Doncaster Local Plan: Employment Land Needs Assessment (ELNA)
March 2020
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1. **Introduction**

**Purpose of the Employment Land Needs Assessment (ELNA)**

1.1 The original ELNA was published in 2015.

1.2 National planning guidance makes it clear that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. The evidence base should be robust and include assessment on: the best fit functional economic market area; the existing stock of land within the area; the recent pattern of employment land supply and loss; market demand; market signals; and oversupply and evidence of market failure. This Employment Land Need Assessment (ELNA) summarises national and regional guidance and strategies, examines local circumstances, analyses the existing employment situation, past trends and potential future changes; and then translates any predicted future growth into floor space and land requirements. The land requirement as well as key messages to come out of national, regional and local strategies inform the land allocations in the Doncaster Local Plan.

1.3 Other employment related evidence base documents have helped with the site selection process in the Local Plan. They can be viewed on the Local Plan website and are:

- The Housing and Economic Land Availability Assessment (HELAA) – this informs the selection of housing and employment allocations in the Local Plan. It identifies a future supply of land that is suitable, available and achievable for housing and economic development uses over the plan period.
- The Doncaster Employment Land Review (ELR) (Colliers International, 2018) – this independently assesses 30 potential employment sites and the conclusions have been factored into the site selection process. (N.B. The Colliers report does not set the land requirement figure; it is the job of the ELNA to do so.)
- There are also a number of other evidence base documents such as the Green Belt Review and these can additionally be found on the Local Plan website, along with the Peter Brett Associates report on Economic Forecasts and Housing Needs Assessment which is referenced further on in this ELNA.

1.4 It should also be noted that Sheffield City Region are currently preparing a Strategic Employment Land Appraisal which will aim to provide an understanding of current employment land across the City Region. At the time of writing, the SCR ELR is still to be finalised.

**Summary of ELNA Findings**

1.5 The Report is set out in the following sections: strategic context; Doncaster – Local Circumstances; Consultation; Doncaster's Functional; Economic Market Area; Employment Land Requirement Calculation. It will sit alongside the site analysis of the HELAA that assesses individual sites to meet the employment requirement. Doncaster is a separate functional economic market area when compared to surrounding boroughs and districts.

1.6 There is a positive policy framework for economic growth arising from national policy, the Sheffield City Region Growth Plan and the emerging Northern Powerhouse. Doncaster’s own Inclusive Growth Strategy seeks to build a stronger and more diverse economy including building on its connectivity assets and raising skill levels.

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1 Economic Forecasts and Housing Need Assessments - Doncaster Council
2 Local Plan - Doncaster Council
1.7 Recent developments and planned investment (e.g. Airport, Unity, Great Yorkshire Way, iPort) and market interest shows it is reasonable to expect growth to be achievable in Doncaster and early indications show significant private sector job growth.

1.8 There has been 383 ha of employment land developed in the borough since 2005 – with over half being for warehousing. Over 50% of the land developed is located adjacent, or near to, motorway junctions.

1.9 Doncaster exhibits high levels of deprivation and is consistently ranked in the top 20% most deprived local authorities in the country. The unemployment rate has fallen consistently (in line with regional and national trends) from over 5% in 2012 to below 1% in 2018.

1.10 Market signals indicate continued demand for warehousing uses and there continues to be interest in manufacturing with an expectation that the National College for Advanced Transport and Infrastructure will provide a further boost. Presently there is less market support for office development in Doncaster town centre. Doncaster hosts a series of significant commercial development projects with other projects emerging. Principal new locations are in the M18 corridor and include business parks alongside Doncaster Sheffield Airport, iPort, the DN7/Unity Project all linked to improved infrastructure.

1.11 Based on independent economic forecasting a land requirement of 481 hectares has been set for the 2015 to 2035 Local Plan period.
2. **Strategic Context**

2.1 The following section sets out the national, regional and local context for employment land provision in Doncaster.

**National Context – Policy and Strategies**

2.2 The National Planning Policy Framework (NPPF)\(^3\) sets out that the purpose of the planning system is to contribute to the achievement of sustainable development through three key roles:

   i. economic;
   ii. social; and
   iii. environmental.

2.3 Planning’s economic role includes contributing to building a strong, responsive and competitive economy by enabling a supply of land of the right type in the right place, and at the right time, so to support growth, innovation and improved productivity.

2.4 Plans should be prepared positively, in a way that is aspirational but deliverable, and be shaped by early, proportionate and effective engagement between plan-makers and communities, local organisations, businesses, infrastructure providers and operators, and statutory consultees. Strategic policies should set out an overall strategy for the pattern, scale and quality of development, and make sufficient provision for:

   a) housing, employment, retail, leisure and other commercial development;
   b) infrastructure for transport, telecommunications, security, waste management, water supply, wastewater, flood risk and coastal change management, and the provision of minerals and energy;
   c) community facilities; and
   d) conservation and enhancement of the natural, built and historic environment, including landscapes and green infrastructure, and planning measures to address climate change mitigation and adaptation.

2.5 Planning policies should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development. Each area should be able to build on its strengths, counter any weaknesses and address the challenges of the future.

2.6 Planning policies should:

   - set out a clear economic vision and strategy for their area which positively and proactively encourage sustainable economic growth;
   - set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
   - seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment; and
   - be flexible enough to accommodate needs not anticipated in the plan, allow for new and flexible working practices, and to enable a rapid response to changes in economic circumstances.

2.7 The plan should recognise and address the specific locational requirements of different sectors. This includes making provision for clusters or networks of knowledge and data-driven,

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creative or high technology industries; and for storage and distribution operations at a variety of scales and in suitable accessible locations.

2.8 Planning policies should also support a prosperous rural economy including enabling the sustainable growth and expansion of all types of businesses in rural areas and the development and diversification of agricultural and other land-based rural businesses.

2.9 There is also a requirement to support the role that town centres play at the heart of local communities. This includes allocating a range of suitable sites in town centres to meet the scale and type of development likely to be needed and meeting the anticipated needs for retail, leisure and office uses.

2.10 The Plan should reflect changes in the demand for land and should be informed by regular plan reviews and land availability. If there is no reasonable prospect of a planning application coming forward for the use allocated in the Plan the land should be reallocated for a more deliverable use. Local planning authorities should also take a positive approach to applications for alternative uses of land where this would help to meet identified needs. Proposals should be supported on retail and employment land where it would help to meet identified development needs provided it would not undermine key economic sectors or sites or the vitality and viability of town centres and would be compatible with other policies in the NPPF.

2.11 National Planning Practice Guidance (PPG)\(^4\) states that strategic policy making authorities will need to assess:

- the best fit functional economic market area;
- the existing stock of land within the area - this will indicate a baseline for land in employment uses;
- the recent pattern of employment land supply and loss – for example based on extant planning permissions and planning applications (or loss to permitted development);
- market demand – sourced from market intelligence from local data and discussions with developers and property agents, recent surveys of business needs or engagement with business and economic forums including locational and premises requirements of particular types of business;
- market signals – based on projected growth in the certain markets and demographic changes; and
- oversupply and evidence of market failure – such as physical or ownership constraints that prevent the employment site being used effectively.

2.12 Central Government has also published a long-term strategy called Industrial Strategy – Building a Britain Fit for the Future (November 2017)\(^5\) which aims to create an economy that boosts productivity and earning power throughout the UK. Under that vision, there are five foundations:

- Ideas – the world’s most innovative economy;
- People – good jobs and earning power for all;
- Infrastructure – a major upgrade to the UK’s infrastructure;
- Business environment – the best place to start and grow a business;
- Places – prosperous communities across the UK.

2.13 The strategy aims to address four grand challenges, which will only be achieved through businesses, academia, society and the Government working together. The four challenges are:

\(^4\)Housing and economic needs assessment - GOV.UK (Paragraph 26, Housing and Economic Needs Assessment)  
\(^5\)The UK's Industrial Strategy - GOV.UK
• Put the UK at the forefront of the artificial intelligence and data revolution;
• Maximise the advantages for UK industry from the global shift to clean growth;
• Become a world leader in shaping the future of mobility; and
• Harness the power of innovation to help meet the needs of an ageing society.

2.14 There is further commitment to local enterprise partnerships (LEPs) which will see their roles and responsibilities reviewed resulting in reforms to leadership, governance, accountability, financial reporting and geographical boundaries. The Strategy recognises that LEPs require financial support in order to deliver their role effectively and additional financial resources will be made available to those who demonstrate ambitious levels of reform.

2.15 The Government will work in partnership with areas to develop long term 'local industrial strategies' that should be based on clear evidence. These strategies will help identify priorities to improve skills, increase innovation and enhance infrastructure and business growth. These will then guide the use of local funding streams and any spending from national schemes.

2.16 Other issues of note in the Industrial Strategy are: the establishment of Skills and Advisory Panels; new Institutes of Technology sitting alongside the four flagship employer-led National Colleges which deliver high-quality skills training for the digital, creative, nuclear and high speed rail sectors; a Transforming Cities Fund; and Competitive Strength in Places Fund.

2.17 The Northern Powerhouse forms part of the Government's industrial strategy and has an objective to achieve a sustained increase in productivity across the whole of the north of England. The ambition is for an economy that works for everyone.

2.18 The Northern Powerhouse Strategy sets out how the Government will increase productivity. The Government will continue to work with northern towns, counties, cities, LEPs, businesses, universities, charities and others to address the fundamental barriers to productivity that the north faces. This will include improving connectivity, both within and between towns, counties and city regions; addressing the disparity in skills between the north and other parts of the country; ensuring the north is an excellent place to start and grow a business; and promoting trade and investment across the north. There is also an emphasis on the role that small and medium enterprises (SMEs) have on productivity in the UK. It is recognised that more productive SMEs are essential if the north is to achieve a dynamic and inclusive economy. This strategy is intended as the beginning of a wider conversation with northern stakeholders.

2.19 Transport for the North is a sub-national transport body that will transform the transport system across the north of England so to provide the infrastructure needed to drive economic growth. The Strategic Transport Plan outlines transport interventions, which will allow better access to jobs, collaboration between businesses, and more choices for leisure and tourism. For Doncaster, it recognises the need for rail improvements; the importance of freight and logistics; improvements needed for the A1(M) and the importance of road connectivity.

6 https://northernpowerhouse.gov.uk/
7 Transport for the North | TfNTransport for the North -
Doncaster forms part of the Sheffield City Region (SCR) Local Economic Partnership (LEP) along with the eight other local authority areas as shown on Figure 1 below.

Figure 1: The Sheffield City Region area

The SCR has a diverse economy comprising a dynamic core city, important towns and market towns, substantial areas of countryside and a significant rural economy. Doncaster is the second largest settlement and economy after Sheffield. The City Region have produced a number of strategies that will play a major role in Doncaster moving forward. The key strategies are described below.

The Sheffield City Region Strategic Economic Plan (SCR SEP) sets out how the region will be structurally transformed to deliver jobs and growth for 2015 to 2025. The plan is ambitious but credible and aims to lay the legacy of industrial job losses to rest using ways to restructure the skills base and business base. A target of 70,000 jobs over 10 years has been set. This will include increasing Gross Added Value (GVA) by 10% and creating 6,000 additional businesses beyond baseline growth rates.

There are a number of core activities that the SCR SEP lists for growing the private sector and these include attracting new businesses; providing the right infrastructure; exporting more; helping businesses to grow faster; and providing a skilled workforce.

By creating 70,000 additional jobs there will be an impact on spatial development patterns and therefore the SEP identifies seven long-term spatial areas of growth and change. For Doncaster, the relevant areas are:

- **Dearne Valley**: A major, mixed use, employment growth cluster, linking a number of development sites (including a number of Enterprise Zone sites).

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8 https://sheffieldcityregion.org.uk/
- **Doncaster Sheffield Airport (DSA):** this and surrounding areas to be recognised as a catalyst for business development, inward investment and job creation with regard to logistics, engineering and associated aviation activities.
- **DN7:** This mixed-use growth corridor will include a cluster of green businesses (including research and development opportunities) and hi-tech companies with new direct access to ports and the motorway network. Using low carbon technologies, it will contribute to UK power needs and become one of the most advanced energy parks in the SCR with impact across the wider northern economy.\(^9\)

2.25 The Economic Plan also emphasises the need for more business start-ups, the need to help indigenous firms to grow and the need to attract new firms. A key part of the strategy is to ensure businesses have the skilled workforce available to them.

2.26 It should be noted that the Sheffield City Region are currently refreshing the Strategic Economic Plan (Inclusive Growth Strategy). We will assess the plan and any potential impacts for Doncaster when it is made publically available.

2.27 The **SCR Integrated Infrastructure Plan (SCRIIP)\(^10\)** sets out the Region’s approach to infrastructure over the next decade. Infrastructure is required to achieve the ambition of increasing GVA within the City Region by £3.1bn by 2025. There are three objectives:

- To develop and deliver a comprehensive, integrated infrastructure network that attracts inward investment to the SCR;
- To maximise the benefit that SCR receives from transformational national projects such as Transport for the North, the National Infrastructure Commission and High Speed Rail;
- To focus on the priorities that create the best opportunities for economic growth, jobs and homes, creating attractive environments for businesses and residents.

2.28 In order to support the economic ambition, the SCR IIP includes Spatial Packages for the SCR Growth Areas setting out a number of desirable infrastructure outcomes. Packages relevant to Doncaster are:

- **Airport Corridor:** capitalise on the opportunity presented by the airport by providing rail connectivity. Overcome a number of transport capacity constraints including Doncaster railway station. Provision of large industrial buildings is key to support the growth of aviation and engineering businesses. There is potential to enhance the role of the airport through the provision of new infrastructure i.e. freight connections.
- **The Unity Project (formerly known as DN7):** A major mixed-use scheme with the potential for significant job creation. Flood defences and transport connectivity enhancements (including rail station improvements and a link road) are required to support the development.\(^11\)

2.29 The **SCR Transport Strategy** is currently in the process of being updated and it will set out the transport priorities for the City region up to 2040. The Strategy will update and supersede the policies and measures the previous strategy published in 2011.

2.30 The current transport strategy sets out the challenge of transforming large parts of the Region from the effects of recession and deprivation. It aims to ensure links are in place to enable people to connect to a range of work and training. It identifies supporting economic growth as

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\(^9\) Sheffield City Region, Strategic Economic Plan, pp. 31
\(^10\) https://sheffieldcityregion.org.uk/
\(^11\) Sheffield City Region, Integrated Infrastructure Plan, pp. 5
the primary goal, including supporting new transport links that all can benefit from. It has three themes identified to achieve this:

- Improving connectivity to improve business efficiency and productivity and it recognises the role of Doncaster at the heart of the SCR logistics sector and it seeks to further enhance this role.
- Supporting regeneration including linking communities which are not situated close to key corridors,
- Linking people to jobs and training to reduce unemployment and ensure lack of transport is not a reason for people to remain out of work.

2.31 The Strategy recognises that new employment opportunities are not always located near to communities requiring regeneration. As such, improved economic activity can give rise to congestion and increased car use. Actions relevant to Doncaster include:

- Improving surface access to international gateways;
- Improve reliability and reliance of the national road network;
- Promote efficient and sustainable means of freight distribution and growing the logistics sector;
- Deliver interventions required for development and regeneration;
- Focus development along key public transport corridors;
- Develop public transport that connects people to jobs and training;
- Improving connectivity between major settlements;
- Improving interurban connectivity especially by rail links;
- New links to major regeneration areas for example the recently completed Great Yorkshire Way;
- Public transport enhancements such as to the redevelopment area at Doncaster Sheffield Airport.

2.32 The SCR Integrated Rail Plan\(^\text{12}\) sets out a vision for how the region will be better connected by both high speed and conventional rail networks into the future – regionally, across the North, and nationally. It recognises that while the benefits of investment in HS2 and Northern Powerhouse should be maximised, there is a need for ongoing, complementary investment in local and regional rail and road networks. The aim is to improve capacity, reliability, affordability and journey times for communities and businesses across the SCR. Some of the principal components of the Plan are:

- Improving the speed and frequency of trains from Sheffield City Region to Greater Manchester and Leeds;
- A new station in the Dearne Valley on the NPR line that has the potential to be served by HS2 and Northern Powerhouse Rail services, supported by road connections between the M1 and A1 along the A635 (this includes developing a feasibility study and business case to relieve existing traffic problems in Hickleton and Marr);
- Providing a direct national rail connection to Doncaster Sheffield Airport;
- Continued investment in updating the East Coast Mainline and the Midland Mainline;
- The opening of low usage or closed rail lines to new passenger and freight services.

\(^{12}\text{https://sheffieldcityregion.org.uk/}\)
Local Planning Policy and Strategies

2.33 Doncaster’s Unitary Development Plan (UDP) (adopted 1998)\(^{13}\) contains a number of policies in relation to the economy and employment land development. Some of which have been superseded by the Core Strategy.

2.34 The policies and sites in the UDP sought to create a healthy economy in light of the process of diversifying and restructuring the economy after traditional employers continued to rationalise their businesses. The UDP looked to continue to support the expanding service sector as well as a growth in office-based activities, warehousing and distribution. It covered up to the period 2006 and provided a supply of 722 ha of land.

2.35 Doncaster’s Core Strategy (adopted 2012)\(^{14}\) forms part of the current statutory development plan and sets out that employment opportunities will be located to support the Settlement Hierarchy, attract a range of businesses and ensure that good sustainable transport links exist or can be provided.

2.36 Regarding the employment land requirement it stated that 290 ha was required for distribution warehousing; 34 hectares (plus additional for freight and cargo) was required for the Airport; and 190 ha were required for light industry and manufacturing. This requirement helps to provide sufficient land for the creation of 36,000 jobs in a number of sectors. There is a separate policy for Robin Hood Airport and Business Park, where growth and investment is supported in line with a number of principles.

2.37 Work commenced on the new Doncaster Local Plan\(^{15}\) in December 2014 with the Call for Sites process where a number of proposed employment sites where submitted by developers and landowners. In 2015, the Council undertook consultation on the Vision, Aims and Objectives for the Local Plan (a further consultation in 2018) and the Issues and Options Stage.

2.38 The Issues and Options Paper was published to ascertain public opinion on how and where the borough should grow. A number of employment land related questions were asked and the consultation responses, which included the views of Team Doncaster (the strategic partnership), contained ten clear messages in respect of employment distribution and related matters:

- major sites for job creation do not always need to be close to major residential areas;
- it is acceptable for some jobs to be provided at locations that are less suitable for new homes (for example at some motorway junctions) provided good transport links are in place;
- some reserve employment sites should be identified that would only be granted permission in the plan period if and when employment allocations were substantially used up;
- certain types of employment uses should be clustered together, for example hi-tech and air related uses at the Airport and low carbon technology uses at Unity/DN7 (Hatfield/Stainforth);
- jobs arising from the growing rail engineering industry should be concentrated in certain locations e.g. Doncaster Main Urban Area or Lakeside;

\(^{13}\) Doncaster Unitary Development Plan - Doncaster Council
\(^{14}\) LDF - Core Strategy Development Plan Document (DPD) - Doncaster Council
\(^{15}\) Local Plan - Doncaster Council
• There should be a more flexible approach to the location of offices to allow out-of-town offices (rather than only allowing offices in town centres so that they can support other town centre uses);
• the borough’s overall housing and employment needs should be met outside the Green Belt as far as possible so as to help protect the Green Belt;
• it is acceptable to use brownfield and other well-located urban centre sites in flood risk areas provided existing or proposed flood defences/mitigation measures would make the development safe;
• improvements are needed to the A1(M) to improve connectivity and relieve congestion. However the improvements should not be precursor to further development in the A1(M) corridor;
• the A1(M)/A19 link road proposal is not necessarily needed as it will be an incursion into the Green Belt and would impact on the already busy A1 and the A630 dualling would unlock land for development.

2.39 Informal consultation was undertaken in September – October 2018 on Draft Policies and Proposed Sites. A large number of responses were received including some additional potential sites. Consultation on the Publication version of the Local Plan took place in August – September 2019.

2.40 The Local Plan timetable can be found on the Local Plan website (see footnote 14).

2.41 Doncaster Growing Together\textsuperscript{16} is a four-year plan produced by Team Doncaster that sets out a vision for Doncaster to be a thriving place to learn, work, live and care. This vision will ensure residents have the support they need to gain skills and access our growing economy, such as through apprenticeships. Businesses will also be supported to allow them to flourish, and targeted support will be given to key growth sectors such as rail engineering. A greater emphasis will be placed on business innovation and increased productivity as well as attracting businesses and companies that will provide more and better quality jobs.

2.42 In order to ensure the benefits of growth reach all people and places (as described in the Doncaster Growing Together strategy. The Council and its partners have developed an Inclusive Growth Strategy\textsuperscript{17} for the borough that has a mission to enable Doncaster people, places and businesses to enjoy improved prosperity by participating in the growing and productive economy. It is important to diversify the economic offer in the borough. It is a 15-year vision that recognises that over recent years Doncaster businesses have led jobs growth that has been driving the economy forward and building confidence. There has been record levels of business investment and house building has contributed to the achievement of a £5.2bn economy. Doncaster has innovative businesses across a range of sectors, hard-working employees, an expanding skills sector, excellent connectivity and a growing cultural scene. The Strategy recognises there are a number of investments across the borough that are part of that success such as iPort, the Airport, in our town centre and rail industry, and that there are many aspirations such as University City and plans for a major film and TV production hub.

2.43 Employment levels have hit record highs, providing more residents with a stake in the economy, higher incomes and greater self-esteem. This has all been delivered in challenging, uncertain economic times in a true partnership effort between the public and private sector, working towards one goal.

2.44 In order to achieve the mission there are six drivers of inclusive growth:

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\textsuperscript{16} Doncaster Growing Together - Doncaster Council
\textsuperscript{17} Doncaster inclusive growth strategy - Doncaster Council
- Quality of place – improving Doncaster as a place to live, work, visit and invest;
- Industry specialisms – a focus on higher-skilled jobs, productivity, and export potential of: engineering and technology; digital and creative; future mobility (via rail, road and air; and advanced materials (for manufacturing and construction);
- Education and skills – reforming our education and skills system to equip residents with the skills, ambition and attributes that employers need;
- Better work and jobs – ensuring more Doncaster work is good work, supporting people in unstable temporary work to progress and ensuring more jobs offer quality, fairness, flexibility and equality;
- Social value and community wealth building – by increasing the impact of local investment and economic growth on social and environmental well-being, civic pride and opportunities for local people.
- Reaching vulnerable people and places – through work to reform our public services so they are increasingly joined up, targeted, focussed on prevention and working alongside local communities.

2.45 Within those six drivers of growth, there are a number of actions that will deliver infrastructure, connectivity, major investment projects and targeted support to raise the productivity of key growth industries. Examples of these include:

- Deliver an Urban Centre Masterplan;
- Support airport growth;
- Improve digital connectivity;
- Integrated transport;
- Unity and the wider northern growth corridor;
- National College for High Speed Rail (renamed the National College for Advanced Transport and Infrastructure in August 2019).

2.46 Further work has been undertaken on the Industry Specialisms\(^\text{18}\) driver for inclusive growth. The Report identifies the industrial specialisms within the Doncaster economy; sets out how the development of and growth within these specialisms might impact on the Doncaster economy in the future; and advises the Council on how to integrate the industrial specialisms game-changer into the wider Integrated Growth Strategy.

2.47 The relevant conclusions are:

- Supporting the local economy to create larger number of high value jobs is seen as crucial to address local economic weaknesses and to drive inclusive growth that benefits all;
- Stimulating greater critical mass in the town centre in order to ensure viability and vibrancy;
- Ensuring that wider economic development, growth and strategic opportunities are tapped into;
- Building a stronger service economy;
- Supporting the digital and creative economy;
- Creating a long-term plan that delivers a sustainable vision and action plan;
- Building an educational offer with services current needs and is fit for the future;
- Recognising that individual specialisms are not mutually exclusive.

\(^{18}\) Doncaster inclusive growth strategy - Doncaster Council
2.48 The Doncaster Urban Centre Masterplan\(^{19}\) acts as a prospectus for investment and change in Doncaster that will enable all parties to capitalise on potential. The vision includes:

- Ensuring the centre is a focus for business and enterprise;
- Building on the success of the current markets;
- Recognising the city core as the heart of the economy;
- Enhancing green spaces and waterways;
- Developing the cultural quarter and reinforcing the retail and leisure core;
- Developing city-scale functions and assets;
- Developing and bidding for new city-wide cultural venues, a University and Research and Development facilities;
- Rebranding Doncaster as a location of choice for regional businesses.

Moving forward – Key Sites and Schemes

2.49 There are a number of large, strategic sites and projects across Doncaster that are helping to deliver an economic transformation both locally and regionally. They are:

2.50 Doncaster Sheffield Airport (DSA) is of strategic economic importance to the Sheffield City Region and is seen as a catalyst for growth for both the local and wider regional economy. Since 2005 when it opened, it has become one of the fastest growing airports in the UK. It currently handles over 1.3 million passengers per annum, serves 54 destinations each year, and has a rapidly growing cargo operation. It already has existing employment land totalling approximately 34 ha, with 8 ha have being developed in recent years, 16 ha has current planning permission and 10 ha is undeveloped (planning permission having recently expired). There are further opportunities for more land to become available which together will form Aero Centre Yorkshire (ACY).

2.51 DSA is often referred to as the “Gateway to the City Region” and it now forms part of a corridor linking it to the M18 via the recently constructed Great Yorkshire Way (see below) which includes the iPort and housing at Rossington Colliery. The University of Sheffield Advanced Manufacturing Park, alongside Sheffield Parkway in Rotherham, is also within close proximity and easy access of the airport. It is recognised that the expansion of the airport and its business parks will have a major transformational effect on the local and regional economy.

2.52 In 2018, Peel, as landowner and operator, consulted on a draft Masterplan\(^{20}\) that sets out how it sees the future of the airport developing. It demonstrates how the airport and its wider estate will create significant job creation both locally and regionally. Peel are proposing that the airport will become a “place combining living, working and travel”. The masterplan includes plans for:

- Large passenger growth;
- Growth in cargo operations;
- The enhancement of the terminal building;
- Airside development;
- Development of the Maintenance, Repair and Overhaul (MRO) facility, linked to the Advanced Manufacturing Research Centre;

\(^{19}\) Doncaster Urban Centre Masterplan - Doncaster Council
\(^{20}\) Doncaster Sheffield Airport, Masterplan 2018 – 2037, Draft Consultation Report, March 2018
- Ambitions for housing and employment growth around the airport, as well as a plaza incorporating retail, leisure and hotel facilities;
- A potential future railway station linking to the nearby East Coast Mainline.

### 2.53 Great Yorkshire Way
Great Yorkshire Way has provided a new link road from M18 at junction 3 to Doncaster Sheffield Airport with links into Rossington and iPort. The second and final phase connecting the A638 Bawtry Road to Hurst Lane opened in June 2018. It provides a direct link from the M18 to Doncaster Sheffield Airport and via the White Rose Way, to Lakeside and the site of the new National College for Advanced Transport and Infrastructure (NCATI). Benefits for Doncaster include:

- Supporting new development and growth at Doncaster Sheffield Airport and along the route at iPort and Rossington Colliery;
- Improving access to Rossington and Finningley; and
- Providing an alternative route into Doncaster from the south, avoiding Bawtry Road.

### 2.54 iPort, Rossington
iPort, Rossington is a strategic rail freight interchange (SFRI) with capacity for over 6 million sq. ft. of logistics warehousing across 158 ha. The Secretary of State approved the planning application in 2001. Assessment of the site, which is in Green Belt, identified that it was the only suitable location in the region to locate such a facility. The total number of jobs is forecast to be approximately 4,500, primarily in the logistics sector. As at March 2018, approximately 50% of the warehousing space is complete.

### 2.55 Logistics developer and investor Verdion, with backing from its funding partner, the Healthcare of Ontario Pension Plan (HOOPP), is developing the scheme and tenants include Amazon, CEVA, Fellowes and Lidl. The scheme has exceptional connectivity with over 87% of the UK’s population being accessible within a four-hour drive time. The UK’s four major container ports are also located within four hours and iPort Rail provides immediate access to the national rail network. Doncaster Sheffield Airport is four miles away and can accommodate the biggest airfreight carriers.

### 2.56 Unity
Unity is a mixed-use regeneration scheme with planning permission covering the area between Hatfield, Stainforth, Dunscroft and Dunsville. It proposed that up to 3,100 homes will be developed over the lifetime of the scheme (up to 1200 new homes over the Local Plan’s plan period). There will be approximately 66 hectares of land for employment uses including business development, general industrial and storage and distribution uses. Other uses proposed are a training centre, energy related developments and associated education, technological and research facilities. The scheme will also include a new local centre next to the railway station with retail, education and community facilities proposed. Green infrastructure will also play a key role in the scheme. The project is a result of partnership working between developers, landowners, local community, elected members and Government agencies. The scheme is identified as one of Sheffield City Region’s seven spatial areas of growth and change.

### 2.57 The scheme also importantly includes a link road, which will connect Hatfield – Stainforth to junction 5 of the M18/junction 1 of the M180. Construction commenced in spring 2019.

### 2.58 National College for Advanced Transport and Infrastructure (NCATI):
National College for Advanced Transport and Infrastructure (NCATI): Doncaster is one of two sites, along with Birmingham, for the NCATI which opened in September 2017 on Lakeside. The College has been established to provide higher-level skills needed to transform UK rail and transport infrastructure. It is dedicated to providing the higher-level training required to create rail projects such as HS2 and Northern Powerhouse Rail as well as support the skills demand from employers who are facing challenges such as the digitalisation of the railway and an ageing workforce. The College provides technical and professional courses,
using the very latest industry technology through a combination of classroom teaching and real work experience, apprenticeships and short courses.

2.59 **M18/A1 Motorway Corridors:** Doncaster is at the heart of the country’s infrastructure network. The A1 runs through the west of the borough and offers excellent north/south links. The M18, in the east of the borough, links Doncaster to the M1 and M62. In addition to these, the M180 links the borough to Humberside and the Humber ports, and ports to the south such as Felixstowe.

2.60 Analysis of the location of land developed for employment type use between 2005 and 2018 (in Table 1 below) clearly shows the emphasis on sites in the M18 and A1 corridors. Over 47% of all development has taken place at Armthorpe M18 J4 West Moor Park, the A1/A638 Junction at Redhouse Interchange, M18 J3 Rossington iPort and M18 J6 Capitol Park.

### Table 1: Land developed for employment use 2005-2018

<table>
<thead>
<tr>
<th>Location</th>
<th>Land Developed (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Armthorpe J4</td>
<td>9.36%</td>
</tr>
<tr>
<td>Balby</td>
<td>8.55%</td>
</tr>
<tr>
<td>Bawtry</td>
<td>6.01%</td>
</tr>
<tr>
<td>Bentley</td>
<td>1.72%</td>
</tr>
<tr>
<td>Cottam</td>
<td>2.55%</td>
</tr>
<tr>
<td>Danby Lane</td>
<td>0.23%</td>
</tr>
<tr>
<td>Hatfield, South Street J3</td>
<td>0.30%</td>
</tr>
<tr>
<td>Kirk Sandall</td>
<td>0.00%</td>
</tr>
<tr>
<td>Lakeside</td>
<td>0.00%</td>
</tr>
<tr>
<td>Miborough</td>
<td>0.01%</td>
</tr>
<tr>
<td>Redhouse J3/A638</td>
<td>0.00%</td>
</tr>
<tr>
<td>RH405</td>
<td>0.01%</td>
</tr>
<tr>
<td>Rossington (iPort)</td>
<td>0.00%</td>
</tr>
<tr>
<td>Thorne &amp; Capitol Park</td>
<td>0.00%</td>
</tr>
<tr>
<td>Town Centre</td>
<td>0.24%</td>
</tr>
<tr>
<td>Waverley Hall Road</td>
<td>1.60%</td>
</tr>
<tr>
<td>York Road</td>
<td>0.04%</td>
</tr>
</tbody>
</table>

2.61 The development of these sites signals the significant shift from Doncaster’s traditional industrial role to one taking advantage of its historical position on the road transport network. Although connected to the motorway network, these sites are immediately adjacent to a pool of labour from which they are able to draw. Nevertheless, this is not always easy as work patterns do not always dovetail well with public transport operational times.

2.62 These motorway connected sites connect well into transport routes operating to the Humberside Ports as well as north/south routes. Together they have given Doncaster a reputation as a prominent hub that is now underpinned by the Logistics Hub UK initiative (www.logisticshubuk.com).

2.63 There is continued demand in the M18 corridor with the Unity scheme at Junction 5 having outline planning permission and all of the remaining plots at iPort having either full or outline permission. Many of the sites received through the Call for Sites process were also along the M18 corridor. Figure 2 below shows how the sites, which were submitted as part of the Call for Sites process, and those with planning permission, are distributed along the M18 corridor.
2.64 The A1 is constrained by Green Belt and currently suffers from high levels of congestion. This congestion limits the delivery of new large-scale strategic employment sites. Figure 3 below shows the existing employment sites along the A1(M) corridor and as well as those submitted through the Call for Sites process.
2.65 The Highways England Route Strategy – London to Leeds East 2015\textsuperscript{21} states that one of HE’s priority issues is the “capacity and safety concerns on the A1 between junction 34 and Holmfield Interchange (M62), that could threaten growth”. There is a “lack of capacity to support growth in Doncaster and Wakefield” and that the A1 junctions 38 – 41 are a poor standard alternative to the M1.

2.66 Due to these problems, the A1(M) is currently part of the Highways England programme for capacity improvements and these are likely to include both the widening of the road and junction re-alignments. The scheme is still in its early stages and there is no date set yet for scheme commencement. It is therefore difficult at this time to allocate sites along A1(M) as it is unclear what land-take the road will require and it is unlikely that extra traffic on the A1(M) will be supported by Highways England. As referred to earlier, the responses to the Issues and Options consultation also did not support development along the A1(M) corridor.

2.67 Developer interest for the A1(M) is focused on proposals for the Adwick North area, proposing to link to new sites alongside the Redhouse Interchange via a new A1-A19 link road. There is also development activity in the A1 corridor outside of Doncaster at Harworth and South Elmsall and more recently at the M62/A1(M).

2.68 The M18 on the other hand is currently considered to have capacity for further growth. It is recognised in the HE South Pennines Route Strategy (March 2017)\textsuperscript{22} as having some congestion and capacity issues but that the corridor is also of strategic importance for freight

\textsuperscript{21} Route Strategies: April 2015-March 2020 - GOV.UK (particularly paragraph 10 and diagram on page 11)  
\textsuperscript{22} Future investment in England’s motorways and major roads - GOV.UK (particularly pages 14 and 32)
and logistics as it is a vital link to a number of strategic road network sections in South Yorkshire as well as to the Humber ports. The document also recognises that there are significant levels of growth that are focused along the M18 corridor. It will need to “adapt to additional traffic flows created by corridor developments and increases in tonnage through the Humber ports”.

2.69 **Doncaster SCR Investment Fund Programme (SCRIF):** Doncaster is working towards securing over £50 million of funding from the Sheffield City Region Investment Fund (SCRIF) as part of a total £87 million funding for major infrastructure and ‘Urban Centre’ regeneration projects. Almost £30 million is sought for the following infrastructure projects: FARRRS phase two (now complete), Unity (Hatfield Link Road) and West Moor Link Improvement Scheme (Armsrope). A further £24 million is sought for Doncaster Urban Centre projects23: CCQ Cinema/Restaurant, Colonades, Waterfront, Doncaster Market (Phase 1 complete), St Sepulchre/Station Forecourt, Quality Streets and High Speed Rail College (complete).

2.70 **Investment in the schemes featured will help facilitate regeneration by:**
- Improving connectivity and feasibility via the infrastructure schemes;
- Improving the Urban Centre environment;
- Attracting further investment to the Urban Centre.

2.71 **Additional Road Priorities:** Doncaster’s key route network requires extra capacity to accommodate future demand. Therefore, there are a number of other road priorities for the borough. These include:
- **The Pan Northern Route** – a strategic highway connecting Manchester and the proposed Trans-Pennine tunnel with the A1 and Humber ports, thus releasing capacity on the M62. Locally, this will better link Doncaster and Barnsley;
- **A1 – A19 link** – Improving connectivity between these two major A roads to the north of the borough is a long-term political aspiration. This will provide much needed connectivity as well as boosting regeneration and economic development;
- **Hickleton and Marr bypass** – this is proposed in order to ease traffic in the villages of Hickleton and Marr and connect the A1(M) to the A635, improving connectivity between the borough and the Dearne Valley. It was announced in May 2019 that Sheffield City Region, Doncaster Council and Barnsley Council are currently working on a feasibility study and business case for the delivery of a bypass;
- **A1(M) capacity improvements** – there are plans to upgrade and widen the A1(M) in Doncaster – currently the oldest stretch of two lane motorway still in service. This may help free up development potential along this route in the longer term;
- **West Moor Link** – improvements to the A630 between junction 4 of the M18 motorway to the A18 (Thorne Road) and between the A18 and A630 Wheatley Hall Road.

2.72 **Doncaster’s approach to employment planning policy and allocations needs to reflect the key messages and issues to come out of national and regional policies and strategies.** Doncaster’s approach will be and is reflecting the objectives set out by Northern Powerhouse particularly improving connectivity by rail, road and public transport (of which Doncaster has many planned or completed schemes), and addressing the skills gap. It is also recognised locally that freight and logistics are important to Doncaster and this is shown by the planning permissions that have been granted over recent years. However, there is also a drive and recognition at the regional and local level that there is a need to diversify the economic offer in the borough such as ensuring that high value jobs are created in areas such as engineering, digital and creative, and advanced materials. Other important economic strands include building a stronger service economy and ensuring viability and vibrancy in the town centre i.e. through an Urban Centre

Masterplan. Some of these economic strands will not require new land to be provided and this will be reflected in the Local Plan.
3. **Doncaster – Local Circumstances**

3.1 In order for the Local Plan to address the borough’s strengths, counter weaknesses and address the challenges of the future\(^{24}\), it is helpful to look at Doncaster’s economy. This section sets out how the economy is currently performing and how it operates with regard to issues such as deprivation; travel to work information; land and property enquiries from potential developers; employment land availability; employment land take up; and travel to work patterns.

N.B the data used is the most recent available at the time of writing.

**Deprivation**

3.2 The Index of Multiple Deprivation 2015 (IMD)\(^{25}\) is a relative measure of multiple deprivation at the small area (Lower Super Output Area/LSOA) level for the whole of England. A LSOA is a low-level area unit that has a population of approximately 1,500 people of which there are 193 in Doncaster (from 32,482 nationally). Individual Output Areas and Local Authorities (LAs) can be compared and ranked. The IMD 2015 is an update of the IMD 2010. The overall Index is compiled from seven sub domains:

- Income deprivation (22.5%);
- Employment Deprivation (22.5%);
- Health Deprivation and Disability (13.5%);
- Education, Skills and Training Deprivation (13.5%);
- Barriers to Housing and Services (9.3%);
- Crime (9.3%), and
- Living Environment Deprivation (9.3%).

3.3 In the overall Index for 2015, Doncaster has improved three places to 42, from number 39 in 2010, out of 326 local authorities nationally, where 1 is the most deprived. Doncaster is still in the top 20% most deprived local authorities in England. Doncaster is the 4th most deprived from the 21 local authorities in the Yorkshire and Humber Region (Hull and Bradford being the most deprived) and is the second most deprived area in the Sheffield City Region. Table 2 below shows how Doncaster compares to its near neighbours.

**Table 2: Comparison with Doncaster’s near neighbours\(^{26}\)**

<table>
<thead>
<tr>
<th>Area</th>
<th>2010</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barnsley</td>
<td>47</td>
<td>39</td>
</tr>
<tr>
<td>Rotherham</td>
<td>53</td>
<td>52</td>
</tr>
<tr>
<td>Sheffield</td>
<td>56</td>
<td>60</td>
</tr>
<tr>
<td>Doncaster</td>
<td>39</td>
<td>42</td>
</tr>
</tbody>
</table>

\(^{24}\) NPPF, paragraph 80  
\(^{26}\) IMD 2015 LA summaries Rank of average scores across domains
3.4 Both geographically, and in terms of population, Doncaster Borough has significant levels of deprivation. Overall, 36% of Doncaster’s population live in areas rated as being in the top 20% most deprived in England. 60% of Doncaster’s population live in areas classified as having worse than average deprivation. Table 3 below shows Doncaster’s most deprived areas.

Table 3: Doncaster’s most deprived areas

<table>
<thead>
<tr>
<th>Doncaster rank</th>
<th>Area</th>
<th>IMD overall rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Balby Bridge</td>
<td>118</td>
</tr>
<tr>
<td>2</td>
<td>Denaby Main</td>
<td>129</td>
</tr>
<tr>
<td>3</td>
<td>Mexborough Main Street</td>
<td>463</td>
</tr>
<tr>
<td>4</td>
<td>Mexborough Windhill</td>
<td>718</td>
</tr>
<tr>
<td>5</td>
<td>Mexborough Adwick Road North</td>
<td>720</td>
</tr>
<tr>
<td>6</td>
<td>Hexthorpe &amp; St Sepulchre Gate West</td>
<td>735</td>
</tr>
<tr>
<td>7</td>
<td>Stainforth South</td>
<td>982</td>
</tr>
<tr>
<td>8</td>
<td>Old Denaby</td>
<td>1125</td>
</tr>
<tr>
<td>9</td>
<td>Conisbrough North</td>
<td>1163</td>
</tr>
<tr>
<td>10</td>
<td>Lower Wheatley North Bridge</td>
<td>1313</td>
</tr>
</tbody>
</table>

Distribution of Overall Deprivation 2015

3.5 Generally, most of Doncaster’s urban areas are relatively deprived. The north of the borough is more deprived than the southern half. The most deprived areas are Balby Bridge and Denaby Main, which rank within the top 1% most deprived nationally. Over 3,000 people live in these two areas. Balby Bridge is Doncaster’s most deprived area and is ranked the 118th most deprived nationally from over 32,000 areas. Only 10 (from 194) areas in Doncaster are classified as being in the top 20% least deprived nationally, including Auckley and Sprotbrough Central which are in the top 10% least deprived.

3.6 The map (Figure 4) below sorts the 194 survey areas of Doncaster (Lower Super Output Areas) into five categories (or quintiles) based on their comparative national ranking from 32,000.

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27 English indices of deprivation 2015 - GOV.UK
The Employment sub domain of the Indices of deprivation

3.7 Employment Deprivation is a sub domain of the overall IMD 2015 and, along with the Income sub domain, is the largest contributor to the overall rank of deprivation. The IMD Summary 2015 describes it as:

“This domain measures employment deprivation conceptualised as involuntary exclusion of the working age population from the world of work. The employment deprived are defined as those who would like to work but are unable to do so through unemployment, sickness or disability. Worklessness is regarded as a deprivation in its own right, and not simply a driver for low income. Attachment to the labour market confers a number of social and psychological advantages, and it is therefore important to measure the deprivation experienced by individuals who are detached from the labour market.”

3.8 The indicators are:

- recipients of Jobseekers Allowance;
- recipients of Incapacity Benefit;
- recipients of Severe Disablement Allowance;
- participants in the New Deal for the 18-24’s not in receipt of JSA;
- participants in the New Deal for 25+ not in receipt of JSA;
- participants in the New Deal for Lone Parents.

3.9 The map below (Figure 5) shows a very similar pattern to the overall level of deprivation for each area. The most deprived areas are in the urban centre, and around Mexborough and Thorne, with the north of the borough generally more deprived than the south.
Figure 5: Distribution of employment deprivation 2015 in Doncaster

The Employment Domain of the IMD 2015 in Doncaster

3.10 As with the overall rankings, the majority of Doncaster’s urban areas are classified as being in the top 20% most deprived nationally. The northern half of the borough having a greater degree of deprivation than the south. The key points of the employment sub domain are:

- Doncaster is ranked the 36th most deprived nationally;
- There are two areas, Balby Bridge (60) and Denaby Main (120), classified as being in the top 1% most deprived of the Employment domain;
- 41% of the Doncaster population live in areas classified as being in the top 20% most deprived nationally of the Employment domain;
- Overall 66% of the borough’s population live in areas classified as having worse than average Employment deprivation.

3.11 Table 4 below shows ten areas in Doncaster which are the most deprived.

Table 4: Doncaster’s most deprived areas in the Employment Domain

<table>
<thead>
<tr>
<th>Doncaster Rank</th>
<th>Area</th>
<th>Emp IMD Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Balby Bridge</td>
<td>60</td>
</tr>
<tr>
<td>2</td>
<td>Denaby Main</td>
<td>120</td>
</tr>
<tr>
<td>3</td>
<td>Mexborough Windhill</td>
<td>501</td>
</tr>
<tr>
<td>4</td>
<td>Hexthorpe &amp; St Sepulchre Gate West</td>
<td>605</td>
</tr>
<tr>
<td>5</td>
<td>Mexborough Main Street</td>
<td>778</td>
</tr>
<tr>
<td>6</td>
<td>Mexborough Adwick Road North</td>
<td>783</td>
</tr>
<tr>
<td>7</td>
<td>Conisbrough North</td>
<td>839</td>
</tr>
<tr>
<td>8</td>
<td>Stainforth South</td>
<td>1013</td>
</tr>
<tr>
<td>9</td>
<td>Old Denaby</td>
<td>1100</td>
</tr>
<tr>
<td>10</td>
<td>Lower Wheatley Highfield Road</td>
<td>1159</td>
</tr>
</tbody>
</table>

Summary of deprivation in Doncaster

- Doncaster still has some pockets of severe relative deprivation and is ranked overall in the top 20% most deprived nationally for all local authorities;
- This position has not changed in 2004, 2007, 2010 and 2015 although it has improved slightly between 2010 and 2015;
- Most of Doncaster’s urban areas are relatively deprived;
- The north of the borough is relatively more deprived than the south;
- 60% of Doncaster’s population are classified as living in areas having worse deprivation than the English average.

Job Seekers Allowance

3.12 The Claimant Count is expressed as the percentage of people aged 16 to 64 who are claiming Job Seekers allowance.

3.13 The chart below (Figure 6) details the Doncaster unemployment rate between 2005 and 2018 in comparison with the Sheffield City Region and England. Over the period, the Doncaster rate has remained an average 0.50% higher than the SCR and just over 1% higher than the English average but dipped below the averages in 2018. The overall trend mirrors that of the SCR and England. Since a peak of 5.6% in 2012, the rate has fallen to its current (2018) rate of 0.8%. This equates to approximately 1,500 people claiming job seekers allowance. The Doncaster rate is currently at its lowest for over 10 years.

![Figure 6: Claimant Count rate (%) 2005 - 2018](image)

Travel to Work/Commuting

3.14 At the 2011 Census, the number of Doncaster residents of working age in employment was 112,371. 71% (almost 80,000) worked in Doncaster. This was down from 76% in 2001. The total number of people working in Doncaster (residents and non-residents) was 106,372. 75% of these workers lived in Doncaster. This was down from 82% in 2001.

3.15 The net balance between the ‘inflow’ and ‘outflow’ of workers was (minus) –5,999 i.e. Doncaster has a net ‘out commute’. This was down 36% (from 9,342) in 2001. The net outflow compares with Barnsley at (minus) –20,460, Rotherham at (minus) –6,954 and Sheffield at (plus) +17,628. The largest net ‘out commute’ in the Yorkshire and Humber Region (Y&H Region) is Kirklees at (minus) –25,114. The highest net ‘in commute’ is Leeds at 55,602 – see Figure 8 below.

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29 Nomis 2018 Claimant Count
This sets out that there is an increasing movement of workers between Doncaster and its neighbours as a greater proportion of Doncaster residents find work outside of Doncaster but also more workers travel in to Doncaster. However, compared to other places, Doncaster is still relatively self-contained with 71% of its working population living in Doncaster.

The table below (Table 5) illustrates the commuting pattern of workers for Census 2001 and 2011.

Table 5: Commuting data summary for Census 2001 and 2011

<table>
<thead>
<tr>
<th>Resident working age population</th>
<th>2001</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live and work in Doncaster</td>
<td>76%</td>
<td>71%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Doncaster Employees</th>
<th>2001</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live in Doncaster</td>
<td>82%</td>
<td>75%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Net Commute</th>
<th>2001</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net commute balance between inflow and outflow</td>
<td>-9,342</td>
<td>-5,999</td>
</tr>
</tbody>
</table>

The In-Out commute

Workers travel to and from all of Doncaster’s near neighbours with Rotherham having both the largest in commute and out commute figure. See Figure 7 and 8 which showing the net commuting figures for the Y&H Region.

Figure 7: Where are people are travelling to and from in Doncaster to work

Distance travelled to work

At Census 2011 Doncaster residents, in employment, travelled an average 12.5Km to work. This is further than near neighbours Barnsley, Rotherham and Sheffield but lower than the Yorkshire and Humber Region average of 14.1Km. Approximately 5% of Doncaster workers work at home which is lower than the Y&H average of 7% but is in line with the South Yorkshire near neighbours.

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30 Census 2001/2011 via Nomis
Method of travel

3.20 At Census 2011, 37% of Doncaster residents in employment travelled to work by driving a car or van. This figure is average for the Y&H region. Analysis of all other methods of travel show nothing distinctive or different from the norm in comparison with all other Y&H areas.

Moving forward – Addressing Deprivation

3.21 As described above, Doncaster borough has significant levels of deprivation with 36% of the population living in areas rated in the top 20% most deprived in England. With the north being more deprived than the south. This is also reflected by the distribution of employment deprivation. The amount of people seeking job seekers allowance is also higher than the amount in the SCR and England although this has been falling over recent years. It is imperative therefore that the policies and allocations in the Local Plan recognise and address these issues with the aim of providing the land in the right place at the right time which together with local strategies and interventions will assist people to find work and improve their skills.

3.22 Consultation on the Local Plan has so far shown that there is no need or requirement for employment sites to be located adjacent to the communities that they serve. However, there have been a number of transport improvements made within the borough and more are planned (see paragraph 2.71). This then allows people to access jobs across the borough, rather than relying on jobs being located next to where they live. The map in Appendix 1 shows the links between transport schemes (both existing and proposed) and key settlements/main urban area and areas of deprivation.
Demand for Land and Property

3.23 Planning practice guidance states the local authorities should assess market demand and market signals.

3.24 The Employment Land Review (Colliers International, 2018)\(^3\) describes occupier demand for the 2\(^{nd}\) half of 2016. It states that there was a marked improvement in demand for logistics and industrial properties in South Yorkshire. At that time, activity in Doncaster was dominated with lettings to Amazon and Ceva at iPort. This set new headline rents for the region of £5.50 per sq ft for units between 140,000 and 200,000 sq ft. The principal locations were in the M18 corridor including business parks alongside Doncaster Sheffield Airport and iPort.

3.25 Colliers also state that market signals indicated a continued demand for industrial (B2 and B8) uses but less market demand for office development, particularly in the town centre.

3.26 The take-up of industrial units above 50,000 sq ft in South Yorkshire reached 1.8m sq ft in the last six months of 2016, more than double the level of take-up over the previous six months. Deals secured brought the total for the whole of 2016 to 2.5m sq ft, compared with 1.5m sq ft in 2015.

3.27 This has continued in 2018 and it is well documented that there is strong demand for industrial property in South Yorkshire due to cost, location and availability of labour. Knight Frank in their Logistics and Industrial Commentary for H2 2018 Review\(^3\) states that “South Yorkshire continues to see sustained demand across all size ranges”. There is demand from a variety of sectors including manufacturing, but admits that at the larger end of the market, Brexit is causing some caution.

Doncaster Land and Property Enquiry data

3.28 Business Doncaster\(^3\) (part of Doncaster Council) provides support for businesses looking to invest and locate in Doncaster. They record all property enquiries for land, industrial units, office, retail units, residential, design and build, leisure and general workspace. An enquiry constitutes a person or organisation seeking available vacant premises or land. If the enquiry is for a specific size of unit or area of land that size is recorded.

3.29 The total number of property enquiries was 6,531 between 2005 and 2015 of which 5,308 are for ‘Employment’ type uses (i.e. ‘b’ type uses). The average yearly total is 482 enquiries. In 2005 over 700 enquiries are recorded for employment type use. The total falls in subsequent years (in line with the economic downturn) but recovers reaching a post 2005 peak of over 600 in 2013. No data is available for 2016 and 2017. 2018 shows a significant drop in enquiries to only 188 in total – see Figure 9 below.

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\(^3\) Section 2.4 (see Local Plan website for document)  
\(^3\) https://www.knightfrank.co.uk/research/logic-south-yorkshire-h2-2018-6308.aspx  
\(^3\) https://wearedoncaster.co.uk/business-in-doncaster/
Enquires by type

3.30 The graph (Figure 10) below details the total number of enquiries by type and year for the three most frequent enquiries: industrial, office and land (i.e. vacant units or land being marketed and categorised for such use).

Figure 10: Enquires by type for selected Employment type uses

*No data available for 2016 and 2017

3.31 Examination of the individual enquiry type reveals ‘Industrial’ to be the most popular, followed by ‘office’ and land’. (Industrial includes ‘distribution’, which was not recorded as a category in its own right until 2014). Enquires by type show a similar profile year on year.

Enquires by unit size

3.32 Units in the range 0-1000 sq. ft. (i.e. the smallest size) are the most popular enquiry. Almost a third all enquiries are for sub 1000 sq. ft. unit size. This is more than all of the other unit sizes combined.

Enquires for Land (undeveloped land)

3.33 819 enquires for land were recorded between 2005 and 2018 (no data available for 2016 and 2017), at an average of 68 per year (see Figure 11 below). 2018 shows a significant fall to only 26 enquiries for land. An average 20% of all employment type enquiries (i.e. ‘B’ uses) are for land.
Summary: Key points from analysis of the enquiry data

- There are on average of 455 employment type enquiries made to the database per year;
- The total number of enquiries fell significantly in 2018;
- The most frequent enquiry is for ‘industrial’ followed by ‘office’ and ‘land’;
- In relation to ‘size band’, sub 1,000 sq. ft. enquiries are by far the most common.

Employment Land Availability (ELA)

3.34 The ELA monitors the availability and distribution of employment land. It details development over the previous year (latest 2018 report: April 2017 – March 2018) and the amount of land available for development.

3.35 The 2018 report continues from previous studies carried out annually from 2005. It includes employment land sites allocated in the adopted Unitary Development Plan (UDP), regardless of size, that are considered available or suitable for employment type development.

3.36 The study is based on allocations in the adopted Unitary Development Plan. However, in order to provide a more complete assessment of employment land, the study includes other significant land that comes forward for development, either because of planning applications for redevelopment of existing sites or other new opportunities. It also includes Mixed Use Regeneration Policy (MURP) development and sites developed for other uses (e.g. residential). However, where part of a site has been developed for a use other than employment, the remaining part of the site remains in the database as an undeveloped site.

3.37 There are currently 126 sites recorded on the Employment Land Availability Database with a gross site area of 768 ha. Table 6 below summarises the ELA data and shows that currently 546 hectares of land is theoretically available. In addition, it is important to note that these sites may be re-allocated for other uses in the Local Plan if they are unsuitable for modern business needs.

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34 Monitoring and Implementation - Doncaster Council
### Table 6: Employment Land Availability Summary Statistics

<table>
<thead>
<tr>
<th>Site Status</th>
<th>No of sites</th>
<th>Gross area</th>
<th>Gross site area sites not available (ha)</th>
<th>Gross site area sites available (ha)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete this survey [April 2017 - March 2018]</td>
<td>10</td>
<td>40.32</td>
<td></td>
<td></td>
<td>18%</td>
</tr>
<tr>
<td>Development Started</td>
<td>15</td>
<td>69.36</td>
<td></td>
<td></td>
<td>31%</td>
</tr>
<tr>
<td>Has Full Planning Permission but not started</td>
<td>18</td>
<td>112.23</td>
<td></td>
<td></td>
<td>50%</td>
</tr>
<tr>
<td>Has Outline Planning Permission</td>
<td>16</td>
<td>262.35</td>
<td></td>
<td></td>
<td>118%</td>
</tr>
<tr>
<td>Undeveloped</td>
<td>34</td>
<td>171.05</td>
<td></td>
<td></td>
<td>77%</td>
</tr>
<tr>
<td>Previously Developed for other use</td>
<td>33</td>
<td>112.81</td>
<td></td>
<td></td>
<td>51%</td>
</tr>
<tr>
<td>Sites in temporary use</td>
<td>0</td>
<td>0.00</td>
<td></td>
<td></td>
<td>0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>126</strong></td>
<td><strong>222</strong></td>
<td></td>
<td><strong>546</strong></td>
<td></td>
</tr>
</tbody>
</table>

### Employment Land Take-up 2005-2018

3.38 The ELA also records historic land take up. 117 sites with a total of 383 ha were developed between 2000 and 2018. Table 7 below details the total amount of land developed (ha) each year by use. It shows a steady climb 2000-2006 with a sharp increase in 2007. 2008-2011 shows the recession years and 2012-2013 shows the start of the recovery period with continued growth to the second highest total in the study period in 2017.

### Table 7: Employment land take up by use

<table>
<thead>
<tr>
<th>Year</th>
<th>No of sites</th>
<th>Gross area</th>
<th>Office</th>
<th>Industrial</th>
<th>Warehouse</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>12</td>
<td>23.70</td>
<td>0.85</td>
<td>8.02</td>
<td>6.95</td>
<td>7.88</td>
</tr>
<tr>
<td>2006</td>
<td>9</td>
<td>43.12</td>
<td>3.23</td>
<td>8.88</td>
<td>25.10</td>
<td>5.91</td>
</tr>
<tr>
<td>2007</td>
<td>20</td>
<td>84.08</td>
<td>3.70</td>
<td>11.59</td>
<td>65.57</td>
<td>3.22</td>
</tr>
<tr>
<td>2008</td>
<td>12</td>
<td>17.91</td>
<td>1.07</td>
<td>8.32</td>
<td>8.52</td>
<td>0.00</td>
</tr>
<tr>
<td>2009</td>
<td>4</td>
<td>6.37</td>
<td>0.04</td>
<td>0.80</td>
<td>5.53</td>
<td>0.00</td>
</tr>
<tr>
<td>2010</td>
<td>4</td>
<td>1.00</td>
<td>0.01</td>
<td>0.68</td>
<td>0.31</td>
<td>0.00</td>
</tr>
<tr>
<td>2011</td>
<td>3</td>
<td>1.32</td>
<td>0.00</td>
<td>1.12</td>
<td>0.00</td>
<td>0.20</td>
</tr>
<tr>
<td>2012/13 *</td>
<td>9</td>
<td>21.08</td>
<td>1.68</td>
<td>2.28</td>
<td>0.17</td>
<td>16.95</td>
</tr>
<tr>
<td>2014</td>
<td>0</td>
<td>12.92</td>
<td>0.00</td>
<td>6.58</td>
<td>0.00</td>
<td>6.34</td>
</tr>
<tr>
<td>2015</td>
<td>8</td>
<td>15.65</td>
<td>0.24</td>
<td>2.13</td>
<td>0.82</td>
<td>12.47</td>
</tr>
<tr>
<td>2016</td>
<td>14</td>
<td>36.44</td>
<td>2.45</td>
<td>5.76</td>
<td>23.26</td>
<td>4.97</td>
</tr>
<tr>
<td>2017</td>
<td>12</td>
<td>78.85</td>
<td>0.68</td>
<td>3.38</td>
<td>48.94</td>
<td>25.85</td>
</tr>
<tr>
<td>2018</td>
<td>10</td>
<td>40.32</td>
<td>0.00</td>
<td>2.31</td>
<td>29.07</td>
<td>8.94</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>117</strong></td>
<td><strong>383</strong></td>
<td><strong>14</strong></td>
<td><strong>62</strong></td>
<td><strong>214</strong></td>
<td><strong>93</strong></td>
</tr>
</tbody>
</table>

* No survey in 2012

3.39 The Employment Land Availability report records the amount of employment land developed by use over the 2005 to 2018 period. This is shown in Figure 12 below.
In total, 57% of all land developed has been for B8 use, 16% for B2 use and 24% for non-employment use as shown by Figure 13 below. Figure 14 shows the spatial distribution of development of employment and non-employment use with Redhouse, Balby Carr and Rossington having the most development.
Summary of Historic Development Key Points

- The average annual rate of development was 28ha;
- 57% of all development was for distribution warehousing;
- 24% of all development was for non-employment uses. This figure has grown in the last 4 years of the study period with an increased amount of development on allocated employment sites and re-development of existing sites for alternative uses. This partly indicates that some of the remaining supply and existing older employment sites are no longer viable for employment use or are more suitable to other uses;
- The peak build year was 2007 with 84ha of land developed;
- The lowest total amount developed was 1ha in 2010;
- Almost 70% of all development was in five areas with direct access to the motorway; Armthorpe Junction 4 (9%), Redhouse (15%), Thorne (9%) and Balby Carr (18%) and Rossington (17%).

Valuation Office Agency (VOA) Business Floor Space Data

3.41 The Valuation Office Agency (VOA) has produced a time series of statistics for a range of classes of property liable for business rates. The estimates of numbers of properties\(^\text{35}\), total rateable values, total floor space and average rateable value per square metre (m\(^2\)) are derived from data for England and Wales extracted from the Valuation Office Agency’s administrative database in March 2019 (latest data 2015).

\(^{35}\) VOA use the term ‘hereditament’ meaning a property or area of land to which a rent can be applied.
Rateable Value

3.42 Rateable value represents the open market annual rental value of a business/non-domestic property. This means the rent the property would let for on the valuation date, if it were being offered on the open market. Local authorities use the rateable value when they calculate the business rates bill.

a) Offices

3.43 Doncaster has (at 2015) 249,000 m² of office floor space. This is more than Barnsley and Rotherham but significantly less than Sheffield with 908,000 m². Doncaster’s total office floor space represents 16% of the South Yorkshire total (compared to Sheffield at 58%, Rotherham at 15% and Barnsley at 11%). The total amount of office floor space in Doncaster has risen by 17% between 2000 and 2015 (7% less than the South Yorkshire average) and has remained constant between 2005 and 2015.

3.44 The Rateable Value (RV) of the office floor space in Doncaster is £76/m² (15% below the South Yorkshire average of £90/m²). Doncaster’s office floor space value is slightly higher than Rotherham but significantly less than Sheffield at £101/m². The total RV of Doncaster’s office floor space is £19 million, which represents 14% of the South Yorkshire total. The highest rateable value in the Y&H Region is Leeds at £142/m², more than double the value of Doncaster office space.

3.45 The graph below (Figure 15) illustrates the RV/m² change between 2000 and 2015. Doncaster’s general trend mirrors that of the selected others and the differences between all areas has remained constant.

Figure 15: Office space rateable value £/m²

3.46 Approximately 7% of Doncaster office floor space is currently (2019) classified as available\textsuperscript{36}. This is a fall from 18% in 2015.

\textsuperscript{36} Business Doncaster database March 2019
b) Industrial

3.47 Doncaster has (at 2015) 2,452,000 m² of Industrial floor space. This represents 25% of the South Yorkshire total. This is the eighth highest of the 22 areas in the Y&H Region. The total amount of floor space has risen by 40% in the 2000 to 2015 period. Only Selby had a larger increase (47%). Overall, the Y&H Region has seen a decrease in industrial floor space of 3% over the 2000 to 2015 period. Industrial land in Doncaster currently has a rateable value of £32/m², which is the highest in South Yorkshire and is on a par with both East and West Midlands. The total value of the Industrial floor space is £79 million that represents 6.6% of the Y&H Region total and 25% of South Yorkshire. The value per square metre has risen by 45% between 2000 and 2015 (significantly higher than any South Yorkshire near neighbours) and 13% more than the regional average. The total value has almost doubled in the 2000 to 2015 period. The Figure below (Figure 16) illustrates the rateable value/m² change for Doncaster, Sheffield and the Y&H Region.

**Figure 16: Industrial space rateable value**

3.48 The general trend has been a steady rise in the rateable value of industrial land with Doncaster maintaining its position of having one the highest values in the region.

3.49 The graph below (Figure 17) illustrates the percentage change in floor space, rateable value and count. Whilst the total floor space dipped in 2009 following 8 years of increase, its value continued to rise. This dip reflects some correlation with evidence from the Annual Business Inquiry (ABI) that shows a fall of over 3,000 employees (net) in that same period. It is also apparent that the total floor space rose at a steeper rate than the count between 2002 and 2008; this period that saw several large-scale warehouse developments in Doncaster.

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37 VOA Administrative Data as at 31 March 2016
VOA data conclusions

Office
- Doncaster does not have a significant amount of office floor space in comparison to other major locations in the Y&H Region;
- Although the amount of office floor space has grown, it fell 5% short of the regional average growth between 2000 and 2015;
- The rateable value per m² office floorspace is 22% below the regional average. That trend has remained largely unchanged for the 15-year period.

Industrial
- Industrial land in Doncaster currently has a rateable value of £32/m², which is 10% higher than the regional average;
- The RV has increased by 45% between 2000 and 2015; 13% higher than the regional average;
- Doncaster has the highest value industrial floor space in South Yorkshire;
- Between 2000 and 2015, the amount of industrial floor space has grown by 40%; second only to Selby in the Y&H Region;
- The total value of industrial land has doubled in the 15-year period.

3.50 Demand Information, employment land availability and valuation data demonstrates that Doncaster’s economy is generally doing well. There are a healthy amount of employment related enquires made to Business Doncaster per year although that fell significantly in 2018 which may have been a reaction to uncertainty surrounding Brexit. Most enquiries are for industrial uses including warehousing/logistics. This is then reflected in the employment land availability where 57% of historical development has been for warehousing/logistics. Employment related development across the borough has suffered from peaks and troughs in line with the economy where 84 ha was development in 2004 and only 1ha was developed in 2010. Most development (70%) has been developed in areas with direct access to the motorway.

3.51 The VOA data demonstrates that Doncaster does not have a significant amount of office floor space in comparison to other locations in the Y&H Region and this is additionally reflected in the comparatively low amount of office related enquires (as compared to industrial) received by Business Doncaster. The rateable vale for office space in Doncaster is below the regional average while for industrial land, Doncaster’s rateable value is 10% higher than the regional average which makes it the highest value industrial floor space in South Yorkshire.
Overall conclusion

3.52 Although there is a high level of deprivation with Doncaster borough, there are a number of initiatives and schemes which are helping to address this including transport improvements which should help people to access jobs across the borough rather than relying on the jobs being located next to where they live.

3.53 Business Doncaster deal with a number of employment related enquiries each year and these are generally for industrial/warehousing. The rate and amount of development tends to follow the peaks and troughs of the economy and is generally located in areas with direct access to the motorway. The majority of development has been in industrial/warehousing development with the amount of floor space growing by 40% between 2000 and 2015.

3.54 The Doncaster Local Plan will need to address the above issues and consider them as part the policy approach and site allocations. Although Doncaster is an attractive location for warehousing, other employment related type uses will be required to help address issues such as deprivation including the amount of people claiming job seekers allowance.
4. Consultation

4.1 The 2015 ELNA listed the consultation/engagement which took place in 2015 to help support both the Local Plan and its evidence base. This consultation still applies and is listed below:

4.2 Several meetings and workshops were held in 2015 to involve relevant representatives from external organisations and businesses to engage in the Local Plan process. It was intended that these meetings would facilitate the gathering of any additional evidence, engage relevant external agency expertise and draw ‘real world’ insight in support the Employment Land Review work.

a) Market Intelligence Workshop

4.3 A Market Intelligence Workshop was held in April 2015. Participants from external organisations and businesses were invited who represent the employment land market sector. They were primarily representatives from major commercial developers and property agents. Also in attendance were officers from DMBC representing the Local Plans team, Economic Development and Service Improvement.

4.4 The prime objectives of the workshop were:

- To engage with developers and property agents in the local plan process;
- To gain ‘market intelligence’ on any issues relating to employment land to support the evidence base of the local plan and more specifically the Employment Land Review.

4.5 Topics covered included: the Sheffield City Region, market conditions, future need for land, supply of land, warehousing, internet retailing, rail freight, manufacturing, office sector, Airport, development needs, major sites and the Local Plan.

4.6 Conclusions of the workshop in relation to the key employment sectors.

- Warehousing – Doncaster has a strong logistics sector which will continue to grow;
- Manufacturing – the demand for manufacturing units could increase, however, it is dependent on upon Doncaster having the right type of premises and labour supply. The rail sector could provide a significant boost in this sector;
- Office – there is very little demand for the office sector in Doncaster. The Rail College is likely to create a demand of its own, but it is unlikely that this would increase demand in the town centre other than in the long term;
- General - confidence is returning with major projects in Doncaster having a positive effect on investment. This is a suitable time to be preparing a Local Plan with a need to provide a good supply of land to accommodate growth.

b) Chamber Workshop

4.7 A workshop was held in July 2015 with members of Doncaster Chamber of Commerce. A presentation was delivered that covered key topics including the Local Plan ‘Vision Aims and Objectives’, ‘Issues and Options’, the ‘Call for Sites’, growth options and potential growth constraints. Following the presentation there was a question and answer session where members of the Chamber were free to raise any issues. All comments and key points raised were recorded and added to the Local Plan evidence base.

4.8 Key points:

- Doncaster town centre is not generally attractive for office investment;
- There is a lack of skilled workers and need for more attractive training opportunities related to the needs of business.
c) Rail Workshop

4.9 A workshop was held in November 2015 with representatives of several rail or rail related companies. The agenda included discussions on rail connectivity, the development of a potential rail cluster in Doncaster and the rail college.

4.10 Key points included:
- It is expected that rail companies will grow in Doncaster due to: a good workforce (which is adaptable, has appropriate skill levels, and appropriate wage costs); good locations (including a mini cluster of prominent businesses located at Lakeside, and close to the airport); the presence of existing rail freight facilities; and proposed training facilities;
- There is a need to provide additional land for rail companies with further opportunities to consider such as attracting a Design House, or test track

Further consultation

4.11 Since 2015, there has been consultation on the Local Plan the results of which have informed employment land thinking. This includes the Call for Sites process, the Issues and Options and most recently the Draft Policies and Proposed Sites in September to October 2018 (further information can be found in Section 2 – Strategic Context: Local Planning Policy and Strategies). Section 6.12 below also explains how the Draft Policies and Proposed Sites consultation asked a question about land use requirements. Summaries of the Local Plan consultation will be available on the Local Plan website38.

38 www.doncaster.gov.uk/localplan
5. Doncaster’s Functional Economic Market Area

Introduction

5.1 It is important for spatial planning, including meeting the ‘Duty to Cooperate’ requirement, that a functional economic market area is defined through the Local Plan process. Functional economic geographies relate to the real area within which an economy operates rather than simply adhering to administrative boundaries. In 2010, the Department for Communities and Local Government (DCLG)\(^{39}\) defined FEMAs as, “the area over which the local economy and its key markets operate”.

5.2 The subject is also covered in the Government’s online Planning Practice Guidance\(^{40}\) and in the section on Maintaining Effective Cooperation (paragraph 11) ‘How can functional economic market areas be defined?’ the guidance states:

“Since patterns of economic activity vary from place to place, there is no standard approach to defining a functional economic market area, however it is possible to define them taking account of factors including:

- extent of any Local Enterprise Partnership within the area;
- travel to work areas;
- housing market area;
- flow of goods, services and information within the local economy;
- service market for consumers;
- administrative area;
- catchment areas of facilities providing cultural and social well-being;
- transport network”.

Defining Doncaster’s Functional Economic Market Area

5.3 In order to define Doncaster’s functional economic market area, the following themes and factors are considered:

a) Labour markets;

b) Housing markets;

c) Service markets for consumers;

d) Transport networks.

a) Labour markets

5.4 The 2011 Office for National Statistics (ONS) Travel to Work area boundaries (published 2015\(^{41}\)) defined Doncaster Borough as a distinct Travel to Work Area:

‘The current criteria for defining TTWAs is that generally at least 75% of an area’s resident workforce work in the area and at least 75% of the people who work in the area also live in the area. The area must also have a working population of at least 3,500. However, for areas with a working population in excess of 25,000, self-containment rates as low as 66.7% are accepted.’ Figure 18 below shows the ONS defined Travel to Work Areas. The Doncaster TTWA is ‘self contained’ i.e. the same as the L.A. boundary unlike some neighbouring authorities that have wider TTWA’s. This is taken from the ONS Travel to Work Area Analysis (see footnote 40)

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\(^{39}\) DCLG, FEMAs: An economic note, February 2010

\(^{40}\) [https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments](https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments) and [https://www.gov.uk/guidance/plan-making#maintaining-effective-cooperation](https://www.gov.uk/guidance/plan-making#maintaining-effective-cooperation)

\(^{41}\) [Travel to work area analysis in Great Britain - Office for National Statistics](https://www.gov.uk/guidance/plan-making#maintaining-effective-cooperation)
5.5 In 2011, 76% of all resident workers worked in Doncaster and residents take 79.3% of all local jobs. The percentage figure is an indicator of Doncaster's ability to provide employment to its resident workforce.

5.6 The jobs density ratio (jobs per worker) has increased in the last five years from 0.65 to 0.73. It has overtaken the Sheffield City Region ratio and has closed the gap on the national average (0.86)\textsuperscript{42}. This, together with the percentage of its resident workers working in the borough, show that although Doncaster has a net daily out commute of workers it can still be considered to have a relatively self-contained labour market.

Note: See also ‘Commuting’ in paragraph 3.14 onwards. Commuting statistics are based on resident population of working age whereas the Travel to Work statistics are based on the total number of residents working.

**Figure 18: ‘Travel To Work’ areas as defined by the ONS in 2011**

\[\text{\textsuperscript{b)} Housing markets}\]

5.7 The most frequently used approach has been to analyse migration data (i.e. residential mobility).

5.8 The Doncaster Housing Need Assessment (HNA) (2015)\textsuperscript{43} concluded that Doncaster ‘operates as a self-contained housing market’. This Report has been updated by the 2019 Housing Needs Survey that reaches the same conclusion, stating that around or over 75% of moves are within Doncaster borough since 2001.

5.9 In Section 3.5: Determining the Housing Market Area, the 2015 Study states that Doncaster is identified as being one of three stand-alone Housing Market Areas in South Yorkshire (alongside Barnsley and Rotherham/Sheffield HMAs). The Council regularly talks to its neighbouring authorities in the context of the Duty to Cooperate and through its role in the Sheffield City Region Combined Authority and there have been no suggestions from neighbouring authorities that the Doncaster housing market is considered to be anything other than self-contained. The Strategic Housing Land Availability Assessment (SHLAA) Stakeholder

\textsuperscript{42} ONS (via Nomis) jobs density

\textsuperscript{43} Housing Needs Assessments - Team Doncaster
Group (which includes members of the Home Builders Federation as well as neighbouring authorities) has also agreed that Doncaster operates as a self-contained housing market.

5.10 The Housing Needs Assessment (2015) goes on to say that with a “significant jobs growth target and a large number of major transformational job creation projects in the pipeline; it is likely that some of the current out-commuters will be enticed back to work within Doncaster. Jobs growth brings a higher demand (and therefore supply) for housing, which in turn reduces the commuting workforce. This therefore suggests a likely increase in the level of self-containment throughout the Local Plan period.”

c) Service Markets for Consumers

5.11 ‘Service Market Areas’ are a primary indicator of functional economic market areas; retail catchment areas act as a proxy for this indicator. The Doncaster Retail, Leisure and Town Centres Study (GVA, July 2015)\(^{44}\) says that Doncaster Town Centre is a centre of sub-regional importance and provides a prime focus for shopping, leisure, employment, education, health and cultural activities and facilities for residents within and beyond the borough”. Mexborough is the largest town centre in the borough after Doncaster, while Thorne provides a local focus for shopping, leisure and cultural activities commensurate with its role as a principal local town. This hierarchy is consistently recognised though planning policy documents since the Unitary Development Plan (1998).

5.12 The surveys undertaken as part of the Study showed that a high level of residents’ expenditure on comparison retail goods is spent in destinations within the borough (78%) which indicates that the range and quality of the borough’s comparison offer is currently meeting their needs. Although ‘leakage’ to other destinations outside of the borough is inevitable, it is relatively modest given Doncaster’s proximity to the Meadowhall shopping centre and Sheffield city centre, both of which are regional shopping destinations, as well as Parkgate Shopping Park.

d) Transport networks

5.13 Doncaster occupies a strategic position on the national transport network making it strategically significant at a national scale. Doncaster also has an extensive internal transport network that offers connectivity to all parts of the borough to facilitate access to jobs, services and facilities.

5.14 Doncaster is served by:

- **Road** – with the M18 and M180 to the east of the borough and the A1(M) to the west, both of which allow easy access to other national destinations, including links to both the M1 and M62;
- **Rail** – the East Coast Main Line puts Doncaster within two hours reach of central London, and Doncaster rail station provides a point of interchange with a range of local and regional rail services within South Yorkshire and beyond; in addition Doncaster Railport is an important freight interchange which plays a key role in the movement of goods in and out of Doncaster;
- **Air** – Doncaster Sheffield Airport is seven miles from the centre of Doncaster and quickly accessible via the Great Yorkshire Way. It serves 54 destinations and has a growing cargo operation;
- **Ports** – there are excellent links to the M1 and M62, international ports, particularly the Humber Ports (via the M180), are within easy reach of Doncaster. iPort also gives easy access to the ports such as Felixstowe; and

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\(^{44}\) Retail and Leisure Study - Doncaster Council
- **Canal** – the South Yorkshire Canal runs through the centre of the borough and the Stainforth-Keadby Canal passes close to the centre of Thorne and Stainforth.

5.15 Doncaster has excellent connectivity within the borough, to the wider Sheffield City Region and the national transport networks. This connectivity supports both the borough’s self-containment with the effective movement of people, goods and services and its economic prosperity via wider linkages.

**Conclusion**

5.16 The analysis of the Doncaster workforce and jobs shows a high level of self-containment – 76% of resident workers work in Doncaster and 79% of all jobs are taken by residents. These percentages are higher than the national threshold for classification as a distinct Travel to Work Area. Although the local economy can be classified as self-contained, it is also a major contributor to the wider Sheffield City Region economy. Doncaster is the second largest contributor in terms of Gross Value Added (GVA) and in recent years has closed the prosperity gap with the Region.

5.17 The Housing Market Needs Assessment concluded that Doncaster operates as a self-contained housing market. People who live in Doncaster are most likely to stay in Doncaster if they move house (over 70%). Doncaster is self-sufficient in its ‘service market for consumers’; Doncaster residents have access to health, education, cultural, retail and leisure facilities locally.

5.18 Doncaster’s transport network gives access to all parts of the borough for access to jobs, services and facilities. The major road and rail networks not only service the borough but also are nationally important giving north-south and east-west connectivity. The Airport is continuing to grow, covers over 50 destinations, and has an expanding cargo operation.

5.19 In considering the above indicators, Doncaster (the administrative area of Doncaster Council) can be defined as a standalone Functional Economic Market Area (FEMA) and it is reasonable that the Local Plan is prepared on this basis.

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45 Analysis of ONS GVA statistics and calculation of the relative prosperity gap with the SCR
6. Employment Land Requirement Calculation

The Land Use Requirement

6.1 The Employment Land Needs Assessment (ELNA 2015) set an employment land requirement of 474 hectares based on historic employment land take up rates over the previous 15 years (2000 – 2015).

6.2 The ELNA tested eight scenarios to meet the potential land requirement. The previous land take up rate scenario was selected as the preferred option.

6.3 This scenario looked at the actual amount of employment land that was developed and for what use in Doncaster between 2000 and 2015. The annual rate by use was calculated and those figures projected forward to provide a land requirement up to 2032 of 490 ha. This was reduced to 474 ha to take account of a forecast of a lower take up of office space in future.

6.4 Following uncertainty arising from 2017 planning appeals about the borough’s objectively assessed housing need, the Council committed to updating the evidence base to provide a more current assessment of both housing and employment forecasts for the borough. Therefore, in 2018, Doncaster Council commissioned Peter Brett Associates (PBA) to produce an independent economic jobs growth forecast for the period 2015 to 2032. This is in line with PINS procedural guidance and brings the evidence base up to date. The report was issued in June 2018.

6.5 A land requirement of 481 hectares is calculated based on the findings of the PBA Study. This includes a land requirement of 409 ha based on the forecast jobs growth 2015-2032 plus an additional amount of 72 ha to allow for the extension of the plan period by three years. The plan period is now 2015 – 2035.

6.6 This section explains how the figure of 481 ha is derived.

(N.B. The Colliers Employment Land Review report does not set the land requirement figure; it is the job of this ELNA to do so.)

Economic Forecasts and Housing Needs Assessment (Peter Brett Associates 2018)

6.7 Consultants Peter Brett Associates (PBA) produced an independent economic forecast for the period 2015 to 2032. The forecast uses two alternative economic futures, or scenarios:

(1) Standard Baseline Forecast. A business as usual scenario, based on a forecast jobs growth of 0.6% per annum in line with official Government forecasts (see PBA report para 2.10).

(2) A policy-led scenario, that assumes job growth of 1% per annum based on Sheffield City Region aspirations for economic growth.

6.8 Both scenarios use local economic forecasts produced by Experian.

6.9 The Baseline forecast (1) produced a net jobs change between 2015 and 2032 of 14,300 jobs (841/p.a.) across 38 employment sectors. This total jobs figure translates into a land requirement of 103 ha using the DMBC methodology as described in paragraph 6.13 onwards.

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46 Economic Forecasts and Housing Need Assessments - Doncaster Council
47 The revised Sheffield City Region targets have not been published at the time of writing but the Council accepts the risks of proceeding given its status
48 Experian produce independent economic forecasts for the UK Government: https://www.experian.co.uk/economics/economic-forecasts/index.html
6.10 The jobs led forecast (2) produced a net jobs change between 2015 and 2032 of 27,100 jobs (1,594 p.a. / +12,800 jobs above the baseline) across 38 employment sectors. This translates into a land requirement of 409 ha using the DMBC methodology (see paragraph 6.13 onwards). The ‘Jobs Led’ scenario is the one selected for the Local Plan. This approach is ambitious but realistic. It follows on from the significant economic growth in Doncaster of the previous 15 years and is in line with SCR growth aspirations.

6.11 Evidence of land take up and jobs growth for the period 2015 to 2018 suggests that Doncaster is on target to meet the 1% jobs growth per annum.

**Consultation**

6.12 The informal Local Plan consultation (2018) asked the question would a land use requirement based on historic trends (as per the ELNA 2015) be preferable to the 1% jobs growth per annum land requirement. Analysis of the consultation responses (which can be found on the Local Plan website) concluded that there was no support for the ‘historic trends’ option. Therefore, the land requirement of 481 ha (based on 1% growth p.a. as per PBA/Experian forecast) remains the option selected in the Local Plan.

**Calculating the Land Requirement**

6.13 There are three main stages in calculating the land requirement

1. Define the jobs change by sector for the period 2015 to 2032.

2. Convert the resulting job numbers into land use categories.

3. Convert the job numbers in those categories into a land requirement.

1. **Define the jobs change by sector for the period 2015 to 2032**

6.14 Table 8 below show data taken from Table 2.5 from the PBA report. This table details the jobs change by sector for the job-led scenario. The total (net) number of new jobs is 27,100 across 38 sectors.
Table 8: Forecast Jobs change by sector 2015 – 2032.

<table>
<thead>
<tr>
<th>Job sector</th>
<th>2015</th>
<th>2032</th>
<th>change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accomodation &amp; Food Services</td>
<td>6,900</td>
<td>8,900</td>
<td>2,000</td>
</tr>
<tr>
<td>Administrative &amp; Supportive Service Activities</td>
<td>11,800</td>
<td>14,100</td>
<td>2,300</td>
</tr>
<tr>
<td>Agriculture, Forestry &amp; Fishing</td>
<td>800</td>
<td>600</td>
<td>-200</td>
</tr>
<tr>
<td>Air &amp; Water Transport</td>
<td>200</td>
<td>300</td>
<td>100</td>
</tr>
<tr>
<td>Chemicals</td>
<td>100</td>
<td>100</td>
<td>0</td>
</tr>
<tr>
<td>Civil Engineering</td>
<td>2,400</td>
<td>3,700</td>
<td>1,300</td>
</tr>
<tr>
<td>Computer &amp; Electronic Products</td>
<td>1,100</td>
<td>1,100</td>
<td>0</td>
</tr>
<tr>
<td>Computing &amp; Information Services</td>
<td>600</td>
<td>700</td>
<td>100</td>
</tr>
<tr>
<td>Construction of Buildings</td>
<td>2,600</td>
<td>3,100</td>
<td>500</td>
</tr>
<tr>
<td>Education</td>
<td>12,100</td>
<td>14,000</td>
<td>1,900</td>
</tr>
<tr>
<td>Extraction &amp; Mining</td>
<td>600</td>
<td>500</td>
<td>-100</td>
</tr>
<tr>
<td>Finance</td>
<td>2,400</td>
<td>2,800</td>
<td>400</td>
</tr>
<tr>
<td>Food, Drink &amp; Tobacco</td>
<td>800</td>
<td>600</td>
<td>-200</td>
</tr>
<tr>
<td>Fuel Refining</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Health</td>
<td>14,400</td>
<td>16,900</td>
<td>2,500</td>
</tr>
<tr>
<td>Insurance &amp; Pensions</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Land Transport, Storage &amp; Post</td>
<td>10,700</td>
<td>17,400</td>
<td>6,700</td>
</tr>
<tr>
<td>Machinery &amp; Equipment</td>
<td>400</td>
<td>600</td>
<td>200</td>
</tr>
<tr>
<td>Media Activities</td>
<td>200</td>
<td>200</td>
<td>0</td>
</tr>
<tr>
<td>Metal Products</td>
<td>1,700</td>
<td>1,800</td>
<td>100</td>
</tr>
<tr>
<td>Other Manufacturing</td>
<td>2,200</td>
<td>2,200</td>
<td>0</td>
</tr>
<tr>
<td>Other Private Services</td>
<td>2,300</td>
<td>2,400</td>
<td>100</td>
</tr>
<tr>
<td>Pharmaceuticals</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Printing and Reproduction of Recorded Media</td>
<td>200</td>
<td>100</td>
<td>-100</td>
</tr>
<tr>
<td>Professional Services</td>
<td>5,600</td>
<td>6,800</td>
<td>1,200</td>
</tr>
<tr>
<td>Public Administration &amp; Defence</td>
<td>6,700</td>
<td>6,100</td>
<td>-600</td>
</tr>
<tr>
<td>Real Estate</td>
<td>900</td>
<td>1,200</td>
<td>300</td>
</tr>
<tr>
<td>Recreation</td>
<td>4,100</td>
<td>4,900</td>
<td>800</td>
</tr>
<tr>
<td>Residential Care &amp; Social Work</td>
<td>8,500</td>
<td>10,700</td>
<td>2,200</td>
</tr>
<tr>
<td>Retail</td>
<td>14,300</td>
<td>14,400</td>
<td>100</td>
</tr>
<tr>
<td>Rubber, Plastic and Other Non-Metallic Mineral Products</td>
<td>2,300</td>
<td>3,000</td>
<td>100</td>
</tr>
<tr>
<td>Specialised Construction Activities</td>
<td>5,100</td>
<td>6,400</td>
<td>1,300</td>
</tr>
<tr>
<td>Telecoms</td>
<td>700</td>
<td>700</td>
<td>0</td>
</tr>
<tr>
<td>Textiles &amp; Clothing</td>
<td>200</td>
<td>100</td>
<td>-100</td>
</tr>
<tr>
<td>Transport Equipment</td>
<td>600</td>
<td>1,200</td>
<td>600</td>
</tr>
<tr>
<td>Utilities</td>
<td>1,200</td>
<td>1,300</td>
<td>100</td>
</tr>
<tr>
<td>Wholesale</td>
<td>8,100</td>
<td>11,700</td>
<td>3,600</td>
</tr>
<tr>
<td>Wood &amp; Paper</td>
<td>300</td>
<td>200</td>
<td>-100</td>
</tr>
</tbody>
</table>

2. Convert the job numbers by sector into land use categories

6.15 The total number of new jobs created in each sector is distributed across ten land use sectors. A conversion matrix filters the job numbers into 10 land use categories from the final column of table 8 above.
6.16 Of the 27,100 new jobs, not all will require additional land. ‘B’ type uses (Offices, Industry, Storage and Distribution) require new land. Other sectors (non ‘B’ type uses e.g. Retail, Health, and Education) do not require additional land to be allocated, as the land related to these job sectors already exists. In many cases, 100% of the jobs types will fall within one land use sector, however on occasion some may fall into multiple ones (e.g. 85% of the jobs in ‘Land Transport Storage and Post’ go into land use sector ‘Storage and Distribution’ and 5% go into Offices.

6.17 The matrix (Table 9 below) filters the jobs from the 38 sectors into 10 land use categories: Primary / Utilities; Industry (B1 b/c, B2); Miscellaneous; Retail, Leisure and Catering; Storage and Distribution (B8 other); Storage and distribution (B8 shed); Offices (B1a); Other public services; Health and Education; and Construction.

Table 9: land use conversion matrix

<table>
<thead>
<tr>
<th>Primary / Utilities</th>
<th>Industry B1 b/c, B2</th>
<th>Misc / Other</th>
<th>Retail, leisure and catering</th>
<th>Storage, Distribution B8</th>
<th>Storage, Distribution B8 other</th>
<th>Offices B1a</th>
<th>Other Public Services</th>
<th>Health and Education</th>
<th>Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation &amp; Food Services</td>
<td>100%</td>
<td></td>
<td></td>
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<tr>
<td>Administrative &amp; Support Service Activities</td>
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<tr>
<td>Agriculture, Forestry &amp; Fishing</td>
<td>100%</td>
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<tr>
<td>All &amp; VSLV Transport</td>
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<tr>
<td>Chemicals</td>
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<tr>
<td>Computer &amp; Electronic Products</td>
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<td>Computing &amp; Information Services</td>
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<td>Construction &amp; Building</td>
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<td>Education</td>
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<tr>
<td>Extraction &amp; Mining</td>
<td>100%</td>
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<td>Finance</td>
<td>100%</td>
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<tr>
<td>Food Drink &amp; Tobacco</td>
<td>100%</td>
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<td>Fuel &amp; Power</td>
<td>100%</td>
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<tr>
<td>Health</td>
<td>100%</td>
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<tr>
<td>Insurance &amp; Pensions</td>
<td>100%</td>
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<tr>
<td>Land Transport, Storage &amp; Post</td>
<td>95%</td>
<td>5%</td>
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<tr>
<td>Machinery &amp; Equipment</td>
<td>100%</td>
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<tr>
<td>Media Activities</td>
<td>100%</td>
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<tr>
<td>Metal Products</td>
<td>100%</td>
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<tr>
<td>Other Manufacturing</td>
<td>100%</td>
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<td>Other Private Services</td>
<td>100%</td>
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<tr>
<td>Pharmaceuticals</td>
<td>100%</td>
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<td></td>
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</tr>
<tr>
<td>Printing and Reproduction of Recorded Media</td>
<td>80%</td>
<td>20%</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Professional Services</td>
<td>50%</td>
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<td></td>
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</tr>
<tr>
<td>Public Administration &amp; Defence</td>
<td>50%</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Real Estate</td>
<td>100%</td>
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<tr>
<td>Recreation</td>
<td>100%</td>
<td></td>
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<tr>
<td>Residential Care &amp; Social Work</td>
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<tr>
<td>Retail</td>
<td>100%</td>
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<td></td>
</tr>
<tr>
<td>Rubber, Plastic and Other Non-Metallic Mineral Products</td>
<td>100%</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Specialised Construction Activities</td>
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<td></td>
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<tr>
<td>Telecommunications</td>
<td>100%</td>
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<td>Textiles &amp; Clothing</td>
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<td>Wholesale</td>
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<td>Wood &amp; Paper</td>
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</tr>
</tbody>
</table>

6.18 Of the ten land use categories shown in the Table 9 above, the four highlighted (in blue) require additional land for development: development: Industry (B1b/c, B2); Storage and Distribution (B8 other); Storage and Distribution (B8 shed) and Offices (B1a).

6.19 Table 10 below shows the results of the land use conversion. 14,813 of the initial 27,100 jobs require land for development (those highlighted in blue in the table).
Convert the job numbers into a land requirement

6.20 The job numbers from employment sectors requiring land from Table 9 and 10 i.e. those highlighted in blue (industry; storage and distribution shed; storage and distribution other; and office) are translated into a land requirement using the following conversion (Table 11 and 12). The land requirement model is based on the same methodology as that developed for the 2009 Employment Land Review and subsequent revisions.

6.21 Table 11 shows which assumptions are made to covert the job projections provided by Peter Brett Associates into a locally based projection and Table 12 is more detailed.

Table 11: Jobs to Floorspace Local Conversion Methodology
Table 12: land requirement model

<table>
<thead>
<tr>
<th>Jobs led land requirement</th>
<th>Office Sector (B'16)</th>
<th>Business and industry sector (B16:C)</th>
<th>Non strategic warehousing (B6)</th>
<th>Strategic warehousing (B8)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Number of net jobs forecast 2015 to 2031</td>
<td>3,735</td>
<td>1,796</td>
<td>2,532</td>
</tr>
<tr>
<td>B</td>
<td>Job Density</td>
<td>Job density multiplier (m2/person)</td>
<td>16</td>
<td>60</td>
</tr>
<tr>
<td>C</td>
<td>Floor space required (m2) to accommodate net change in jobs (A x B)</td>
<td>67,230</td>
<td>167,760</td>
<td>126,600</td>
</tr>
<tr>
<td>D</td>
<td>Frictional or Churn</td>
<td>Frictional or 'Churn' requirement 16% of existing stock but 5% for strategic stock (m2)² - data is based 2015 VOA data.</td>
<td>24,900</td>
<td>117,686</td>
</tr>
<tr>
<td>E</td>
<td>Total floorspace (m2), (C + D)</td>
<td>92,130</td>
<td>225,456</td>
<td>131,594</td>
</tr>
<tr>
<td>F</td>
<td>Plot Ratio</td>
<td>Plot ratio (%)</td>
<td>0%</td>
<td>40%</td>
</tr>
<tr>
<td>G</td>
<td>Site area needed to accommodate floorspace m2 (E x F)</td>
<td>92,130</td>
<td>565,040</td>
<td>328,700</td>
</tr>
<tr>
<td>H</td>
<td>Hectares (G/10,000)</td>
<td>9,21</td>
<td>56.36</td>
<td>32.83</td>
</tr>
<tr>
<td>I</td>
<td>Other Uses</td>
<td>Percentage factor to allow for other uses on employment site (%)</td>
<td>0</td>
<td>25</td>
</tr>
<tr>
<td>J</td>
<td>Area required to allow for other uses on employment sites (ha), (H x I)</td>
<td>0.00</td>
<td>14.39</td>
<td>6.22</td>
</tr>
<tr>
<td>K</td>
<td>Total Hectares (H + J)</td>
<td>9.21</td>
<td>70.46</td>
<td>41.10</td>
</tr>
<tr>
<td>L</td>
<td>Choice</td>
<td>Choice factor as a % **</td>
<td>25</td>
<td>50</td>
</tr>
<tr>
<td>M</td>
<td>Area requirement for choice factor (ha), (K x L)</td>
<td>2.30</td>
<td>35.23</td>
<td>20.55</td>
</tr>
<tr>
<td>L</td>
<td>Total site area required (ha), (K + M)</td>
<td>12</td>
<td>105</td>
<td>62</td>
</tr>
<tr>
<td></td>
<td>Total Hectares required</td>
<td>115.63</td>
<td>409</td>
<td></td>
</tr>
</tbody>
</table>

6.22 The job numbers from the four land use sectors are entered into row A of the (above) calculation model. Then follows several further stages to reach a final land calculation of 409 hectares.

6.23 This calculation factors in the following:

- **Job density multiplier (B)**
  Standard Government job densities differ from the figures used in this analysis. A higher figure (i.e. greater floor space requirement per worker) is used in this model in response to the findings of local research conducted by DMBC Local Plans Team in 2015. The density research findings were verified by the 'Housing and Economic Land Availability Assessment (HELAA) Stakeholder Group'. The stakeholder group agreed that the local densities be applied to produce a more realistic figure.

- **Frictional or Churn requirement (D)**
  An additional percentage to allow for business re-location and based on the amount of existing 'stock'. A frictional or 'churn factor has been derived from Valuation Office data using 10% of existing stock. A reduced figure of 5% is set for warehousing given that the majority of investment will come from outside the borough rather from the re-location of existing businesses.

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50 Representatives from commercial developers, property agents, DMBC officers representing Local Plans team, Economic Development and Service Improvement
• **Plot ratio** (F)
  Standard average net developable area of a site. Based on local historic take up rate analysis, which are in line with national averages.

• **Other uses** (I)
  Additional percentage to allow for loss to other uses. Losses to other uses on allocated employment sites have become more prevalent in recent years due in part to the age of the Unitary Development Plan (UDP) and some existing and undeveloped sites being no longer suitable for employment use. The allocations process should result in sites that are attractive to new and existing businesses, therefore minimising the likelihood of employment land being lost in the future.

• **A Choice factor** (L)
  Additional percentage to include a reasonable level of flexibility allowing for a greater choice of sites. Choice factors range from 25% for B1a and strategic warehousing to 50% for B1b/c, B2 and non-strategic warehousing.

The illustration below (figure 19) summarises the process from job numbers to land use requirement.
### Figure 19: Land use requirement calculation process

1. **Conversion – job to land use categories**

<table>
<thead>
<tr>
<th>Job use change</th>
<th>Sector</th>
<th>Primary division</th>
<th>Industrial</th>
<th>Miscellaneous</th>
<th>Other services</th>
<th>Health and education</th>
<th>Conclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td>2/300</td>
<td>Admin. Services &amp; Support Services</td>
<td>Accommodation &amp; Food Services</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/300</td>
<td>Admin. Services &amp; Support Services</td>
<td>Agriculture, Forestry, Fishing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/300</td>
<td>Admin. Services &amp; Support Services</td>
<td>Construction</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/300</td>
<td>Admin. Services &amp; Support Services</td>
<td>Education</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/300</td>
<td>Admin. Services &amp; Support Services</td>
<td>Electricity &amp; Water Supply</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/300</td>
<td>Admin. Services &amp; Support Services</td>
<td>Finance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/300</td>
<td>Admin. Services &amp; Support Services</td>
<td>Health &amp; Social Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/300</td>
<td>Admin. Services &amp; Support Services</td>
<td>Real Estate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/300</td>
<td>Admin. Services &amp; Support Services</td>
<td>Transport &amp; Storage</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/300</td>
<td>Admin. Services &amp; Support Services</td>
<td>Wholesale, Retail Trade &amp; Repair</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. **Convert jobs to land use categories**

3. **Convert jobs to land requirement**

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51 A higher resolution version of this Figure is available on the website.
Peter Brett Associates Land Calculation

6.24 The Peter Brett Report does include a land requirement calculation (see PBA table 3.1) which totals 193 hectares. This is based on converting the forecast job numbers using only ‘Plot Ratio’ and ‘Job density multipliers’ (stages F and B in the DMBC calculation) to arrive at a total. PBA do recognise in Section 3: Employment Land of their report that consideration should be given to additional factors to allow for (i) other uses, (ii) churn or frictional vacancy, (iii) competition and choice. The additional factors are used in the Local Plan to produce a more realistic locally based land requirement calculation.

Extension of the Plan Period

6.25 The Peter Brett study forecasts the change in job numbers for the period 2015 to 2032. Based on those job number forecasts the land requirement is calculated to be 409 ha. Since this study, the Plan Period has been extended by 3 years to 2035 (in line with national guidance where strategic policies should look ahead over a minimum 15 year period from adoption\textsuperscript{52}). There is no jobs forecast available past 2032. An assumption has been made that that the land required for the additional 3 years (2032-2035) will be the same as the annualised calculated amount for the 2015-2032 period multiplied by three. Therefore, the land requirement is adjusted accordingly to 481 ha based upon the following calculation:

- Land requirement for 17 years (2015-2032) = 409 ha.
- Three additional years (pro-rata) = (409/17) X 3 = 72 ha.
- Revised land requirement (2015-2035) = (409 + 72) = 481 ha.

Calculating the Employment Land Requirement – Conclusion

6.26 An independent economic forecast for Doncaster for the new Local Plan period resulted in an employment land requirement figure of 481 hectares being set, using a specific Doncaster based methodology as set out from paragraph 6.13 onwards. The ‘Jobs Led’ scenario has been selected for the Local Plan which is considered ambitious but realistic. Evidence of land take up and jobs growth for the period 2015 to 2018 suggests that Doncaster is on target to meet the 1% jobs growth per annum.

6.27 The requirement figure comprises 409 ha based on forecast jobs growth up to 2032 (a 1% per annum rate) plus an additional 72 ha ‘pro-rata’ for the extension of the plan period to 2035 (i.e. three additional years).

6.28 This figure of 481 ha is used in the Local Plan to determine planning policy as well as the amount of allocated land required. The allocations will need to meet that requirement whilst taking the amount of extant planning permissions into account.

\textsuperscript{52} Paragraph 22 of the NPPF
7. Conclusion

7.1 In order to plan for economic development in the Doncaster Local Plan, it is important that the policies and allocations reflect the key messages and issues which come out of national and regional strategies, as well as what is already happening or is planned to happen locally. The Local Plan needs to assist in helping to improve connectivity by rail, road public transport in addition to addressing the skills gap.

7.2 Whilst it is accepted that warehousing/logistics has helped boost the economy over the last few years, there is now a recognition at the regional and local level that there is a need to diversify the economic offer in the borough such as ensuring that high value jobs are created in areas such as engineering, digital and creative, and advanced materials. This will require other employment uses being provided in the borough so the right sites need to be delivered at the right time as stated in national guidance.

7.3 Doncaster exhibits high levels of deprivation and is consistently ranked in the top 20% most deprived local authorities in the country. The unemployment rate has fallen consistently (in line with regional and national trends) from over 5% in 2012 to below 1% in 2018. There is however much interest in the borough for employment related development and Business Doncaster deal with a healthy amount of employment related enquiries each year (although that fell significantly in 2018 which may have been a reaction to uncertainty surrounding Brexit).

7.4 Recent developments and planned investment (e.g. Airport, Unity, Great Yorkshire Way, iPort) and market interest show it is reasonable to expect growth to be achievable in Doncaster and early indications show significant private sector job growth. Regarding demand, there are a number of key findings that are worth noting:

7.5 The ELNA demonstrates that Doncaster is a separate standalone functional economic market area when compared to surrounding boroughs and districts. It is therefore reasonable that the Local Plan is prepared on this basis. Doncaster has a high level of self-containment with 76% of resident workers working in Doncaster and with 79% of all jobs currently being taken by Doncaster residents. Doncaster is also a self-contained housing market with over 70% of people staying within the borough when they move house.

7.6 The overall conclusion of the ELNA is that there is a land requirement of 481 ha for employment land for the Local Plan period 2015 to 2035. This has been based on independent forecasting which has then been taken forward using a specific Doncaster based methodology. The figure is based on a job forecast growth of 1% in line with Sheffield City Region aspirations for economic growth.

7.7 The ELNA is one of the evidence base documents used to support and inform the Doncaster Local Plan. The figure of 481 ha is used to inform the evidence base behind the site allocations and this is set out in the Housing and Employment Site Selection Methodology & Results Report (which can be found on the Local Plan website). The figure of 481 ha is also used to inform employment policies in the Local Plan document.
Appendix 1: Key Transport Routes, Built Up Areas and Deprivation