forming machinery
C	28.49	Other business space 'B1b/c, B2'	Manufacture of other machine tools
C	28.91	Other business space 'B1b/c, B2'	Manufacture of machinery for metallurgy
C	28.92	Other business space 'B1b/c, B2'	Manufacture of machinery for mining, quarrying and construction
C	28.93	Other business space 'B1b/c, B2'	Manufacture of machinery for food, beverage and tobacco processing
C	28.94	Other business space 'B1b/c, B2'	Manufacture of machinery for textile, apparel and leather production
C	28.95	Other business space 'B1b/c, B2'	Manufacture of machinery for paper and paperboard production
C	28.96	Other business space 'B1b/c, B2'	Manufacture of plastics and rubber machinery
C	28.99	Other business space 'B1b/c, B2'	Manufacture of other special-purpose machinery n.e.c.
C	29.10	Other business space 'B1b/c, B2'	Manufacture of motor vehicles
C	29.20	Other business space 'B1b/c, B2'	Manufacture of bodies (coachwork) for motor vehicles; manufacture of trailers and semi-trailers
C	29.31	Other business space 'B1b/c, B2'	Manufacture of electrical and electronic equipment for motor vehicles
C	29.32	Other business space 'B1b/c, B2'	Manufacture of other parts and accessories for motor vehicles
C	30.11	Other business space 'B1b/c, B2'	Building of ships and floating structures
C	30.12	Other business space 'B1b/c, B2'	Building of pleasure and sporting boats
C	30.20	Other business space 'B1b/c, B2'	Manufacture of railway locomotives and rolling stock
C	30.30	Other business space 'B1b/c, B2'	Manufacture of air and spacecraft and related machinery
C	30.40	Other business space 'B1b/c, B2'	Manufacture of military fighting vehicles
C	30.91	Other business space 'B1b/c, B2'	Manufacture of motorcycles
C	30.92	Other business space 'B1b/c, B2'	Manufacture of bicycles and invalid carriages
C	30.99	Other business space 'B1b/c, B2'	Manufacture of other transport equipment n.e.c.
C	31.01	Other business space 'B1b/c, B2'	Manufacture of office and shop furniture
C	31.02	Other business space 'B1b/c, B2'	Manufacture of kitchen furniture
C	31.03	Other business space 'B1b/c, B2'	Manufacture of mattresses
C	31.09	Other business space 'B1b/c, B2'	Manufacture of other furniture
C	32.11	Other business space 'B1b/c, B2'	Striking of coins
C	32.12	Other business space 'B1b/c, B2'	Manufacture of jewellery and related articles
C	32.13	Other business space 'B1b/c, B2'	Manufacture of imitation jewellery and related articles
C	32.20	Other business space 'B1b/c, B2'	Manufacture of musical instruments
C	32.30	Other business space 'B1b/c, B2'	Manufacture of sports goods
C	32.40	Other business space 'B1b/c, B2'	Manufacture of games and toys
C	32.50	Other business space 'B1b/c, B2'	Manufacture of medical and dental instruments and supplies
C	32.91	Other business space 'B1b/c, B2'	Manufacture of brooms and brushes

Section:	Class	Land use	Description
C	32.99	Other business space 'B1b/c, B2'	Other manufacturing n.e.c.
C	33.11	Other business space 'B1b/c, B2'	Repair of fabricated metal products
C	33.12	Other business space 'B1b/c, B2'	Repair of machinery
C	33.13	Other business space 'B1b/c, B2'	Repair of electronic and optical equipment
C	33.14	Other business space 'B1b/c, B2'	Repair of electrical equipment
C	33.15	Other business space 'B1b/c, B2'	Repair and maintenance of ships and boats
C	33.16	Other business space 'B1b/c, B2'	Repair and maintenance of aircraft and spacecraft
C	33.17	Other business space 'B1b/c, B2'	Repair and maintenance of other transport equipment
C	33.19	Other business space 'B1b/c, B2'	Repair of other equipment
C	33.20	Other business space 'B1b/c, B2'	Installation of industrial machinery and equipment
D	35.11	non B	Production of electricity
D	35.12	non B	Transmission of electricity
D	35.13	non B	Distribution of electricity
D	35.14	office B1a	Trade of electricity
D	35.21	Other business space 'B1b/c, B2'	Manufacture of gas
D	35.22	non B	Distribution of gaseous fuels through mains
D	35.23	office B1a	Trade of gas through mains
D	35.30	non B	Steam and air conditioning supply
E	36.00	non B	Water collection, treatment and supply
E	37.00	non B	Sewerage
E	38.11	non B	Collection of non-hazardous waste
E	38.12	non B	Collection of hazardous waste
E	38.21	non B	Treatment and disposal of non-hazardous waste
E	38.22	non B	Treatment and disposal of hazardous waste
E	38.31	non B	Dismantling of wrecks
E	38.32	non B	Recovery of sorted materials
E	39.00	non B	Remediation activities and other waste management services
F	41.10	Other business space 'B1b/c, B2'	Development of building projects
F	41.20	Other business space 'B1b/c, B2'	Construction of residential and non-residential buildings
F	42.11	Other business space 'B1b/c, B2'	Construction of roads and motorways
F	42.12	Other business space 'B1b/c, B2'	Construction of railways and underground railways
F	42.13	Other business space 'B1b/c, B2'	Construction of bridges and tunnels
F	42.21	Other business space 'B1b/c, B2'	Construction of utility projects for fluids
F	42.22	Other business space 'B1b/c, B2'	Construction of utility projects for electricity and telecommunications
F	42.91	Other business space 'B1b/c, B2'	Construction of water projects
F	42.99	Other business space 'B1b/c, B2'	Construction of other civil engineering projects n.e.c.
F	43.11	Other business space 'B1b/c, B2'	Demolition
F	43.12	Other business space 'B1b/c, B2'	Site preparation
F	43.13	Other business space 'B1b/c, B2'	Test drilling and boring

Section:	Class	Land use	Description
F	43.21	Other business space 'B1b/c, B2'	Electrical installation
F	43.22	Other business space 'B1b/c, B2'	Plumbing, heat and air-conditioning installation
F	43.29	Other business space 'B1b/c, B2'	Other construction installation
F	43.31	Other business space 'B1b/c, B2'	Plastering
F	43.32	Other business space 'B1b/c, B2'	Joinery installation
F	43.33	Other business space 'B1b/c, B2'	Floor and wall covering
F	43.34	Other business space 'B1b/c, B2'	Painting and glazing
F	43.39	Other business space 'B1b/c, B2'	Other building completion and finishing
F	43.91	Other business space 'B1b/c, B2'	Roofing activities
F	43.99	Other business space 'B1b/c, B2'	Other specialised construction activities n.e.c.
G	45.11	non B	Sale of cars and light motor vehicles
G	45.19	non B	Sale of other motor vehicles
G	45.20	non B	Maintenance and repair of motor vehicles
G	45.31	non B	Wholesale trade of motor vehicle parts and accessories
G	45.32	non B	Retail trade of motor vehicle parts and accessories
G	45.40	non B	Sale, maintenance and repair of motorcycles and related parts and accessories
G	46.11	office B1a	Agents involved in the sale of agricultural raw materials, live animals, textile raw materials and semi-finished goods
G	46.12	office B1a	Agents involved in the sale of fuels, ores, metals and industrial chemicals
G	46.13	office B1a	Agents involved in the sale of timber and building materials
G	46.14	office B1a	Agents involved in the sale of machinery, industrial equipment, ships and aircraft
G	46.15	office B1a	Agents involved in the sale of furniture, household goods, hardware and ironmongery
G	46.16	office B1a	Agents involved in the sale of textiles, clothing, fur, footwear and leather goods
G	46.17	office B1a	Agents involved in the sale of food, beverages and tobacco
G	46.18	office B1a	Agents specialised in the sale of other particular products
G	46.19	office B1a	Agents involved in the sale of a variety of goods
G	46.21	Warehouse 'B8'	Wholesale of grain, unmanufactured tobacco, seeds and animal feeds
G	46.22	Warehouse 'B8'	Wholesale of flowers and plants
G	46.23	Warehouse 'B8'	Wholesale of live animals
G	46.24	Warehouse 'B8'	Wholesale of hides, skins and leather
G	46.31	Warehouse 'B8'	Wholesale of fruit and vegetables
G	46.32	Warehouse 'B8'	Wholesale of meat and meat products
G	46.33	Warehouse 'B8'	Wholesale of dairy products, eggs and edible oils and fats
G	46.34	Warehouse 'B8'	Wholesale of beverages

Section:	Class	Land use	Description
G	46.35	Warehouse 'B8'	Wholesale of tobacco products
G	46.36	Warehouse 'B8'	Wholesale of sugar and chocolate and sugar confectionery
G	46.37	Warehouse 'B8'	Wholesale of coffee, tea, cocoa and spices
G	46.38	Warehouse 'B8'	Wholesale of other food, including fish, crustaceans and molluscs
G	46.39	Warehouse 'B8'	Non-specialised wholesale of food, beverages and tobacco
G	46.41	Warehouse 'B8'	Wholesale of textiles
G	46.42	Warehouse 'B8'	Wholesale of clothing and footwear
G	46.43	Warehouse 'B8'	Wholesale of electrical household appliances
G	46.44	Warehouse 'B8'	Wholesale of china and glassware and cleaning materials
G	46.45	Warehouse 'B8'	Wholesale of perfume and cosmetics
G	46.46	Warehouse 'B8'	Wholesale of pharmaceutical goods
G	46.47	Warehouse 'B8'	Wholesale of furniture, carpets and lighting equipment
G	46.48	Warehouse 'B8'	Wholesale of watches and jewellery
G	46.49	Warehouse 'B8'	Wholesale of other household goods
G	46.51	Warehouse 'B8'	Wholesale of computers, computer peripheral equipment and software
G	46.52	Warehouse 'B8'	Wholesale of electronic and telecommunications equipment and parts
G	46.61	Warehouse 'B8'	Wholesale of agricultural machinery, equipment and supplies
G	46.62	Warehouse 'B8'	Wholesale of machine tools
G	46.63	Warehouse 'B8'	Wholesale of mining, construction and civil engineering machinery
G	46.64	Warehouse 'B8'	Wholesale of machinery for the textile industry and of sewing and knitting machines
G	46.65	Warehouse 'B8'	Wholesale of office furniture
G	46.66	Warehouse 'B8'	Wholesale of other office machinery and equipment
G	46.69	Warehouse 'B8'	Wholesale of other machinery and equipment
G	46.71	Warehouse 'B8'	Wholesale of solid, liquid and gaseous fuels and related products
G	46.72	Warehouse 'B8'	Wholesale of metals and metal ores
G	46.73	Warehouse 'B8'	Wholesale of wood, construction materials and sanitary equipment
G	46.74	Warehouse 'B8'	Wholesale of hardware, plumbing and heating equipment and supplies

Section:	Class	Land use	Description
G	46.75	Warehouse 'B8'	Wholesale of chemical products
G	46.76	Warehouse 'B8'	Wholesale of other intermediate products
G	46.77	Warehouse 'B8'	Wholesale of waste and scrap
G	46.90	Warehouse 'B8'	Non-specialised wholesale trade
G	47.11	non B	Retail sale in non-specialised stores with food, beverages or tobacco predominating
G	47.19	non B	Other retail sale in non-specialised stores
G	47.21	non B	Retail sale of fruit and vegetables in specialised stores
G	47.22	non B	Retail sale of meat and meat products in specialised stores
G	47.23	non B	Retail sale of fish, crustaceans and molluscs in specialised stores
G	47.24	non B	Retail sale of bread, cakes, flour confectionery and sugar confectionery in specialised stores
G	47.25	non B	Retail sale of beverages in specialised stores
G	47.26	non B	Retail sale of tobacco products in specialised stores
G	47.29	non B	Other retail sale of food in specialised stores
G	47.30	non B	Retail sale of automotive fuel in specialised stores
G	47.41	non B	Retail sale of computers, peripheral units and software in specialised stores
G	47.42	non B	Retail sale of telecommunications equipment in specialised stores
G	47.43	non B	Retail sale of audio and video equipment in specialised stores
G	47.51	non B	Retail sale of textiles in specialised stores
G	47.52	non B	Retail sale of hardware, paints and glass in specialised stores
G	47.53	non B	Retail sale of carpets, rugs, wall and floor coverings in specialised stores
G	47.54	non B	Retail sale of electrical household appliances in specialised stores
G	47.59	non B	Retail sale of furniture, lighting equipment and other household articles in specialised stores
G	47.61	non B	Retail sale of books in specialised stores
G	47.62	non B	Retail sale of newspapers and stationery in specialised stores
G	47.63	non B	Retail sale of music and video recordings in specialised stores
G	47.64	non B	Retail sale of sporting equipment in specialised stores
G	47.65	non B	Retail sale of games and toys in specialised stores
G	47.71	non B	Retail sale of clothing in specialised stores
G	47.72	non B	Retail sale of footwear and leather goods in specialised stores
G	47.73	non B	Dispensing chemist in specialised stores
G	47.74	non B	Retail sale of medical and orthopaedic goods in specialised stores
G	47.75	non B	Retail sale of cosmetic and toilet articles in specialised stores
G	47.76	non B	Retail sale of flowers, plants, seeds, fertilisers, pet animals and pet food in specialised stores
G	47.77	non B	Retail sale of watches and jewellery in specialised stores
G	47.78	non B	Other retail sale of new goods in specialised stores
G	47.79	non B	Retail sale of second-hand goods in stores
G	47.81	non B	Retail sale via stalls and markets of food, beverages and tobacco products
G	47.82	non B	Retail sale via stalls and markets of textiles, clothing and footwear
G	47.89	non B	Retail sale via stalls and markets of other goods
G	47.91	non B	Retail sale via mail order houses or via Internet
G	47.99	non B	Other retail sale not in stores, stalls or markets
H	49.10	non B	Passenger rail transport, interurban

Section:	Class	Land use	Description
H	49.20	non B	Freight rail transport
H	49.31	non B	Urban and suburban passenger land transport
H	49.32	non B	Taxi operation
H	49.39	non B	Other passenger land transport n.e.c.
H	49.41	non B	Freight transport by road
H	49.42	non B	Removal services
H	49.50	non B	Transport via pipeline
H	50.10	non B	Sea and coastal passenger water transport
H	50.20	non B	Sea and coastal freight water transport
H	50.30	non B	Inland passenger water transport
H	50.40	non B	Inland freight water transport
H	51.10	non B	Passenger air transport
H	51.21	non B	Freight air transport
H	51.22	non B	Space transport
H	52.10	Warehouse 'B8'	Warehousing and storage
H	52.21	non B	Service activities incidental to land transportation
H	52.22	non B	Service activities incidental to water transportation
H	52.23	non B	Service activities incidental to air transportation
H	52.24	Warehouse 'B8'	Cargo handling
H	52.29	non B	Other transportation support activities
H	53.10	Warehouse 'B8'	Postal activities under universal service obligation
H	53.20	Warehouse 'B8'	Other postal and courier activities
I	55.10	non B	Hotels and similar accommodation
I	55.20	non B	Holiday and other short-stay accommodation
I	55.30	non B	Camping grounds, recreational vehicle parks and trailer parks
I	55.90	non B	Other accommodation
I	56.10	non B	Restaurants and mobile food service activities
I	56.21	non B	Event catering activities
I	56.29	non B	Other food service activities
I	56.30	non B	Beverage serving activities
J	58.11	office B1a	Book publishing
J	58.12	office B1a	Publishing of directories and mailing lists
J	58.13	office B1a	Publishing of newspapers
J	58.14	office B1a	Publishing of journals and periodicals
J	58.19	office B1a	Other publishing activities
J	58.21	office B1a	Publishing of computer games
J	58.29	office B1a	Other software publishing
J	59.11	office B1a	Motion picture, video and television programme production activities
J	59.12	office B1a	Motion picture, video and television programme post-production activities
J	59.13	office B1a	Motion picture, video and television programme distribution activities
J	59.14	office B1a	Motion picture projection activities
J	59.20	office B1a	Sound recording and music publishing activities
J	60.10	office B1a	Radio broadcasting
J	60.20	office B1a	Television programming and broadcasting activities
J	61.10	office B1a	Wired telecommunications activities
J	61.20	office B1a	Wireless telecommunications activities

Section:	Class	Land use	Description
J	61.30	office B1a	Satellite telecommunications activities
J	61.90	office B1a	Other telecommunications activities
J	62.01	office B1a	Computer programming activities
J	62.02	office B1a	Computer consultancy activities
J	62.03	office B1a	Computer facilities management activities
J	62.09	office B1a	Other information technology and computer service activities
J	63.11	office B1a	Data processing, hosting and related activities
J	63.12	office B1a	Web portals
J	63.91	office B1a	News agency activities
J	63.99	office B1a	Other information service activities n.e.c.
K	64.11	office B1a	Central banking
K	64.19	office B1a	Other monetary intermediation
K	64.20	office B1a	Activities of holding companies
K	64.30	office B1a	Trusts, funds and similar financial entities
K	64.91	office B1a	Financial leasing
K	64.92	office B1a	Other credit granting
K	64.99	office B1a	Other financial service activities, except insurance and pension funding, n.e.c.
K	65.11	office B1a	Life insurance
K	65.12	office B1a	Non-life insurance
K	65.20	office B1a	Reinsurance
K	65.30	office B1a	Pension funding
K	66.11	office B1a	Administration of financial markets
K	66.12	office B1a	Security and commodity contracts brokerage
K	66.19	office B1a	Other activities auxiliary to financial services, except insurance and pension funding
K	66.21	office B1a	Risk and damage evaluation
K	66.22	office B1a	Activities of insurance agents and brokers
K	66.29	office B1a	Other activities auxiliary to insurance and pension funding
K	66.30	office B1a	Fund management activities
L	68.10	office B1a	Buying and selling of own real estate
L	68.20	office B1a	Renting and operating of own or leased real estate
L	68.31	office B1a	Real estate agencies
L	68.32	office B1a	Management of real estate on a fee or contract basis
M	69.10	office B1a	Legal activities
M	69.20	office B1a	Accounting, bookkeeping and auditing activities; tax consultancy
M	70.10	office B1a	Activities of head offices
M	70.21	office B1a	Public relations and communication activities
M	70.22	office B1a	Business and other management consultancy activities
M	71.11	office B1a	Architectural activities
M	71.12	office B1a	Engineering activities and related technical consultancy
M	71.20	Other business space 'B1b/c, B2'	Technical testing and analysis
M	72.11	office B1a	Research and experimental development on biotechnology
M	72.19	office B1a	Other research and experimental development on natural sciences and engineering
M	72.20	office B1a	Research and experimental development on social sciences and humanities
M	73.11	office B1a	Advertising agencies
M	73.12	office B1a	Media representation
M	73.20	office B1a	Market research and public opinion polling

Section:	Class	Land use	Description
M	74.10	office B1a	Specialised design activities
M	74.20	office B1a	Photographic activities
M	74.30	office B1a	Translation and interpretation activities
M	74.90	office B1a	Other professional, scientific and technical activities n.e.c.
M	75.00	non B	Veterinary activities
N	77.11	Other business space 'B1b/c, B2'	Renting and leasing of cars and light motor vehicles
N	77.12	Other business space 'B1b/c, B2'	Renting and leasing of trucks
N	77.21	non B	Renting and leasing of recreational and sports goods
N	77.22	non B	Renting of video tapes and disks
N	77.29	non B	Renting and leasing of other personal and household goods
N	77.31	Other business space 'B1b/c, B2'	Renting and leasing of agricultural machinery and equipment
N	77.32	Other business space 'B1b/c, B2'	Renting and leasing of construction and civil engineering machinery and equipment
N	77.33	Other business space 'B1b/c, B2'	Renting and leasing of office machinery and equipment (including computers)
N	77.34	Other business space 'B1b/c, B2'	Renting and leasing of water transport equipment
N	77.35	Other business space 'B1b/c, B2'	Renting and leasing of air transport equipment
N	77.39	Other business space 'B1b/c, B2'	Renting and leasing of other machinery, equipment and tangible goods n.e.c.
N	77.40	office B1a	Leasing of intellectual property and similar products, except copyrighted works
N	78.10	office B1a	Activities of employment placement agencies
N	78.20	office B1a	Temporary employment agency activities
N	78.30	office B1a	Other human resources provision
N	79.11	non B	Travel agency activities
N	79.12	non B	Tour operator activities
N	79.90	non B	Other reservation service and related activities
N	80.10	office B1a	Private security activities
N	80.20	office B1a	Security systems service activities
N	80.30	office B1a	Investigation activities
N	81.10	Other business space 'B1b/c, B2'	Combined facilities support activities
N	81.21	Other business space 'B1b/c, B2'	General cleaning of buildings
N	81.22	Other business space 'B1b/c, B2'	Other building and industrial cleaning activities
N	81.29	Other business space 'B1b/c, B2'	Other cleaning activities
N	81.30	non B	Landscape service activities
N	82.11	office B1a	Combined office administrative service activities
N	82.19	office B1a	Photocopying, document preparation and other specialised office support activities
N	82.20	office B1a	Activities of call centres
N	82.30	office B1a	Organisation of conventions and trade shows
N	82.91	office B1a	Activities of collection agencies and credit bureaus
N	82.92	Other business space 'B1b/c, B2'	Packaging activities
N	82.99	Other business space 'B1b/c, B2'	Other business support service activities n.e.c.
O	84.11	office B1a	General public administration activities

Section:	Class	Land use	Description
O	84.12	office B1a	Regulation of the activities of providing health care, education, cultural services and other social services, excluding social security
O	84.13	office B1a	Regulation of and contribution to more efficient operation of businesses
O	84.21	office B1a	Foreign affairs
O	84.22	office B1a	Defence activities
O	84.23	office B1a	Justice and judicial activities
O	84.24	office B1a	Public order and safety activities
O	84.25	non B	Fire service activities
O	84.30	office B1a	Compulsory social security activities
P	85.10	non B	Pre-primary education
P	85.20	non B	Primary education
P	85.31	non B	General secondary education
P	85.32	non B	Technical and vocational secondary education
P	85.41	non B	Post-secondary non-tertiary education
P	85.42	non B	Tertiary education
P	85.51	non B	Sports and recreation education
P	85.52	non B	Cultural education
P	85.53	non B	Driving school activities
P	85.59	non B	Other education n.e.c.
P	85.60	non B	Educational support activities
Q	86.10	non B	Hospital activities
Q	86.21	non B	General medical practice activities
Q	86.22	non B	Specialist medical practice activities
Q	86.23	non B	Dental practice activities
Q	86.90	non B	Other human health activities
Q	87.10	non B	Residential nursing care activities
Q	87.20	non B	Residential care activities for learning disabilities, mental health and substance abuse
Q	87.30	non B	Residential care activities for the elderly and disabled
Q	87.90	non B	Other residential care activities
Q	88.10	non B	Social work activities without accommodation for the elderly and disabled
Q	88.91	non B	Child day-care activities
Q	88.99	non B	Other social work activities without accommodation n.e.c.
R	90.01	non B	Performing arts
R	90.02	non B	Support activities to performing arts
R	90.03	non B	Artistic creation
R	90.04	non B	Operation of arts facilities
R	91.01	non B	Library and archive activities
R	91.02	non B	Museum activities
R	91.03	non B	Operation of historical sites and buildings and similar visitor attractions
R	91.04	non B	Botanical and zoological gardens and nature reserve activities
R	92.00	non B	Gambling and betting activities
R	93.11	non B	Operation of sports facilities
R	93.12	non B	Activities of sport clubs
R	93.13	non B	Fitness facilities
R	93.19	non B	Other sports activities
R	93.21	non B	Activities of amusement parks and theme parks
R	93.29	non B	Other amusement and recreation activities

Section:	Class	Land use	Description
S	94.11	office B1a	Activities of business and employers membership organisations
S	94.12	office B1a	Activities of professional membership organisations
S	94.20	office B1a	Activities of trade unions
S	94.91	office B1a	Activities of religious organisations
S	94.92	office B1a	Activities of political organisations
S	94.99	office B1a	Activities of other membership organisations n.e.c.
S	95.11	non B	Repair of computers and peripheral equipment
S	95.12	non B	Repair of communication equipment
S	95.21	non B	Repair of consumer electronics
S	95.22	non B	Repair of household appliances and home and garden equipment
S	95.23	non B	Repair of footwear and leather goods
S	95.24	non B	Repair of furniture and home furnishings
S	95.25	non B	Repair of watches, clocks and jewellery
S	95.29	non B	Repair of other personal and household goods
S	96.01	non B	Washing and (dry-)cleaning of textile and fur products
S	96.02	non B	Hairdressing and other beauty treatment
S	96.03	non B	Funeral and related activities
S	96.04	non B	Physical well-being activities
S	96.09	non B	Other personal service activities n.e.c.
T	97.00	non B	Activities of households as employers of domestic personnel
T	98.10	non B	Undifferentiated goods-producing activities of private households for own use
T	98.20	non B	Undifferentiated service-producing activities of private households for own use
U	99.00	office B1a	Activities of extraterritorial organisations and bodies

Sources: Office for National Statistics and Dorset County Council

Notes:
Some changes have been made to GVA Grimley's similar matrix using SIC 2003:

- Agricultural support activities are farm/land based so kept as non-B;
- Forestry support activities are farm/land based so kept as non-B;
- Mining/extraction support activities are not office based so kept as non-B;
- Publishing has been sub-divided so that parts of the process are still classed as 'manufacturing' and included as Other business and parts are now in the service sector so included as Office LUC;
- Trade of gas now split from distribution so included as Office;
- All construction now classed as Other business.

Appendix C: Plot ratios by B use type for Dorset local authorities

Plot ratio information has been calculated for office, industry, warehouse, mixed, total (all uses) and industry and warehousing and has been calculated for each district/borough using employment land completions between 1 April 1994 and 31 March 2010 together with outstanding commitments (under construction, unimplemented applications and outstanding land allocations) as at 1 April 2010. Partially developed schemes are not included in the calculations.

Plot ratios by B use type

Bournemouth	Plot ratio	or	**Poole**	Plot ratio	or
Office	5634	0.56	Office	5227	0.52
Industry	4486	0.45	Industry	3783	0.38
Warehouse	3837	0.38	Warehouse	2713	0.27
Mixed	4227	0.42	Mixed	3595	0.36
Total	5056	0.51	Total	3722	0.37
Christchurch	Plot ratio	or	**Purbeck**	Plot ratio	or
Office	2593	0.26	Office	4876	0.49
Industry	3707	0.37	Industry	4471	0.45
Warehouse	2381	0.24	Warehouse	1450	0.15
Mixed	3727	0.37	Mixed	2492	0.25
Total	3397	0.34	Total	4006	0.40
East Dorset	Plot ratio	or	**West Dorset**	Plot ratio	or
Office	3478	0.35	Office	4104	0.41
Industry	3373	0.34	Industry	2835	0.28
Warehouse	4322	0.43	Warehouse	3337	0.33
Mixed	2910	0.29	Mixed	3631	0.36
Total	3365	0.34	Total	3416	0.34
North Dorset	Plot ratio	or	**Weymouth & Portland**	Plot ratio	or
Office	2332	0.23	Office	4489	0.45
Industry	2734	0.27	Industry	2475	0.25
Warehouse	6227	0.62	Warehouse	4565	0.46
Mixed	2239	0.22	Mixed	4617	0.46
Total	2927	0.29	Total	3320	0.33

Definitions:

Office + B1 Office and office

Industry = B1 Industry and industry

Warehouse = Warehouse

Mixed = B1 unspecified and mixed

Source: Dorset Borough and District Councils

	2008 estimate: as used by GVA	2011 estimate for BDP as a whole
Office	0.41	0.44
Other business	0.32	0.32
Warehousing	0.44	0.41

Appendix D: Employment land supply in Dorset local authorities

The definitions of 'available employment land supply' have slight variations according to local authority, as shown in the following table.

Local authority:	Definition of available employment land supply:
Bournemouth	The definition of 'available employment land supply' includes existing allocations, unimplemented planning permissions for new employment land and also remaining potential for existing employment sites (non allocated but employment is existing lawful use).
Poole	The definition of 'available employment land supply' includes existing allocations, unimplemented planning permissions for new employment land and also remaining potential for existing employment sites (non allocated but employment is existing lawful use).
Christchurch	The definition of 'available employment land supply' includes existing allocations, unimplemented planning permissions for new employment land and also remaining potential for existing employment sites (non allocated but employment is existing lawful use).
East Dorset	The supply consists of the undeveloped sites allocated in the current Local Plan (this includes allocated sites with permission but not yet developed), along with sites proposed through the Core Strategy Options document (these are still subject to Pre Submission Public Consultation, Public Examination and adoption by the Council). Non allocated sites are not included.
North Dorset	The figures include sites with planning permission and sites that are already allocated in the Local Plan.
Purbeck	The definition of 'available employment land supply' includes existing allocations, unimplemented planning permissions for new employment land and also remaining potential for existing employment sites (non allocated but employment is existing lawful use).
West Dorset	The supply consists of the remaining undeveloped sites allocated in the current Local Plans (this includes allocated sites with permission but not yet developed). Non allocated sites (with or without permission) are not included.
Weymouth & Portland	The supply consists of the remaining undeveloped sites allocated in the current Local Plans (this includes allocated sites with permission but not yet developed). Non allocated sites (with or without permission) are not included.

Source: Dorset Borough and District Councils

The following tables give details of sites by district and the phasing of availability. Available sites of 10ha or more are shown emboldened.

Local Authority	Name of Site	Designation	Total Size	Available Land	Phasing: 2011-21	Phasing: 2021-31	Total: 2011-31
Bournemouth	Ashley Road Coal Yard	Not Allocated	0.97	0.97	0.49	0.49	0.97
Bournemouth	Ashley Road Station Approach	Not Allocated	2.24	0.00	0.00	0.00	0.00
Bournemouth	Castle Lane East (Deansleigh Road)	B1	8.03	0.93	0.47	0.47	0.93
Bournemouth	Castle Lane East (Riverside Avenue)	B1	6.01	6.01	3.01	3.01	6.01
Bournemouth	Chaseside, JP Morgan	Not Allocated	11.80	0.00	0.00	0.00	0.00
Bournemouth	Elliot Road	B1, B2 & B8	8.84	0.00	0.00	0.00	0.00
Bournemouth	Francis Avenue	B1 & B8	1.23	0.00	0.00	0.00	0.00
Bournemouth	Lansdowne (A - St Paul's)	B1	2.67	0.78	0.39	0.39	0.78
Bournemouth	Lansdowne (B - Oxford Road/Holdenhurst Road)	B1	3.82	0.59	0.30	0.30	0.59
Bournemouth	Lansdowne (C - Cotlands)	B1	6.19	1.41	0.71	0.71	1.41
Bournemouth	Pool Lane	B1 & B8	3.88	1.46	0.73	0.73	1.46
Bournemouth	Southcote Road	B1 & B8	5.02	0.00	0.00	0.00	0.00
Bournemouth	Upper Norwich Road	B1	0.25	0.00	0.00	0.00	0.00
Bournemouth	Wallisdown Road A	B1, B2 & B8	10.95	0.32	0.16	0.16	0.32
Bournemouth	Wallisdown Road B (Proctor and Gamble)	B1, B2 & B8	7.88	3.37	1.69	1.69	3.37
Bournemouth	Wellington Road, Royal Mail Delivery Office	Not Allocated	0.70	0.00	0.00	0.00	0.00
Bournemouth	Wharfdale Road	B1 & B8	1.03	0.00	0.00	0.00	0.00
Bournemouth	Yeomans Road	B1, B2 & B8	7.90	0.12	0.06	0.06	0.12
Total Bournemouth			**89.41**	**15.96**	**7.98**	**7.98**	**15.96**

Source: Bournemouth Borough Council
Note: all of these sites are included in the Bournemouth & Poole SSCT

Local Authority	Name of Site	Designation	Total Size	Available Land	Phasing: 2011-21	Phasing: 2021-31	Total: 2011-31
Poole	Former BG Site, Yarmouth Road	Allocated	0.10	0.10	0.00	0.10	0.10
Poole	Banbury Road, Nuffield Industrial Estate	Allocated	1.39	1.39	0.00	1.39	1.39
Poole	Sterte Avenue West, Sterte	Allocated	5.13	5.13	5.13	0.00	5.13
Poole	Area 3, Ling Road, Mannings Heath	Allocated	2.71	2.71	2.71	0.00	2.71
Poole	Former BT site, Yarrow Road	Allocated	2.20	2.20	2.20	0.00	2.20
Poole	Yarrow Road, Mannings Heath	Allocated	1.56	1.56	0.00	1.56	1.56
Poole	Land south-west of Mannings Heath Road	Allocated	0.58	0.58	0.58	0.00	0.58
Poole	Witney Road, Nuffield Industrial Estate	Allocated	0.40	0.40	0.40	0.00	0.40
Poole	The Fulcrum, Vantage Way, Mannings Heath	Allocated	1.36	1.36	1.36	0.00	1.36
Poole	Land south-west of Mannings Heath Road	Allocated	0.46	0.46	0.46	0.00	0.46
Poole	Former Dalgety site, West Quay Road	Allocated with Employment Element	0.74	9.00	6.00	3.00	9.00
Poole	PBR - Sunseeker/RNLI site (CA5)	Allocated with Employment Element	1.94		0.00	0.00	0.00
Poole	PBR - Sherborne Consortium site (CA6)	Allocated with Employment Element	2.06		0.00	0.00	0.00
Poole	PBR - Sydenhams site (CA7)	Allocated with Employment Element	1.89		0.00	0.00	0.00
Poole	PBR - Former Pilkingtons site (CA7)	Allocated with Employment Element	3.74		0.00	0.00	0.00
Poole	Land at Sterte Avenue West, Sterte	Non-Allocated	0.47	0.47	0.47	0.00	0.47
Poole	Land at rear of Sterte Industrial Estate, Sterte	Non-Allocated	0.65	0.42	0.42	0.00	0.42
Poole	Hamworthy Engineering, Fleets Corner	Non-Allocated	11.04	4.00	2.00	2.00	4.00
Poole	Summit Business Park, Old Wareham Road	Non-Allocated	1.96	0.75	0.75	0.00	0.75
Poole	Land at Seimans Site, Sopers Lane	Non-Allocated	4.78	3.82	3.82	0.00	3.82
Poole	Land at Sembcorp Bournemouth Water, Francis Avenue	Non-Allocated	1.46	1.46	1.46	0.00	1.46
Poole	Area 2, Ling Road, Mannings Heath	Non-Allocated	1.95	1.95	1.95	0.00	1.95
Total Poole			**48.57**	**37.76**	**29.71**	**8.05**	**37.76**

Source: Poole Borough Council

Note: all of these sites are included in the Bournemouth & Poole SSCT

Local Authority	Name of Site	Designation	Total Size	Available Land	Phasing: 2011-21	Phasing: 2021-31	Total: 2011-31
Christchurch	**Aviation Park West**	**B1, B2 & B8**	**74.50**	**38.00**	**15.00**	**9.00**	**24.00**
Christchurch	**Aviation Park East**	**B1, B2 & B8**	**63.10**	**20.00**	**0.00**	**9.00**	**9.00**
Christchurch	Cimex International (Somerford Road / Wilverley Road)	B1, B2, B8	1.80	1.80	1.80	0.00	1.80
Christchurch	Gaswork Site (Bridge Street)	B1 (as part of a mixed use scheme with leisure, and recreational uses)	1.60	1.50	1.50	0.00	1.50
Christchurch	Stony Lane	B1. B2 & B8	1.70	1.70	1.70	0.00	1.70
Christchurch	Qinetiq (Bailey Drive)	B1, B2 & B8	1.80	1.80	1.80	0.00	1.80
Christchurch	Fairmile Road / Vacant land at Avon Trading Park	B1, B2 & B8	0.70	0.70	0.70	0.00	0.70
Christchurch	Grange Road Depot	B1, B2 & B8	1.10	1.10	1.10	0.00	1.10
Christchurch	BAE (Grange Road)	B1, B2 & B8	4.00	1.50	1.50	0.00	1.50
Christchurch	Baptist Church Site (Airfield Way)	B1, B2, B8	0.60	0.50	0.50	0.00	0.50
Christchurch	Bournemouth & West Hants Water (Located at Avon Trading Park)	B1, B2, B8	0.70	0.70	0.70	0.00	0.70
Total Christchurch			**151.60**	**69.30**	**26.30**	**18.00**	**44.30**

Source: Christchurch Borough Council
Note: all of these sites are included in the Bournemouth & Poole SSCT

Local Authority	Name of Site	Designation	Total Size	Available Land	Phasing: 2011-21	Phasing: 2021-31	Total: 2011-31
East Dorset	Riverside Park	B1, B2 & B8	1.15	0.00	0.00	0.00	0.00
East Dorset	Ferndown and Uddens	B1, B2 & B8	57.42	0.00	0.00	0.00	0.00
East Dorset	Ebblake	B1, B2 & B8	15.57	0.79	0.79	0.00	0.79
East Dorset	Brook Road	B1, B2 & B8	2.90	0.00	0.00	0.00	0.00
East Dorset	Brook Road (Flight's Riverside) Potential Loss to residential use.	B1, B2 & B8	**-4.72**	0.00	0.00	0.00	0.00
East Dorset	Brook Road (Flight's South Area)	B1, B2 & B8	1.32	0.00	0.00	0.00	0.00
East Dorset	Brook Road (Flight's Central Area)	B1, B2 & B8	1.69	0.00	0.00	0.00	0.00
	Brook Road (Flight's North Area)	B1, B2 & B8	1.98	0.00	0.00	0.00	0.00
East Dorset	Stone Lane. Potential loss to residential use.	B2/B8	**-1.85**	0.00	0.00	0.00	0.00
East Dorset	East of Cobham Road	B1, B2 & B8	8.43	8.43	8.43	0.00	8.43
East Dorset	Woolsbridge	B2/B8	15.27	0.00	0.00	0.00	0.00
East Dorset	Kingfisher Park (Gundrymor)	B2/B8	3.67	0.00	0.00	0.00	0.00
East Dorset	Bailie Gate	B2/B8	7.74	0.00	0.00	0.00	0.00
East Dorset	**Blunts Farm (Ferndown Extension)**	**B1, B2 & B8**	**0.00**	**30.00**	**0.00**	**30.00**	**30.00**
East Dorset	Woolsbridge Extension	B1, B2 & B8	0.00	9.64	9.64	0.00	9.64
East Dorset	Bailie Gate Extension	B1, B2 & B8	0.00	3.25	0.00	3.25	3.25
Total East Dorset			**110.57**	**52.11**	**18.86**	**33.25**	**52.11**

Source: East Dorset District Council
Note: all of these sites are included in the Bournemouth & Poole SSCT

Local Authority	Name of Site	Designation	Total Size	Available Land	Phasing: 2011-21	Phasing: 2021-31	Total: 2011-31
North Dorset	Sunrise Business Park, Blandford	B1/B8	5.55	0.14	0.14	0.00	0.14
North Dorset	Blandford Heights & Clump Farm, Blandford	B1/B8	13.62	1.64	1.64	0.00	1.64
North Dorset	Holland Way, Blandford	B1/B8	7.52	0.05	0.05	0.00	0.05
North Dorset	The Brewery, Blandford	B1/B8	8.18	3.00	3.00	0.00	3.00
North Dorset	Stour Park, Blandford	B1/B8	0.44	0.44	0.44	0.00	0.44
North Dorset	Shaftesbury Lane, Blandford	Allocated in Local Plan	5.12	4.81	4.81	0.00	4.81
North Dorset	Concept House Blandford Heights, Blandford	B1	0.03	0.03	0.03	0.00	0.03
North Dorset	Adj World of Pine Shaftesbury Lane, Blandford	B1/B8	0.17	0.17	0.17	0.00	0.17
			40.63	*10.28*	*10.28*	*0.00*	*10.28*
North Dorset	Station Road, Gillingham	B1/B8	4.28	0.50	0.50	0.00	0.50
North Dorset	**Brickfields Business Park, Gillingham**	**B1/B8**	**29.78**	**11.66**	**11.66**	**0.00**	**11.66**
North Dorset	Brickfields Business Park, Gillingham	B1/B8	0.18	0.18	0.18	0.00	0.18
North Dorset	Tomlins Lane, Gillingham	B1/B8	0.15	0.00	0.00	0.00	0.00
North Dorset	Gillbury Yard, Gillingham	B1/B8	0.53	0.00	0.00	0.00	0.00
North Dorset	Peacemarsh, Gillingham	Allocated in Local Plan	2.66	1.00	1.00	0.00	1.00
North Dorset	Park Farm, Gillingham	Allocated in Local Plan	4.16	2.60	2.60	0.00	2.60
North Dorset	Higher Ham Farm, Gillingham	B2	0.46	0.46	0.46	0.00	0.46
North Dorset	Land at Kingsmead Business Park, Gillingham	B1/B8	0.35	0.35	0.35	0.00	0.35
North Dorset	Shearstock Farm, Gillingham	B1/B8	0.48	0.42	0.42	0.00	0.42
North Dorset	Unit 26 Brickfields, Gillingham	B2	0.17	0.17	0.17	0.00	0.17
North Dorset	Chantry House 21 Brickfields, Gillingham	B1a	0.08	0.08	0.08	0.00	0.08
North Dorset	Farm Buildings Lower Langham Farm, Gillingham	B1/B8	0.26	0.06	0.06	0.00	0.06
			43.54	*17.48*	*17.48*	*0.00*	*17.48*

…..continues

Local Authority	Name of Site (continued)	Designation	Total Size	Available Land	Phasing: 2011-21	Phasing: 2021-31	Total: 2011-31
North Dorset	Longmead Industrial Estate, Shaftesbury	B1/B8	7.06	0.00	0.00	0.00	0.00
North Dorset	Wincombe Business Park, Shaftesbury	B1/B8	6.52	0.22	0.22	0.00	0.22
North Dorset	CB Morgan Ltd, Shaftesbury	B1/B8	1.24	0.00	0.00	0.00	0.00
North Dorset	Blackmore Creamery, Shaftesbury	B1/B8	0.96	0.00	0.00	0.00	0.00
North Dorset	Land adj Littledown Business Park, Shaftesbury	B1/B8	1.18	1.18	1.18	0.00	1.18
North Dorset	South of A30, Shaftesbury	Allocated in Local Plan	7.00	7.00	7.00	0.00	7.00
			23.96	*8.40*	*8.40*	*0.00*	*8.40*
North Dorset	Butts Pond Industrial Estate, Sturminster	B1/B8	5.80	0.00	0.00	0.00	0.00
North Dorset	North Dorset Business Park, Sturminster	B1/B8	7.16	6.33	6.33	0.00	6.33
North Dorset	The Creamery Site, Sturminster	B1/B8	1.10	0.08	0.08	0.00	0.08
North Dorset	Manston Road, Sturminster	B1/B8	0.49	0.00	0.00	0.00	0.00
North Dorset	Clarkes Yard Bath Road, Sturminster	B1	0.08	0.08	0.08	0.00	0.08
North Dorset	Southern Part Former Livestock Market, Sturminster	B1a	0.26	0.23	0.23	0.00	0.23
			14.89	*6.72*	*6.72*	*0.00*	*6.72*
North Dorset	Station Road, Stalbridge	B1/B8	7.82	0.70	0.70	0.00	0.70
North Dorset	Gibbs Marsh Trading Estate, Stalbridge	B1/B8	7.58	0.00	0.00	0.00	0.00
			15.40	*0.70*	*0.70*	*0.00*	*0.70*

…..continues

Local Authority	Name of Site (continued)	Designation	Total Size	Available Land	Phasing: 2011-21	Phasing: 2021-31	Total: 2011-31
North Dorset	Brixey's Dairy , Tarrant Hinton, Rural Area	B1	0.50	0.25	0.25	0.00	0.25
North Dorset	North Street , Winterborne Kingston, Rural Area	B1/B8	0.00	0.00	0.00	0.00	0.00
North Dorset	North West Farm Buildings, Winterborne Kingston, Rural Area	B1	0.28	0.13	0.13	0.00	0.13
North Dorset	Former Unigate Factory, Bourton, Rural Area	B1/B8	0.88	0.01	0.01	0.00	0.01
North Dorset	South of Lilac Cottage, Bourton, Rural Area	Allocated in Local Plan	0.58	0.58	0.58	0.00	0.58
North Dorset	Orchard Ground Cole Street Lane, East Stour, Rural Area	B1/B8	0.25	0.25	0.25	0.00	0.25
North Dorset	M.Richards/F.Martin, Hazelbury Bryan, Rural Area	*B1/B8*	*0.64*	*0.00*	*0.00*	*0.00*	*0.00*
North Dorset	HXF Fine Foods Handley Cross Farm Pidney, Hazelbury Bryan, Rural Area	B1/B8	0.74	0.67	0.67	0.00	0.67
North Dorset	Rowlands Yard The Causeway, Hazelbury Bryan, Rural Area	B1c	0.08	0.08	0.08	0.00	0.08
North Dorset	Bartlett's Yard, Hinton St Mary, Rural Area	B1/B8	0.61	0.00	0.00	0.00	0.00
North Dorset	Old Estate Yard/White & Sons Ltd/Nicholsons Yard, Hinton St Mary, Rural Area	B1/B8	0.59	0.00	0.00	0.00	0.00
North Dorset	Holwell Road, Kings Stag, Rural Area	B1/B8	0.29	0.00	0.00	0.00	0.00
North Dorset	Blandford Road, Milborne St Andrew, Rural Area	B1/B8	1.88	0.00	0.00	0.00	0.00
North Dorset	Barnes Hill Farm, Milton Abbas, Rural Area	B1a	0.37	0.20	0.20	0.00	0.20
North Dorset	Case & Sons, Motcombe, Rural Area	B1/B8	0.28	0.00	0.00	0.00	0.00
North Dorset	Faccenda Ltd, Okeford Fitzpaine, Rural Area	B1/B8	0.82	0.06	0.06	0.00	0.06
North Dorset	Poultry Houses, Okeford Fitzpaine, Rural Area	Allocated in Local Plan	2.89	0.95	0.95	0.00	0.95
North Dorset	Wessex Park Homes, Okeford Fitzpaine, Rural	B2	2.86	2.86	2.86	0.00	2.86
North Dorset	Down Road, Pimperne, Rural Area	B1/B8	0.34	0.00	0.00	0.00	0.00
North Dorset	Blandford Road, Pimperne, Rural Area	B1/B8	1.32	0.00	0.00	0.00	0.00
North Dorset	Pulham Saw Mills Site, Pulham, Rural Area	B1/B8	1.80	0.00	0.00	0.00	0.00
North Dorset	St Patricks Industrial Estate, Shillingstone, Rural	B1/B8	1.67	0.00	0.00	0.00	0.00
			19.67	*6.04*	*6.04*	*0.00*	*6.04*
Total North Dorset		**Total**	**158.09**	**49.62**	**49.62**	**0.00**	**49.62**

Source: North Dorset District Council
Note: all of these sites are included in the Rural Dorset area

Local Authority	Name of Site	Designation	Total Size	Available Land	Phasing: 2011-21	Phasing: 2021-31	Total: 2011-31
Purbeck	Former Milk Depot, Corfe Castle	B1, B2 & B8	0.40	0.25	0.25	0.00	0.25
Purbeck	Victoria Avenue, Swanage	B1, B2 & B8	3.80	0.00	0.00	0.00	0.00
Purbeck	North Street, Bere Regis	B1	0.80	0.70	0.70	0.00	0.70
Purbeck	Wareham Road, Lytchett Matravers	B1	0.60	0.00	0.00	0.00	0.00
Purbeck	Holton Heath Industrial Estate, Holton Heath	B1, B2 & B8	35.00	8.00	8.00	0.00	8.00
Purbeck	Prospect Business Park Swanage	B1 and B2	1.20	1.20	1.20	0.00	1.20
Purbeck	John's Road, Wareham		0.30	0.20	0.20	0.00	0.20
Purbeck	Admirality Park	B1 and B2	12.90	4.00	4.00	0.00	4.00
Purbeck	**Dorset Green Technology Park**	**B1, B2 & B8**	**72.00**	**20.00**	**12.50**	**7.50**	**20.00**
Purbeck	Romany Works	B1, B2 & B8	1.60	1.00	1.00	0.00	1.00
Total Purbeck			**128.60**	**35.35**	**27.85**	**7.50**	**35.35**

Source: PurbeckDistrict Council
Note: the Warehah Road, Lytchett Matravers site is included in the Bournemouth & Poole SSCT; all others are part of the Rural Dorset area

Local Authority	Name of Site	Designation	Total Size	Available Land	Phasing: 2011-21	Phasing: 2021-31	Total: 2011-31
West Dorset	Beaminster, North of Broadwindsor Road	B1/B2	3.70	3.70	0.00	3.70	3.70
West Dorset	Bridport, Land adjoining St Andrews industrial Estate	B1	2.00	2.00	0.00	2.00	2.00
West Dorset	Bridport, Land at North Mills	B1/B2	0.80	0.80	0.00	0.80	0.80
West Dorset	Charmouth, Catherston Manor Farm	B1	0.28	0.00	0.00	0.00	0.00
West Dorset	Chickerell, Putton Lane	B1/B2	4.00	4.00	4.00	0.00	4.00
West Dorset	Chickerell, Radipole Lane	B1/B2	4.20	4.20	0.00	4.20	4.20
West Dorset	Crossways, land to the west of Warmwell Road	B1	2.10	2.10	2.10	0.00	2.10
West Dorset	Puddletown, Northbrook	B1/B2	1.70	1.70	0.00	1.70	1.70
West Dorset	Sherborne, Former Gas Depot	B1/B2	0.80	0.80	0.00	0.80	0.80
West Dorset	Sherborne Hotel	B1/C1	2.20	2.20	2.20	0.00	2.20
West Dorset	Charlton Down	B1	0.80	0.00	0.00	0.00	0.00
West Dorset	Dorchester, Poundbury	B1	3.86	3.86	2.57	1.29	3.86
West Dorset	Dorchester, Poundbury	B2	2.14	2.14	1.43	0.71	2.14
West Dorset	Lyme Regis, Woodberry Down	B1/B2	0.90	0.90	0.90	0.00	0.90
West Dorset	Sherborne, Barton Farm	B1/B2	3.48	3.48	3.48	0.00	3.48
Total West Dorset			**32.96**	**31.88**	**16.68**	**15.20**	**31.88**

Source: West Dorset District Council
Note: the two sites at Chickerell and the two sites at Dorchester, Poundbury are included in the Weymouth & Dorchester SSCT; all other sites are part of the Rural Dorset area

Local Authority	Name of Site	Designation	Total Size	Available Land	Phasing: 2011-21	Phasing: 2021-31	Total: 2011-31
Weymouth & Portland	Mount Pleasant Business Park		14.04	8.36	8.36	0.00	8.36
Weymouth & Portland	Inmosthay Industrial Estate		0.78	0.78	0.78	0.00	0.78
Weymouth & Portland	Southwell Business Park	B1, B2 & B8	4.87	0.73	0.73	0.00	0.73
Weymouth & Portland	Tradecroft Industrial Estate	B1, B2 & B8	1.10	0.52	0.52	0.00	0.52
Weymouth & Portland	Radipole Lane		1.11	0.00	0.00	0.00	0.00
Weymouth & Portland	Jubilee Business Park		0.91	0.00	0.00	0.00	0.00
Weymouth & Portland	Castletown Pier (boatyard)		0.40	0.00	0.00	0.00	0.00
Weymouth & Portland	Granby Industrial Estate				0.00	0.00	0.00
Weymouth & Portland	Lynch Lane Industrial Estate				0.00	0.00	0.00
Total Weymouth & Portland			**23.21**	**10.39**	**10.39**	**0.00**	**10.39**

Source: Weymouth & Portland Borough Council

Note: the following sites are included in the Weymouth & Dorchester SSCT – Granby Industrial Estate; Lynch Lane Industrial Estate; Mount Pleasant Business Park; Radipole Lane; and Jubilee Business Park. All other sites are part of the Rural Dorset area

Appendix E: Glossary of terms and acronyms

Allocated site	A site identified for a particular future use such as employment or housing in a local planning document.
B use	In this study, B use employment land is defined as Office (B1a), Research and Development (B1b), Light Industry (B1c), General Industry (B2) and Warehouses (B8). See http://www.legislation.gov.uk/uksi/1987/764/schedule/made
BDP	Bournemouth, Dorset and Poole area – now the Dorset Local Enterprise Partnership area (LEP), see http://www.bournemouth2026.org.uk/dorset-local-enterprise-partnership
Churn	The amount of vacant employment land required to allow the property market to operate smoothly. Also known as frictional vacancy.
Employment density or worker density	The average floorspace requirement per Full Time Equivalent (FTE) employee. See the 'Employment Densities Guide 2010' (Drivers Jonas Deloitte) at www.homesandcommunities.co.uk/download-doc/6155/10397
Employment land loss	The loss of land from B use to Non-B use (such as retail or residential use).
Floorspace	In the employment density calculations, Net Internal Area is used: the net lettable or 'usable' area of offices and retail units including entrance halls, kitchens and cleaners' cupboards, but excluding corridors, internal walls, stairwells, lifts, WCs and other communal areas. It is a widely used metric and is the recognised method for marketing, valuation, property management and rating for offices, shops and supermarkets. See p2 in the 'Employment Densities Guide 2010' (Drivers Jonas Deloitte) at www.homesandcommunities.co.uk/download-doc/6155/10397
FTE	Full Time Equivalent employee: for consistency, part time employment is converted to a full time equivalent relative to the number of hours worked eg 0.5 FTE would refer to somebody working half the hours of a full time employee.
GDP	Gross Domestic Product: the market value of all final goods and services from a nation in a given year.
GVA	Gross Value Added: GVA measures the contribution of each individual producer, or sector, to the economy by estimating the value of its gross outputs (goods and services), less purchases and less net spending taxes. GVA plus taxes on products less subsidies on products equals GDP.
HMA	Housing Market Area: there are two main housing markets operating in Dorset - one based on Bournemouth and Poole incorporating the local authority areas of Christchurch, East Dorset, Purbeck and North Dorset. The second is based on Dorchester and Weymouth and incorporates the local authority areas of West Dorset and Weymouth/Portland.
LDF	Local Development Framework: a suite of development documents to guide planning development in a local authority area. Introduced by the Government in 2004, LDFs are intended to deliver sustainable development whilst reflecting the needs of local communities. They aim to deliver 'spatial planning', that is they must take into account social and environmental factors such as health and housing need and should not be focussed solely on the regulation and control of land. http://webarchive.nationalarchives.gov.uk/+/http://www.communities.gov.uk/planningandbuilding/planning/planningpolicyguidance/planningpolicystatements/planningpolicystatements/pps12

Localism Act 2011	Introduced in November 2011 to shift power from central government back into the hands of individuals, communities and councils. See http://www.communities.gov.uk/publications/localgovernment/localismplainenglishupdate
LUC	Land Use Class (see Appendix B for more detail). In this study, three LUCs are used: Office (B1a, B1b), Other business space (B1c, B2), Storage or distribution, including Warehousing (B8). The latter two may also be combined as 'Industrial'. See http://www.legislation.gov.uk/uksi/1987/764/schedule/made
Non-allocated site	A site identified for a particular future use such as employment or housing, but not yet included in a local planning document. A site which is not allocated in an adopted development plan document.
Non-B use	Sectors which do not take up B-use class workspace, for example the retail sector, education, health & social work.
ODPM (DCLG)	Office of the Deputy Prime Minister, superseded by Department for Communities and Local Government. http://www.communities.gov.uk/corporate/
Plot ratio	Total floorspace divided by hectares: calculated for each district/borough using employment land completions between 1 April 1994 and 31 March 2010 together with outstanding commitments (under construction, unimplemented applications and outstanding land allocations) as at 1 April 2010. Partially developed schemes are not included in the calculations.
SHMA	Strategic Housing Market Assessment: a study of the way the housing market works in any particular area. It looks into the type of people living in the area, where they work and what sort of houses they need. http://www.dorsetforyou.com/390062
SIC	Standard Industrial Classification: for classifying business establishments by the type of economic activity in which they are engaged. http://www.ons.gov.uk/ons/guide-method/classifications/current-standard-classifications/standard-industrial-classification/index.html
SSCTs	Strategically Significant Cities and Towns. These were identified in the Regional Spatial Strategy and, in the BDP area, comprise Bournemouth & Poole and Weymouth & Dorchester. Whilst the Regional Spatial Strategy is no longer part of the planning framework, the evidence behind the SSCT geographies is still valid for use as an approximation for functional economic areas.
TTWA	Travel to work area: these were defined in 2007 using 2001 Census information on home and work addresses. Of the resident economically active population in a TTWA, at least 75 per cent actually work in the area, and also, of everyone working in the area, at least 75 per cent actually live in the area. http://www.ons.gov.uk/ons/guide-method/geography/beginner-s-guide/other/travel-to-work-areas/index.html
Windfall development	Development which is not 'planned' in a development plan document. In the context of this study, windfall losses refer to the use of employment land for other than B use class activities (note: in West Dorset and Weymouth & Portland this does not include loss to residential use).
Worker density or employment density	The average floorspace requirement per Full Time Equivalent (FTE) employee. See the 'Employment Densities Guide 2010' (Drivers Jonas Deloitte) at www.homesandcommunities.co.uk/download-doc/6155/10397

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