

**STAFFORD BOROUGH COUNCIL**

**EMPLOYMENT LAND STUDY**

**FUTURE LAND ESTIMATION**

**SUMMARY REPORT**

**JULY 2007**

**Prepared by**

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**Staffordshire**  
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## **1.0 Background to project**

- 1.1 As an integral part of the evidence gathering exercise for the Local Development Framework preparation process in Stafford Borough, a comprehensive review of employment land in the district is being undertaken.
- 1.2 The Employment Land Review is being undertaken following the broad guidelines which are set out in the document "Employment Land Reviews: Guidance Note published by the Office of the Deputy Prime Minister in December 2004, and consists of three main phases:
  - i. An assessment of the existing employment land situation
  - ii. An examination of how much employment land may be required for the future
  - iii. The identification of a portfolio of sites for the future
- 1.3 In particular, the Development Services Directorate Research Unit has been commissioned to provide input into phase 2 of this work for Stafford Borough. The input takes the form of technical advice and support to help assist in the identification of future employment land requirements in Stafford Borough. The findings of this work are summarised in this report. An accompanying technical appendix highlights the detailed findings, and outlines the methodologies employed in assessing employment land requirements.
- 1.4 In order to estimate the potential levels of employment land that may be required, three approaches to land estimation have been employed, in line with the approaches set out in the ODPM's Employment Land Guidance note (a further explanation of each of the methods will be presented at the relevant parts of this paper). The three methods comprise:
  - i. A "Continuation of past development trends" approach, which analyses employment land completions over recent years to establish average annual building rates for the periods of the past 5 years and past 10 years. Average building rates are then factored forwards to provide estimated land requirements.
  - ii. A "Labour Demand" approach, which focuses on the amount of employment land required, as generated by the demand of forecasted employment change from published employment forecasts.
  - iii. A "Labour Supply" approach, which focuses on the amounts of employment land required, generated by likely changes to the labour force in the district. The labour supply approach allows policy assumptions to be tested (such as the options for housing

development outlined in the review of the West Midlands Regional Spatial Strategy, and an upper growth limit of potential housing development to test against for the Stafford Borough area).

- 1.5 The three approaches to estimation of future employment land requirements should be considered collectively and on the basis of their own strengths and weaknesses. A further examination of each of the approaches is outlined later in this report.

## **2.0 The Stafford Borough Context**

- 2.1 Stafford Borough is a large district situated in the central west of the administrative county of Staffordshire. In 2005 the district had an estimated population of 123,600. The district is characterised by a significant rural area particularly to the west of the M6 motorway, a number of small hamlets and villages and larger villages such as Gnosall and Great and Little Haywood. There are two main towns in Stafford Borough – The county town of Stafford and the canal town of Stone. These two towns act as the main focuses for development, with a number of the smaller settlements interspersing the rural area.
- 2.2 Stafford Borough is significantly influenced by, and exerts its own influences on surrounding areas. The town of Stafford is placed quite centrally within the county and has strong links with many of the surrounding areas such as Cannock, Rugeley and northwards towards Stone and the North Staffordshire conurbation. Stafford also has quite considerable linkages with the West Midlands conurbation to the south. Further north, Stone has stronger links with the North Staffordshire Conurbation, and tends to look northwards to higher level services. There are also relationships to the west and east of the district, although these tend to be less strong than those to the north and south.
- 2.3 Several major communications routes cut through the district, and these have been important in shaping the local area. The M6 and A34, provide excellent road links to both the north and south meaning that the majority of the borough is within an hour drive of the major centres of Birmingham and Manchester. Links to the east and west are less well developed, although the nearby A50 offers improved links to the east at Uttoxeter and Blythe Bridge in the very north of the district. Rail links are concentrated along the West Coast Main Line which cuts through the district. With services concentrated on Stafford station. Birmingham can be reached in around 40 minutes and Manchester in 1 hour. Improvements to the West Coast Main Line mean that London Euston is a 1 hour 30 minute journey. Stone station is currently closed but scheduled to reopen in December 2008.
- 2.4 The employment land study will help to identify a range of the locally important factors in Stafford Borough which may not be borne out by hard quantitative evidence, but are significant in their influence on the local economy, and in particular, how they may relate to the future employment land requirements of the district.
- 2.5 Future employment development in Stafford Borough is likely to be partially shaped by the revision of the West Midlands Regional Spatial Strategy. Although Stafford has not been identified as a specific “sub-regional focus for growth” it is likely that a significant amount of development as a result of the revision will be directed towards the town. Under housing distribution options 2 and 3 of the revision of the

Regional Spatial Strategy, a total of 12,900 dwellings have been identified as being required in the district in the period from 2001-2026.

- 2.6 The identification of a balanced supply of employment land, spread across a portfolio of good quality sites will be a key element to the sustainable development of the area for future years, in particular through its ability to support and drive forward these growth proposals.

### **3.0 The Current Economic Base of Stafford Borough**

- 3.1 As at 2004<sup>1</sup>, Stafford district was home to some 55,900 employee jobs. This means that it has the second greatest number of employee jobs of the eight district councils in Staffordshire (after East Staffordshire district). Table 1 below highlights the levels of employment by broad industrial group in the district, and how this compares to the situation in Staffordshire County, the West Midlands Region and nationally. This employment situation however, masks an overall decrease of some 3,600 (a -5.4% change) in employee jobs in the district between 2001 and 2004.
- 3.2 Stafford has a proportionally very large concentration of its employee jobs in the public administration, education and health sector (36.6% or 20,400 jobs) than these comparison areas. This extremely high level of employment can be attributed to the fact that Stafford is the main location for central jobs of Staffordshire County Council, whilst also having significant employment provided by Stafford Borough Council and in the health sector through Mid Staffordshire General Hospitals NHS Trust. Jobs based among the administrative functions of the former South Western Staffordshire Primary Care Trust have recently been lost from the district, following local NHS restructuring. Employment in the education sector is provided by the local schools and further boosted by the presence of the campus of Staffordshire University and Stafford College of Further Education. Therefore, while the district has a good concentration of quite stable service sector employment, it is potentially vulnerable to any major changes which could occur within these sectors.
- 3.3 Although Stafford Borough currently has proportionally less jobs than comparison areas of Staffordshire County and the West Midlands Region in the manufacturing sector, (14.1% of all employment at 2004 or 7,900 employee jobs) the sector is still more important proportionally than for Great Britain as a whole. Stafford Borough has seen one of the greatest levels of decrease in employment among the manufacturing sector of any district in the West Midlands Region. Between 2001 and 2004 some 3,900 manufacturing jobs were lost in the district (a -32.5% decrease in employment in the sector). It is important that the employment land lost as a result of such cyclical changes in the local economy is used to its best potential. Whether that use is for new employment land, housing or a mixture of uses.
- 3.4 After the public administration, education and health sector, the second most important sector locally for employee jobs is the distribution, hotels and restaurants sector which provides 13,300 employee jobs or 23.8% of the employment in Stafford district. Recent developments taking advantage of the districts good links to the M6 motorway in

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<sup>1</sup> Source: Annual Business Inquiry 2004. NOMIS

particular suggest that the market for further development in the distribution and warehousing sector could potentially expand further.

- 3.5 The banking, finance and insurance sector (which is seen as a key driver for the future growth of the service sector in local economies) employs proportionally less people than for Staffordshire County, Nationally or the West Midlands Region. There is therefore potential for some growth in these sectors. In order to develop its economy further into the future, a growth in the financial and business sector will be important.
- 3.6 Representing 2.8% of all employee jobs, Construction employs a proportionally lower level of people against the comparison areas. However, a recent surge in development around the Stafford Borough area, with more development opportunities in the medium to long term pipeline might promote some local increases in the levels of employment in the construction sector.
- 3.7 A valid employment land study will also need to take account of the needs of existing businesses in the local area, as well as the predicted future requirements which may be generated as a result of increased employment, or labour force in the area. An assessment of existing employment locations in Stafford Borough is being undertaken as a separate part of this employment land study.



**Table 1 – Economic Structure (Employment by Broad Industry Group 2004)**

	Agriculture and fishing	Energy and water	Manufacturing	Construction	Distribution, Hotels and restaurants	Transport and communications	Banking, finance and insurance etc	Public administration, education and health	Other services	Total
<b>Stafford Borough (number)</b>	<b>800</b>	<b>0</b>	<b>7,900</b>	<b>1,600</b>	<b>13,300</b>	<b>2,600</b>	<b>6,300</b>	<b>20,400</b>	<b>3,000</b>	<b>55,900</b>
<b>Stafford Borough (%)</b>	<b>1.4</b>	<b>0</b>	<b>14.1</b>	<b>2.8</b>	<b>23.8</b>	<b>4.6</b>	<b>11.3</b>	<b>36.6</b>	<b>5.4</b>	<b>100.0</b>
Staffordshire County (%)	1.0	0.2	16.1	4.5	26.5	7.2	13.9	25.5	5.2	100.0
West Midlands Region (%)	0.8	0.5	16.5	4.4	24.7	5.5	17.3	25.8	4.5	100.0
Great Britain (%)	0.9	0.6	11.8	4.5	24.6	6.0	20.0	26.4	5.1	100.0

Source: Annual Business Inquiry 2004, Crown Copyright

## 4.0 The future of the economy

- 4.1 Predictions of how the economy is likely to change over the medium and longer term future form an important part of the basis of identifying the suitability of the existing employment land stock, and for the identification of new employment land into the future.
- 4.2 Forecasts of the extent to which a local economy is expected to change over time can never be exact, but an appreciation of the way in which patterns of employment may change offers a key input to an employment land study, particularly when assessing the level of labour demand. A significant caveat of employment forecasts is that they are based on trends of historical economic performance and predict how these trends are likely to carry on into the future.
- 4.3 For the purposes of this study, Staffordshire County Council has sourced “off the peg” employment forecast projections based on the “Local Economic Forecasting Model” as produced by the recognised economic forecasting company “Cambridge Econometrics”. As highlighted above, these forecasts employ a trend based analysis, informed by locally important factors, taking into account historical trend data, and predicting the trend for future economic and employment growth.
- 4.4 “Off the peg” economic forecasting models do not take into account local policy implications which can have significant influence on an area (in the case of Stafford this could be pertinent as the district has been earmarked for substantial housing growth as part of the revision of the West Midlands Regional Spatial Strategy), and which will be addressed in the content of the emerging Local Development Framework.
- 4.5 The forecasted employment projections in the Stafford Borough area are presented below in table 2.
- 4.6 The employment forecasts are based on an input data year of 2004. Any data beyond this date should therefore be treated as a forecast, with appropriate caution applied.
- 4.7 Table 2 highlights employment in Stafford Borough for each 5 year period between 2001 and 2026. The projection identifies a substantial decrease in the overall levels of employment between 2001 and 2006, some 2,700 jobs over the 5 year period. This decrease follows the trends identified in the reduction in employment of the manufacturing sector in particular since 2001. For the purposes of this report employment change between 2006 and 2026 will be considered in the greatest levels of detail – concurrent with the period of interest for the Stafford Borough LDF review. **Over the 2006 to 2026 period employment in Stafford Borough is predicted to grow by 6,100 (a positive increase of 9.9%)**

- 4.8 Existing employment data is only available to a base year of 2004. Therefore in order to reflect a base year of 2006 we must use aforementioned employment forecast projections. In 2006, the largest industry in Stafford Borough by these projections is forecast to be the health and education sector, with 14,500 employees. This sector is forecast to remain the sector employing most people in the district all the way through till 2026 when it is expected to employ around 17,000 people. The importance of the public sector in Stafford Borough is reflected in it being the second most important sector in employment terms at 2006 (8,100 jobs) and is forecast to continue around this level to 8,400 jobs in 2026.
- 4.9 Beyond 2016, **the financial and business sector is forecast to become much more important to the local economy**, and is predicted to rise from 8,700 jobs in 2016 to around 11,700 jobs by 2026. This is a common pattern throughout the Staffordshire area, and nationally, where the financial and business sector is becoming one of the biggest areas of growth.
- 4.10 **The decline of the manufacturing sector in the district** is highlighted by the employment forecast. A decrease in the manufacturing sector of some 4,900 jobs was forecast for the period between 2001 and 2006. The pattern of decline **is predicted to continue up to 2026** where the manufacturing sector is forecast to employ around 6,400 people. The overall predicted decline between 2001 and 2026 is some 6,600 jobs or a -50.9% decline in employment in the sector.
- 4.11 **Employment forecasts do suggest that there will also be increases in the numbers of jobs in the construction, retailing, hotels and catering and distribution sectors.**
- 4.12 The findings of these employment forecasts are the key component used to inform the labour demand approach to establishing a future employment land requirement.
- 4.13 By way of summary, the employment forecasts would suggest the following as likely trends in the district up to 2026:
- Over the 2006 to 2026 period employment in Stafford Borough is predicted to grow by 6,100 (a positive increase of 9.9%)
  - The financial and business sector of the economy is forecast to become much more important to the local economy
  - The decline of the manufacturing sector in the district is predicted to continue up to 2026
  - Employment forecasts do suggest that there will also be increases in the numbers of jobs in the construction, retailing, hotels and catering and distribution sectors

**Table 2 – Forecasted Employment by Industry in Stafford Borough – Local Economic Forecasting Model 2001-2026**

	2001	2006	2011	2016	2021	2026	Change 2001-26	% Change 2001-26	Change 2006-26	% Change 2006-26
Primary and Utility	962	991	868	746	644	557	-405	-42.1%	-435	-43.8%
Manufacturing	12954	8089	7761	7310	6837	6367	-6588	-50.9%	-1722	-21.3%
Construction	2284	2599	2669	2728	2857	3012	728	31.9%	414	15.9%
Retailing	5648	5649	5867	5995	6180	6380	732	13.0%	730	12.9%
Distribution NES	4682	3735	3993	4092	4209	4326	-356	-7.6%	590	15.8%
Hotels and Catering	3972	4812	4864	4919	4939	4951	980	24.7%	139	2.9%
Transport	3245	2418	2159	1914	1688	1492	-1753	-54.0%	-926	-38.3%
Communications	539	587	567	546	539	534	-5	-1.0%	-53	-9.1%
Financial and Business	7092	6577	7556	8697	10108	11728	4636	65.4%	5152	78.3%
Public Administration	7755	8063	8185	8277	8356	8445	689	8.9%	382	4.7%
Health and Education	12985	14522	15625	16148	16609	17033	4048	31.2%	2511	17.3%
Other Service Activities	2625	4035	3927	3745	3569	3399	774	29.5%	-635	-15.7%
<b>TOTAL</b>	<b>64743</b>	<b>62077</b>	<b>64039</b>	<b>65116</b>	<b>66534</b>	<b>68224</b>	<b>3481</b>	<b>5.4%</b>	<b>6147</b>	<b>9.9%</b>

Source; Cambridge Econometrics, Local Economic Forecasting Model. Data has been extrapolated by the Research Unit to 2026. These forecasts are consistent with Regional Economic Prospects. July 2006.

## **5.0 Identifying a future employment land supply**

- 5.1 This report follows the advice set out in the document – “Employment Land Reviews: Guidance Note published by the Office of the Deputy Prime Minister in December 2004.
- 5.2 In this report, three different approaches have been used for the calculation of a potential future employment land supply in Stafford Borough. The three methods are:
- i. A continuation of past development trends approach
  - ii. A labour demand led approach – based on likely employment land requirements as a factor of forecasted employment change
  - iii. A labour supply approach – based on the likely employment land requirements generated by projected labour force change
- 5.3 The three approaches differ quite significantly in both their methodologies and the results that they yield. It is important to recognise that no single approach should be classed as preferable to another, rather the three approaches should be considered together. Likewise, the suggested land requirement results generated from the three approaches should be seen only as a starting point for the identification of employment land requirements rather than a definitive statement of future needs.
- 5.4 An indication of the potential land requirements generated under each of the land forecasting approaches is presented below, alongside a brief commentary on the implications of each approach. For further more detailed explanation of the methodology used in each of these approaches, and the technical data which sits behind them, please see the accompanying technical appendix document.

### **Continuation of past trends approach**

- 5.5 The continuation of past trends approach is a relatively straight forward land estimation method which considers the levels of B Class employment land development in the district over recent years to create an average building rate. This building rate is then factored forwards over the period of interest to calculate a potential land requirement.
- 5.6 For the purposes of this project, past development rates have been calculated for the past 5 years (2001/02 to 2005/06) and the past 10 years (1996/97 to 2005/06). Table 3 overleaf highlights total employment land completions in Stafford Borough over the past 10 years.

5.7 The average building rate over the 5 years between 2001 and 2006 in Stafford Borough was 7.1 hectares per annum, while the average build rate over the 10 years from 1996 to 2006 in Stafford was 6.2 hectares per annum. These average build rates are shown below as part of Table 4. The high levels of employment land development in certain years (such as 2002/03 ) may be skewed in part by the significant levels of distribution and warehousing development which have been coming forward in Stafford Borough. Although development figures up to April 2007 are not yet available, it is likely that completions on the Prime Point 14 site in particular are likely to boost a 2006/07 figure to around the level of 20 hectares of land developed in the year.

**Table 3 Employment Land Completions in Stafford Borough 1996/97 to 2005/06 (Hectares)**

	1996 /1997	1997 /1998	1998 /1999	1999 /2000	2000 /2001	2001 /2002	2002 /2003	2003 /2004	2004 /2005	2005 /2006
<b>Total Employment Land Completions</b>	2.68	8.96	6.25	4.68	3.91	1.9	24.74	4.9	3.82	0.21

Source; Staffordshire Employment Land Survey 2006

**Table 4 Total and Average Employment Land Building Rates in Stafford Borough for past 5 and 10 years (Hectares)**

	2001/2002 to 2005/2006	Average Build Rate (5 years)	1996/1997 to 2005/2006	Average Build Rate (10 years)
<b>Total Land</b>	35.57	7.11	62.05	6.21

Source; Staffordshire Employment Land Survey 2006

5.8 The average build rates are then factored forward over the period of interest (20 years) to provide an indication of the future employment land requirements of the district. Using the average build rates from 2001 to 2006 a total of **142 hectares** of land would be required, while the development trends between 1996 and 2006 would generate a new employment land requirement of **124 hectares**. These requirements are highlighted below in table 5.

**Table 5 Average Employment Land Building Rates in East Staffordshire for past 5 and 10 years, and Future Employment Land Requirements (Hectares)**

	Average Build Rate (5 years)	Land Supply 2006-26 (based on 5 year build rate)	Average Build Rate (10 years)	Land Supply 2006-26 (based on 10 year build rate)
<b>Total Land</b>	7.11	142.28	6.21	124.10

Source; Staffordshire Employment Land Survey 2006

- 5.9 The land requirements provided by this approach are likely to be towards the “upper end” of the expected employment land requirements in Stafford Borough into the future. The approach uses recent development trends to calculate requirements for the future. In Stafford Borough, development trends may have been skewed by the high levels of B8 type distribution and warehousing developments that have been completed in some of the recent years. The extent to which these land requirements will be reflective of the situation of land development in Stafford Borough will be somewhat shaped by the types of development that the area is likely to accommodate, and willing to attract into the future.
- 5.10 As with all approaches to land estimation, an element of caution should therefore be applied to these findings. They do however offer a useful “at a glance” approach estimate to the levels of employment land which may be required if Stafford Borough was to experience sustained levels of growth similar to those which have taken place over recent years.

## Labour Demand led approach

- 5.11 The labour demand led approach uses forecasted employment change to identify potential future land requirements in the district over the next 20 years. Forecasted employment change for each of the 5 year periods between 2006 and 2026 is taken into account. Employment change is then attributed to employment densities for different sectors to create an employment floor space requirement. This floor space requirement is then multiplied by a plot ratio factor to give an allocation of total employment land to accommodate the required level of floor space, and an overall employment land requirement is the final result.
- 5.12 The labour demand approach is useful, in that it takes account of the likely changes to employment in the area into the future. The approach uses the employment forecasts from Cambridge Econometrics as highlighted in Tables 6 and 7 below as it's starting point.

**Table 6 – Employment Forecasts 2006-26 (absolute jobs)**

	2006	2011	2016	2021	2026
1 Primary and Utility	991	868	746	644	557
2 Manufacturing	8089	7761	7310	6837	6367
3 Construction	2599	2669	2728	2857	3012
4 Retailing	5649	5867	5995	6180	6380
5 Distribution NES	3735	3993	4092	4209	4326
6 Hotels and Catering	4812	4864	4919	4939	4951
7 Transport	2418	2159	1914	1688	1492
8 Communications	587	567	546	539	534
9 Financial and Business	6577	7556	8697	10108	11728
10 Public Administration	8063	8185	8277	8356	8445
11 Health and Education	14522	15625	16148	16609	17033
12 Waste Treatment and Other Service Activities	4035	3927	3745	3569	3399
<b>Total</b>	<b>62077</b>	<b>64039</b>	<b>65116</b>	<b>66534</b>	<b>68224</b>

Source: Cambridge Econometrics.

**Table 7 – Employment Forecasts 2001-26 (change in absolute jobs)**

	2006-11 change	2011-16 change	2016-21 change	2021-26 change	2006-26 change
1 Primary and Utility	-124	-122	-102	-87	-435
2 Manufacturing	-328	-451	-473	-470	-1722
3 Construction	70	58	130	155	414
4 Retailing	218	128	185	200	730
5 Distribution NES	257	100	117	117	590
6 Hotels and Catering	52	55	21	12	139
7 Transport	-259	-245	-226	-196	-926
8 Communications	-20	-21	-7	-5	-53
9 Financial and Business	980	1140	1411	1621	5152
10 Public Administration	122	92	79	89	382
11 Health and Education	1102	524	461	424	2511
12 Waste Treatment and Other Service Activities	-108	-182	-176	-170	-635
<b>Total</b>	<b>1963</b>	<b>1076</b>	<b>1419</b>	<b>1690</b>	<b>6147</b>

Source: Cambridge Econometrics

- 5.13 The employment change highlighted in Table 7 forms the basis of employment land demand in each of the 5 year periods. Sectors which yield a forecasted negative employment change will not generally form a need for additional employment land so are discounted from further



calculation. An allowance is made however for relocations from the important manufacturing sector.

5.14 An assumption is then made as to the expected proportions of forecasted employment change that will require the development of new B class industrial land. This assumption has been made using data from Industrial Estates Survey undertaken by Staffordshire County Council's Research Unit. The detailed background to these assumptions is highlighted in step 3 (page 8) of the accompanying technical appendix report.

5.15 To develop a floor space requirement, resulting from expected employment change, employment densities are applied as set out in Table 8 below. Floorspace is then factored by "plot ratios" (which are also highlighted in Table 8 below) to create an overall employment land requirement. The sectors highlighted in bold in Table 8 are those which are likely to require development of B class employment land.

**Table 8 – Sector to Use Class (Best Fit), Floor Space Density and Plot Ratio Factors**

Employment by industry	Use Class (Best Fit)	Floor space Density (sq m required per job)	Plot Ratios (Factor of additional land required to accommodate floorspace)
1 Primary and Utility	B2	Unknown	0.4
<b>2 Manufacturing</b>	<b>B2</b>	<b>30</b>	<b>0.4</b>
<b>3 Construction</b>	<b>B2</b>	<b>30</b>	<b>0.4</b>
4 Retailing	A1 or Sui Generis	20	0.4
<b>5 Distribution NES</b>	<b>B8</b>	<b>65</b>	<b>0.4</b>
6 Hotels and Catering	C1	15	
<b>7 Transport</b>	<b>B1 or Sui Generis</b>	<b>20</b>	<b>0.6</b>
<b>8 Communications</b>	<b>B1(c)</b>	<b>20</b>	<b>0.4</b>
<b>9 Financial and Business</b>	<b>B1(a)</b>	<b>20</b>	<b>0.6</b>
<b>10 Public Administration</b>	<b>B1(a)</b>	<b>20</b>	<b>0.6</b>
<b>11 Health and Education</b>	<b>D1 and B1 (a)</b>	<b>20</b>	<b>0.6</b>
<b>12 Waste Treatment and Other Service Activities</b>	<b>B2</b>	<b>20</b>	<b>0.4</b>

Source: Densities – English Partnerships, Employment Densities: A simple guide – September 2001  
 Plot Ratios – Atkins Staffordshire Moorlands Employment Land Study August 2006

- 5.16 Using a preferred methodology, which takes into account assumptions on the amounts of new employment taking B class employment land, and including a factor for relocations from manufacturing a total expected land requirement **between 2006 and 2026** would be in the region of **28 hectares**.

**Table 9 – Indicative land requirements from labour demand approach (hectares)**

	2006-11	2011-16	2016-21	2021-26	2006-26
Total (HA)	7.6	6.8	6.7	6.5	27.5

- 5.17 For further information on the methodologies and assumptions used in the development of the labour demand land requirement please see page 11 of the accompanying technical appendix document. The technical appendix also includes details of the potential land requirements generated by alternative development scenarios to this preferred method, **including a scenario where all positive employment change would be catered for by B class land. This scenario** which could be seen as an “upper end” estimate using the labour demand approach **generated a requirement of around 54 hectares of employment land over the 2006-26 period.**
- 5.18 The labour demand led approach gives a good indication of the likely levels of land required under a **trend based** growth in the local economy. It is by nature a rather conservative approach as it does not take into account the influences on the local economy of planning policy led growth scenarios, and takes into account the economic trends of the past 25 years to predict what may happen into the future.
- 5.19 As with any estimation of employment land of this kind, assumptions are required in terms of employment densities to use, plot ratio factors and in the case of this piece of work, the expected levels of employment growth to be accommodated on B Class employment land.

## **Labour Supply led approach**

- 5.20 The labour supply approach to land estimation uses forecasted changes in the local labour force (labour supply), and then goes on to suggest the potential levels of employment land that may be required to service such levels of labour force growth.
- 5.21 A key benefit of the labour supply approach in comparison to other methods of employment land estimation is that it allows an element of policy led growth scenarios to be tested rather than being purely reliant on historical development patterns, or purely trend based models. This is an important consideration for Stafford Borough as the revision of the West Midlands Regional Spatial Strategy which is currently under way, has identified the area as being capable of accommodating a significant amount of housing towards the end of the 2026 plan period.
- 5.22 In the case of Stafford Borough there are several potential housing development scenarios which could in turn influence local labour force growth. These are driven by the spatial options of housing distribution set out in the current West Midlands Regional Spatial Strategy revision, and an option of a potential “upper end growth level” for the district to test against, if the area is expected to accept housing growth above and beyond that proposed by the RSS revision
- i. RSS Housing Option 1 – 9,500 dwellings to be built in the period 2001 to 2026
  - ii. RSS Housing Options 2 and 3 – 12,900 dwellings to be built in the period 2001 to 2026
  - iii. Upper end growth level – 15,000 dwellings to be built in total in the period 2001 to 2026
- \* Note – The proposal for RSS Housing Option 1 yields a negative change in labour force which would not translate to further employment land needing to be identified. For this reason, the option 1 scenario has not been included in the further calculations of land required under the various labour force scenarios.
- 5.23 Population projections were created for each of these development scenarios, which were then fed into a labour force projection model (POPGROUP). For further information on this modelling work please see the accompanying technical appendix (page 12 onwards of the technical appendix).
- 5.24 A factor of commuting has been added to the labour force projection to establish a more realistic indication of the likely labour force patterns in the district. The favoured approach was to use a “net commuting” factor which takes into account the difference between those coming in to the district to work and those travelling out of Stafford Borough for work –

this equates to a net out commuting factor of -0.2%. Further details on the commuting factors used in the calculations can be found in the accompanying technical appendix (pages 12 and 13).

5.25 In order to quantify an appropriate employment density to translate to land requirements, an assumption is made as to which sectors people in the increased labour force will be employed. For consistency the proportion of employment identified by Cambridge Econometric employment forecasts for each of the 5 years between 2006 and 2026 have been applied to the labour force projection. This then establishes the potential labour force increase for each sector for each of these 5 years. The proportions are set out in table 10 below.

**Table 10 – Forecasted proportion of overall employment (%) between 2006 - 26**

EMPLOYMENT PROPORTIONS	2006	2011	2016	2021	2026
1 Primary and Utility	1.45	1.0	0.9	0.8	0.6
<b>2 Manufacturing</b>	<b>23.26</b>	<b>17.2</b>	<b>16.3</b>	<b>15.4</b>	<b>14.5</b>
<b>3 Construction</b>	<b>5.20</b>	<b>4.7</b>	<b>4.7</b>	<b>4.9</b>	<b>5.1</b>
4 Retailing	11.25	10.6	10.7	10.8	11.0
<b>5 Distribution NES</b>	<b>8.04</b>	<b>6.2</b>	<b>6.3</b>	<b>6.3</b>	<b>6.4</b>
6 Hotels and Catering	6.77	6.3	6.3	6.3	6.2
<b>7 Transport</b>	<b>4.17</b>	<b>7.3</b>	<b>6.3</b>	<b>5.4</b>	<b>4.6</b>
<b>8 Communications</b>	<b>0.78</b>	<b>0.7</b>	<b>0.7</b>	<b>0.7</b>	<b>0.7</b>
<b>9 Financial and Business</b>	<b>13.37</b>	<b>17.5</b>	<b>19.0</b>	<b>20.8</b>	<b>22.6</b>
<b>10 Public Administration</b>	<b>2.94</b>	<b>3.4</b>	<b>3.4</b>	<b>3.4</b>	<b>3.4</b>
<b>11 Health and Education</b>	<b>19.24</b>	<b>20.1</b>	<b>20.6</b>	<b>20.8</b>	<b>21.0</b>
<b>12 Waste Treatment and Other Service Activities</b>	<b>3.53</b>	<b>5.0</b>	<b>4.7</b>	<b>4.4</b>	<b>4.1</b>
Total	100.00	100.0	100.0	100.0	100.0

Source: Cambridge Econometrics

Sectors highlighted in **BOLD** have been summed to calculate the total levels of employment land required for each of the relevant periods

5.26 Using this methodology, indicative land requirements were calculated for each of the different growth scenarios highlighted in paragraph 5.25. These yielded significantly different employment land requirements as set out in table 11 below.

**Table 11 Labour Supply led employment land requirements 2006-26 (Hectares)**

Scenario	Land Required (Hectares)
RSS Housing Option 2/3	12.7
Upper End Growth Level	24.1

5.27 The labour supply led employment land prediction provides another alternative option for the possible needs of employment land in Stafford Borough. The results that the Labour Supply method yields are generally lower than those for the alternative approaches with the exception of the “upper end growth” scenario which represents the testing of a theoretical

maximum level of growth for the Stafford Borough area. One of the key benefits of the labour supply approach is its ability to take into account policy led growth assumptions rather than the trend based analysis of the other two approaches.

## **Conclusions – Identifying future land requirements**

- 5.28 The three approaches to quantifying new employment land requirements used in this study have yielded significantly different results. The continuation of past trends approach, which looks to roll forward historical development patterns to establish a predicted land requirement yields a much greater indicative land requirement than the two approaches which seek to predict levels of land needed to serve predicted future growth in employment and the labour force.
- 5.29 It is not the purpose of this report to provide a definitive employment land requirement in Stafford Borough over the next 20 years. Rather the indicative figures should be seen as a starting point to stimulate the further investigation of both the suitability and availability of the existing stock of employment land in the district, and how appropriate this will be for the future development vision of the area.
- 5.30 In the simplest terms, if Stafford Borough continues to develop its employment land along the lines of recent years, with a significant focus on development in the distribution and warehousing sector it is likely that new sites for employment land will need to be identified, above and beyond the portfolio of land currently identified (the total current land portfolio extends to 111 hectares at April 2006 – although some 24 hectares of this land was under construction). The exact amount of land will be subject to a detailed market testing of the employment land portfolio to assess its fitness for purpose for the range of likely future uses.
- 5.31 At the other end of the development scale, if Stafford Borough's future employment development pipeline follows the lines of those forecast by employment and labour force projections, the existing portfolio of land could quite possibly accommodate expected levels of growth. Once again, this would be subject to the detailed market testing of the portfolio of land to ensure sites are suitable both in type and quality and their location.
- 5.32 The key consideration for identification of employment land in Stafford Borough will therefore be linked to the development vision of the district, and how this vision will relate to employment land requirements. A high growth vision would therefore intimate much higher employment land requirements and potentially the need to identify new land, whereas a conservative development approach may see employment growth accommodated by the existing supply, albeit subject to the testing of the suitability and quality of sites.
- 5.33 An investigation of some of the issues which are not necessarily highlighted by the quantitative land identification approach is considered in further detail in section 6 below.

## **6.0 Further issues to take into account**

- 6.1 In addition to the issues drawn out in earlier sections of this report, there are a number of other important local factors which need to be taken into account as part of this employment land study. The three methods of land estimation provide a good starting point for the investigation of the needs of future employment land requirements, however, finer details of interest which are not necessarily picked up by examining quantitative evidence, form an important basis to the study. These issues will be considered in some part below, and while these issues are by no means exhaustive, they do offer an additional insight to the employment land situation in Stafford Borough.

### **The Economic Structure of Stafford Borough**

- 6.2 Stafford Borough's economic structure at 2004 was skewed very heavily towards the public administration, education and health sector, accounting for 20,400 jobs, or 36.6% of the total employee jobs in the district. The major employers in this sector include Stafford Borough Council, Staffordshire County Council (as Stafford is the county town of Staffordshire), Mid Staffordshire General Hospitals NHS trust, Staffordshire University and Stafford College of Further Education and local schools and the ministry of defence at the RAF Stafford site. Although employment in these sectors is considered to be relatively stable, uncertainties in the sector over recent years have led to job losses such as the restructuring of local NHS Primary Care Trusts which has seen a relocation of employment in the former South Western Staffordshire PCT to the new headquarters of South Staffordshire PCT in Rugeley.
- 6.3 Although the levels of public sector employment in Stafford are predicted to maintain strong into the future, it is the vision of Stafford Borough Council to promote some diversity of the local economy to try and reduce the potential vulnerability in having an economy which is too reliant on a single sector.
- 6.4 Indeed the vulnerability of Stafford Borough's economic base over recent years can be highlighted by the massive changes in the levels of manufacturing employment over the past decade or so. Manufacturing employment at 2004 (the most up to date Annual Business Inquiry data) suggests it is still an important sector locally, accounting for 7,900 jobs or 14.1% of the total employment in the Stafford Borough area. Between 2001 and 2004 some 3,900 manufacturing jobs were lost in the district making this one of the biggest losses of manufacturing employment in the whole of the West Midlands Region. The vulnerability of the sector is highlighted by examples such as Creda closing its facility at Blythe Bridge in the far north of Stafford Borough, resulting in the loss of some 619 jobs. An employment land review cannot predict when and how such closures may occur into the future, although key considerations of employment land reviews are to identify

land/premises that were in industrial use and which are currently vacant or considered to redundant, and it will be up to the Borough Council to consider how best to manage the potential re use of such land. Whether that be for a continuation/re-introduction of an employment use, or whether it may be more appropriate to be released for other potentially beneficial uses.

- 6.5 One of the most important implications for the identification for the location and type of future employment land supply in Stafford Borough will be the extent to which new development will be concentrated among the different types of property which will be suited to office, general industrial and distribution/warehousing style premises. The employment forecasts provided by Cambridge Econometrics suggest that the greatest levels of growth in employment in the area will be experienced in the financial and business sector and the health and education sector, and therefore appropriate accommodation should be provided for these. Employee jobs within these sectors are likely to have specific requirements, and are possibly more likely to be demanding office style accommodation. Office accommodation is more likely to be demanding of town centre locations which should (and are likely to) act as the primary focus for office development. Edge of centre development in areas accessible to good public transport links should form the next most suitable locations for office development, with out of centre development the next level of the sequential approach to development.
- 6.6 While the employment forecasts provided by Cambridge Econometrics do not predict a significant increase of employment in the distribution and warehousing sector in terms of employment change, the sector has been by far the most buoyant sector for recent employment land completions both locally and wider afield. The availability of sites such as Prime Point 14 with excellent access to the M6 motorway has helped to fuel this buoyancy of development. A continuation of employment land development at these buoyant levels would likely require identification of employment land towards the upper end of those identified by the 3 methodologies of land estimation in section 5 of this report. In addition, as the distribution and warehousing sector becomes ever more sophisticated and technologically advanced, operators may require new and updated premises which may therefore introduce some relocation requirements. It would be pertinent to allow for such possibilities when investigating the future portfolio of employment land for Stafford Borough.

### **Economic Activity Rates used in the Labour Supply methodology**

- 6.7 The underlying data for the Labour Supply methodology approach to employment land forecasting uses a labour force projection which was calculated in house by the Research Unit. One of the most important factors influencing the projected labour force in these projections is the economic activity rates which have been used to calculate the



proportion of the overall population who are forecasted to be feeding into the labour market.

- 6.8 For the purposes of this project, economic activity rates into the future forecasted at the national level have been adjusted using a factor of economic activity for the relevant age groups for Stafford Borough as at the time of the 2001 Census of Population. These factors have been used to calculate the indicative land requirements based on the labour supply method as highlighted in section 5.26.
- 6.9 While this approach offers the most logical method of calculating the labour force into the future, it should only be seen as an assumption of the potential labour force. Structural changes to the labour market and the wider economy overall in Stafford Borough could have significant implications for economic activity rates in the district. It is possible that the demographic structure of the district could change over time, with potentially significant levels of new development to take place in the area which could attract in migration of younger age groups. It is also possible that proposed developments at the former RAF Stafford base could influence changes to the labour force of the area through a restructuring of the demographic profile and potential for a greater proportion of younger people in the local labour market.
- 6.10 Changing the economic activity assumptions used in the labour force projections can have a small but possibly significant effect on the need to identify new employment land. Using a very crude calculation methodology it is estimated that by increasing the economic activity rate assumptions used in the labour supply model by a factor of 1%, an additional 2 hectares of employment land would be required over the 2006 to 2026 period. Whilst this is not a huge increase in the predicted land requirements, this issue highlights the need to allow for elements of flexibility in the calculations when interpreting both employment land predictions and labour force forecasts.

### **Commuting patterns**

- 6.11 The influences of commuting patterns in the area have been considered as an integral part of the labour supply employment land calculation process. 3 different assumptions of commuting have been taken into account which may have impacts on the levels of the labour force who will service expected development in Stafford Borough.
- 6.12 The 3 different scenarios take into account: a “base projection” – which considers only the labour force projection with no account for commuting, an “out commuting scenario” which corrects the labour force by taking away an element of the predicted labour force growth which may be expected to commute out of Stafford borough for work purposes, and a “net commuting scenario” which takes into account the balance of in and out commuting, by calculating those people who live

and work in Stafford, those who live in Stafford but work outside, and those who live outside and work in Stafford.

- 6.13 The most reliable source of data for commuting patterns comes from the Journey to Work analysis which was undertaken for the 2001 Census of Population. This analysis, however, is now some 6 years old and although the overall patterns of movement to and from work are likely to be broadly similar, there will have undoubtedly been some significant changes to the journey to work dynamics of the area over this period of time. At the time of the 2001 Census of Population Stafford Borough had very similar numbers of people working in the district as those that came into the district to work, but slightly more travelled out for work giving a net commuting factor of -0.2%.
- 6.14 The most up to date information available on economic activity and the working age population suggests that Stafford Borough has a relatively high district "job density" of 0.88 (meaning that there are 0.88 employee jobs for every person of working age in the district). This is the second highest job density of the Staffordshire districts after East Staffordshire.
- 6.15 It is difficult to predict with any certainty how the commuting patterns of Stafford may have changed over time since the publication of the 2001 Census of Population. The levels of development in Stafford Borough since 2001 suggest that there are a greater number of employee jobs in the district at present than 5 years ago, and as such there may be slightly different commuting dynamics in place.
- 6.16 Recent improvements to the rail network in Stafford mean that it is now easier to commute to the West Midlands conurbation and northwards towards Manchester. The fastest train to London Euston now completes the journey in 1 hour 30 minutes also offering the potential to commute to the capital. While these improved links may mean greater levels of out commuting than in 2001, they also offer the opportunity to capitalise on these improved links to attract people to work in Stafford. Similarly, the planned re-opening of Stone station should improve the potential links from the town to other areas and also improve links to the town.
- 6.17 The road network of Stafford Borough offers good links to other towns in the area and to further afield, offering the chance to commute both into and out of the district. Travel to work patterns from the 2001 Census have identified that Stafford town can be seen as a relatively defined travel to work area with people travelling in from some distance to help service the local economy. Stone, although a smaller employment centre sees a similar number of persons travelling into the town to those travelling out for employment purposes.
- 6.18 Although the levels of in commuting into the district do not suggest that these would create significant additional demand for employment land based on the unadjusted labour force projection, commuting issues

should be considered with some importance in the preparation of the employment land review as the development of a comprehensive portfolio of land can have the potential to help in the development of sustainable local growth where expected housing development and employment development are considered in parallel.

### **The Impact of Migrant Workers**

- 6.19 The impact of migrant workers to the local economy is a further potential consideration for this employment land study. In common with the majority of localities in Staffordshire, Stafford district has a relatively small proportion of its population made up from Black and Minority Ethnic groups. The town of Stafford tends to have a slightly greater proportion of persons from BME backgrounds, a characteristic that is somewhat shaped by the significant student population attending the Stafford campus. More recently, the area has seen some increases in migrants, in particular from the Accession 8 countries which joined the European Union in 2004.
- 6.20 The National Insurance Workers Registration Scheme has identified that in 2005/06 just under 600 persons registered for National Insurance purposes. Around 200 of these people were from a Polish background, possibly attracted by the existing strong Polish community in Stafford. These figures represent a significant increase on the numbers of people registering for National Insurance prior to the Accession 8 countries joining the European Union.
- 6.21 These data only offer a snap shot of the current labour market situation in the Stafford district area, but do highlight the importance of migrant worker groups to the local labour market. These data only represent those people that have registered for employment purposes on the National Insurance register, and do not take into account the possibility for double counting – for example if somebody registers for NI, leaves the country for a period of time and then subsequently registers again for NI at a later date. Neither do they take into account those people who may be operating in a less formal economy and thus are not registered for NI. Nevertheless, the influence of migrant workers to the local labour market and more widely the local economy could have some impact on the future land requirements, especially if their numbers continue to rise significantly.

### **Portfolio of Employment Land**

- 6.22 Using a base situation as at April 2006, Stafford Borough's portfolio of employment land extended to a total of around 111 hectares of land. Of this total, some 58.5 Ha of land had the benefit of full or outline planning permission, with around 52 Ha having no planning permission at April 2006. Of this land, at April 2006 – 23.7 Ha was under construction, with 51.5 Ha of land classed as being readily available for development and a further 35.4 Ha being suitable for development

within the next five years. None of the identified land was constrained beyond five years for development purposes.

- 6.23 At April 2006 a total of 100 hectares of land was identified on sites above 5 hectares in size. The remaining 10 hectares of land being identified on 14 smaller sites which range in size from 0.03 Ha up to 1.85 Ha (many of these smaller plots of land relate to parcels of land within a much larger industrial estate).
- 6.24 In considering the portfolio of employment land against the range of categories identified in the Regional Spatial Strategy and Regional Employment Land Study, Stafford Borough has no employment land in the category of Regional Logistics Site, Major Investment Site or Regional Investment Site. The majority of the employment land portfolio (89 hectares) is classed as sub-regional employment site, with a further 21.6 hectares classed as good or other local employment sites.
- 6.25 The suitability of this portfolio of employment land to accommodate the potential levels of growth suggested in this paper will be an important element of the examination of the existing stock of employment land in Stafford Borough, and the market testing of these sites (as identified by stage 1 of the ODPM's Employment Land Review Guidance). This element of the employment land review, combined with an identification of future requirements, will go towards the stage 3 objective of identifying the suitable portfolio of employment land for the future.
- 6.26 It is quite possible that the existing portfolio of employment land in Stafford Borough will not be suitable for the expected levels and types of economic growth in the area (for example with regard to the office sector). In this respect, there is a possibility that new employment land allocations may need to be identified, once the existing portfolio has been tested for its fitness for purpose.

### **Constraints to the development of sites**

- 6.27 Whilst the current portfolio of employment land in Stafford Borough is not subject to a high degree of physical constraints, these issues are always important and should be considered whilst undertaking an assessment of employment land in the area. It is possible that any future additions to the local portfolio of employment land may be subjected to some elements of development constraint, possibly more so in the case of land which is to be found on recycled or Brownfield land.
- 6.28 Access constraints to the road and rail network are often some of the most complex to consider. The former Meaford Power Station site to the north of Stone is one of the most significant employment land proposals in the borough. A planning permission dealing with these access issues amongst others has recently been granted for the site.

- 6.29 As well as the physical and infrastructural constraints to a particular site, ownership issues of a site can provide some additional barriers to development. Some sites have sat dormant for long periods of time as developers and other owners may prefer to sit on their land (especially if they have significant other land banks in their own portfolios) to speculate on whether a site may be reallocated for a more profitable use in the future.
- 6.30 The lack of intent to develop identified land is a key constraint, and together with physical and infrastructural constraints were key considerations for investigation during stages 1 and 3 of the employment land study. Information gleaned during the assessment of existing employment land can then be tested alongside the findings of section 5 of this study to identify whether new employment land should be allocated, with the ultimate aim of establishing a sustainable portfolio of employment land.

#### **Phasing of employment land and identifying a “buffer” of land**

- 6.31 In order to establish a sustainable supply of employment land in Stafford Borough over the next 20 years, it may be pertinent to establish a phasing policy, which will help to manage the release of land over the full plan period, rather than seeing significant spikes of development during particular periods.
- 6.32 Any phasing policy would also ideally be tied into the possible phasing of housing development proposed for Stafford Borough as part of the revision of the West Midlands Regional Spatial Strategy.
- 6.33 An additional element to the phasing of employment land is the concept of providing a “buffer” of employment land which attempts to resolve some of the issues related to landowners stock piling land, and not bringing forward their sites for development, as well as to take into account the problems associated with those sites which although they have been identified for employment development, are less likely to come forwards for development as a result of infrastructural and other constraints as identified above. For this reason it is sensible to identify an additional “buffer” of employment land additional to the indicative requirements identified in section 5 to help alleviate some of these problems.
- 6.34 It is difficult to accurately estimate the extent of land to be included in this buffer for future requirements. An Employment Land study in South Derbyshire undertaken by Roger Tym and Partners suggested that the equivalent of an additional 10% of the existing employment **floor space** in the district should be identified as “buffer” land, which can help to satisfy the ongoing churn of the property market. This part of the Stafford Borough employment land study (which is primarily based

around identifying a future supply of land) has not assessed the existing property market in detail. In order to quantify a buffer of employment land under the same approach used by Roger Tym and partners, a 10% element of the existing office (B1) and general industrial floor space stock (B2) and warehousing floor space (B8) of the district is calculated – this floor space is then factored by the relevant plot ratios to establish an overall land requirement. To meet the methodology adopted by Roger Tym and Partners, this additional buffer of land should then be added to the predicted land requirements, as identified in section 5 above.

- 6.35 While these approaches will not necessarily alleviate the problems associated with land banking, and related to infrastructural problems, they do offer some potential for helping to ensure that an adequate supply of land is made available. The prudent identification of future employment land requirements should incorporate some element of phasing and land buffers. These issues will need to be taken into account when considering the future portfolio of employment land in stage 3 of the employment land study.

**The need to match housing development with complimentary growth in employment land**

- 6.36 Stafford Borough has been identified as the potential location for some significant levels of housing growth in the revision to the West Midlands Regional Spatial Strategy. Between 2001 and 2026, under Option 2 of the revision to the West Midlands RSS, the district has been identified to potentially accommodate 12,900 dwellings. This clearly has significant implications for the future development of the district as a whole as well as the major settlements of Stafford and Stone which are likely to be expected to absorb the majority of development in the district.
- 6.37 It will be important to ensure that the scale and phasing of this potential development will be considered in harmony with the findings of the employment land review to promote the sustainable development of the 2 main towns and the wider Stafford Borough area.
- 6.38 This report provides an initial indication of the potential additional employment land requirements of the area based on identifying historic development trends, using predicted forecasts of employment in the area (which don't take into account policy growth assumptions in the area) and through labour force forecasts (which take into account the policy led growth assumptions)

## **7.0 Overall Summary**

- 7.1 This report has consistently highlighted the need to interpret future land requirements cautiously, and to appreciate that the findings of section 5 of the report represent the very first steps towards the identification of a future portfolio of employment land.
- 7.2 The 3 methods of land forecasting have yielded quite different results – with the lowest levels of requirement being identified through using the labour force projection led approach, whilst the recent buoyancy experienced in the distribution and warehousing sector has led the continuation of past development trends approach to yield the greatest future land requirement.
- 7.3 For the identification of the future portfolio of employment land in Stafford Borough, it will be important to establish the development vision that Stafford Borough Council has for the district over the next 20 years. Such a development vision will ultimately shape the future land requirements of the district. A vision which focuses on the predicted growth of the financial and business sector is likely to require a lower level of land take than a vision which includes a significant element of development in the distribution and warehousing sectors.