



Public Document Pack

Uttlesford District Council

Interim Chief Executive: Rob Tinlin

Local Plan Leadership Group Remote Meeting

Date: Thursday, 29th July, 2021

Time: 7.00 pm

Venue: Zoom - <https://zoom.us/>

Chair: Councillor G Bagnall

Members: Councillors M Caton, R Freeman, P Lees, M Lemon, B Light,
S Merifield, R Pavitt (Vice-Chair), N Reeve, M Sutton and M Tayler

Public Participation

At the start of the meeting there will be an opportunity for up to 10 members of the public to ask questions and make statements subject to having given notice by 2pm the working day before the meeting. Each speaker will have 4 minutes to make their statement. Please write to committee@uttlesford.gov.uk to register your intention to speak with Democratic Services.

Public speakers will be offered the opportunity for an officer to read out their questions or statement at the meeting, or to attend the meeting over Zoom to readout their questions or statement themselves

Members of the public who would like to watch the meeting live can do so [here](#). The broadcast will be made available as soon as the meeting begins.

AGENDA

PART 1

Open to Public and Press

- 1 Apologies for Absence and Declarations of Interest**
To receive any apologies and declarations of interest.
- 2 Minutes of the Previous Meeting** 3 - 6
To consider the minutes of the previous meeting.
- 3 Local Plan Preliminary Outline Strategy** 7 - 13
To consider the Local Plan Preliminary Outline Strategy.
- 4 Employment Interim Report** 14 - 119
To note the current progress on the assessment of economic growth and employment needs that will inform the Local Plan.
- 5 Sustainable Density** 120 - 140
To consider the development of a policy in the emerging Local Plan to deliver sustainable levels of density.

For information about this meeting please contact Democratic Services

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Public Document Pack Agenda Item 2

LOCAL PLAN LEADERSHIP GROUP held at ZOOM - [HTTPS://ZOOM.US/](https://zoom.us/), on THURSDAY, 24 JUNE 2021 at 7.00 pm

Present: Councillor G Bagnall (Chair)
Councillors M Caton, R Freeman, P Lees, M Lemon, B Light,
S Merifield, R Pavitt (Vice-Chair), N Reeve and M Sutton

Guest (non-voting): Councillor J Evans

Officers in attendance: G Glenday (Assistant Director - Planning), S Miles (Local Plans and New Communities Manager), S Nicholas (New Communities Senior Planning Officer) and C Shanley-Grozavu (Democratic Services Officer)

Also Present: C Beattie (AECOM) and A Peattie (AECOM)

1 **APOLOGIES FOR ABSENCE AND DECLARATIONS OF INTEREST**

Apologies for absence were received by Councillor Tayler.

There were no declarations of interest.

2 **MINUTES OF THE PREVIOUS MEETING**

Councillor Caton queried the wording within Item 3 (Local Plan Strategic Objectives) around not encouraging volunteer shops as they did not create additional employment opportunities. Following discussion of the minute, the Chair requested that the wording be revised, to reflect that the Local Plan could not influence premises usage.

Councillor Light also said that she had mentioned the example of Debden village shop in the meeting, however Councillor Merifield said that this may not be a village shop anymore.

The minutes were approved, subject to the amended wording to reflect the content of the discussion in Item 3.

3 **LOCAL PLAN HOUSING NUMBERS**

The Local Plans and New Communities Manager presented a report on the draft housing requirement for the new Local Plan.

In response to questions from members, officers clarified the following:

- Wages of employees in the district impact the affordability uplift; this is a policy decision of government. Whilst officers did not know the specific impact of Stansted Airport, they said that if they generally offer lower wages, then this would affect the affordability uplift.

- The housing supply includes a buffer which will all be allocated onto deliverable sites. If they all come forward, the Council will over deliver on their requirement.
- Officers monitor Planning Permission annually and these statistics will be included within the five-year land supply statement.
- Where a local authority fails their housing delivery test, they are asked to create an action plan to address it. Currently, the Council contacts agents when they have not used their planning permission.
- The high number of self-employed residents in Uttlesford is considered a statistical anomaly and could be capable of demonstrating exceptional circumstances. However, it is difficult to collect reliable data of self-employed earnings to include in the calculations and so there is not sufficient evidence to justify exceptional circumstances.
- The 2014-based household forecasts that have been used to determine the minimum annual housing need figure of 706 dwellings per annum, as per the government guidance, however the affordability ratio is updated annually.
- There are permitted development rights to convert sites, such as office blocks, into residential spaces, although Uttlesford lack many of these site in the district.
- Further work will be conducted around employment in the district which will involve the Economic Development team and the employment consultants.
- It is not currently known how Covid-19 will be impacting the number of people moving into the area, from urban areas such as London.
- Care home places are included within the housing numbers.
- The housing number can also be influenced by supply side reasons, e.g. if the evidence suggests that supplies such as water cannot meet the demand. This evidence is underway.
- If the group did not recommend the numbers to Cabinet, then officers would have to return with another suggestion and planning justification. It was important for officers to have a target at this point in the process which they can then refer to when assessing to Calls for Sites submissions.

AGREED: To recommend to Cabinet the draft housing requirement for the new Local Plan and planning for 706 dwellings per annum.

It was noted that Councillor Light voted against the recommendation as the numbers were based on old statistics and are worse than last time.

4 **EVIDENCE BASE UPDATE**

The Local Plans and New Communities Manager presented an update on the current progress on eighteen separate studies that will inform the preparation of the new Local Plan.

In response to a question from Councillor Reeve, the Local Plans and New Communities Manager clarified that officers were developing the new Local Plan, using the existing national planning framework, but were conscious of the government's upcoming planning bill. An example of this was in undertaking their

work around heritage evidence whereby they were looking at the sustainable settlements in the district, alongside the Call for Sites submissions, whilst also considering potential new government thinking around protect, growth and renewal.

The Group noted the report.

5 **SUSTAINABILITY APPRAISAL UPDATE**

The New Communities Senior Planning Officer and representatives from AECOM presented an update on progress on the Sustainability Appraisal process.

It was confirmed that the Sustainability Appraisal would inform a range of documents including the Environmental Statement and Development Consent Orders. Emerging finding would be brought to future meetings of the Local Plan Leadership group for discussion, before they go out for consultation.

Members highlighted inconsistency in the names of some areas within the draft Sustainability Appraisal Scoping Report, as well as further points for clarification including the M11 constraints and the green space in Hatfield Heath. The Chair requested that members contact the New Communities Senior Planning Officer if they have any further points of clarity.

The Group noted the report.

6 **WINDFALL ALLOWANCE**

The New Communities Senior Planning Officer presented a report on the methodology and evidence for an allowance for windfall sites to contribute to the overall housing supply.

In response to questions, officers confirmed that there was evidence to justify including a windfall allowance of 114 dwellings per annum in the overall housing supply as well as the housing trajectory and 5-year supply. Officers explained that in calculating an annual average, it was worth noting that the average number of dwellings permitted and built on windfall sites can vary depending on several factors, including whether rural exception sites are included in the data and the age of a Local Plan where allocated sites are more likely to have been built on.

It was noted that Windfall sites are not allocated, but should the Council seek to encourage more, then they could look to adopt a policy framework which is more permissive to smaller sites.

AGREED: To approve the Windfall Allowance paper as evidence to support the preparation of the Local Plan

UPDATE ON DUTY TO COOPERATE MEETINGS

The New Communities Senior Planning Officer presented an update on the how the Council is working with its Duty to Cooperate Partners in preparing the Local Plan.

Officers clarified that, despite East Herts District Council not featuring in the report, the Council were still regularly engaging with them through a Cooperative Sustainability Development Group, along with Harlow and Epping Councils.

The Group noted the report.

The meeting ended at 20:47

Committee:	Local Plan Leadership Group	Date:	Thursday, 29 July 2021
Title:	Local Plan Preliminary Outline Strategy		
Portfolio Holder:	Councillor J Evans, Portfolio Holder for Planning and the Local Plan		
Report Author:	Stephen Miles, Local Plans and New Communities Manager smiles@uttlesford.gov.uk	Key decision:	N

Summary

1. The Council is preparing a new Local Plan, one of the early tasks is to agree a Preliminary Outline Strategy (POST).

Recommendations

2. That LPLG recommends to Cabinet the POST and that Cabinet agrees the POST so as to inform work on the emerging Local Plan.

Financial Implications

3. The approved budget for the Local Plan in 2021-22 includes sufficient provision for the work needed through to the end of March.

Background Papers

4. The following papers were referred to by the author in the preparation of this report and are available for inspection from the author of the report.
 - 'Settlement Facilities 2020
 - [TRACC mapping](#)

Impact

- 5.

Communication/Consultation	This work has been informed by the first consultation on the Local Plan and will be subject to further consultation as the plan progresses
Community Safety	N/a
Equalities	Forthcoming policies will be subject to an Equalities and Healthy Impact Assessment

	(EqHIA)
Health and Safety	N/a
Human Rights/Legal Implications	Preparation of a local plan is a statutory duty. It needs to meet legal tests and comply with regulations.
Sustainability	Forthcoming policies will need to meet the sustainability objectives of the Council and the Local Plan will be subject to a Sustainability Appraisal.
Ward-specific impacts	All
Workforce/Workplace	N/a.

Situation

6. In order to ensure the emerging Local Plan is 'strategy-led' it is important for the Council to look at and decide upon the issues that will determine the Local Plan strategy. The draft vision and objectives and draft housing requirement already considered by the group have informed these considerations alongside national and local policy, the corporate strategy, the first consultation on the Local Plan and emerging evidence.
7. Below are existing spatial considerations for the emerging Local Plan, these are drawn together at paragraphs 8 and 9 below.

Preliminary Outline Strategy: considerations to inform the Uttlesford Local Plan

- a. The Local Plan should positively seek to meet the development needs of the area with a buffer to be flexible.
- b. Addressing climate change and zero carbon should be a key thread running through the Local Plan – spatially, this means (1) planning for development in accessible locations where there are or will be services and facilities so as to enable less car use; (2) planning to reduce the need to travel and provide genuine choices other than the car for some trips, in a rural district public transport is challenging to deliver, and this may mean planning for increased opportunities for walking and cycling; (3) any new settlements should set ambitious goals of reduced car use – starting with at least 50% of trips originating or finishing in the settlement made by modes other than the car (4) in rural areas, enabling a scale of development to support local services and facilities, planning for active modes, and supporting 'local employment hubs'.

- c. The TCPA principles¹ should apply to all new developments in the district, in a way that is proportionate to the size of the development – spatially this means (1) closely linking homes to local jobs, shops and other facilities in 15 minute walkable neighbourhoods; and (2) planning for integrated and accessible transport choices other than the car.
- d. Development should preserve or enhance heritage assets, valued landscapes, sites of biodiversity importance and green spaces – for Uttlesford this includes the considerable number of listed buildings, conservation areas and other heritage assets, Hatfield Forest and other ancient woodlands and sites of ecological importance and the landscape comprised of river valleys, including chalk streams, farmland plateaux and chalk uplands.
- e. Any new settlements or other large development should be well located to existing and proposed infrastructure and facilities, so as to be as self-sufficient as possible, and if not available in the settlement is provided for nearby.
- f. The Local Plan should plan to address existing infrastructure deficits and ensure the delivery of new infrastructure at the when it is needed.
- g. Homes and jobs should be planned in a way that is well connected so as to reduce the need for commuting – this means more homes should be planned for closer to the larger settlements within and outside the district where there are more job opportunities or better transport links than elsewhere in the district.
- h. The Local Plan should support working in more flexible ways and support innovation – for example this might mean more flexible use of village shops for other uses and support for rural employment hubs.
- i. Smaller villages without capacity of large-scale growth, should see only limited development commensurate with their size and so as to support local services and facilities.
- j. Employment growth should build on key sectors and strengths, e.g. the visitor economy, the rural economy, life sciences, research and innovation, aviation and related activities, construction and IT.
- k. Employment growth should support ‘opportunity sectors’, e.g. advanced manufacturing, Life Sciences and Healthcare – associated with Chesterford Research Park; Advanced Manufacturing and Logistics – associated with Stansted Airport; and Low Carbon and Renewables.
- l. Larger developments should include a mix of uses to reduce the need to travel and to minimise the number and length of journeys.

- ¹ <https://www.tcpa.org.uk/garden-city-principles>

- m. Development on brownfield sites should be prioritised – although there are limited brownfield sites in the district, and there will be a need for development on greenfield sites.
 - n. Allocations in the Local Plan must have a realistic prospect of being delivered. Any larger new developments should be part of a phased programme of delivery and have a proportion of development be deliverable within the plan period.
 - o. The Local Plan should avoid altering Green Belt boundaries unless exceptional circumstances justify it.
 - p. Development should be avoided where is a risk of, or will be susceptible to, flooding.
 - q. Incremental growth over the last 10-15 years has resulted in many of the better sites being developed already – this loss of ‘better’ sites and limited brownfield sites means it is likely that new settlements will need to form part of the strategy.
 - r. The Local Plan should plan for a good supply of small and medium sized sites to play a greater role in order to maintain a consistent and flexible housing supply. Any larger developments, including new settlements should have a reduced role when compared with the previous Local Plan.
 - s. Larger development should be supported by high quality infrastructure, and maximise the potential of mass rapid transport and public transport alongside walking and cycling routes.
8. Drawing these points together, it is apparent that the spatial strategy should support sustainable development (including economic growth) concentrated on existing town centres, larger villages and in the vicinity of Stansted Airport and Chesterford Research Park. Any new settlements should also seek opportunities to maximise links to existing infrastructure (including sustainable transport infrastructure), these opportunities are best realised in proximity to transport hubs and networks that would best be able to handle large numbers of trips –the West Anglia Line railway, Stansted Airport, M11 A120, and to a lesser extent the B1383 and B1256. These areas are better provided for by existing infrastructure than more rural parts of the district, and will provide better opportunities for new and existing residents to choose modes of transport other than the car for some of their trips. In a rural district, this will assist in reducing carbon emissions and planning for development in a sustainable manner. In more sustainable areas, plans should also promote the 15 minute walkable neighbourhood concept, whereby as residents are able to meet most of their needs within a 15 minute walk or cycle of their home.
9. Elsewhere in more rural areas, limited development should support existing services and facilities, promote active travel and rural employment opportunities. This could use concepts such as the ‘Velo Villages’ or Cycle Villages’ concept², whereby a cluster of villages ‘share’ their services, and are linked by high quality cycling infrastructure which connects to rail stations and

▪ ² Also known as the Velo City concept

high frequency bus services. Shops, community facilities and employment uses in rural areas should be supported by flexible policies that support innovation in local businesses.

Risk Analysis

10.

Risk	Likelihood	Impact	Mitigating actions
That the POST is not approved in a timely manner impacting on the ability of the Council to keep to the timetable for the Local Plan in the LDS	2 – the timetable is tight	3 – any delay in the Local Plan timetable extends the period of time that the district is vulnerable to speculative development	The member workshop on 22 July allows for an opportunity to discuss the POST

1 = Little or no risk or impact

2 = Some risk or impact – action may be necessary.

3 = Significant risk or impact – action required

4 = Near certainty of risk occurring, catastrophic effect or failure of project.

Parish / village	2011 resident population *	2017 Population estimate **	2011 number of dwellings (all types) *	Dwellings built 2011 - 2020 (net)***	Estimated no of dwellings April 2020 (column D+E)	Primary schools	Secondary schools	Doctors surgeries	Dentists (NHS/Private)	Food shops	Post offices (0.5 =Part Time)	Pharmacies	Pubs (open / Closed)	Public Halls	Children's play areas	MUGA / skatepark / BMX tracks	Sports Pitch(s) with Community Use (excl school sites)	Indoor sports halls	Allotments	Bus score based on frequency 0= no service 0.5= intermittent 1= 2 hourly 2=hourly or better	Railway stations
Saffron Walden	15,504	17,050	6,764	1070	7,834	4	1	2	6	9	2	2	8	3	5	2	4	3	5	2	
Great Dunmow	8,830	9,636	3,961	840	4,801	2	1	2	4	3	1	2	7	2	4	1	3	2	2	2	
Stansted Mountfitchet	6,011	6,459	2,624	354	2,978	3	1	1	3	2	1	2	7	4	5	2	1	1	3	2	1
Takeley	3,367	5,212	1,397	590	1,987	2			2	2	1	1	3	3	1	1	3	1		2	
Elsenham	2,446	2,620	980	506	1,486	1		1		1	1		1	1	1		2		1	1	1
Thaxted	2,845	3,325	1,245	238	1,483	1		1	1	2	1	1	5	2	1		2		2	0.5	
Newport	2,352	2,371	974	339	1,313	1	1	1		1		1	2	1	2		1	1	1	2	1
Felsted	3,051	3,112	1,122	110	1,232	1		1		1	1		2	2	4	1	1	1	1	2	
Birchanger	1,589	2,632	632	308	940	1				1			1	1	1		1		1	2	
Flitch Green	2,190	2,457	751	132	883	1				1				1	1		1	1		2	
Hatfield Heath	1,930	2,077	747	47	794	1		1		1	0.5		2	1	1		2		2	2	
Great Chesterford	1,494	1,543	627	151	778	1		2		1			3	1	2	1	1			2	1
Little Hallingbury	1,582	1,669	585	33	618	1					0.5		1	1			1			2	
Stebbing	1,300	1,363	551	52	603	1				1			1	2	3		2		1	2	
Clavering	1,238	1,356	511	57	568	1				1	1		2	1	1		1		1	0	
Henham	1,233	1,313	486	73	559	1				1	0.5		1	1					1	1	
Hatfield Broad Oak	1,276	1,268	531	16	547	1		1		1	1		2	1	1		1		1	1	
Wimbish	1,629	1,705	505	39	544	1							1	1	1		2			0.5	
Little Canfield	935	1,304	385	143	528								1	1	4				1	2	
Great Easton	1,035	1,128	405	46	451	1							3	1	2		1			0.5	
Ashdon	893	920	373	10	383	1					0.5		1	1	2		2		1	0.5	
Barnston	947	917	373	9	382								1	1	2		1			2	
Littlebury	869	862	346	14	360								1	1	2		1			2	
Debden	778	882	324	16	340	1				1	0.5		1	1	1		1		1	1	
Great Hallingbury	713	735	279	13	292									1			1			0	
Manuden	677	684	265	26	291	1							1	1	1	1	1	1	2	0.5	
High Easter	754	756	280	10	290						0.5		1	1	1		2		1	0.5	
Quendon and Rickling	587	610	249	40	289	1							1	1			2		1	2	
Radwinter	612	607	243	41	284	1					0.5		1	1	1		1			0.5	
Elmdon	610	633	269	11	280									2			1			0	
Leaden Roding	616	691	269	5	274	1				1				1						2	
Great Sampford	586	618	232	5	237	1								1	1	1	1			0	
Chrishall	555	582	224	12	236	1							1	1	1		1			0.5	
High Roding	478	511	191	40	231								1	1	1		1		1	0.5	
Broxted	508	535	208	18	226								1	1						2	
Sewards End	511	527	186	23	209									1	1		1			0.5	
Widdington	504	473	193	12	205						0.5		1	1	1				1	2	
Wendens Ambo	473	459	180	22	202					1			2	1	1		1			2	1
Little Easton	437	415	187	2	189								1	1	1		2			0.5	
Berden	465	478	183	6	189									1	1					0.5	
Farnham	410	417	181	6	187	1							1	1	1		1			0	
Hempstead	451	423	176	8	184								1	1	1					0.5	
Ugley	449	448	169	7	176									1						2	
Great Canfield	414	456	164	9	173									1			1			0	

Agenda Item 4

Committee: Local Plan Leadership Group

Date:

Title: Employment Needs, Economic Development and Growth

Tuesday, 27 July 2021

Report Author: Joanna Hill, Planning Policy Officer
jhill@uttlesford.gov.uk

Summary

1. This report sets out current progress on the assessment of economic growth and employment needs that will inform the Local Plan.

Recommendations

2. To note progress on the employment evidence base summarised in this report.

Financial Implications

3. The approved budget for the Local Plan in 2021-22 includes sufficient provision for the work needed through to the end of March 2022.

Background Papers

4. The following assessment of the *local economy of Uttlesford* interim working papers are appended:
 - Overview Paper (8 July 2021)
 - Working Paper A: Literature Review (draft July 2021)
 - Working Paper B: Socio-Economic Baseline (draft July 2021)
 - Working Paper C: Insights from employment projections by Cambridge Econometrics (draft July 2021)
 - Commercial Property Market Dynamics Paper (July 2021)

Impact

- 5.

Communication/Consultation	N/a
Community Safety	N/a
Equalities	Forthcoming policies will be subject to an Equalities and Healthy Impact Assessment (EqHIA).
Health and Safety	N/a

Human Rights/Legal Implications	Preparation of a local plan is a statutory duty. It needs to meet legal tests and comply with regulations.
Sustainability	Forthcoming policies will need to meet the sustainability objectives of the Council and the Local Plan will be subject to a Sustainability Appraisal.
Ward-specific impacts	All
Workforce/Workplace	N/a

Situation

6. Consultants Icen, in collaboration with SQW, were appointed in May 2021 to prepare evidence on economic growth assessment and employment needs to inform the Local Plan.
7. The timing of the work is outlined below:

<i>Topline input into strategic context work (initial findings from key objectives 1-3)</i>	<i>5th July 2021</i>
<i>Initial report to inform preferred options Local Plan</i>	<i>1st October 2021</i>
<i>Detailed work to inform Reg 19 Submission Plan</i>	<i>Autumn 2022</i>
<i>Contribution to Local Plan examination of Reg 19 Submission Plan and modifications, as required</i>	<i>Autumn 2023-Spring 2024</i>

8. The economic development work will examine the different strands of the local economy including:
 - The Stansted hub – airport, travel, and logistics
 - Life sciences, research & innovation sector – focused around Chesterford Research Park
 - The rural and visitor economy – identifying the needs of primarily smaller businesses (76% of businesses in Uttlesford have less than 4 employees and 69% of businesses have a turnover of less than £250,000)
 - The green economy, including for example: new methods of construction, renewable energy, electric charging points, retrofitting property to meet new standards etc

9. The interim reports (July 2021) will be informed by further work including a Business Survey particularly focusing on understand the needs of small business enterprises and the rural economy.

10. The Overview Paper includes initial findings regarding:

- Overall employment growth
- Sectoral dimensions
- Spatial dimensions
- Stansted airport
- Commercial market dynamics
- Opportunities and threats

11. Regarding opportunities and threats the following key points are made:

- There is currently very limited employment space available; a very low vacancy rate and almost no development potential on existing sites (with the exception of Chesterford Research Park). The industrial market is particularly tight, with a need to improve the supply position. For office space, the market is evidently flatter and viability challenging and there are schemes which have been part delivered or have not come forwards
- The effects from the pandemic and consequences of UK departure from the EU are important contextual factors and are both reflected in the Cambridge Econometrics projections
- Aviation is a potentially important growth driver but there are some uncertainties about the pace of its recovery
- The logistics sector is projected to grow and demand for logistics-related activities is likely to be high. The Council will need to take a view on appropriate provision, recognising the double-edged nature of the sector's growth
- With regard to the research and innovation agenda, there are opportunities and threats, however, prospects in relation to life sciences should continue to be strong:

Opportunities:

- spur for additional investment and growth in the quest for vaccines and therapeutics during the pandemic
- relocation of Public Health England to Harlow
- establishment in Braintree of the Cell and Gene Therapy Manufacturing Catapult's Manufacturing Innovation Centre

Threats:

- whilst the Oxford-Cambridge Arc continues to be a national priority, the implications for resourcing seem increasingly uncertain
- insofar as research investment is funded by the public sector – there may well be increasing pressure to direct available resources out of the Golden Triangle in response to wider 'levelling up' imperatives

- Although Uttlesford is within the ‘digital innovation zone’, CE’s analysis suggests that the IT sector is underrepresented in Uttlesford currently
- The construction sector is set to see rapid future growth, this relates in part to projected population growth within Uttlesford, but also more broadly across Essex, Cambridgeshire and Hertfordshire
- More could be done to support micro-business in Uttlesford, reflecting the reasonably well qualified working population, in higher order occupations and likely post-pandemic impact of working from home, including:
 - a strategy for enterprise – including appropriate incubator/innovation centre provision
 - consideration ought to be given to appropriate grow-on space
- Of the three main towns, Saffron Walden is the most vibrant and best connected. Great Dunmow and Thaxted are smaller and less well connected. The economic role of all three towns will need consideration going forward
- Issues around a growing, ageing population ought to be considered carefully. How this growth is distributed within the District and phased over time will have economic implications

12. The *Essex Sector Development Strategy Missing Middle* will be published on 23 July 2021. Our consultants working on employment needs and economic development will be informed of the work once published.

Risk Analysis

13.

Risk	Likelihood	Impact	Mitigating actions
that the employment evidence is not ready on time to inform the reg 18 Local Plan	1	a potential delay to the timetable for the Local Plan production	the consultants have a well-managed project plan
that the uncertainty around the pandemic impacts on the quality of the evidence	2	this will impact the ability of the Local Plan to implement the right policies	up to date forecasts are being used to inform the evidence, if necessary an early review of the plan can update policies

1 = Little or no risk or impact

2 = Some risk or impact – action may be necessary.

3 = Significant risk or impact – action required

4 = Near certainty of risk occurring, catastrophic effect or failure of project.



Uttlesford Employment Needs & Employment Land Assessment

Initial Analysis – Overview Paper

July 2021

Iceni Projects

London: Da Vinci House, 44 Saffron Hill, London, EC1N 8FH

Edinburgh: 11 Alva Street, Edinburgh, EH2 4PH

Glasgow: 177 West George Street, Glasgow, G2 2LB

Manchester: This is the Space, 68 Quay Street, Manchester, M3 3EJ

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1. INTRODUCTION

1.1 Uttlesford District Council has just started to develop a new Local Plan. The new Local Plan will be a comprehensive Development Plan Document (DPD), containing both strategic and non-strategic policies for development over at least the next 15 years. To inform the development of the Plan, Icení and SQW were commissioned to undertake an employment needs and economic growth assessment.

1.2 This Overview Report reflects on early evidence gathering (noting that it will need to be developed as the study progresses). It is underpinned by four Working Papers:

- Working Paper 1 provides a review of key literature, structured by the main themes identified in our brief from Uttlesford District Council
- Working Paper 2 presents a socio-economic baseline, drawing on a range of socio-economic datasets from ONS
- Working Paper 3 summarises a set of employment projections prepared for this study by Cambridge Econometrics.
- Working Paper 4 presents Icení's analysis of commercial property market dynamics, addressing the office and industrial markets.

1.3 It is important to note that most of the evidence and data reported in the first two working papers predates the pandemic. The projections considered in Working Paper 3 are based on Cambridge Econometrics' forecasts from March 2021 and they do therefore take account of the pandemic and of the UK's departure from the EU.

1.4 This Overview Report seeks to bring together the initial analysis in the four working papers and set out initial key findings arising from it. It has been prepared to inform the preparation of the Local Plan Issues and Options consultation document.

1.5 The Overview Report has been drafted by Icení and SQW.

2. OVERVIEW OF UTTLESFORD

- 2.1 Uttlesford is a district in north-west Essex. In 2019, it had a total population of 91,000 people¹. According to ONS sources, the total number of jobs in the district was 56,000 in 2019² and the total number of enterprises was 5,475³.
- 2.2 Within Uttlesford, the largest settlements are Saffron Walden (population approximately 15,500), Great Dunmow (8,800), and Stansted Mountfitchet (6,400)⁴. Collectively these settlements accommodate 30,700 – around a third of the District's population – with two-thirds living in rural areas.
- 2.3 South Cambridgeshire and Cambridge lie to the north of Uttlesford, whilst the Essex Districts (and towns) of Braintree and Chelmsford lie to the east and south east, and the East Hertfordshire town of Bishop's Stortford lies to the west (Figure 2.1).
- 2.4 The district is home to London Stansted Airport – the UK's fourth busiest airport by total passenger traffic in 2019⁵ - and aided by its location between London and Cambridge is well served by major road and rail links. The M11 motorway runs north-south through the district with junctions at Stansted Airport (junction 8) and Stump Cross near Saffron Walden (junction 9), whilst the A120 runs east-west between Bishop's Stortford and Braintree via Great Dunmow. This connects Uttlesford to Colchester, Harwich and Hertford. These major transport corridors influence the geography of demand for employment space.
- 2.5 The West Anglia Main Line also runs north-south through the district with stations at six locations (Stansted Mountfitchet, Stansted Airport, Elsenham, Newport, Audley End and Greater Chesterford). From all stations there are frequent services to Cambridge operated by Greater Anglia. Greater Anglia also runs services from Stansted Airport (and on occasion Stansted Mountfitchet) to London Liverpool Street, under the branding of the Stansted Express. These services run every half hour with a journey time of approximately 50 minutes.

¹ ONS Mid-Year Population Estimates, 2019

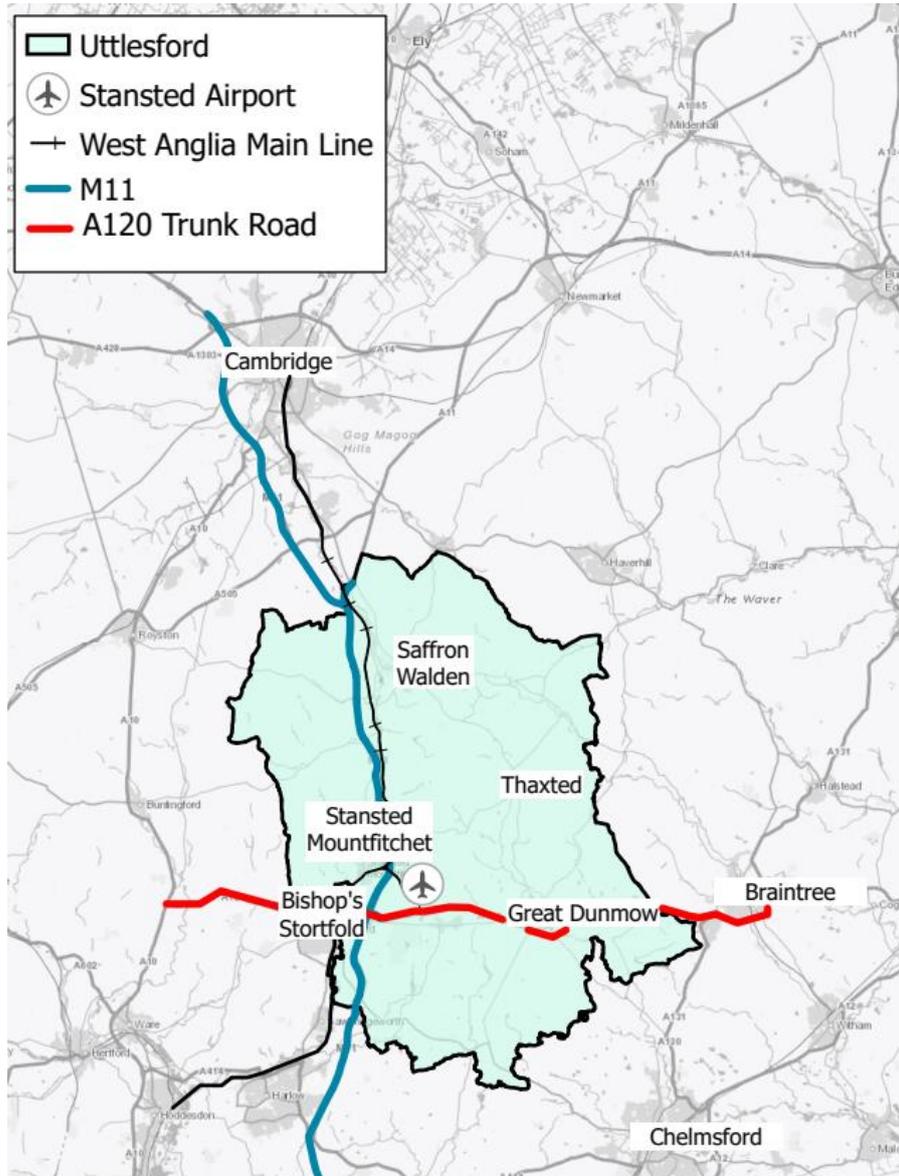
² ONS Jobs Density, 2019

³ UK Business Counts, 2020

⁴ Essex Highways (2018) *Uttlesford District Cycling Action Plan*

⁵ UK Civil Aviation Authority (CAA) Airport Data 2019 - <https://www.caa.co.uk/Data-and-analysis/UK-aviation-market/Airports/Datasets/UK-Airport-data/Airport-data-2019/>

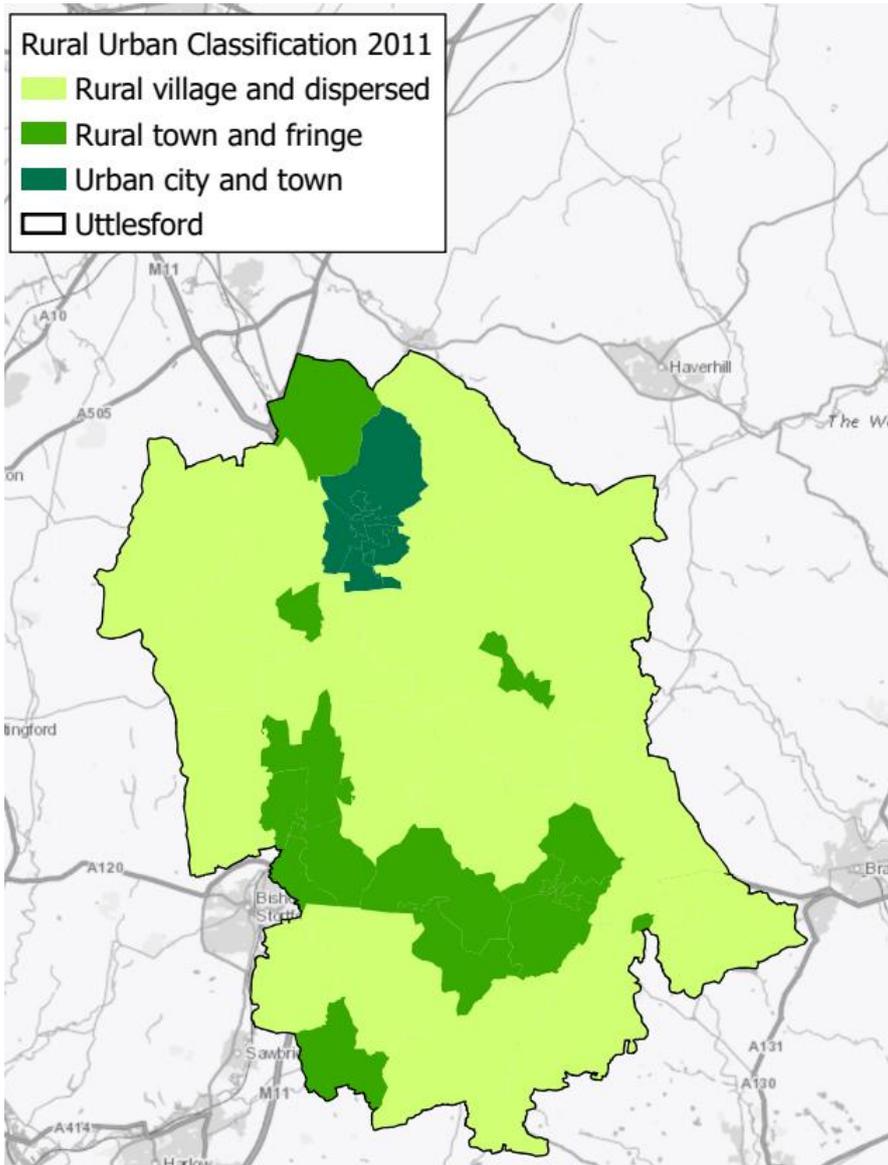
Figure 2.1: Map of the Major Settlements and Transport Links in and around Uttlesford



Source: Produced by SQW 2021. Licence 100030994

2.6 As shown in Figure, Uttlesford is predominantly rural; most of its territory is defined as either 'Rural village and dispersed' or 'Rural town and fringe' under the 2011 Rural / Urban Classifications. The only Lower Layer Super Output Areas (LSOAs) classified as 'Urban city and town' are situated in the north of the district clustered around Saffron Walden. As set out above, two-thirds of the District's population lives in the rural areas/settlements.

Figure 2.2: Rural Urban Classification 2011 – Uttlesford



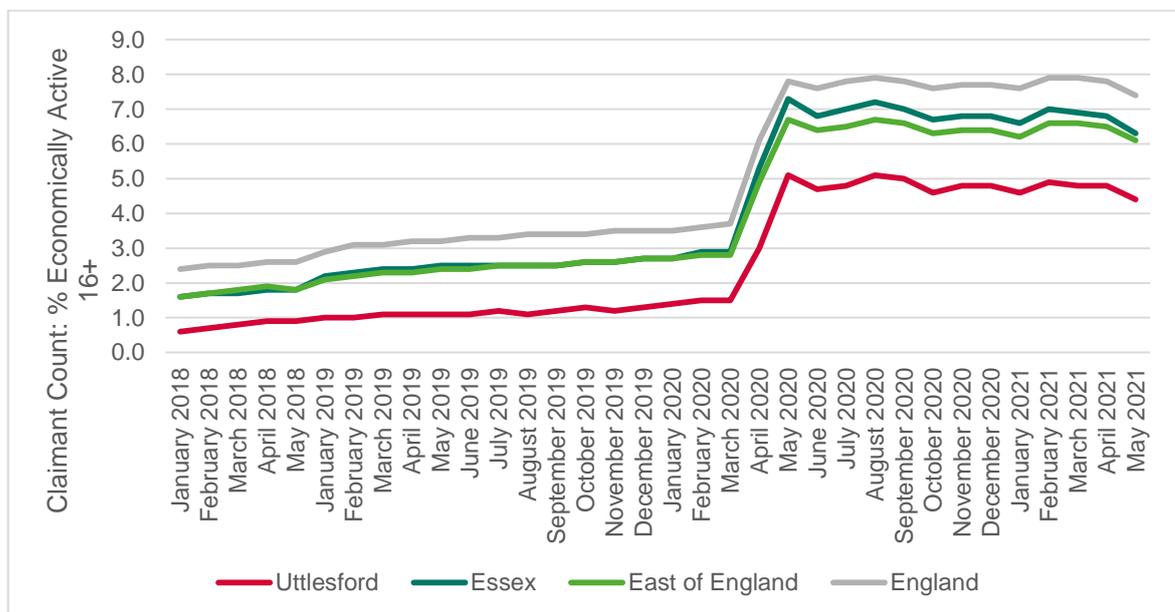
Source: 2011 Rural / Urban Classification, ONS. Produced by SQW 2021. Licence 100030994

3. KEY FINDINGS FROM INITIAL RESEARCH

Overall Employment Growth

- 3.1 The evidence reviewed through the working papers suggests that **Uttlesford has seen relatively rapid employment growth in recent years**. It has outperformed surrounding areas in comparative terms.
- 3.2 2019 is the last year for which historic data are available. ONS' Jobs Density dataset suggests that there were 56,000 jobs in Uttlesford. CE's estimate for 2019 is slightly lower – at 53,800. There is no single data source for employment, with Cambridge Econometrics modelling 53,800 jobs in 2019. The difference between the data sources, noting the former is modelled to the nearest 1,000 is modest. For consistency with other elements of the assessment, the core figure used should be 54,000 jobs.
- 3.3 Clearly the Covid-19 pandemic has affected the local economy. Unemployment rose sharply in Spring 2020, but the claimant count in Uttlesford – which stood at 4.4% in May 2021 – remains below regional and national averages.

Figure 3.1: Trend in Unemployment Claimants, 2018-21



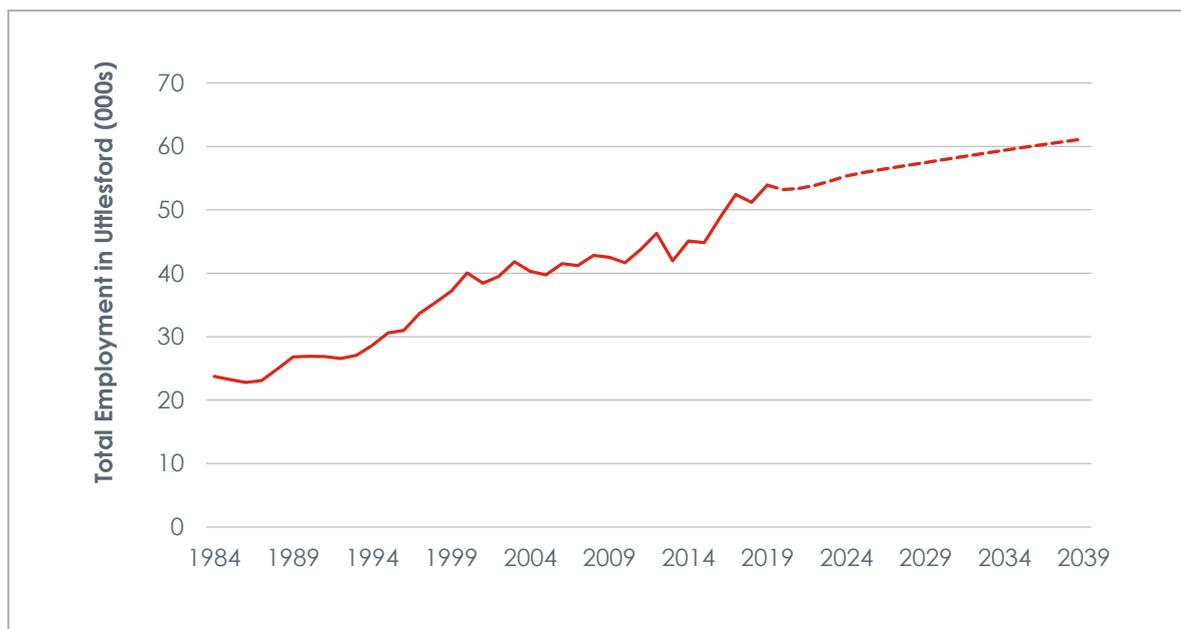
Source: NOMIS

- 3.4 HMRC provisional data indicates that as at 31st May 2021, there were 3,900 employments furloughed in Uttlesford representing a rate of 10% of roles. This is slightly above the Essex, regional and national averages of 8%, but not as high as might be expected given that aviation is one of the sectors which has been relatively strongly affected by Covid-19. In addition to the employments

furloughed, there will be self-employed persons who have sought support through the Self-Employed Income Support Scheme. The profile of the roles furloughed, shows that the highest absolute numbers are in transport and storage (760), wholesale/retail (520) and accommodation and food (470) highlighting that aviation and leisure are key areas affected.

3.5 Looking ahead, growth is projected to continue, although generally at a slower rate than over the last decade. According to Cambridge Econometrics baseline projections, total employment in Uttlesford is projected to increase from 53,800 jobs in 2019 to 57,500 jobs in 2029 and just over 61,000 ten years later in 2039. In 2009, the number of jobs in the district was 42,500. Hence from 2009-2019, the increment was 11,300 jobs whereas the expected change from 2019-2029 is a more modest 3,700. These projections take account of the structure of the local economy, how different sectors are expected to perform in the future (at a national and regional level) and the relative historical performance of these sectors in Uttlesford.

Figure 3.2: Absolute Level of Employment in Uttlesford, Historic and Projected, 1984-2039



Source: Baseline projections from CE (LEFM), based on regional and national forecasts from March 2021

3.6 As the project progresses, we will consider and progress alternative growth scenarios informed by our analysis and stakeholder discussions.

Sectoral Dimensions

3.7 Within this overall picture, the existing evidence points to a range of key sectors in Uttlesford. From the *Uttlesford Economic Development Strategy and Action Plan 2018-21* (prepared by Uttlesford District Council in 2018), these are identified as including:

- the visitor economy

-
- the rural economy
 - life sciences, research and innovation.

3.8 In addition, **activities linked directly or indirectly to Stansted Airport are effectively a fourth key 'sector'**; this embraces aviation, some advanced manufacturing and logistics/warehousing activities, as well as retail, hotel and other ancillary functions linked to a major airport.

3.9 From the available data, it is difficult to shed much light on the prospects for these sectors: none of them map precisely onto the SIC codes which structure the projections and in most cases, short to medium term prospects have been significantly influenced by the pandemic. This is especially true of the visitor economy and aviation-related activities (although in both cases, medium term growth is projected in allied sectors). The rural economy is likely to have proved more resilience while the life sciences cluster – focused on Chesterford Research Park and assuming it mirrors the prospects of life sciences nationally – ought to have seen sustained growth⁶.

3.10 From CE's analysis, other sectors which ought to be recognised as important across Uttlesford, and apparently with growth potential, include **construction** (which is projected to grow especially quickly) and **IT services** (which is growing, albeit from a relatively low base).

Spatial Dimensions

3.11 Icenis has next sought to drill into spatial dynamics within the District. Using BRES data on employment, we have split the district into four geographical building blocks. These are as follows:

- Stansted Airport and environs⁷
- Saffron Walden⁸
- Great Dunmow⁹
- Other Rural Areas.¹⁰

⁶ From CE's analysis, both pharmaceuticals and health appear to be on a growth trajectory in Uttlesford, although the pharmaceuticals sector is identified as being very small in absolute terms

⁷ LSOAs E01022086 and 090

⁸ LOSAs E01022074, 075, 076, 077, 978, 079, 080, 081 and 082

⁹ LSOAs E01022067, 068, and 69 plus E01033054, 55, and 56

¹⁰ Remaining LSOAs in the District

-
- 3.12 Our analysis is based on the best fit to lower level super output areas (LSOAs). The data will not fully count self-employment (which we would expect to be greater in the rural areas), but provides some indication of the relative composition of employment in different areas.
- 3.13 Stansted Airport and environs has the greatest concentration of jobs at 14,900 accounting for around a third of the District total. Employment in this area is strongly focused in transport and storage (7,700) – essentially activities associated with the airport operation – together with accommodation and food (2,000), which will include employment in restaurants and hotels. These two sectors account for around three quarters of jobs in this area. The next largest sector is accommodation and support.
- 3.14 The Saffron Walden area accounts for 7,000 jobs, around 16% of the BRES District total. The largest employment sector in this area is wholesale/retail (1,400 jobs, LQ 1.3). There is an above average representation of employment in public administration (350 jobs, LQ 1.6) influenced by the Council's presence here; but also above average jobs in higher value sectors such as professional, scientific and technical activities (800 jobs, LQ 1.2) and finance and insurance (250 jobs, LQ 1.3) albeit that employment numbers in these sectors are modest.
- 3.15 The Great Dunmow area accommodates around 4,100 jobs. It appears to have a relatively broad employment base with slightly higher levels of employment relative to the region in real estate, construction, wholesale/retail and other services; albeit that the absolute numbers of jobs are modest. Wholesale and retail is the largest employment sector (900 jobs) followed by admin and support services (almost 500).
- 3.16 The remaining rural areas of the District accommodate over 18,000 jobs, around 40% of the District total. The largest employment sectors in this area are again wholesale and food, construction and education – as is the case in many areas. Sectors which are more strongly represented in this area are Professional, scientific and technical activities (3,400 jobs, LQ 2.0), construction (1800 jobs, LQ 1.6). Health and accommodation and food also account for over 1500 jobs, with the latter having an LQ of 1.3.
- 3.17 An analysis of the business base shows that 92% of businesses in rural areas have less than 2 employees, compared to 90% across the East of England. This drives the stronger focus on micro-businesses across the District relative to the regional average. There are few large businesses in the District overall, with 99% of businesses in the District being SMEs.

Table 3.1 Business Base, 2020

2020	Total Enterprises	Micro (0 to 9)	Small (10 to 49)	Medium-sized (50 to 249)	Large (250+)
Saffron Walden	640	565	60	15	0
		88%	9%	2%	0%
Stansted Airport	760	665	75	20	0
		88%	10%	3%	0%
Great Dunmow	500	455	40	5	0
		91%	8%	1%	0%
Other Rural Areas	3,575	3,300	230	25	5
		92%	6%	1%	0%
Uttlesford Total	5,475	4,985	410	65	10
		91%	7%	1%	0%
East of England	271,395	244,305	22,095	4,000	995
		90%	8%	1%	0%

Source: IDBR/NOMIS

- 3.18 An analysis of the business base by sector shows a large number of enterprises in the District in Professional, scientific and technical activities (over 1000) of which more than two thirds are in the rural areas. Construction and wholesale/retail and the next largest. However relative to the regional profile, there is a stronger concentration of agricultural enterprises in Uttlesford (which number 375 in 2020, LQ 2.0). These are very much focused in the rural areas. Other sectors with larger numbers of enterprises in the rural areas include construction and wholesale/retail.

Table 3.2 Enterprises by Sub-Area, 2020

	Saffron Walden	Stansted Airport	Great Dunmow	Other Rural Areas	Uttlesford	East of England
A : Agriculture, forestry and fishing	5	40	15	315	375	11,935
B : Mining and quarrying	0	0	0	0	0	100
C : Manufacturing	30	35	45	190	300	14,345
D : Electricity, gas, steam and air conditioning supply	5	0	0	0	15	285
E : Water supply; sewerage, waste management and remediation activities	0	5	0	5	15	935
F : Construction	85	125	70	595	875	43,505
G : Wholesale and retail trade; repair of motor vehicles and motorcycles	100	90	80	375	645	37,250
H : Transportation and storage	15	45	15	100	175	13,945
I : Accommodation and food service activities	30	30	25	110	195	13,270
J : Information and communication	55	65	35	255	410	22,185
K : Financial and insurance activities	20	15	10	85	125	5,235
L : Real estate activities	20	30	20	110	180	9,510
M : Professional, scientific and technical activities	120	125	80	710	1,040	44,580
N : Administrative and support service activities	65	90	45	330	530	22,840
O : Public administration and defence; compulsory social security	5	0	5	40	45	1,350
P : Education	5	15	5	70	95	4,755
Q : Human health and social work activities	30	15	10	100	155	9,395
R : Arts, entertainment and recreation	15	10	5	85	125	6,065
S : Other service activities	35	15	30	95	175	9,905
Total	640	760	500	3,575	5,475	271,395

Source: IDBR/NOMIS

- 3.19 Saffron Walden has a slightly higher proportion of private sector enterprises engaged in sectors typically associated with office space (Sections J-N).

Stansted Airport

- 3.20 Stansted Airport is clearly a major economic driver for the District's economy; but one which has been hit hard (as with other airports) by the Covid-19 pandemic. It is currently unclear how long it will take for passenger numbers and freight volumes to return to pre-pandemic levels and then to resume a growth trajectory. This will have implications for the wider footprint of Stansted as an employment hub.

-
- 3.21 Pre-pandemic, there had been ambitious plans for Stansted. In 2018, Manchester Airport Group outlined plans for £500 million investment over five years¹¹. The plans included: construction of a new Arrivals terminal; reconfiguration of an existing terminal to become a departures terminal; and development of a new technical and professional skills college on site (which subsequently opened and is operated in conjunction with Harlow College).
- 3.22 In May 2021 the Airport was granted planning consent for expansion of the airport to enable combined airport operations of 274,000 aircraft movements (in line with the current cap), but with an increased proportion of passenger flights and an increased throughput of 43 million terminal passengers per annum. To facilitate this, the planning consent (UTT/18/0460/FUL) includes provision for two new taxiway links to the runway and nine additional aircraft stands, together with highways improvements including at M11 Junction 8.
- 3.23 The Appeal decision notes that the planning consent provides airlines and other prospective investors, with greater certainty regarding the ability of Stansted to grow, secure long-term growth deals and expand their network – potentially including long-haul routes. It notes that since the acquisition of the Airport by Manchester Airports Group (in 2013) and the onset of the Covid-19 pandemic there had been significant growth in passengers – with passenger numbers increasing by over 10mppa, from 17.8m in 2013 to 28mppa with associated growth in routes, airlines and employment (from 10,200 to 13,000).
- 3.24 The Inquiry evidence estimated that it would take 3-4 years for passenger traffic to recover to levels seen before the pandemic. It notes that the airport is less exposed to the long-haul and business markets which are likely to see more prolonged recovery curves and (in the case of the business sector) structural change to working practices.
- 3.25 The Inquiry Panel found that the conclusions of the ES and ESA regarding forecast passenger growth numbers were reasonable and sensible, and sufficiently robust (ID Para 27). The ES Addendum updated the demand forecasting to take account of Covid. This shows 35mppa being achieved in 2027 the cap of 43 mppa being reached in 2032-34. The Panel found that if it takes the airport longer than expected to reach the anticipated levels of growth, the environmental effects would take longer to realise; we note that a worst-case scenario assessed (reaching the cap in 2034) in the ES/ ESA.
- 3.26 The Inquiry evidence on forecasts expected cargo volumes growing from 234k tonnes in 2019 to 375k tonnes in 2032 – a 60% growth in cargo tonnage, but just 2% of the overall total cargo handled

¹¹ Uttlesford District Council (2018) *Uttlesford Economic Development Strategy and Action Plan 2018-21. 'Supporting Sustainable Business Growth'*

at London Airports. The assumed split of flights in 2032 is 92% passenger (252,000), 5% cargo (15,000) and 7% other (e.g. private aviation).

3.27 The economic impact analysis undertaken for MAG by Optimal Economics. This expected Stansted-related employment across a wide study area to grow from 24,100 in 2019 (of which 13,000 is direct on-airport employment) to 30,300 – with the proposed development supporting 5,600 additional jobs and £380m GVA. Of the additional employment, 3,000 is additional direct on-airport jobs.

3.28 In terms of the wider economic benefits, the evidence indicated that the proposed development will enable 1.2 million business passengers to travel through Stansted in 2032, which is estimated to create an additional £1 billion of GVA for the East of England and London economies. The spending of the 2.2 million inbound leisure passengers will support 13,900 jobs and £336 million of GVA in the tourism industry. Both these effects will support the growth of the East of England and London economies.¹² These WEBs arise through a range of factors:

- Attractiveness to FDI and enabling local firms to exploit investment opportunities overseas;
- Facilitating trade – through both the shipment of goods and enabling people to visit customers;
- Labour market effects – in particular associated with the attraction of highly skilled individuals to work in the UK;
- Agglomeration effects – both through the role of the flight network and in influencing FDI decisions resulting in clustering of firms in locations around airports;
- Tourism – supporting growth in tourism through inbound visitor travel/ expenditure.

3.29 Many of these wider benefits are at a regional level rather than specific to Uttlesford, which is likely to benefit more specifically from direct airport jobs and some potential for growth in businesses locally which provide products or services to the Airport. We will look further at these issues as the project progresses.

3.30 The evidence then identifies particular air intensive or air sensitive economic sectors, but picks out in particular the globally important tech, pharmaceuticals and life science sector around Cambridge and in the LSC Corridor.

¹² Proof of Evidence of Edith McDowall, Optimal Economics

Commercial Market Dynamics

- 3.31 Uttlesford has a relatively modest stock of office space (94,000 sq.m) but the level of office space has remained relatively stable over the period since 2010 (in contrast to surrounding areas where stock levels have fallen). The focus of the market is on SME businesses which are looking for local affordable space, as opposed to larger HQ requirements which are rare. Larger deals have been focused at Chesterford Research Park, which is focused on R&D and the bioscience sector, and reflects proximity to Cambridge; as well as at Parsonage Road in Takeley close to the A120.
- 3.32 Vacancy levels has risen over the last 18 months, likely influenced by companies not renewing leases, to around 8.0% but from a low base. The vacancy level is therefore necessary to support turnover in a functioning market. However there is essentially no Grade A office space available. New development will however primarily occur when an occupier is in place, and prepared to pay a premium; with the rental tone of around £19 psf for Grade A space insufficient to support speculative development. For these reasons together with the potential shift towards more flexible/ virtual ways of working, the level of new development of office space is likely to be fairly modest.
- 3.33 The District has a much greater volume of industrial space (459,000 sq.m), which includes industrial and warehousing premises; and the total volume of such space has grown by 6% between 2010-20. Leasing activity has been focused towards SME businesses with almost all deals for units of < 50,000 sq.ft, however this appears (at least in part) a reflection of a lack of availability of larger units or sites that could accommodate them.
- 3.34 Positive net absorption over the last 6 years has reduced the vacancy level to a very low 1.8% with both the data and stakeholder engagement pointing to a constrained supply and urgent need to bring forward additional land at commercially attractive locations. The market remains vibrant, with demand for properties of a range of sizes; and with the greatest demand focused at locations close to/ accessible from M11 Junction 8.

4. OPPORTUNITIES AND THREATS LOOKING FORWARDS

4.1 The effects of the pandemic – and the consequences of the UK’s departure from the EU – are very important contextual factors in informing an understanding of future prospects for Uttlesford’s economy; both are reflected in the projections developed by CE.

4.2 Beyond this, we would note the following points. **All of these need further investigation and research**, but we think **all will be important in shaping the next iteration of the Uttlesford Local Plan**:

- In relation to its employment implications, **aviation is a potentially important growth driver but there are some uncertainties about the pace of its recovery**. It is currently unclear how long it will take for passenger numbers and freight volumes to return to pre-pandemic levels and then to resume a growth trajectory. This will have implications for the wider footprint of Stansted as an employment hub. Pre-pandemic, there had been ambitious plans for Stansted. In 2018, Manchester Airport Group outlined plans for £500 million investment over five years¹³. The plans included: construction of a new Arrivals terminal; reconfiguration of an existing terminal to become a departures terminal; and development of a new technical and professional skills college on site (which subsequently opened and is operated in conjunction with Harlow College).

In May 2021 the Airport was granted planning consent for expansion of the airport with the core assumption being of 35mppa being achieved in 2027 the cap of 43 mppa being reached in 2032-34. The Panel found that if it takes the airport longer than expected to reach the anticipated levels of growth, the environmental effects would take longer to realise; we note that a worst-case scenario assessed (reaching the cap in 2034) in the ES/ ESA. This can be expected to support the District’s economy.

- The M11 motorway transects Uttlesford and the associated ‘innovation corridor’ in principle presents opportunities, particularly in respect of life sciences given the significance of Chesterford Research Park on the edge of the Cambridge sub-region. However **with regard to the research and innovation agenda there are both opportunities and threats looking forward**. On the positive side, the quest for vaccines and therapeutics during the pandemic has been a spur for additional investment and growth. In addition, the relocation of Public Health England to Harlow (to the south of Uttlesford) and the establishment in Braintree (to the east) of the Cell and Gene Therapy Manufacturing Catapult’s Manufacturing Innovation Centre both

¹³ Uttlesford District Council (2018) *Uttlesford Economic Development Strategy and Action Plan 2018-21*. ‘Supporting Sustainable Business Growth’

potentially present opportunities. But set against this – and insofar as research investment is funded by the public sector – there may well be increasing pressure to direct available resources out of the Golden Triangle in response to wider ‘levelling up’ imperatives. Whilst the Oxford-Cambridge Arc continues to be a national priority, the implications for resourcing seem increasingly uncertain. However, on balance, for Uttlesford – and given the momentum that undoubtedly exists – **prospects in relation to life sciences should continue to be strong.**

- Uttlesford is within the ‘**digital innovation zone**’. This has been established by local authorities across Essex and Hertfordshire with the aim of delivering the following vision: “*To be the best connected place of its type in the UK. A place of innovation and inclusion. A place where the benefits of digital investment are harnessed, maximised and shared across residents, commuters, businesses and borders*”¹⁴. Digital connectivity will certainly be important going ahead – particularly in relation to Uttlesford’s rural economy and its Garden Communities (see below). In addition, the links to the digital sector could be important. **CE’s analysis suggests that the IT sector is underrepresented in Uttlesford currently**, but that reasonable growth is projected and the links to the DIZ could be important. Strong broadband connectivity will be important in supporting growth in business and professional services as the relationship with London evolves.
- **Uttlesford’s population is set to grow quickly.** Between 2019 and 2039, the population is expected to increase by just over 16,000 people. This translates into a growth rate of 0.8% per annum across the 20 year period – double the rate for the East of England and England, and faster than the rate observed in neighbouring areas. Within this, the fastest rate of growth is in the older age groups (as is the case nationally); this arguably presents both opportunities and threats in relation to the district’s economic prospects, but **issues around a growing, ageing population ought to be considered carefully.** How this growth is distributed within the District and phased over time will have economic implications.
- From CE’s analysis, **the construction sector is set to see rapid future growth.** This relates in part to projected population growth within Uttlesford, but also more broadly across Essex, Cambridgeshire and Hertfordshire. *The future of the sector is an issue that needs to be considered in the context of the Local Plan review.* The importance of construction is referenced in most of SELEP’s principal strategic statements – including through the delivery of major projects – although its needs as a sector perhaps need further consideration.
- Already, Uttlesford’s **resident working age population** is reasonably (although not outstandingly) well qualified overall and within it, there is a high incidence of residents working in higher order occupations. London commuting is a feature and the sectoral mix suggests that

¹⁴ See [Our Vision – DIZ](#)

post-pandemic, that there will be more residents working for home for more of the time. It seems likely therefore that Uttlesford will be home to many individuals who could, at some stage, consider self-employment and/or the formation of new businesses. Already, Uttlesford has a very high incidence of micro enterprises within its business stock. However new firm formation rates are modest and survival rates are somewhat lower than comparator areas. *This may suggest that more could be done to support micro-business in Uttlesford, particularly if broader shifts precipitate a growing interest in enterprise (which is probable):*

- **a strategy for enterprise – including appropriate incubator/innovation centre provision** – ought therefore to be considered in relation to the new Local Plan
- in addition, **consideration ought to be given to appropriate grow-on space** which appears to be a particular issue (and the absence of it may be one reason why micro businesses appear to be growing slowly).
- Another sector which is projected to grow is **logistics**. With the M11 motorway and the A120 – and with a major international airport – Uttlesford is well connected and the scale of demand for logistics-related activities is likely to be high. The Council will need to take a view on appropriate provision, recognising the double-edged nature of the sector's growth.
- There are three main towns in Uttlesford: **Saffron Walden, Great Dunmow and Thaxted**. The evidence suggests that the most vibrant is Saffron Walden – in part because of its train connections to London Liverpool Street (via Audley End) and in part because of its proximity to the Cambridge sub-region. Existing studies have suggested a need for more retail provision – although with the shift to on-line retail, it is unclear whether this continues to be the case. Great Dunmow and Thaxted are smaller and less well connected. *The economic role of all three towns will need consideration going forward.*
- The evidence we have been able to review says very little about the **rural parts of Uttlesford**. Simply in terms of their economic footprint, these are dominated by micro enterprises, and they are generally home to people who work elsewhere (whether within the district or further afield). There is concern that redundant farm buildings are being converted to residential uses. Looking ahead, small scale employment provision is likely to be important – but so too is high quality broadband.

4.3 Stakeholder consultation and the business survey will provide further insight into a number of these issues as the project progresses.

The Local Economy of Uttlesford

Developing an evidence base to inform the new
Local Plan

Working Paper A: Literature Review – DRAFT

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Disclaimer

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1. Introduction

Aim

- 1.1** This Working Paper seeks to understand the wider context surrounding the local economy of Uttlesford. To achieve this aim, a review of key policy and strategy documents was conducted. These included documents specific to Uttlesford, but also to the wider geographies of Essex, Greater Cambridge and South East LEP (Table 1-1).

Table 1-1: Documents Reviewed

Geography	
Uttlesford	<ul style="list-style-type: none"> • AECOM (2016) - <i>Uttlesford District Employment Land Review Update</i> • Savills (2018) <i>Uttlesford Retail Study Update</i> • Uttlesford District Council (2018) <i>Uttlesford Economic Development Strategy and Action Plan 2018-21. 'Supporting Sustainable Business Growth'</i> • Uttlesford District Council (2020) <i>Uttlesford Economic Recovery Plan</i> • The Planning Inspectorate (May 2021) <i>Appeal Decision Regarding London Stansted Airport, Essex</i>
Essex	<ul style="list-style-type: none"> • North Essex Economic Board (2019) <i>North Essex Economic Strategy</i> • Essex County Council and Success Essex (2020) - <i>The Essex Prosperity and Productivity Plan</i> • Essex County Council (2021) <i>Financial Wellbeing: Sector and Resident Types</i>
Greater Cambridge	<ul style="list-style-type: none"> • South Cambridgeshire District Council and Cambridge City Council (2020) <i>Greater Cambridge Employment Land & Economic Development Evidence Study</i>
South East LEP	<ul style="list-style-type: none"> • South East Local Enterprise Partnership (2021) <i>SELEP Skills Strategy 2018-2023</i> • South East Local Enterprise Partnership (2021) <i>Working Together for a Faster, Smarter and More Sustainable Economic Recovery. Economic Recovery and Renewal Strategy</i>

- 1.2** This Working Paper is structured to provide responses to the principal issues outlined in the brief. It is divided into five further chapters:
- Chapter 2: Employment Land Growth Projections
 - Chapter 3: Key Sectors
 - Chapter 4: Stansted Airport
 - Chapter 5: Impact of Covid-19 and Recovery
 - Chapter 6: Challenges and Opportunities

2. Employment Land Growth Projections

Summary of evidence

- 2.1** We have reviewed two studies which have considered issues relating to employment land across Uttlesford. These are technical studies and have informed iterations to the Local Plan. They need to feed into the current study. Reflecting on the changing picture since 2011, Aecom (2016) comments on the constrained supply of employment land and the need to plan for significant growth across all Use Classes. The study by Savills is focused on retail provision. It identifies need for additional provision in Saffron Walden, but elsewhere there is either no capacity or no requirement for additional provision. It is worth noting that the studies predate the pandemic. Given the effects of the pandemic on retail and town centres, the analysis completed by Savills may therefore be out of date.
- 2.2** A third study by Hardisty Jones Associates - *Ensuring Robust Employment Evidence for The Uttlesford Local Plan (2018)* – was initially included in the evidence base. The focus of the study is three proposed Garden Communities in Uttlesford (North Uttlesford, Easton Park and West of Braintree) and the possible employment provision associated with these. However, the 2020 Inspector’s Report into the examination of the Uttlesford Local Plan concluded that there was not sufficient evidence to demonstrate that the Garden Communities were justified, and thus the planning Inspectors recommended that Essex Council withdraw the Local Plan for examination¹. As a result, any work that was done previously relating to the Garden Communities is no longer relevant to the current study, and as such the Hardisty Jones Associates has been taken out of the evidence base.

Review of relevant strategies and reports

AECOM (2016) Uttlesford District Employment Land Review Update

- 2.3** This Employment Land Review (ELR) update assesses the quantity and quality of Uttlesford’s employment land and forecasts future land and floorspace requirements. The review builds upon and the findings of the ELR undertaken in 2011. For the purposes of the study employment land and premises are defined as commercial and industrial uses falling into use class orders B1a/b/c, B2 and B8.
- 2.4** The ELR identifies that the current supply of employment land within the District is tightly constrained and that there is a need to plan to accommodate growth for the local office market, manufacturing and warehousing land.
- 2.5** Drawing on the East of England Forecasting Model (EEFM), the ELR provides a projection of future floorspace demand by use class as the most sustainable indicator of future need. The forecast concludes that over the local plan period demand for office floorspace in Uttlesford

¹ Crosby, Inspector L., Worthington, Inspector E., (2020) *Letter to Stephen Miles (Planning Policy Team Leader at Uttlesford District Council) re Examination of the Uttlesford Local Plan*, 10th January 2020

is likely to increase by between 7,900sqm and 13,700sqm, whilst demand for warehousing is likely to increase by between 6,200sqm and 21,900sqm. The demand for manufacturing floorspace is anticipated to decrease by between -8,900sqm and -13,300sqm.

- 2.6** The forecast for office floorspace calculates an additional net requirement of between 10,600sqm and 16,800sqm in Uttlesford District up to 2031. The most likely scenario is an additional requirement for 16,600sqm. This equates to an average increase of 1,100sqm per annum over the plan period. To meet this demand the ELR states that Uttlesford District Council should support the provision and retention of existing office space across the District and promote the provision of new office space within suitable locations, such as the town centres of Saffron Walden and Great Dunmow, and sites located within or in proximity to other large villages in Uttlesford.
- 2.7** The forecast for industrial land (manufacturing and warehousing) calculates that there is a deficit of employment land in the District in the region of between 13.6ha and 18.2 ha. The most likely scenario is an additional requirement for 18.0ha of industrial land over the period to 2031. To support this, the ELR states that the Council should prioritise the development of employment clusters which are currently functioning well as employment locations but have vacant land, land with derelict buildings or have underutilised land and premises.

Savills (2018) Uttlesford Retail Study Update

- 2.8** This publication examines the capacity for retail development in Uttlesford District over the period 2016 to 2033. With regards to methodology, the study examines retail capacity on a constant market share basis – i.e. that shopping patterns identified by a household survey of 1,000 individuals living in Uttlesford are maintained through to 2033.
- 2.9** The headline findings relating to each of the main towns are detailed below:
- Saffron Walden – there is a need for additional floorspace in Saffron Walden, this equates to a requirement of 3,410 m² net in 2026 and 4,537 m² net by 2033.
 - Great Dunmow – there is no need for additional comparison floorspace in Great Dunmow and no requirement to allocate land for development during the plan period.
 - Stansted Mountfitchet – there is no capacity for additional non-food retail development in Stansted Mountfitchet over the plan period
 - Thaxted – there is no capacity for additional non-food retail development in Thaxted over the plan period

3. Key Sectors

Summary of evidence

- 3.1** We reviewed one report which considered evidence relating to key sectors in Uttlesford. It is important to note that this predated the pandemic. This emphasised the importance of the visitor economy; rural economy; and life sciences, research and innovation. The visitor economy in particular is likely to have been adversely affected by the pandemic.
- 3.2** It is notable that there is no reference in the analysis to the importance of, or prospects for, the aviation sector and its supply chain. On the face of it, this appears to be an omission.
- 3.3** From our analysis of CE's most recent projections and also our review of BRES data, the choice of sectors appears broadly appropriate – although there is a case for adding in aviation (and related activities), construction and (possibly) IT services.

Review of relevant strategies and reports

Uttlesford District Council (2018) Uttlesford Economic Development Strategy and Action Plan 2018-21. 'Supporting Sustainable Business Growth'

- 3.4** The Uttlesford Economic Development Strategy and Action Plan for 2018 to 2021 identifies and supports the expansion of three key sectors in Uttlesford: Visitor Economy; Rural Economy; and Life Sciences, Research and Innovation. More detail pertaining to these sectors is provided below.

The Visitor Economy

- 3.5** The visitor economy is the second most important income strand for Uttlesford after retail spending and is made up of:
- Visitors – for leisure and business and for day and overnight stays
 - Core supply chain – comprising accommodation, attractions, bars and restaurants
 - Related supply chain – retail, transport and other services such as food suppliers
- 3.6** In addition to the town centres and villages, the district contains a number of visitor attractions of both regional and national importance. These include: Saffron Hall, Audley End House, Bridge End Gardens, Fry Art Gallery, Audley End Railway, St Mary the Virgin Parish Church, Saffron Walden Museum, Priors' Hall Barn, Gardens of Easton Lodge, Great Dunmow Maltings, Mountfitchet Castle and Toy Museum, St Mary's Church Stansted, Hatfield Forest, Thaxted Morris Festival, Dunmow Flich, St Botolph's Saxon Church, Hadstock and Chickney St Mary's.

Rural Economy

- 3.7** Approximately 97% of the land in the Uttlesford District is agricultural land, and it is mostly arable. Farming remains an important part of the rural economy, although in recent years there has been a degree of diversification into new areas of activity.
- 3.8** The Economic Development Strategy and Action Plan states that the development of Uttlesford rural economy is integral to sustainable business growth, maximising the opportunities for residents to work near to where they live. Furthermore, looking ahead there may be opportunities for links with other target sectors: for example some businesses in the life science sector such as wormeries might opt for a rural location for their operations, as opposed to the centre of a research park.
- 3.9** The Economic Development Strategy and Action Plan highlights that in recent years many redundant farm buildings have been converted into residential properties, making considerably more profit from the conversion than they would have done if the building had been converted to business use.

Life Sciences, Research and Innovation

- 3.10** A key local economic driver in Uttlesford is Chesterford Research Park. Located in the north of the District, Chesterford Research Park provides laboratory and office space for biotechnology, pharmaceutical and technology R&D companies. Current occupiers include AstraZeneca, Cambridge Epigenetix, Microbiotica and Oxford Nanopore Technologies².
- 3.11** Chesterford Research Park is working closely with Granta Park, Babraham Research Park and the Wellcome Trust Sanger Institute as part of the South East Cambridge Cluster. This reflects the growth of the life science and research and innovation sectors within Cambridge and the wider area.
- 3.12** The Uttlesford District Employment Land Review Update discussed above states that the Council should support the continued expansion of Chesterford Research Park for research and development uses in accordance with the approved masterplan for around 900,000 sq ft of laboratory and R&D space (approximately 300,000 sq ft of space is already occupied).

² <https://www.chesterfordresearchpark.com>

4. Stansted Airport

Summary of Evidence

- 4.1** Stansted Airport is identified as a major economic driver – although existing analyses pre-date the pandemic. Within the literature, opportunities for increased freight operations and more medium and long haul passenger flights were specifically identified; investment plans were described; and the Airport’s economic footprint (accounting for 12,000 jobs) was articulated. In May 2021, the Airport was granted planning permission for airfield works that will enable combined airfield operations of 274,000 aircraft movements and a throughput of 43 million terminal passengers in a 12-month calendar period. The extent to which these plans and ambitions will survive the pandemic will need to be assessed in planning for Uttlesford’s future growth.

Review of relevant strategies and research

AECOM (2016) Uttlesford District Employment Land Review

- 4.2** The main driver of economic linkages between Stansted Airport and employment land elsewhere in Uttlesford District is through logistics operations. Intelligence gathered through consultations as part of the ELR indicates that the airport handles approximately 230,000 to 240,000 tonnes of cargo per annum, and that the airport has the capacity to double this to 400,000 tonnes per annum.
- 4.3** However, there are two interrelated factors that constrain the growth of freight operations at the airport: low-cost airlines and night noise restrictions. The majority of passenger airlines operating out of the airport tend to be low cost, and as such have a lesser propensity to carry freight in the lower deck of the aircrafts (referred to as ‘belly freight’). As a result, cargo is carried on dedicated flights which often use older and noisier aircrafts and fly at off peak times. This is problematic as night noise restrictions are in place surrounding Stansted Airport.
- 4.4** It is expected that Stansted Airport will diversify its offer to include more medium and long-haul flights to a greater number of destinations. Consultation reported on in the ELR signals growing interest in Stansted Airport’s freight and logistic operations, with the airport’s geographic connections to both London and the East Midlands cited as making the airport an attractive offering for potential operators. As the Airport’s cargo offering increases opportunities may arise for an increase in freight and logistics operations and supply chain linkages with the rest of Uttlesford.

Uttlesford District Council (2018) Uttlesford Economic Development Strategy and Action Plan 2018-21. 'Supporting Sustainable Business Growth'

- 4.5** Stansted Airport is located in the south of Uttlesford District and is a regional economic driver. It is the primary airport for the East of England, the third largest freight airport behind Heathrow and East Midlands, and the fourth busiest airport in the UK by passenger numbers. It is also the largest single employment site in the East of England - in 2018 Stansted Airport employed approximately 12,000 people across 220 companies – and a report by Oxford Economics estimated that a substantial proportion of the airport's workforce (18.3%) also reside in Uttlesford, capturing a cumulative £39.7m in wages³.
- 4.6** In 2018 Manchester Airport Group, which owns and operates the airport, outlined plans for £500 million investment over five years. The plans included three priority actions:
- Construction of a new Arrivals terminal
 - Reconfiguration of an existing terminal to become a departures terminal
 - Development of a new technical and professional skills college on site. *The Stansted Airport College (operated in conjunction with Harlow College) opened in September 2018.*

The Planning Inspectorate (May 2021) Appeal Decision Regarding London Stansted Airport, Essex

- 4.7** In February 2018 Stansted Airport Limited submitted a planning application to Uttlesford District Council for airfield works comprising two new taxiway links to the existing runway, six additional remote aircraft stands, and three additional aircraft stands to enable combined airfield operations of 274,000 aircraft movements and a throughput of 43 million terminal passengers, in a 12-month calendar period. The application was refused by Uttlesford District Council in January 2020. Following the refusal, Stansted Airport Limited appealed against the decision, and in May 2021 the appeal was allowed by the Planning Inspectorate and planning permission was granted for the proposed airfield works.

³ Oxford Economics (2013) *Economic Impact of Stansted Scenarios*

5. Impact of Covid-19 and Recovery

Summary of Evidence

- 5.1** The pandemic has precipitated a substantial economic shock and the scale of this is set out in some of the literature we reviewed. However the evidence and data mostly related to the uptake of government schemes and there is, as yet, little evidence of wider impacts – and no consideration of the long term effects on key sectors like aviation and the visitor economy.
- 5.2** Uttlesford District Council and SELEP have both developed recovery strategies and plans.

Review of relevant strategies and research

Essex County Council (2021) Financial Wellbeing: Sector and Resident Types

- 5.3** This document presents data on the impact of the Covid-19 pandemic on sectors and resident types in Essex. The document also includes a break down of data by district; headline findings relating to Uttlesford and detailed below:
- Uttlesford had the lowest rate of Self-Employment Income Support Scheme (SEISS) claims in Essex
 - Across the county, female employees have been most impacted by furlough, accounting for 55% of people using the scheme. This is due to women having greater representation in some of industries most affected by Covid – such as retail and hospitality. Alongside Epping, Braintree and Maldon, Uttlesford is one of the districts cited as having a slightly higher proportion of women on the furlough scheme compared to other areas (female take up rate of 18%).
 - The top three sectors in Essex most affected by SEISS Claims have been Construction, Transport and Storage and the Other Services Sector. With regards to Transport and Storage, employment levels in this sector in Uttlesford are forecast to experience the greatest drop between 2019 and 2021, compared to other Districts in Essex. From 2021 onwards however growth in this sector is expected.
 - The top three sectors in Essex most affected by the Furlough Scheme have been Wholesale and Retail; Accommodation and Food; and Administrative and Support Services. With regards to Accommodation and Food, this sector experienced growth in employment prior to the pandemic but is expected to see a drop between 2020 and 2021. From 2022 onwards however growth in employment is forecast, with the fastest growth expected in Uttlesford, Colchester and Chelmsford.

- Young people aged 16-24 have been hardest hit by both unemployment and redundancy in the aftermath of the Covid-19 pandemic. Between March and May 2020 only Uttlesford and Chelmsford saw unemployment rates of less than 3% (1.96% and 2.8% respectively).

Uttlesford District Council (2020) Uttlesford Economic Recovery Plan

5.4 The Uttlesford Economic Recovery Plan highlights that some businesses in the District have been hit harder by the impact of the Covid-19 pandemic than others. These include:

- Businesses in town centres and in the retail, hospitality and personal services
- Businesses in the Visitor Economy and arts and entertainment venues and associated services
- London Stansted Airport and business in the aviation supply chain and transportation sector

5.5 The Economic Recovery Plan is organised around four work themes: business engagement and support; information, advice and guidance; skills and training; and creating jobs and inward investment. Examples of current/planned activities being pursued by Uttlesford District Council that fall under these work themes include:

- Installation of super / ultrafast broadband across the District
- Specific business support for the visitor economy and for airport based/related businesses
- Promotion of skills and training offers (including a logistics course targeted at young people offered at Stansted Airport College)
- Development of a business prospectus for potential investors in the UK Innovation Corridor
- Direct investment in town centres and Chesterford Research Park
- Research into specific sectors that offer business growth opportunities (Life Sciences, Green Economy, Rural Economy).

South East Local Enterprise Partnership (2021) Working Together for a Faster, Smarter and More Sustainable Economic Recovery. Economic Recovery and Renewal Strategy

5.6 The aim of the SELEP Economic Recovery and Renewal Strategy is to ensure the survival and stability of the SELEP economy in the short term, and to drive sustainable economic renewal and growth in the medium to long term. This will be achieved through a focus on four strategic priorities: Business Resilience and Growth; UK's Global Gateway; Communities for the Future; Coastal Catalyst.

5.7 SELEP commitments of most relevance to Uttlesford fall under the Business Resilience and Growth priority and include:

- Support R&D and innovation activities (including the adoption of new models, technologies and processes)
- Identify and address gaps in digital infrastructure and promote high quality digital infrastructure in all new developments (including the Garden Communities)
- Help to develop a highly skilled workforce that can meet the demands of industry (including supporting a bid for an Institute of Technology in logistics, automation, construction, health and life sciences in SELEP to grow the area's technical skills base)
- Facilitate business collaborations (for example by promoting opportunities to enable business to come together around R&D and product innovation)

6. Challenges and Opportunities

- 6.1** Several of the documents outlined challenges and opportunities being faced by Uttlesford. These are detailed below.

Challenges

Uttlesford District Council (2018) *The Uttlesford Economic Development Strategy and Action Plan 2018-2021 'Supporting Sustainable Business Growth'*

- 6.2** Roads in Uttlesford are often congested and public transport is limited in rural areas. This has resulted in a dependence on the car for travel, with 71% of journeys to work undertaken via this means.
- 6.3** In comparison to other districts in Essex, carbon dioxide emissions in Uttlesford are relatively high; this is exacerbated by the presence of the M11 motorway.
- 6.4** There is a lack of digital connectivity in many parts of the District, particularly in rural areas. This has the adverse effect of limiting opportunities of inward invest and can impinge on local businesses and their ability to compete.

AECOM (2016) - Uttlesford District Employment Land Review Update

- 6.5** Uttlesford experiences substantial out-commuting; in 2011 Uttlesford was a net supplier of labour to other local authorities; this could reflect a propensity to commute to other areas for work where earnings tend to be higher. The ELR outlines that net commuting is anticipated to increase in Uttlesford from 1,100 in 2016 to approximately 2,000 in 2031. This suggests that the District will become an increasingly larger exploiter of employees to other local authorities.
- 6.6** The ELR also highlights that the current supply of employment land within the District is tightly constrained.

Savills (2018) *Uttlesford Retail Study Update*

- 6.7** Although not unique to Uttlesford, town and village centres are facing challenges from out-of-town competition and the emergence of 'Special Forms of Trading' such as online retail and click and collect. This is in addition to experiencing a relatively slow recovery from the 2008/09 recession.

Essex County Council and Success Essex (2020) - The Essex Prosperity and Productivity Plan

- 6.8** Across Essex there is a general lack of 'grow-on' space. This presents a challenge to businesses once they have reached a stage at which they need to expand.

Opportunities

Uttlesford District Council (2018) The Uttlesford Economic Development Strategy and Action Plan 2018-2021 'Supporting Sustainable Business Growth'

- 6.9** The Uttlesford Economic Development Strategy and Action Plan identifies a series of opportunities for Uttlesford within the District, Essex, and the East of England.
- 6.10** Within the District, the plan highlights the opportunities presented by the development of the three Garden Communities at Easton Park, North Uttlesford and West of Braintree. These concern the design of the communities to support the development and implementation of smart technology solutions that improve quality of life, and increased support for new and existing businesses.
- 6.11** With regards to opportunities within Essex, the plan references the 'opportunity sectors' identified by the Essex Economic Commission (established to shape the economy of Greater Essex). These are identified as sectors destined for future growth and include:
- Advanced Manufacturing – associated with Chesterford Research Park and Stansted Airport in Uttlesford
 - Life Sciences and Healthcare – associated Chesterford Research Park
 - Logistics – associated with Stansted Airport
 - Low Carbon and Renewables – the report identifies a small sector strength in low carbon and renewables in Uttlesford; in light of climate change and the Government's policy to reduce emissions this sector will only increase in importance moving forward.
- 6.12** Within the East of England, the plan discusses the location of Uttlesford within the London Stansted Cambridge Corridor. The Corridor is Europe's leading life sciences cluster and is built upon 37 key research institutes and anchored by key assets such as Cambridge University. The Corridor provides a national innovation and knowledge hub, driving UK growth and economic dynamism. According to the final report of the London Stansted Cambridge Consortium Growth Commission, the number of jobs in the Corridor increased at more than twice the national rate in the 10 years prior to the publication of the report in 2016.

AECOM (2016) - Uttlesford District Employment Land Review Update

- 6.13** Following the move of AstraZeneca’s global headquarters to Cambridge in 2016, Public Health England will be moving their operations to Harlow over the coming years. This will help cement the role of the London Stansted Cambridge Corridor in the UK and globally and provide opportunities for life science businesses in Uttlesford.
- 6.14** There are also opportunities for businesses in the Visitor Economy: due to the District’s proximity to Cambridge and London, and in light of the accelerating ‘staycation trend’, there are opportunities for Uttlesford to attract more visitors.
- 6.15** In addition, the ELR highlights the potential of the Essex and Hertfordshire Digital Innovation Zone to put West Essex and East Hertfordshire on the map as the best place for digital innovation in the UK outside of London.

Essex County Council and Success Essex (2020) - The Essex Prosperity and Productivity Plan

- 6.16** With the growth of remote and flexible working, opportunities for ‘part-time’ commuting from locations further afield from traditional employment hubs in cities such as London are likely to increase. This has the potential to enhance the attractiveness of Essex, and therefore districts like Uttlesford, as residential bases.



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The Local Economy of Uttlesford

Developing an evidence base to inform the new
Local Plan

Section B: Socio-Economic Baseline – DRAFT

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1. Introduction

Aim

- 1.1** This Working Paper seeks to understand the current socio-economic situation in Uttlesford District. To achieve this aim, it reviews publicly accessible data from a variety of sources to assess the District's performance on a number of key metrics relating to demography, labour market and enterprise. For each metric, this section presents the most recent data (in the majority of cases this is 2019) and, where the data are available, analyses trends over the last 10 years.
- 1.2** The data sources used in this baseline include:
- Business Register and Employment Survey (2019)
 - Census (2011)
 - English Indices of Deprivation (2019)
 - ONS Annual Population Survey (2020)
 - ONS Annual Survey of Hours and Earnings (ASHE) (2020)
 - ONS Business Demography (2019)
 - ONS Jobs Density (2019)
 - ONS Mid-Year Population Estimates (2019) and Projections (2018)
 - UK Business Counts (2020)
- 1.3** Whilst the focus is on Uttlesford, comparator areas are used to assess the District's *relative* performance across the key metrics. The comparator areas include the Local Authority Districts (LADs) which abut Uttlesford (namely Braintree, Chelmsford, East Hertfordshire, South Cambridgeshire), as well as county (Essex), regional (East of England) and national comparators (England).
- 1.4** This Working Paper begins with an analysis of key demographic data. This is followed by analysis of data relating to the labour market, commuting flows and earnings, and enterprise. The Working Paper closes with a series of conclusions.

2. Demography

Population Estimates

- 2.1** The population of Uttlesford in 2019 was just over 91,000 (Table 2-1). Between 2010 and 2015, the average annual growth in the population was 1.6% per annum. This was higher than the growth recorded in the neighbouring LADs and the county, regional and national comparators. Notably, the annual growth rate in Uttlesford was double that observed across both Essex and England (0.8% pa over this period).
- 2.2** Between 2015 and 2019, the average annual growth rate in Uttlesford was slightly higher at 1.7% per annum. Again, this was substantially higher than the growth observed across the comparator areas for the same time period.

Table 2-1: Total Population 2019 and Compound Annual Growth Rates (CAGR) (%) 2010-2015 and 2015-2019

	2019	2010-2015	2015-2019
Uttlesford	91,284	1.6	1.7
Braintree	152,604	0.6	0.3
Chelmsford	178,388	0.6	0.8
East Hertfordshire	149,748	1.1	0.9
South Cambridgeshire	159,086	0.9	0.7
Essex	1,489,189	0.8	0.8
East of England	6,236,072	0.9	0.7
England	56,286,961	0.8	0.7

Source: SQW analysis of ONS Mid-Year Population Estimates (2019)

2.3 Table 2-2).

2.4 In comparison to the neighbouring LADs, Uttlesford had the second largest 0-15 population behind South Cambridgeshire (20.1%), the third largest working age population behind East Hertfordshire (62.1%) and Chelmsford (61.6%), and the second largest 65+ population behind Braintree (20.4%).

2.5 In comparison to the average for England, Uttlesford had a relatively large 0-15 population and 65+ population, and a relatively small working age population.

Table 2-2: Population Age Structure 2019 (% of Total Population)

	0-15	16-64	65+
Uttlesford	19.9	60.5	19.6
Braintree	19.2	60.4	20.4
Chelmsford	19.1	61.6	19.2
East Hertfordshire	19.7	62.1	18.1
South Cambridgeshire	20.1	60.3	19.6
Essex	19.0	60.4	20.7
East of England	19.4	60.7	19.9
England	19.2	62.4	18.4

Source: SQW Analysis of ONS Mid-Year Population Estimates (2019)

- 2.6** Between 2010 and 2019, Uttlesford recorded the fastest rate of population growth of the comparator areas across all three age groups (Table 2-3).
- 2.7** The greatest growth rate was recorded for the 65+ population between 2010 and 2015 (4.2%). From 2015 to 2019, the rate of growth in this age group slowed slightly, however it remained notably higher than the growth rates recorded for the neighbouring LADs and the county, regional and national comparators.

Table 2-3: Population Age Structure, CAGR (%) 2010-2019

	0-15		16-64		65+	
	2010-2015	2015-2019	2010-2015	2015-2019	2010-2015	2015-2019
Uttlesford	1.3	1.7	1.0	1.5	4.2	2.5
Braintree	0.2	0.3	-0.1	-0.2	3.8	2.0
Chelmsford	0.7	1.4	-0.2	0.4	3.4	1.4
East Hertfordshire	0.8	0.9	0.5	0.5	3.5	2.2
South Cambridgeshire	0.9	1.1	0.1	0.2	3.7	1.9
Essex	0.6	1.3	0.2	0.4	3.0	1.3
East of England	1.0	1.2	0.3	0.2	2.9	1.6
England	0.9	1.0	0.3	0.3	2.5	1.6

Source: SQW Analysis of ONS Mid-Year Population Estimates (2019)

- 2.8** Dependency ratios are calculated by dividing the size of the dependent population (those not typically in the labour force, namely those aged 0-15 and 65+) by the size of the working age population (16-64). Higher values indicate a greater the level of dependency.

- 2.9** In 2019, Uttlesford recorded a dependency ratio of 65.3 (Table 2-4). The dependency ratios recorded for the neighbouring LADs were very similar.
- 2.10** Looking across the county, regional and national comparators, Uttlesford had a relatively lower level of dependency in its population compared to Essex, but a relatively higher level of dependency compared to the East of England and England.

Table 2-4: Dependency Ratios, 2019

	2019
Uttlesford	65.3
Braintree	65.5
Chelmsford	62.2
East Hertfordshire	61.0
South Cambridgeshire	65.9
Essex	65.6
East of England	64.7
England	60.3

Source: SQW Analysis of ONS Mid-Year Population Estimates (2019)

Population Projections

- 2.11** Between 2019 and 2039, the population of Uttlesford is expected to increase by just over 16,000 people, resulting in a projected growth rate of 0.8% per annum across the 20 year period (Table 2-5). This growth rate exceeds the rates projected for the neighbouring LADs and is double the rate projected for the East of England and England (0.4%).

Table 2-5: Population Projections: Total Population and CAGR (%) 2019-2039

	2019	2024	2029	2034	2039	%
Uttlesford	90,417	95,854	100,186	103,586	106,428	0.8
Braintree	151,970	154,094	155,866	157,773	160,047	0.3
Chelmsford	178,712	185,792	191,318	196,086	200,513	0.6
East Hertfordshire	148,910	153,152	156,128	158,516	160,875	0.4
South Cambridgeshire	158,395	161,672	162,978	163,614	164,431	0.2
Essex	1,488,292	1,534,709	1,573,455	1,607,700	1,640,640	0.5
East of England	6,240,418	6,408,246	6,535,934	6,644,617	6,750,247	0.4
England	56,343,075	57,816,882	58,969,497	59,988,994	60,961,810	0.4

Source: ONS Population Projections by Local Authority and Year (2018)

2.12 The projected population growth in Uttlesford is expected to be driven primarily by growth in the 65+ age group. The size of this age group is projected to grow at a rate of 2.2% per annum across the 20 year period (Table 2-6). A similar trend is expected to be observed across the comparator areas, although not as pronounced.

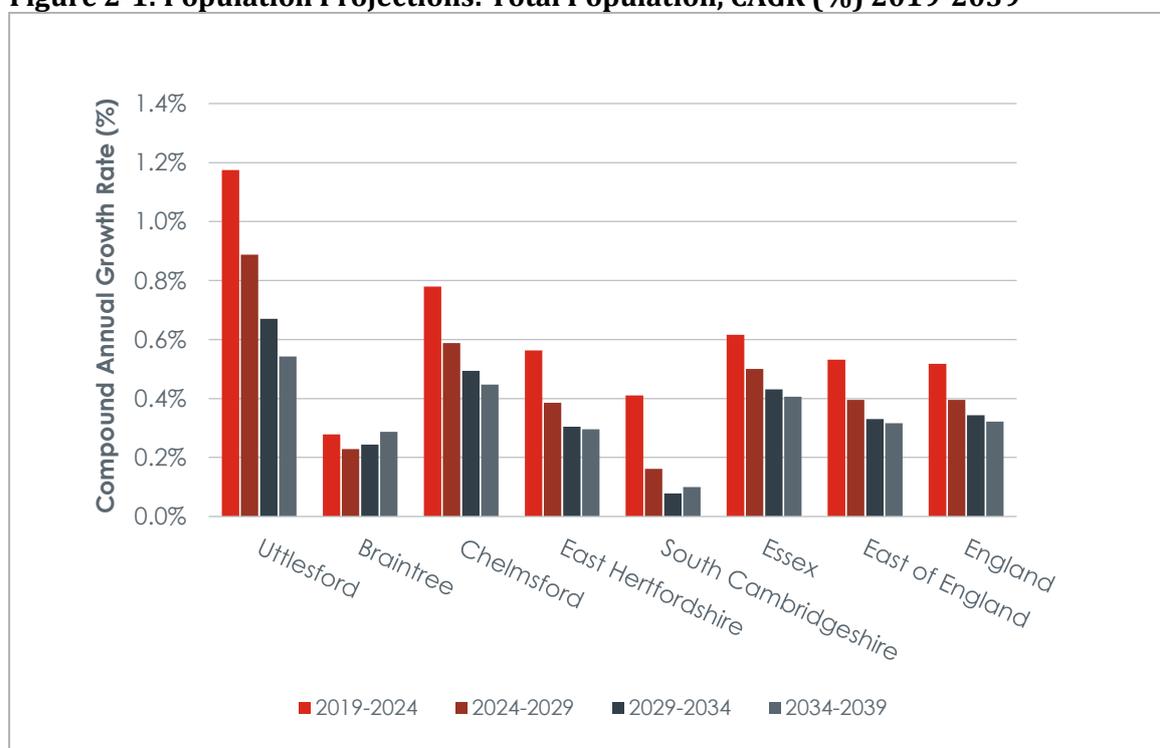
Table 2-6: Population Projections by Age Group, CAGR (%) 2019-2039

	0-15	16-64	65+	Overall
Uttlesford	0.3	0.4	2.2	0.8
Braintree	-0.4	-0.1	1.6	0.3
Chelmsford	0.2	0.4	1.5	0.6
East Hertfordshire	-0.3	0.0	2.1	0.4
South Cambridgeshire	-0.5	-0.1	1.5	0.2
Essex	0.1	0.2	1.5	0.5
East of England	-0.2	0.1	1.6	0.4
England	-0.2	0.1	1.7	0.4

Source: SQW Analysis of ONS Population Projections by Local Authority and Year (2018)

2.13 Breaking down the projected population growth into five-year periods reveals that the rate of growth in Uttlesford is expected to slow between 2019 and 2039 from just shy of 1.2% per annum (2019-2024) to 0.5% per annum (2034-2039) (Figure 2-1). In every time period however Uttlesford's growth rate is projected to be faster than the comparator areas.

Figure 2-1: Population Projections: Total Population, CAGR (%) 2019-2039



Source: SQW Analysis of ONS Population Projections by Local Authority and Year (2018)

3. Labour Market

Skills

- 3.1** In the 12 months to December 2020, 38.4% of the working age population in Uttlesford had an NVQ Level 4+ qualification (Table 3-1). With the exception of South Cambridgeshire which recorded a substantially higher percentage (56.2%) this was similar to the neighbouring LADs. With regards to the county, regional and national comparators, the percentage of the working age population with NVQ Level 4 + qualification in Uttlesford was higher than the average for Essex (35.3%) but lower the average for the East of England (39.2%) and England (42.8%).
- 3.2** On the other end of the spectrum, namely the percentage of the working age population with no qualifications, Uttlesford recorded a percentage of 4.5%. This was higher than what was recorded for South Cambridgeshire and Chelmsford (2.9% and 4.3% respectively), but lower than Braintree (6.9%) and the county, regional and national average. Data for East Hertfordshire was missing.

Table 3-1: Qualification of Residents Aged 16-64 in 2020 (12 Months to December)

	% with NVQ4+	% with NVQ3+	% with NVQ2+	% with NVQ1+	% with other quals	% with no quals
Uttlesford	38.4	60.2	77.7	88.9	6.5	4.5
Braintree	34	60	79.9	90	3	6.9
Chelmsford	37.9	61.8	84.2	91.1	4.6	4.3
East Hertfordshire	41.3	62.3	79.8	95.3	3.5	!
South Cambridgeshire	56.2	73.4	88	94.6	2.5	2.9
Essex	35.3	55.5	76.3	89.5	5.4	5.1
East of England	39.2	57.6	76.9	88.8	5.6	5.7
England	42.8	61.3	78.2	88.2	5.7	6.2

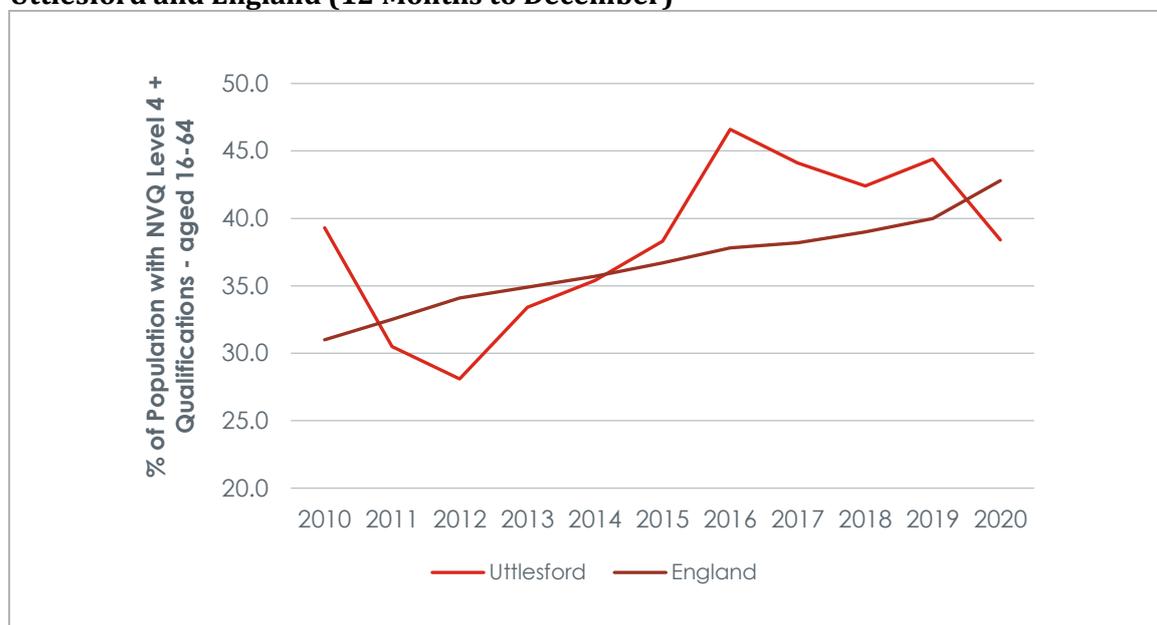
Source: ONS Annual Population Survey (2020)

! Estimate and confidence interval not available since the group sample size is zero or disclosive (0-2).

- 3.3** Between 2010 and 2020, the percentage of working aged residents in Uttlesford with a NVQ Level 4 + qualification fell by 0.9 percentage points from 39.3% to 38.4%. East Hertfordshire also saw a fall in the percentage of the working age population with a NVQ Level 4+ qualification, from 43.2% to 41.3%. With the exception of Chelmsford, the remaining comparator areas (including the county, regional and national comparators) all recorded increases in the percentage of their populations with NVQ Level 4+ qualifications between 2010 and 2020 of over 10 percentage points.

- 3.4** An analysis of trend data points to significant volatility in the data for Uttlesford. Overall, the inference is that the qualifications profile is similar to the England average on this measure (Figure 3-1).

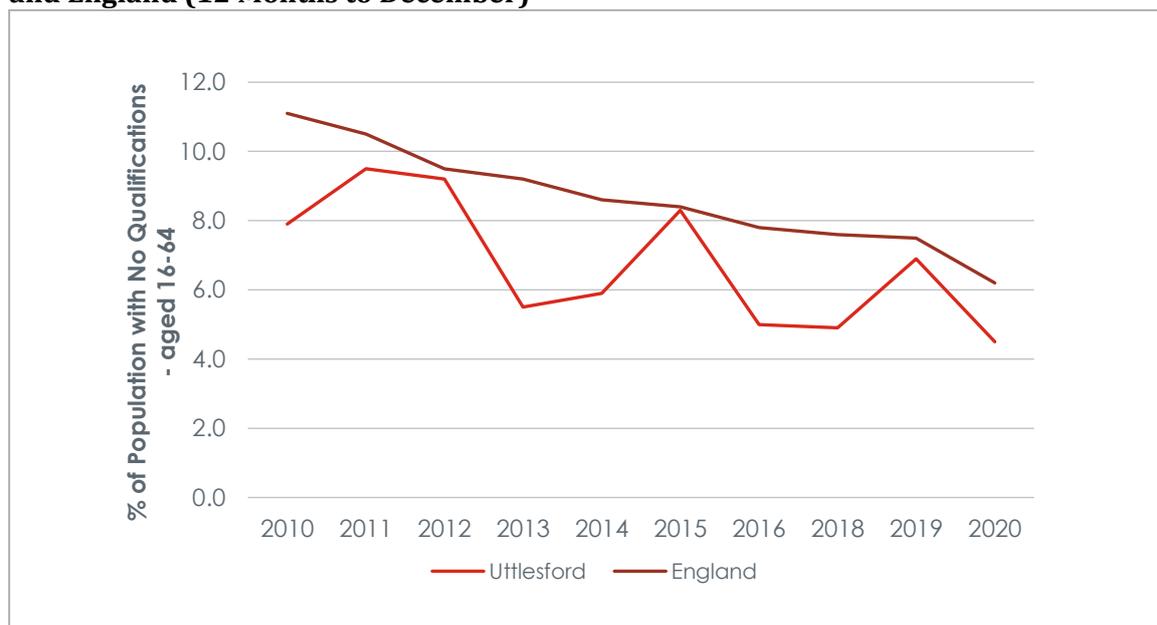
Figure 3-1: % of Population Aged 16-64 with NVQ Level 4 + Qualification, 2010-2020, Uttlesford and England (12 Months to December)



Source: SQW Analysis of ONS Annual Population Survey Data (2020)

- 3.5** On the other end of the spectrum, the percentage of the working age population in Uttlesford with no qualifications fell by 3.4 percentage points from 7.9% to 4.5% between 2010 and 2020. All of the comparator areas recorded falls in the percentage of the working age population with no qualifications over this period, although the decline was more pronounced in some areas than others, for example Braintree recorded a fall of 5.5 percentage points between 2010 and 2020, whilst the average across Essex was 6 percentage points.
- 3.6** Analysis of trend data reveals that the percentage of the working age population in Uttlesford with no qualifications fluctuated year on year which could be due to a small sample size. However, the percentage of the working age population with no qualifications in Uttlesford was consistently lower than the national average between 2010 and 2020 (Figure 3-2).

Figure 3-2: % of Population Aged 16-64 with No Qualifications, 2010-2020, Uttlesford and England (12 Months to December)



Source: SQW Analysis of ONS Annual Population Survey Data (2020)

Occupations

- 3.7** In 2020, 19.6% of working age residents in Uttlesford were employed as Managers, Directors and Senior Officials; this was notably higher than in the neighbouring LADs and across the county, regional and national comparators (Table 3-2). The percentage of working age residents employed in Skilled Trades Occupations in Uttlesford (18.9%) was much higher than elsewhere. The percentage of working age residents employed in Professional Occupations (21.3%) was close to the national average; it was higher than in most adjacent areas but noticeably lower than in South Cambridgeshire (37.3%).
- 3.8** Occupations that appear to be thinly represented in Uttlesford include administrative and secretarial; process, plant and machine operatives; and elementary occupations. These occupations are typically associated with major employers and/or production activities.

Table 3-2: Percentage in Employment by Standard Occupation Classification, 2020 (%) (12 Months to December)

	Managers, directors & senior officials	Professional occupations	Associate professional & technical occupations	Administrative & secretarial occupations	Skilled trades occupations	Caring, leisure & other service occupations	Sales & customer service occupations	Process, plant & machine operatives	Elementary occupations
Uttlesford	19.6	21.3	14.8	4.9	18.9	6.9	6	3.2	4.4
Braintree	16.8	8.9	20.1	10.7	9.5	8.4	9.5	6.5	9.6
Chelmsford	17.7	19.2	20.4	7.9	7.1	13.2	6.3	3.1	4.5
East Hertfordshire	15.6	18	22.7	13.3	9.7	5.3	4.5	3.7	7.2
South Cambridgeshire	11.1	37.3	12.9	7.4	10.1	8.1	3.3	2.5	7.2
Essex	13.6	17.5	16.4	12.2	10.5	10.4	6.4	4.6	8
East of England	12.9	20.7	15.4	10.9	10.1	8.9	6.6	5.2	9.3
England	11.8	22.9	15.9	10.1	9.1	8.7	6.7	5.4	9.2

Source: ONS Annual Population Survey

3.9 Between 2010 and 2020, the percentage of working age residents employed as Managers, Directors and Senior Officials in Uttlesford increased by 10.6 percentage points, from 9% in 2010 to 19.6% in 2020. The percentage of working age residents employed in Skilled Trades Occupations also increased by over 10 percentage points, from 8.4% in 2010 to 18.9% in 2020. Conversely, the percentage of working age residents employed in Professional Occupations in Uttlesford fell by 6.2 percentage points over the 10 year period, from 27.5% in 2010 to 21.3% in 2020.

Jobs

3.10 In 2019, there were 56,000 jobs in Uttlesford. There was a jobs density of 1.01, meaning that there was roughly one job for every resident aged 16-64 (Table 3-3). With the exception of South Cambridgeshire – which recorded a similar jobs density of 1.03 - the job densities recorded in the neighbouring LADs and across the county, regional and national comparators were below 1, indicating that in these areas there was less than one job for every resident aged 16-64. Generally, high jobs densities are associated with urban economies. In the case of Uttlesford, it is likely to be explained by the presence of Stansted Airport which is a major employer (accounting for around 12,000¹ jobs).

Table 3-3: Total Number of Jobs and Jobs Density, 2019

	Number of Jobs	Jobs Density
Uttlesford	56,000	1.01
Braintree	67,000	0.73
Chelmsford	103,000	0.94
East Hertfordshire	84,000	0.9
South Cambridgeshire	99,000	1.03
Essex	715,000	0.79
East of England	3,268,000	0.86
England	30,999,000	0.88

Source: ONS Jobs Density Data (2019)

3.11 Since 2010, the total number of jobs in Uttlesford has increased by roughly 16,000 (Table 3-4). Between 2010 and 2015, the average annual growth in the number of jobs was 2.8%. This was on par with the growth rate observed in Braintree and, with the exception of East Hertfordshire (3.3%), exceeded the growth rates observed in the other comparator areas.

3.12 Between 2015 and 2019, the average annual growth rate in the number of jobs in Uttlesford almost doubled to 5%. This exceeded the growth rates observed in the neighbouring LADs and across the county, regional and national comparators.

Table 3-4: Total Number of Jobs and CAGR (%) 2010-2019

	2010	2015	2019	2010-2015	2015-2019
Uttlesford	40,000	46,000	56,000	2.8	5.0
Braintree	55,000	63,000	67,000	2.8	1.6
Chelmsford	93,000	95,000	103,000	0.4	2.0
East Hertfordshire	62,000	73,000	84,000	3.3	3.6
South Cambridgeshire	81,000	87,000	99,000	1.4	3.3

¹ Uttlesford District Council (2018) *Uttlesford Economic Development Strategy and Action Plan 2018-21*. 'Supporting Sustainable Business Growth'

	2010	2015	2019	2010-2015	2015-2019
Essex	608,000	667,000	715,000	1.9	1.8
East of England	2,770,000	3,053,000	3,268,000	2.0	1.7
England	26,295,000	29,219,000	30,999,000	2.1	1.5

Source: SQW Analysis of ONS Jobs Density Data (2019)

Comparison to CE's projections (Working Paper 3)

- 3.13** Data within the projections produced by Cambridge Econometrics differ slightly to the ONS Jobs Density data. The Cambridge Econometrics data estimated there to be 53,900 jobs in Uttlesford in 2019 (in comparison to 56,000), and the growth rates between 2010-2015 and 2015-2019 were 1.5% per annum and 4.7% per annum respectively, lower than those derived from the ONS Jobs Density data.
- 3.14** The Cambridge Econometrics forecasts also estimated there to be fewer jobs in the East of England in 2019 than the ONS Jobs Density Data (3,221,000 in comparison to 3,268,000) and the growth rates between 2010-2015 and 2015-2019 were also lower than those derived from the ONS Jobs Density data (1.7% and 1.2% respectively in comparison to 2% and 1.7%).

Economic Activity, Employment and Unemployment Rate

- 3.15** In the 12 months to December 2020, the economic activity rate and the employment rate of the working age population in Uttlesford was 77.1% and 75.2% respectively (Table 3-5). These appeared to be the lowest rates recorded amongst the neighbouring LADs and lower than the county, regional and national comparators. Figure 3-3 and Figure 3-4 reveal however that the economic activity rate and employment rate of the working age population in Uttlesford have generally exceeded the average for England. The volatility in the data is a consequence of survey-related issues.
- 3.16** From APS, there are no data on the unemployment rate in Uttlesford due to the sample size being too small.

Table 3-5: Economic Activity Rate, Economic Employment Rate and Unemployment Rate, Aged 16-64 (%), 2020 (12 Months to December 2020)

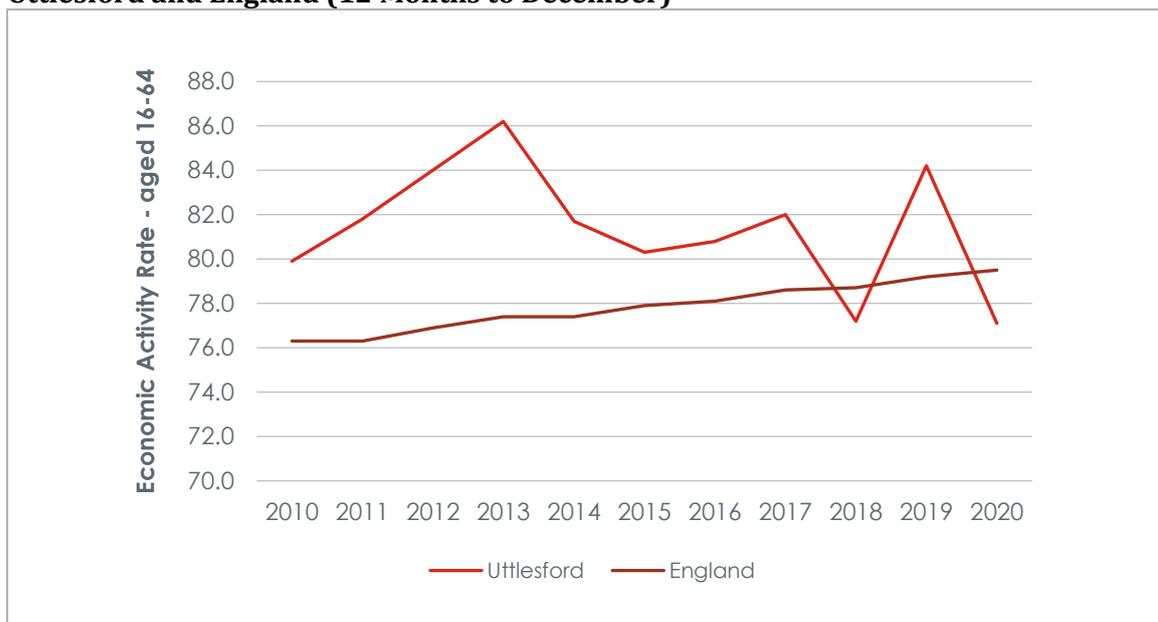
	Economic activity rate - aged 16-64	Employment rate - aged 16-64	Unemployment rate - aged 16-64
Uttlesford	77.1	75.2	!
Braintree	87.6	86	!
Chelmsford	83.1	80.8	2.8
East Hertfordshire	79.4	76.2	4
South Cambridgeshire	78.3	76.1	2.8
Essex	78.9	76	3.6
East of England	80.4	77.2	4

	Economic activity rate - aged 16-64	Employment rate - aged 16-64	Unemployment rate - aged 16-64
England	79.5	75.7	4.8

Source: ONS Annual Population Survey (2020)

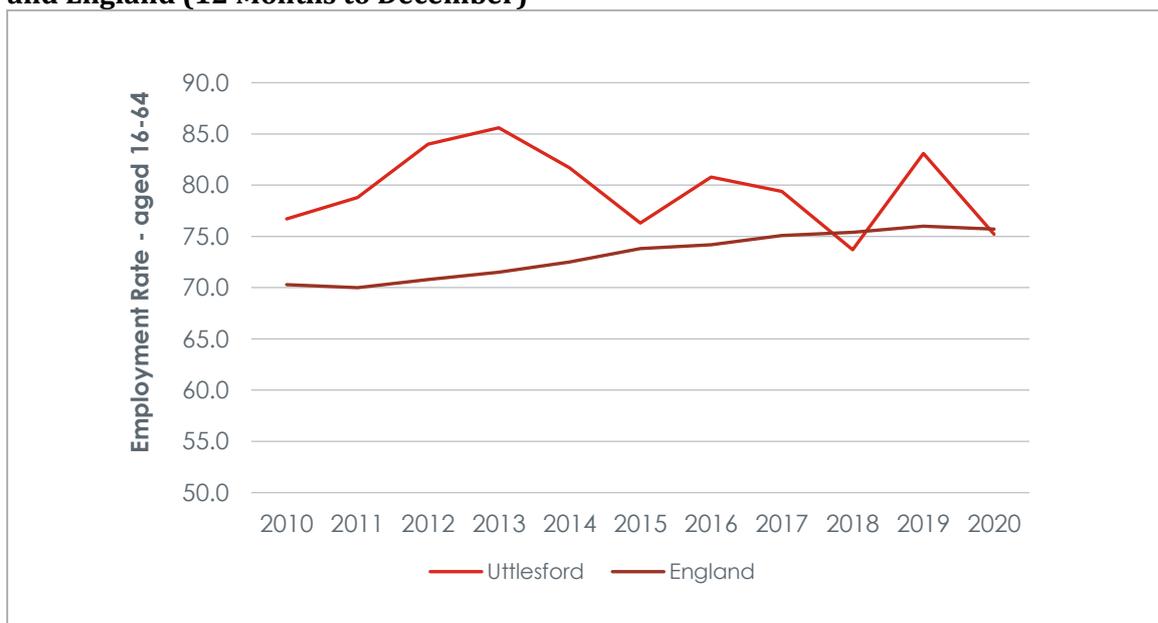
! Estimate and confidence interval not available since the group sample size is zero or disclosive (0-2).

Figure 3-3: Economic Activity Rate of the Working Aged Population, 2010-2020, Uttlesford and England (12 Months to December)



Source: SQW Analysis of ONS Annual Population Survey (2020)

Figure 3-4: Employment Rate of the Working Aged Population, 2010-2020, Uttlesford and England (12 Months to December)



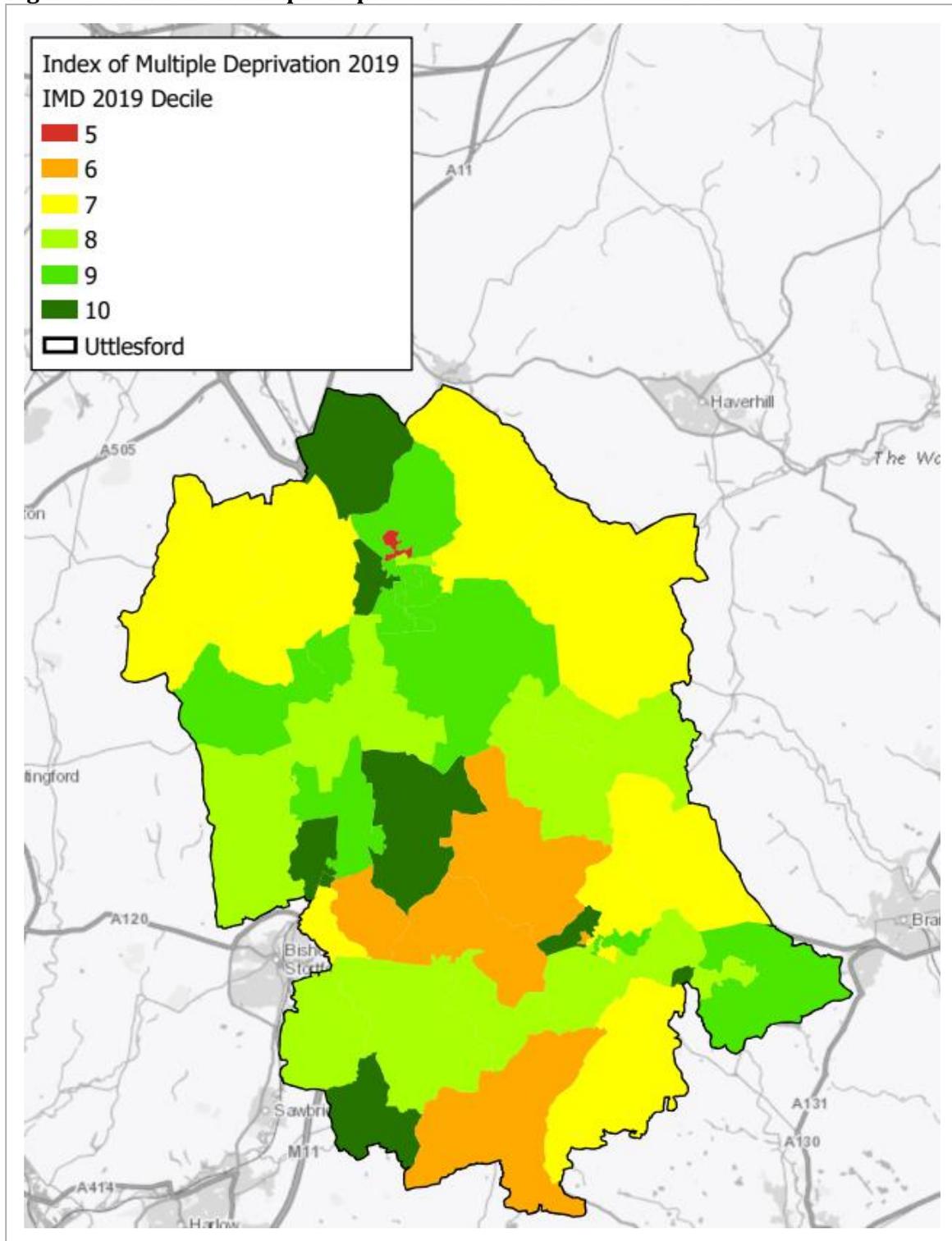
Source: SQW Analysis of ONS Annual Population Survey (2020)

Deprivation

- 3.17** The Index of Multiple Deprivation (IMD) is the official measure of relative deprivation for small areas in England. The IMD decile is calculated by ranking the 32,844 LSOAs in England from most deprived area (1) to least deprived area (32,844) and dividing them into 10 equal groups. LSOAs in the first decile are therefore in the 10% most deprived areas in England, whilst those in tenth decile are in the 10% least deprived².
- 3.18** Mapping the deciles of LSOAs in Uttlesford confirms that the district is relatively affluent: there are no LSOAs classified as falling within the 40% most deprived areas in England and there are large swathes of green shading indicating that there are areas of the district that are in the 30% least deprived in England (Figure 3-5).
- 3.19** Notably, LSOAs in the tenth decile (10% least deprived) are concentrated along the major north-south transport axis: in the north of the District near Great Chesterford, in the centre of the District near Stansted Mountfitchet and Elsenham, and in the south west of the District near Hatfield Heath.
- 3.20** Areas of relative deprivation (indicated by orange and red shading) are more concentrated in the southern part of the district, although there is a pocket of deprivation just north of Saffron Walden and adjacent to an area of relative affluence.

² <https://www.gov.uk/government/statistics/english-indices-of-deprivation-2019>

Figure 3-5: Index of Multiple Deprivation Deciles 2019 - Uttlesford



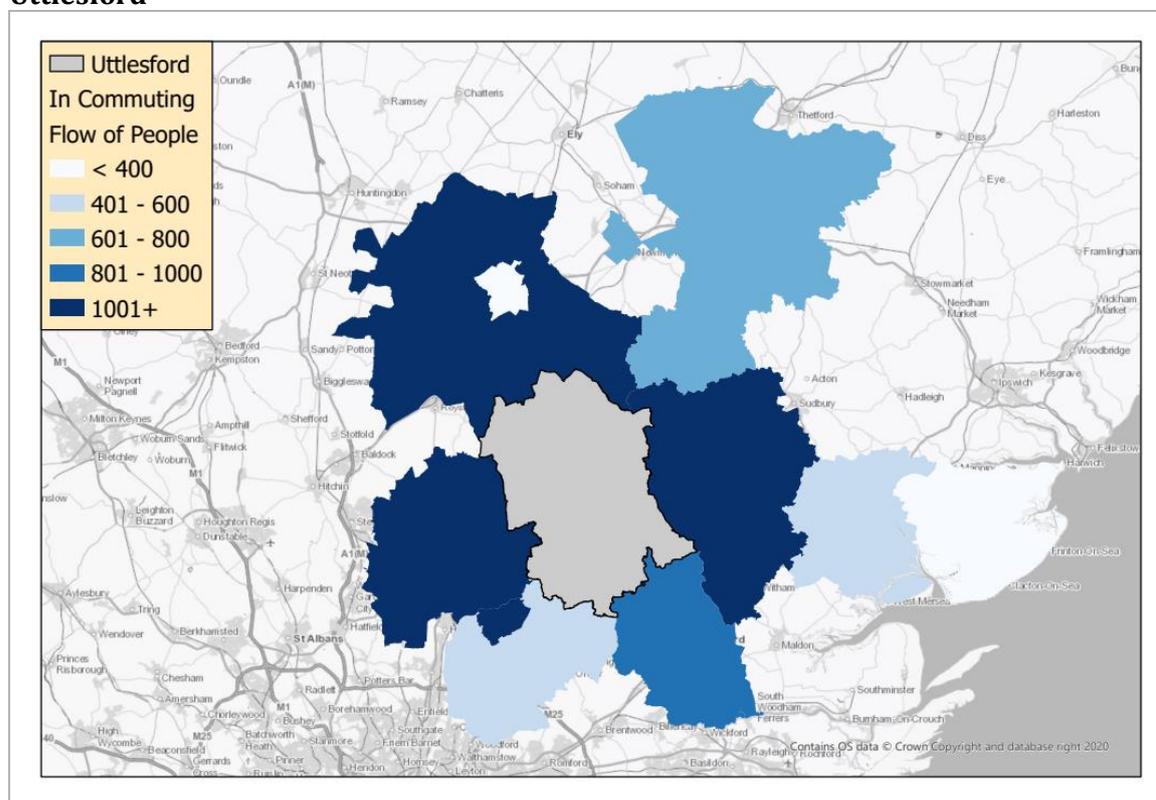
Source: English Indices of Multiple Deprivation (2019) Produced by SQW 2021. Licence 100030994

4. Commuting and Earnings

Commuting

- 4.1** At the time of the 2011 Census, 13,006 people both lived and worked in Uttlesford.
- 4.2** With regards to in-commuting (Figure 4-1), the top three Local Authority Districts of residence for people working in Uttlesford but living elsewhere were Braintree (3,830 people), East Hertfordshire (3,418) and South Cambridgeshire (1,178). The other LADs making up the top ten included Harlow, Chelmsford, St Edmundsbury, Colchester, Epping Forest, Cambridge and Tendring.

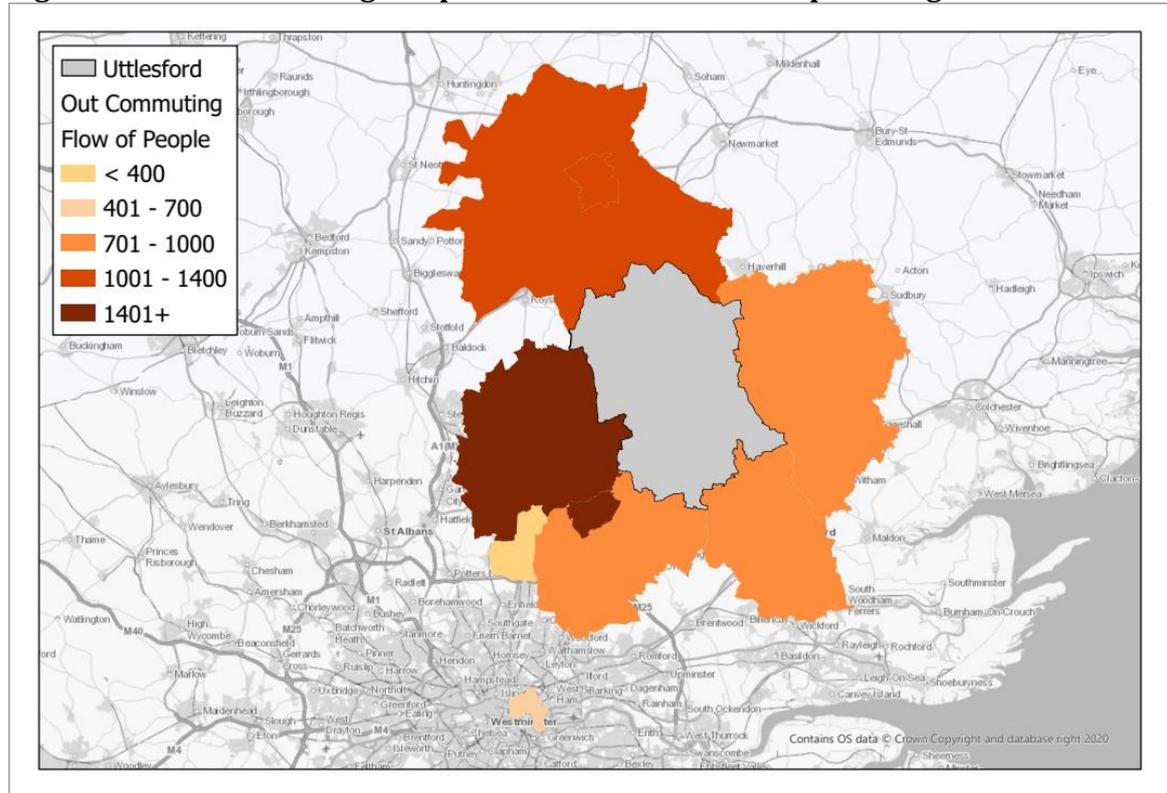
Figure 4-1: In Commuting – Top 10 Places of Residence for People Working in Uttlesford



Source: 2011 Census, Location of Usual Residence and Place of Work. Produced by SQW 2021. Licence 100030994

- 4.3** With regards to out commuting (Figure 4-2) the top three LADs of work for people living in Uttlesford but working elsewhere were East Hertfordshire (2,972), Westminster (1,978) and Harlow (1,412). The other LADs making up the top ten included Cambridge, South Cambridgeshire, Chelmsford, Braintree, Epping Forest, Tower Hamlets and Broxbourne.

Figure 4-2: Out Commuting – Top 10 Places of Work for People Living in Uttlesford



Source: 2011 Census, Location of Usual Residence and Place of Work. Produced by SQW 2021. Licence 100030994

- 4.4** Subtracting the total number of people commuting out of Uttlesford for work (17,973) from the total number of people commuting into Uttlesford for work (17,618) results in an overall balance of -355. Although there were reasonably significant flows of both in- and out-commuters to/from Uttlesford, at the time of the last Census, these were close to being balanced.

Earnings

- 4.5** With regards to the resident earnings analysis, the median gross weekly earnings for full-time employees living in Uttlesford in 2020 were £660 (Table 4-1). This was mid range in relation to the neighbouring LADs – resident earnings were higher in East Hertfordshire (£710) and South Cambridgeshire (£720) but lower in Chelmsford (£630) and Braintree (£580) – but exceeded the county, regional and national comparators.
- 4.6** With regards to the workplace analysis, the median gross weekly earnings for full-time employees working in Uttlesford in 2020 were £570. With the exception of Braintree and Essex, this was lower than the workplace earnings recorded across the comparator areas. Notably, the median gross weekly earnings were £100 higher for full-time employees working in South Cambridgeshire compared to Uttlesford.

Table 4-1: Median Gross Weekly Earnings (£) for Full-Time Employees, 2020

	Resident Analysis (£)	Workplace Analysis (£)
Uttlesford	660	570
Braintree	580	520
Chelmsford	630	580
East Hertfordshire	710	610
South Cambridgeshire	720	670
Essex	620	560
East of England	600	570
England	590	590

Source: Annual Survey of Hours and Earnings (2020)

- 4.7** Between 2010 and 2020, growth was recorded in both the resident and workplace earnings for full-time employees in Uttlesford (Table 4-2). With regards to resident earnings, the median gross weekly earnings for full-time employees living in Uttlesford increased at a rate of 1.7% per annum over the ten year period. With the exception of South Cambridgeshire – which recorded an annual growth rate of 2% - this was higher than the neighbouring LADs and the county, regional and national comparators.
- 4.8** With respect to workplace earnings, the median gross weekly earnings for full-time employees working in Uttlesford increased at a rate of 1.6% per annum between 2010 and 2020. This was lower than the rate of growth recorded for workplace earnings in East Hertfordshire (2.1%), higher than the rates of growth recorded in Braintree, Chelmsford, South Cambridgeshire and across Essex, and on par with the regional and national comparators.

Table 4-2: Change in Median Gross Weekly Earnings (£) for Full-Time Employees, CAGR (%) 2010-2020

	Resident Analysis	Workplace Analysis
Uttlesford	1.7	1.6
Braintree	0.8	0.9
Chelmsford	1.2	1.0
East Hertfordshire	1.1	2.1
South Cambridgeshire	2.0	1.1
Essex	1.4	1.4
East of England	1.5	1.6
England	1.5	1.6

Source: SQW Analysis of Annual Survey of Hours and Earnings Data (2020)

5. Enterprise

Number and Size of Enterprises

- 5.1** In 2020, there were 5,475 enterprises in Uttlesford, the lowest number recorded amongst the comparator LADs (Table 5-1).
- 5.2** Between 2010 and 2015 the number of enterprises in Uttlesford increased at a rate of 1.9% per annum; this rate of growth was the same as that observed in Braintree but lower than the rates observed across the remaining LADs and the county, regional and national comparators.
- 5.3** Between 2015 and 2020, the rate of growth slowed to 1.5% per annum; again this was lower than the rates observed across the neighbouring LADs – with the exception of Braintree – and across Essex, the East of England and England. With the exception of East Hertfordshire, all comparator areas experienced a decline in the rate of growth of the number of enterprises across the five year period.

Table 5-1: Total Number of Enterprises, 2020 and CAGR (%) 2010-2020

	2010	2015	2020	2010-2015	2015-2020
Uttlesford	4,635	5,090	5,475	1.9	1.5
Braintree	5,875	6,440	6,615	1.9	0.5
Chelmsford	6,180	7,245	8,215	3.2	2.5
East Hertfordshire	6,815	7,625	8,720	2.3	2.7
South Cambridgeshire	6,930	7,815	8,590	2.4	1.9
Essex	52,260	59,575	66,535	2.7	2.2
East of England	213,640	242,975	271,395	2.6	2.2
England	1,797,910	2,116,295	2,390,970	3.3	2.5

Source: SQW Analysis of UK Business Counts Data (2020)

- 5.4** In 2020, 91% of the enterprises in Uttlesford were classified as micro (having between zero and nine employees), 7.5% were classified as small (10-49 employees), 1.2% were medium (50-249 employees) and 0.2% were large (250+ employees) (Table 5-2).
- 5.5** Looking across the comparator areas, the size distribution of enterprises in Uttlesford in 2020 included a relatively higher proportion of micro enterprises, and a relatively lower proportion of SMEs.

Table 5-2: Size Distribution of Enterprises, 2020 (% of Total Enterprises)

	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)
Uttlesford	91.1	7.5	1.2	0.2
Braintree	89.0	9.0	1.7	0.2
Chelmsford	90.6	7.7	1.3	0.4
East Hertfordshire	90.8	7.6	1.4	0.2
South Cambridgeshire	89.0	8.8	1.7	0.5
Essex	90.2	8.1	1.4	0.3
East of England	90.0	8.1	1.5	0.4
England	89.7	8.4	1.5	0.4

Source: SQW Analysis of UK Business Counts Data (2020)

- 5.6** With the exception of medium enterprises - the number of which increased at the rate of 5% per annum between 2010 and 2020, greatly exceeding the pace of growth observed across the comparator areas – the annual growth rate in the number of micro, small and large enterprises in Uttlesford was relatively low in comparison to the neighbouring LADs and the county, regional and national comparators (Table 5-3).

Table 5-3: Size Distribution of Enterprises, CAGR (%) 2010-2020

	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)
Uttlesford	1.6	1.7	5.0	0.0
Braintree	1.2	0.9	3.7	11.6
Chelmsford	2.9	2.8	3.9	1.8
East Hertfordshire	2.5	2.7	4.1	2.9
South Cambridgeshire	2.2	2.1	2.3	2.9
Essex	2.5	1.9	3.8	1.4
East of England	2.5	1.8	2.4	1.7
England	3.0	1.9	2.5	2.3

Source: SQW Analysis of UK Business Counts Data (2020)

Sectoral Analysis

- 5.7** In 2020, the largest sector in Uttlesford by the number of enterprises was *Professional, Scientific and Technical Services*, accounting for 19% of total enterprises), followed by *Construction* (16%) and *Wholesale and Retail Trade* (11.8%) (Table 5-4). Other sectors that accounted for greater than 5% of the total number of enterprises included *Administration and Support Service Activities* (9.7%), *Information and Communication* (7.5%), *Agriculture, Forestry and Fishing* (6.8%) and *Manufacturing* (5.5%).
- 5.8** Analysis of ten-year compound annual growth rates reveals that between 2010 and 2020 the *Construction* and *Administration and Support Services Activities* sectors experienced notable growth, of just under 3% per annum. *Wholesale and Retail Trade* was the only sector that declined in size during the ten-year period, experiencing a 0.7% fall in the number of enterprises per annum.

Table 5-4: Sectoral Distribution of Enterprises, 2020 (% of Total Enterprises)

	Uttlesford	Braintree	Chelmsford	East Hertfordshire	South Cambridgeshire	Essex	East of England	England
A : Agriculture, forestry and fishing	6.8	6.0	2.7	2.6	6.3	3.3	4.4	4.2
B : Mining and quarrying	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0
C : Manufacturing	5.5	7.2	4.2	4.5	9.0	5.4	5.3	4.9
D : Electricity, gas, steam and air conditioning supply	0.3	0.0	0.1	0.3	0.1	0.1	0.1	0.2
E : Water supply; sewerage, waste management and remediation activities	0.3	0.4	0.4	0.5	0.2	0.4	0.3	0.3
F : Construction	16.0	18.7	17.2	15.7	12.4	19.6	16.0	12.8
G : Wholesale and retail trade; repair of motor vehicles and motorcycles	11.8	12.9	12.7	11.9	10.2	13.1	13.7	14.1

	Uttlesford	Braintree	Chelmsford	East Hertfordshire	South Cambridgeshire	Essex	East of England	England
H : Transportation and storage	3.2	3.6	3.1	6.2	2.0	4.6	5.1	4.6
I : Accommodation and food service activities	3.6	4.4	4.3	3.6	3.4	4.5	4.9	5.6
J : Information and communication	7.5	6.9	10.2	8.3	11.1	7.5	8.2	8.7
K : Financial and insurance activities	2.3	1.5	2.6	1.8	1.5	2.1	1.9	2.3
L : Real estate activities	3.3	2.9	3.7	4.0	3.5	3.5	3.5	3.8
M : Professional, scientific and technical activities	19.0	15.6	18.8	19.7	21.2	15.9	16.4	17.5
N : Administrative and support service activities	9.7	8.5	8.8	11.0	7.9	8.9	8.4	8.8
O : Public administration and defence; compulsory social security	0.8	0.8	0.3	0.3	0.8	0.4	0.5	0.3
P : Education	1.7	1.7	1.9	1.6	1.9	1.7	1.8	1.7
Q : Human health and social work activities	2.8	2.8	3.5	2.6	3.6	3.4	3.5	3.7
R : Arts, entertainment and recreation	2.3	2.3	2.0	2.3	2.1	2.1	2.2	2.5
S : Other service activities	3.2	3.8	3.5	3.2	2.8	3.6	3.6	3.8

Source: SQW Analysis of UK Business Counts Data (2020)

5.9 The largest sectors in Uttlesford by the proportion of total employment in 2019 were *Transportation and Storage* (19.6%), *Professional, Scientific and Technical Services* and *Wholesale and Retail Trade* (both 10.9%) (Table 5-5). Other sectors that recorded greater than 5% of total employment included *Accommodation and Food Service Activities* (8.7%), *Manufacturing, Administration and Support Services*, and *Education* (all of which accounted for 6.5%), *Construction* and *Human Health and Social Work Activities* (both of which accounted for 5.4%).

Table 5-5: Employment by Sector, 2019 (% of Total Employment)

	Uttlesford	Braintree	Chelmsford	East Hertfordshire	South Cambridgeshire	Essex	East of England	England
A : Agriculture, forestry and fishing	2.7	2.2	0.9	1.1	1.9	1.5	1.7	1.3
B : Mining and quarrying	0.2	0.1	0	0.1	0	0	0.1	0.1
C : Manufacturing	6.5	10.7	4.4	5.9	12.1	6.7	7.5	7.8
D : Electricity, gas, steam and air conditioning supply	0	0	0.1	0.1	0.1	0.1	0.2	0.4
E : Water supply; sewerage, waste management and remediation activities	0.7	0.8	1	0.4	0.5	0.8	0.7	0.6
F : Construction	5.4	8.9	6.7	6.6	6.6	7.9	6.2	5
G : Wholesale and retail trade; repair of motor vehicles and motorcycles	10.9	17.9	16.7	15.8	9.9	16.4	15.8	15.1
H : Transportation and storage	19.6	3.6	3.3	5.3	1.9	5.1	4.9	5
I : Accommodation and food service activities	8.7	5.4	6.7	6.6	4.9	6.9	6.9	7.5
J : Information and communication	2.7	2.7	3.9	3.9	8.8	3.3	3.8	4.4

	Uttlesford	Braintree	Chelmsford	East Hertfordshire	South Cambridgeshire	Essex	East of England	England
K : Financial and insurance activities	1.7	2.7	3.9	1.3	1.1	2.8	2.4	3.5
L : Real estate activities	1.7	1.8	1.9	2	1.4	2	1.9	2
M : Professional, scientific and technical activities	10.9	8.9	7.8	10.5	25.3	8.9	9.6	9.2
N : Administrative and support service activities	6.5	6.2	6.7	17.1	6.6	8.2	10.1	8.9
O : Public administration and defence; compulsory social security	2.7	3.6	5	2	1.4	3	3.2	3.9
P : Education	6.5	8	8.9	9.2	7.7	8.9	9	8.4
Q : Human health and social work activities	5.4	10.7	16.7	7.9	7.7	13	11.7	12.4
R : Arts, entertainment and recreation	2	2.2	2.2	2.6	1.1	2.5	2.5	2.5
S : Other service activities	1.5	1.8	2.8	1.6	1.9	2.1	2	2.1

Source: Business Register and Employment Survey (2019)

5.10 Looking at the absolute numbers, analysis of compound annual growth rates for the period 2015 to 2019 reveals that one of the fastest growing sectors in Uttlesford by total employment was *Professional, Scientific and Technical Services*, recording 9.3% growth per annum. The data also show that the *Wholesale and Retail Trade* and *Construction* sectors declined in size during the four-year period (both sectors recorded annual growth rates of -4.5%).

5.11 Analysis of location quotients (LQ) reveals that employment in the Transportation and Storage sector in Uttlesford in 2019 was almost four times as concentrated than the national average, shown by a LQ of 3.9 (Table 5-6). This reflects the importance of Stansted Airport.

Table 5-6: Location Quotients

	Uttlesford	Braintree	Chelmsford	East Hertfordshire	South Cambridgeshire	Essex	East of England
A : Agriculture, forestry and fishing	2.1	1.7	0.7	0.8	1.5	1.1	1.3
B : Mining and quarrying	2.6	0.6	0.3	1.6	0.4	0.5	0.7
C : Manufacturing	0.8	1.4	0.6	0.8	1.6	0.9	1.0
D : Electricity, gas, steam and air conditioning supply	0.0	0.0	0.3	0.3	0.3	0.2	0.5
E : Water supply; sewerage, waste management and remediation activities	1.0	1.3	1.6	0.6	0.9	1.3	1.2
F : Construction	1.1	1.8	1.3	1.3	1.3	1.6	1.2
G : Wholesale and retail trade; repair of motor vehicles and motorcycles	0.7	1.2	1.1	1.0	0.7	1.1	1.0
H : Transportation and storage	3.9	0.7	0.7	1.1	0.4	1.0	1.0
I : Accommodation and food service activities	1.2	0.7	0.9	0.9	0.7	0.9	0.9
J : Information and communication	0.6	0.6	0.9	0.9	2.0	0.8	0.9
K : Financial and insurance activities	0.5	0.8	1.1	0.4	0.3	0.8	0.7
L : Real estate activities	0.9	0.9	1.0	1.0	0.7	1.0	0.9

	Uttlesford	Braintree	Chelmsford	East Hertfordshire	South Cambridgeshire	Essex	East of England
M : Professional, scientific and technical activities	1.2	1.0	0.8	1.1	2.8	1.0	1.0
N : Administrative and support service activities	0.7	0.7	0.8	1.9	0.7	0.9	1.1
O : Public administration and defence; compulsory social security	0.7	0.9	1.3	0.5	0.4	0.8	0.8
P : Education	0.8	1.0	1.1	1.1	0.9	1.1	1.1
Q : Human health and social work activities	0.4	0.9	1.3	0.6	0.6	1.0	0.9
R : Arts, entertainment and recreation	0.8	0.9	0.9	1.2	0.4	1.0	1.0
S : Other service activities	0.7	0.8	1.3	0.8	0.9	1.0	0.9

Source: SQW Analysis of Business Register and Employment Survey Data (2019)

Enterprise Birth Rates, Death Rates and Survival Rates

- 5.12** In 2019, 580 new enterprises were established in Uttlesford and 600 enterprises ceased trading; these were the lowest rates of enterprise births and deaths recorded amongst the comparator LADs (Table 5-7).
- 5.13** Between 2014 and 2019, the number of enterprise births in Uttlesford fell at a rate of 0.5% per annum. Braintree and East Hertfordshire also recorded negative growth rates for the five-year period (both -1.7%), whilst Chelmsford and South Cambridgeshire recorded annual growth of just over two and three percent respectively. Annual growth rates across the county, regional and national comparators ranged from 2% to 2.2%.
- 5.14** Over the same five year period, the number of enterprise deaths in Uttlesford increased at a rate of almost 10% per annum. With the exception of East Hertfordshire, which recorded a 21.9% annual increase in enterprise deaths, this was substantially higher than the rates recorded for the neighbouring LADs and the county, regional and national comparators.

Table 5-7: Enterprise Births and Deaths 2019, and CAGR (%) 2014-2019

	Enterprise Births		Enterprise Deaths	
	2019	2014-2019	2019	2014-2019
Uttlesford	580	-0.5	600	9.9
Braintree	715	-1.7	655	2.5
Chelmsford	1,095	2.1	980	4.5
East Hertfordshire	960	-1.7	1,800	21.9
South Cambridgeshire	1,060	3.1	895	6.6
Essex	8,875	2.1	7,720	5.3
East of England	36,040	2.0	32,670	6.5
England	349,675	2.2	299,935	6.6

Source: SQW Analysis of ONS Business Demography Data (2019)

- 5.15** The one-year survival rate of enterprises born in Uttlesford in 2014 was 91.6% (Table 5-8). Other than Braintree, this was the lowest one-year survival rate recorded amongst the comparators.
- 5.16** The three-year survival rate of enterprises born in Uttlesford in 2014 was 64.7%. Although this was lower than the survival rates recorded for East Hertfordshire and South Cambridgeshire (65.6% and 65.4% respectively), it was higher than the rates recorded for Braintree (62.8%) and Chelmsford (64%) and the county (63%), regional (63%) and national comparators (61.4%).

5.17 The five-year survival rate of enterprises born in Uttlesford in 2014 was 47.9%. This was the highest five-year survival rate recorded amongst the neighbouring LADs, and notably was more than three percent higher than the county and regional comparators, and more than five percent higher than the average for England.

Table 5-8: 5-Year Business Survival Rates (of Businesses Born in 2014)

	1-year survival	2-year survival	3-year survival	4-year survival	5-year survival
Uttlesford	91.6	78.2	64.7	54.6	47.9
Braintree	91.0	76.3	62.8	52.6	45.5
Chelmsford	92.9	80.2	64.0	54.3	47.2
East Hertfordshire	94.3	78.5	65.6	52.6	45.0
South Cambridgeshire	93.4	77.5	65.4	54.9	47.3
Essex	93.7	78.0	63.0	52.1	44.8
East of England	93.1	77.3	63.0	51.6	44.5
England	92.3	75.9	61.4	49.4	42.5

Source: ONS Business Demography (2019)

6. Conclusions

Summary of Key Findings

- Between 2019 and 2039 the population of Uttlesford is expected to increase by just over 16,000 people. This equates to a rate of growth that is double the rate projected for the East of England and England.
- In 2020, the proportion of working age people with an NVQ Level 4+ qualification in Uttlesford was higher than the average for Essex. There is considerable year-on-year volatility in the available ONS data, but overall, the incidence of working age people qualified to this level is similar to the national average.
- With regards to occupations, Uttlesford had a notably higher proportion of residents employed as Managers, Directors and Senior officials; the data also revealed a 10 percentage point increase in the percentage of residents employed in this occupation class between 2010 and 2020. Conversely, although Uttlesford had a relatively high proportion of residents employed in Professional Occupations in 2020, this was lower than the proportion of residents employed in the occupation class in 2010.
- In 2019 Uttlesford had roughly 56,000 jobs and a job density of 1.01, indicating that there was roughly one job for every resident aged 16-64. The analysis of time series data revealed that job growth had been particularly strong, especially between 2015 and 2019.
- Between 2010 and 2020, economic activity and employment rates have fluctuated (mainly because of issues linked to the data) but overall, they have been close to the national average.
- With regards to deprivation, Uttlesford is a relatively affluent district with LSOAs in the tenth decile (10% least deprived areas in England) concentrated along the major north-south transport axis, although there are some pockets of deprivation in the south of the district and near the market town of Saffron Walden.
- Analysis of earnings data revealed that full time employees living in Uttlesford in 2020 earned over £80 more a week than full time employees working in Uttlesford. Workplace earnings were also notably lower than the comparator areas.
- Growth rates pertaining to the number of enterprises in Uttlesford between 2010 and 2020 were relatively low. Of the growth that did occur over the ten-year period, much of this was driven by growth in the number of medium sized enterprises.
- Sectoral analysis revealed that the largest sectors by the number of enterprises in 2020 were *Professional, Scientific and Technical Services, Construction and Wholesale and Retail Trade*. The largest sectors by the amount of employment in 2019 were *Transportation and Storage, Professional, Scientific and Technical Services and Wholesale and Retail Trade*.

- *Construction and Administration and Support Services Activities* sectors experienced notable growth in the number of enterprises between 2010 and 2020. *Professional, Scientific and Technical Services* experienced fast absolute growth in the employment over the same time period.
- Analysis of location quotients revealed that employment in the *Transportation and Storage* sector was almost four times as concentrated in Uttlesford compared to the national average.
- Enterprise birth and death rates were relatively low in Uttlesford, as were one-year business survival rates, but five-year survival rates were relatively high.



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SQW is a leading provider of research, analysis and advice on sustainable economic and social development for public, private and voluntary sector organisations across the UK and internationally. Core services include appraisal, economic impact assessment, and evaluation; demand assessment, feasibility and business planning; economic, social and environmental research and analysis; organisation and partnership development; policy development, strategy, and action planning. In 2019, BBP Regeneration became part of SQW, bringing to the business a RICS-accredited land and property team.

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The Local Economy of Uttlesford

**Developing an evidence base to inform the new
Local Plan**

**Working Paper C: Insights from employment projections
prepared by Cambridge Econometrics – DRAFT**

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3. Sectoral Analysis	5

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1. Introduction

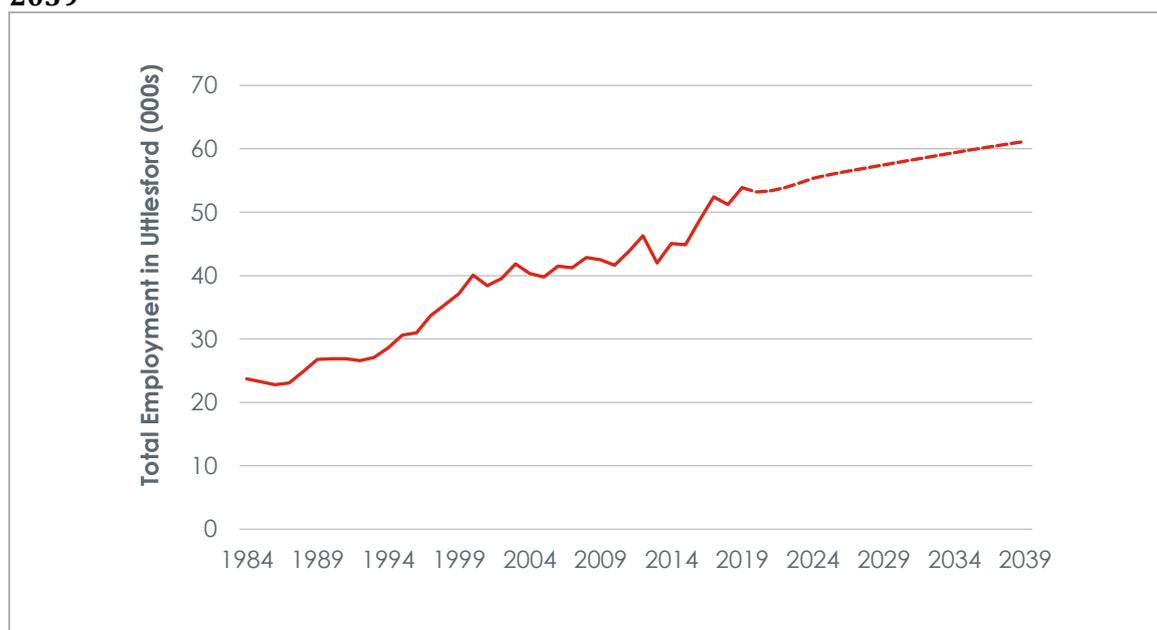
Aim

- 1.1** This Working Paper examines a set of employment projections produced by Cambridge Econometrics (CE). These provide sectoral data on granular scale, reporting on 45 sectors. As well as future projections, they provide evidence on historic performance.
- 1.2** CE's projections for Uttlesford are based on its Local Economy Forecasting Model. The projections are informed by CE's UK and regional (East of England) forecasts from March 2021. They take into account both the UK's departure from the EU, and the implications of the pandemic (insofar as this was known and understood in March 2021).
- 1.3** This Working Paper is divided into two chapters:
 - Chapter 2: Historic and projected future patterns of employment growth
 - Chapter 3: Sectoral analysis

2. Historic and projected future patterns of employment growth

- 2.1** In 1984, the total level of employment in Uttlesford was 23,700. Between 1984 and 2012 this increased fairly steadily to 46,300, before falling to just shy of 42,000 in 2013. From 2013 to 2019 the total level of employment increased to 53,800 (Figure 2-1). In comparison to other data sources, the Cambridge Econometrics estimates for 2019 are lower than the ONS Jobs Density data (which estimated there to be 56,000 jobs in Uttlesford in 2019) and higher than the Business Register and Employment Survey data, which estimated total employment in Uttlesford to be 46,000 in 2019.
- 2.2** The forecasts project that the total level of employment in Uttlesford will continue to increase over the next 20 years. In 2024 the total level of employment is projected to be 55,300; by 2029 this is expected to increase to 57,500; and by 2034 to 59,500. By 2039 the total level of employment in Uttlesford is projected to be just over 61,000.

Figure 2-1: Absolute Level of Employment in Uttlesford, Historic and Projected, 1984-2039



Source: SQW Analysis of Cambridge Econometrics Forecasts

- 2.3** Between 1984 and 2019 – and over a series of five-year intervals – the average annual rate of employment growth in Uttlesford fluctuated quite substantially (Figure 2-2). From 1984 to 1989, the average rate of growth was 2.5% per annum; over the following five-year period this fell to 1.3% per annum before more than quadrupling to 5.4% per annum between 1994 and 1999. Between 1999 and 2014 the rate of growth remained below 2% per annum. However between 2014 and 2019 it almost doubled to 3.6% per annum.

- 2.4** Looking ahead, the projected patterns of employment growth in Uttlesford over the next 20 years are expected to be lower than the rates of growth observed historically: in the four five-year periods between 2019 and 2039, rates of growth are not expected to exceed 1% per annum.

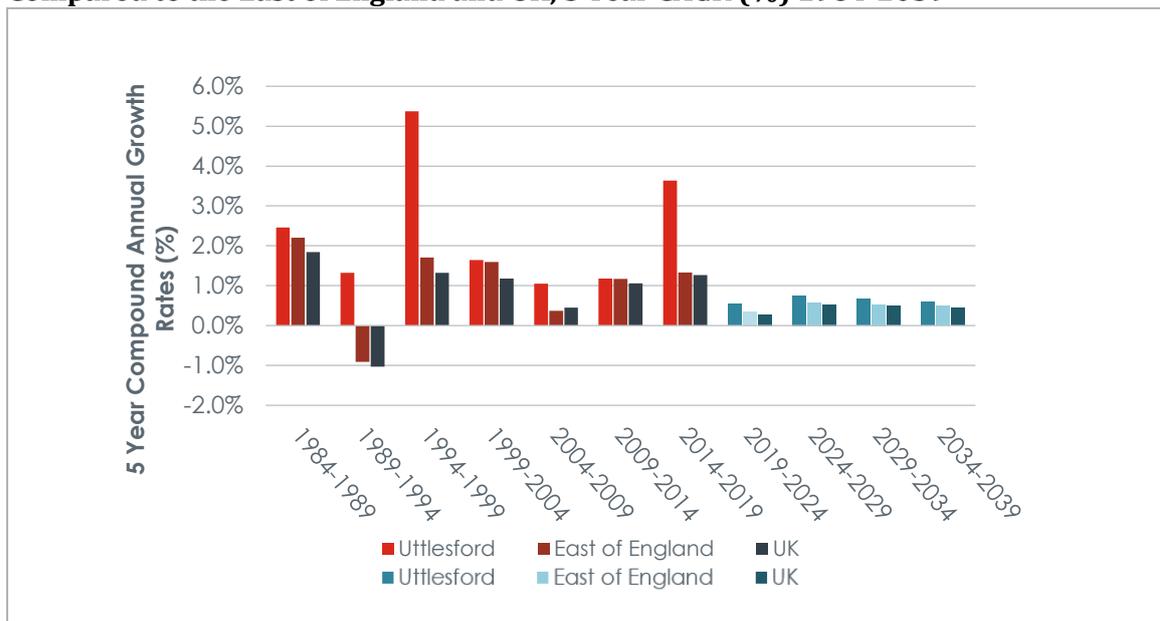
Figure 2-2: Historic and Projected Patterns of Employment Growth in Uttlesford, 5 Year CAGR (%) 1984-2039



Source: SQW Analysis of Cambridge Econometrics Forecasts

- 2.5** Comparison of the historic patterns of employment growth in Uttlesford to those observed across the East of England and the UK between 1984 and 2019 reveal that rates of growth in Uttlesford have been consistently higher (Figure 2-3). This is most notable in two five-year periods: 1989-1994 (where Uttlesford recorded 1.3% growth in employment per annum in comparison to a 0.9% and 1% decline across the East of England and UK) and 1994-1999, where Uttlesford's annual employment growth rate was more than three times the rate observed across the East of England and more than four times the rate observed nationally.
- 2.6** Looking ahead, this trend is expected to continue with rates of employment growth in Uttlesford projected to be consistently higher than the rates anticipated for the East of England and nationally.

Figure 2-3: Historic and Projected Patterns of Employment Growth in Uttlesford Compared to the East of England and UK, 5 Year CAGR (%) 1984-2039



Source: SQW Analysis of Cambridge Econometrics Forecasts

3. Sectoral Analysis

Sectoral Profile of Employment

- 3.1** In 2009, five sectors accounted for 43% of the total employment in Uttlesford. These sectors were *Construction* (which had a total employment of 4,000, equating to 9.5% of all employment in the District), *Education* (3,900, 9.1%), *Warehousing and Postal* (3,700, 8.8%), *Retail Trade* (3,500, 8.2%) and *Business Support Services* (3,000, 7.1%). Notably, employment in the *Warehousing and Postal* sector in Uttlesford was over four times as concentrated as the national average (Table 3-1).
- 3.2** In 2019, total employment in the *Warehousing and Postal* sector increased to 4,600, making it the largest sector by the percentage of total employment (8.5%). This was followed by *Construction* with total employment of 4,300 (8%), *Business Support Services* (3,800, 7%), *Education* (3,700, 7%) and *Food and Beverage Services* (3,500, 6.5%). Analysis of Location Quotients reveals that employment in the *Warehousing and Postal* sector in Uttlesford in 2019 was 3.5 times as concentrated as the national average.
- 3.3** Looking ahead over the next 20 years, the sectoral profile of employment is not projected to change very much. With anticipated employment of 6,000 and 6,800 respectively, *Construction* is expected to be the largest sector in both 2029 and 2039 with 10.4% and 11.2% of total employment respectively. Analysis of Location Quotients reveals that employment in this sector is expected to be around 1.5 times as concentrated as the national average.
- 3.4** *Warehousing and Postal*, with expected employment of 4,800 (8.3% of total employment) is projected to be the second largest sector in 2029 just ahead of *Food and Beverage Services* in third (4,000 employment, 7.3%). In 2039, these positions are expected to reverse with *Food and Beverage Services* projected to have a total employment of 5,000 (8.1%) and *Warehousing and Postal* projected to have a total employment of 4,900 (8%). In both 2029 and 2039, employment in *Warehousing and Postal* is expected to be over three times as concentrated as the national average.
- 3.5** *Business Support Services* and *Education* are expected to take the fourth and fifth spots in 2029 and 2039 with regards to the largest sectors by the proportion of total employment with 6.7% and 6.5%, and 6.5% and 6.3% respectively.

Table 3-1: Absolute Employment by Sector and LQs, 2009 - 2039

	2009		2019		2029		2039	
	N	LQ	N	LQ	N	LQ	N	LQ
Construction	4,000	1.3	4,300	1.2	6,000	1.5	6,800	1.6
Education	3,900	1.1	3,700	0.8	3,700	0.8	3,800	0.8
Warehousing and Postal	3,700	4.1	4,600	3.5	4,800	3.3	4,900	3.2

	2009		2019		2029		2039	
Retail Trade	3,500	0.8	3,200	0.7	3,200	0.7	3,300	0.7
Business Support Services	3,000	0.9	3,800	0.8	3,800	0.8	4,000	0.8
Food and Beverage Services	2,500	1.2	3,500	1.2	4,000	1.2	5,000	1.2

Source: SQW Analysis of Cambridge Econometrics Forecasts

Fastest Growing Sectors, 2019-2039

- 3.6** Over the 20 year period from 2019 and 2039, the three sectors projected to experience the fastest growth in employment in Uttlesford are *Construction* (growth rate of 2.3% per annum, equating to an additional 2,500 jobs in the sector), *Health* (2.1% growth pa, 700 additional jobs) and *Food and Beverage Services* (1.7% growth pa, 1,400 additional jobs) (Table 3-2).
- 3.7** These sectors are also projected to be in the top four fastest growing sectors across the East of England (with the addition of *Real Estate*) and in the top six nationally (with the addition of *Food and Beverage Services*, *Other Professional Services*, and *Real Estate*), although the rates of growth projected for Uttlesford across these sectors are expected to be higher.

Table 3-2: Fastest Growing Sectors by Employment, CAGR (%) 2019-2039, Uttlesford, East of England, UK

	Uttlesford		East of England		UK	
	Rank	CAGR	Rank	CAGR	Rank	CAGR
Construction	1	2.3	1	1.9	6	0.7
Health	2	2.1	2	1.4	4	1.0
Food & Beverage Services	3	1.7	4	1.1	2	1.2

Source: SQW Analysis of Cambridge Econometrics Forecasts

Aviation

- 3.8** Uttlesford is home to Stansted Airport. The policy review revealed that Stansted is a major employer in the District and a regional economic driver.
- 3.9** The data reveal that employment in sectors related to the Aviation (*Air Transport, Land Transport, Warehousing and Postal, and Food and Beverage Services*) accounted for 25% of total employment in 2019 (as opposed to 10% across the East of England and 11% across the UK). Over the next 20 years this industry is expected to remain dominant and is projected to account for 26% of total employment in both 2029 and 2039.



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Uttlesford Employment Needs & Employment Land Assessment

Commercial Property Market Dynamics Paper

Iceni Projects Limited on behalf of
Uttlesford District Council

July 2021

ICENI PROJECTS LIMITED
ON BEHALF OF
UTTLESFORD DISTRICT
COUNCIL

Uttlesford Employment Needs &
Employment Land Assessment
COMMERCIAL PROPERTY MARKET DYNAMICS
PAPER

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1. INTRODUCTION

- 1.1 Uttlesford District Council has commissioned Icen Projects and SQW to prepare an Economic Needs and Employment Land Assessment to inform the preparation of its new Local Plan and inform the Council's role in supporting the District's economic development.

District's Geography

- 1.2 Uttlesford is a principally rural district sitting in North West Essex. It includes two market towns – Saffron Walden and Great Dunmow – and a range of rural settlements. Around 70% of the District's population live within the villages and countryside outside of the main towns. Larger villages within the District include Stansted Mountfitchet, Thaxted, Elsenham, Great Chesterford, Hatfield Heath, Newport and Takeley.
- 1.3 Stansted Airport sits within the District, but larger settlements in proximity to it such as Bishops Stortford¹ and Harlow lie outside of the District's boundaries. Braintree equally sits beyond but relatively close to the District's boundaries to the west.
- 1.4 The M11 runs north/south through the District. Junction 8 (Stansted/ Bishops Stortford) falls within the District, with Junction 9/9A (Great Chesterford) sitting on the District's northern boundary. Great Chesterford Research Park, in the north of the District, forms part of the wider South Cambridgeshire research and bio-tech cluster. The A120 dual carriageway runs east through the District from Bishops Stortford/M11 Junction 8 to Braintree, Colchester and the Port of Harwich.
- 1.5 There are a number of rail stations in the District served by Greater Anglia services. There are stations at Stansted Mountfitchet, Stansted Airport, Elsenham, Newport, Audley End, and Great Chesterford on the London Liverpool Street-Cambridge line. Stansted Airport is also served by Cross Country trains which run to Peterborough, Leicester and Birmingham.
- 1.6 The south-western fringes of the District fall within Metropolitan Green Belt. This includes settlements such as Margaret Roding, Leader Roding, White Roding, Hatfield Heath Little Hallingbury, and Birchanger.

This Paper

- 1.7 This Paper provides an assessment of commercial property market dynamics considering first the office sector, followed by industrial. Icen's analysis benchmarks performance relative to the Property

¹ Bishops Stortford sits within East Hertfordshire

Market Area (which additionally includes Epping Forest, East Hertfordshire and Harlow) together with the regional position for key indicators.

2. OFFICE MARKET

2.1 The recent trend in office markets has been of subdued activity as a result of Covid-19 and the associated effect on the wider economy. Despite the overall subdued outlook, CBRE expect certain office sectors to see above average activity including the lifesciences sector which is an important component in the northern part of Uttlesford District.

Office Stock

2.2 Based on VOA data, Uttlesford contains around 94,000 sq.m of office floorspace, equating to 22% of the total office stock across the FEMA. Whilst East Hertfordshire and Harlow have seen a notable decline in office floorspace over the last decade, the stock in Uttlesford has declined only modestly in net terms – with a loss of 4,000 sq.m (-4%). This is broadly in line with trends across the East of England.

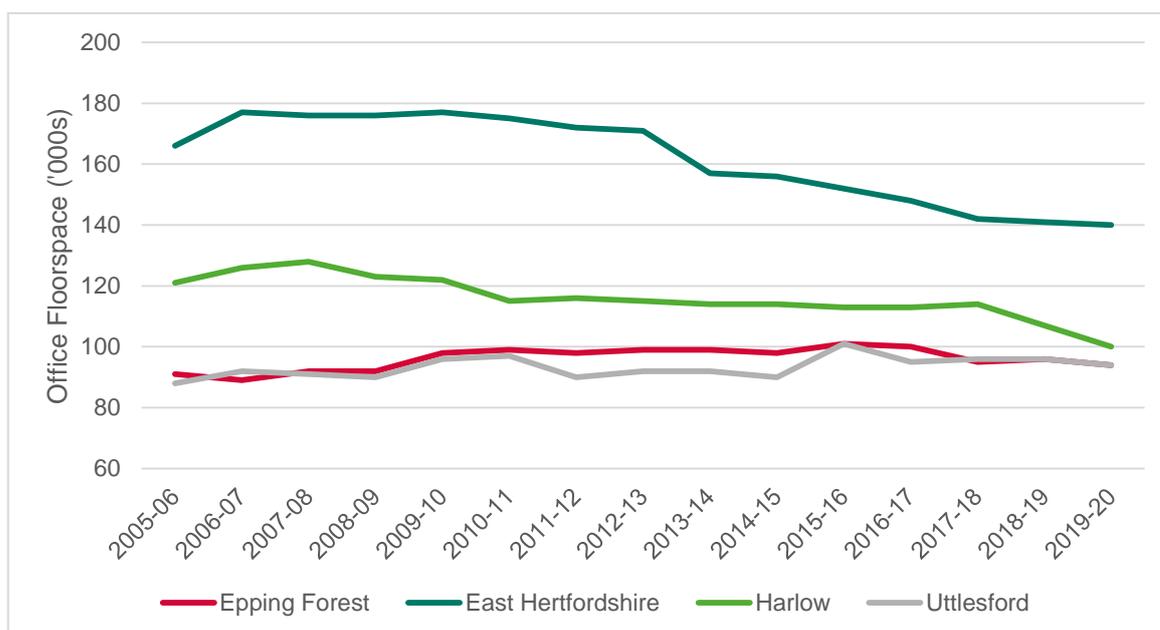
Table 2.1 Office Stock in the District and FEMA, 2019-20

	Stock, 2020 (sq.m)	% FEMA Stock	Stock Change, 2010-20	% Change, 2010-20
Epping Forest	94,000	22.0%	-4,000	-4%
East Hertfordshire	140,000	32.7%	-37,000	-21%
Harlow	100,000	23.4%	-22,000	-18%
Uttlesford	94,000	22.0%	-2,000	-2%
FEMA	428,000		-65,000	-12%
East of England	7,041,000		-374,000	-5%
England	84,598,000		-5,000	0%

Source: VOA Non-Domestic Rating Statistics

2.3 As the chart below shows, whilst the scale of office floorspace in the FEMA has historically been greatest in East Herts, followed by Harlow, the reduction in floorspace in these areas seen – in particular since the introduction of permitted development rights in 2013 – has reduced these differentials.

Figure 2.1: Change in Office Floorspace, 2005-20



Source: VOA Non-Domestic Rating Statistics

2.4 Data on the average size of office properties in the District is lower than in the other parts of the FEMA and across wider (regional/ national) geographies, and notably half that in Harlow. This reflects the rural nature of the District and focus on SME businesses.

Table 2.2 Average Size of Office Properties, 2020

	Stock, 2019-20 (sq.m)	Rateable Properties	Average Floorspace (sq.m)
Epping Forest	94,000	930	101
East Hertfordshire	140,000	1,000	140
Harlow	100,000	470	213
Uttlesford	94,000	890	106
FEMA	428,000	3,290	130
East of England	7,041,000	38,540	183
England	84,598,000	411,000	206

Source: VOA Non-Domestic Rating Statistics

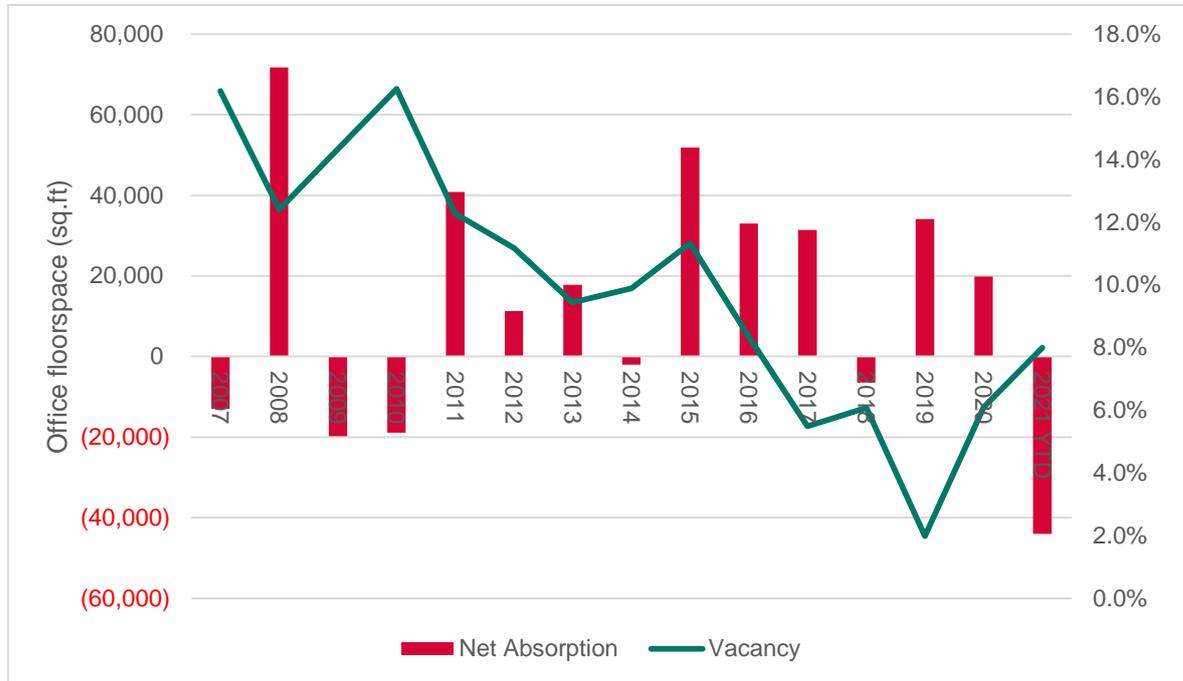
2.5 We would note that CoStar shows a slightly higher level of office stock in the District at 107,800 sq.m than the VOA data. CoStar ranks the quality of existing office stock, showing that of this just 8,000 sq.m (7.4%) of stock is ranked Grade 4 or 5 Star.

Take-Up and Net Absorption

2.6 The District has seen positive net absorption in the majority of years over the 2010-20 decade, meaning that more office floorspace was being take-up than coming onto the market (either through existing office space being vacated or new-build development). As the graph below shows, this has

resulted in a reduction in the level of vacant floorspace which fell to a low-point of 2.0% in 2019. This has however since risen and stands at 8.0% in mid 2021.

Figure 2.2: Office Net Absorption and Vacancy Rate – Uttlesford District



Source: Icen analysis of CoStar data

2.7 The trends in net absorption over time show an average take-up of 21,200 sq.ft of office space (2,150 sq.m) per annum over the 2011-20 period. However the negative net absorption of 4,086 sq.m in 2021 to date has driven a rise in the vacancy rate.

Table 2.3 Office Net Absorption and Vacancy Rate – Uttlesford District

	Annual Net Absorption (sqm)	Vacancy Rate at End of Period
2007-10	467	16.3%
2011-15	2,226	11.3%
2016-20	2,078	6.1%
2021 YTD	(4,086)	8.0%

Source: Icen analysis of CoStar data

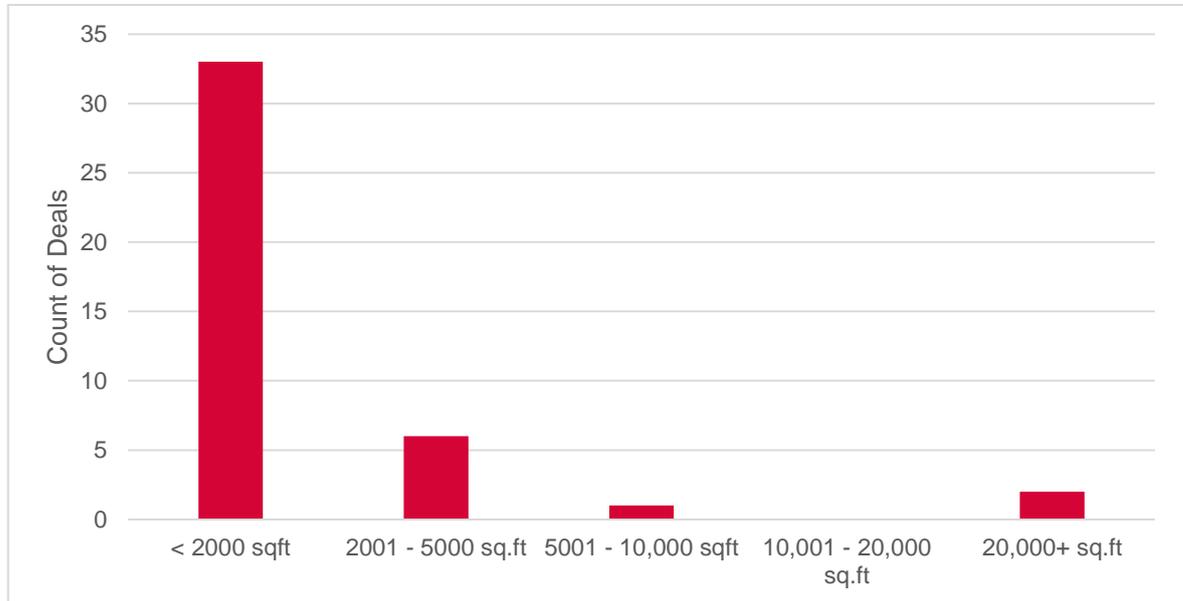
2.8 The overall vacancy rate for office stock at 8% is above the average for Essex (4.4%). However this is reflective of vacant lower grade space, with no vacancy within the stock of Grade 4 or 5 Star space.

Leasing Activity

2.9 The median size of office floorspace leased in the District over the last three years (2018-20) has been of 850 sq.ft, reflecting the focus of the District’s economy towards micro- and small businesses.

Indeed as the chart below shows, leasing activity is strongly focused on office units of < 2,000 sq.ft (185 sq.m). CoStar records just nine larger deals.

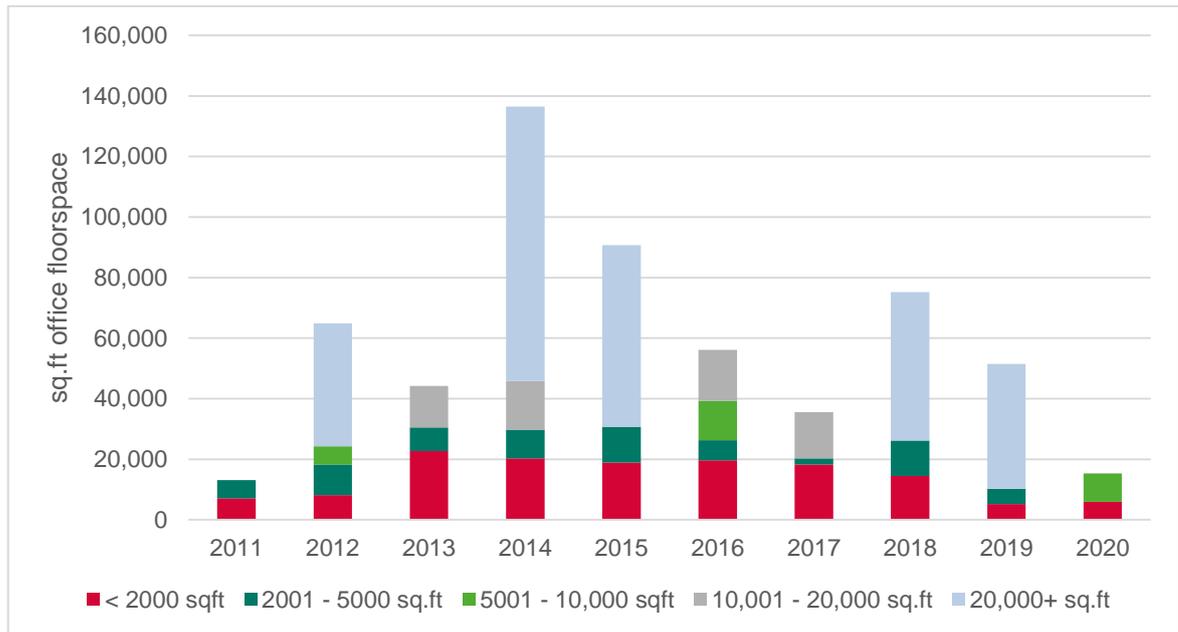
Figure 2.3: Leasing Activity by Size Band – Uttlesford, 2018-20



Source: Icen analysis of CoStar data

2.10 However the larger deals disproportionately affect overall take-up, as the Figure below shows. Strong take-up in 2014 reflected the leasing of 49,000 sq.ft of space at Parsonage Road in Takeley to Weston Homes and of 41,500 sq.ft of space at Chesterford Research Park to Retroscreen Virology Ltd. 2015 similarly saw a single larger deal for 60,000 sq.ft of space at Chesterford Research Park to Biofocus. 2018 then saw Weston Homes take a further 49,000 sq.ft at Parsonage Road; with 2020 seeing 41,300 sq.ft unit occupied by Lonza at Chesterford Research Park.

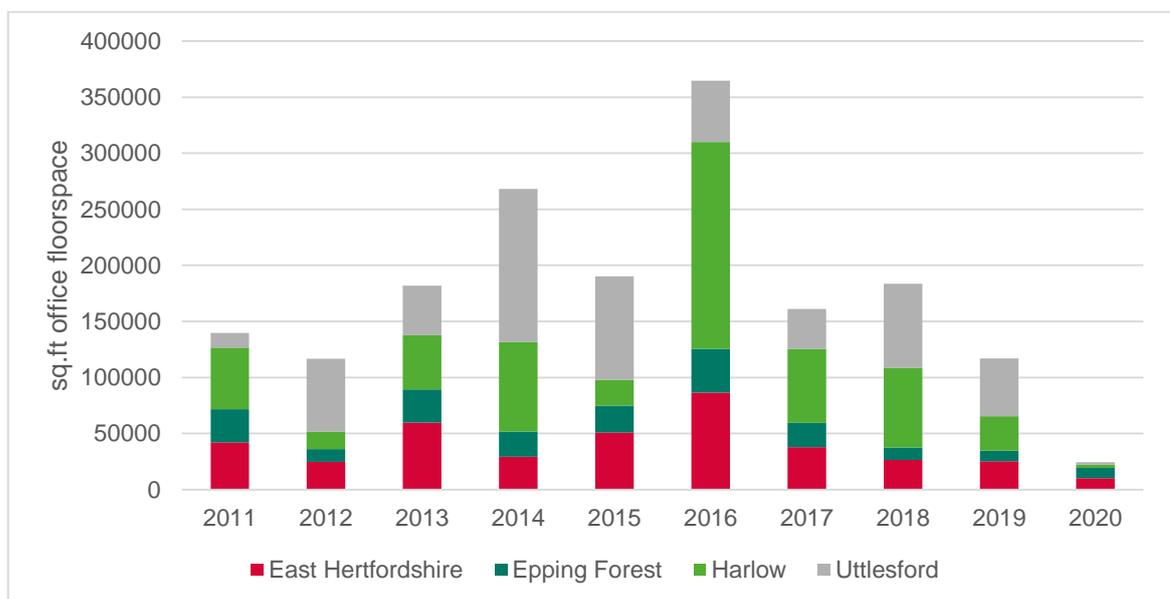
Figure 2.4: Office Leasing Activity by Size Band – Uttlesford



Source: Icen analysis of CoStar data

- 2.11 The analysis highlights the influence of a few larger deals on overall take-up; and the role which development at Chesterford Research Park in particular has had on office/R&D take-up.
- 2.12 The chart below shows take-up across the wider Property Market Area. Over the last 10 years, CoStar records take-up of 175,000 sq.ft (16,200 sq.m) per annum with Uttlesford accounting for on average a third (33%) of this, consistent with overall office take-up in Harlow (33%). East Hertfordshire has then accounted for 22% and Epping Forest 12%.

Figure 2.5: Office Take-Up across the Property Market Area

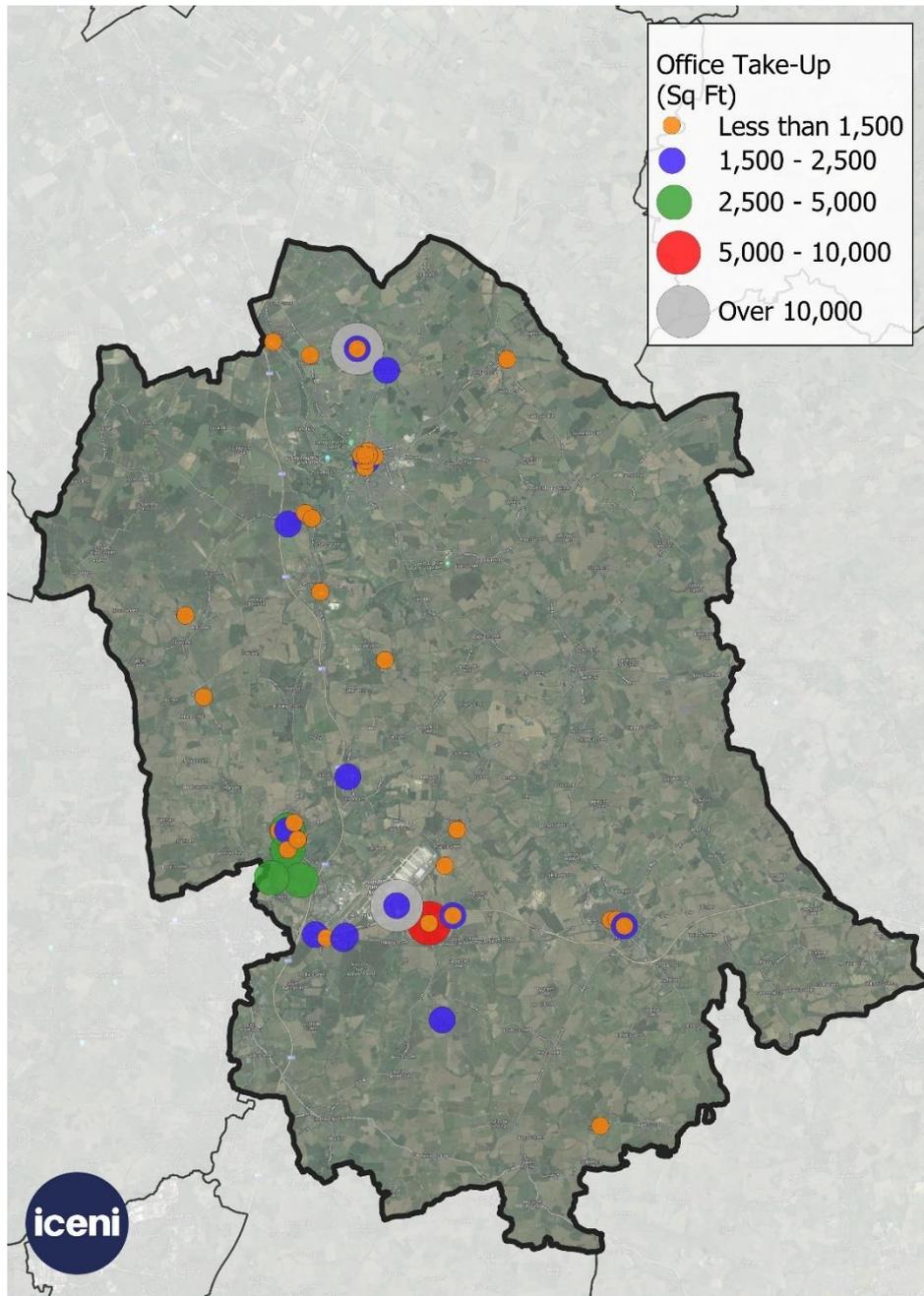


Source: Icen analysis of CoStar data

2.13 If a shorter time frame is used, Uttlesford has accounted for 40% of take-up in the PMA, with weak take-up in both Epping Forest and East Hertfordshire.

2.14 Figure 2.5 below shows the spatial distribution of office leasing activity in the District between 2015-20.

Figure 2.5: Office Leasing Activity in Uttlesford, 2015-20

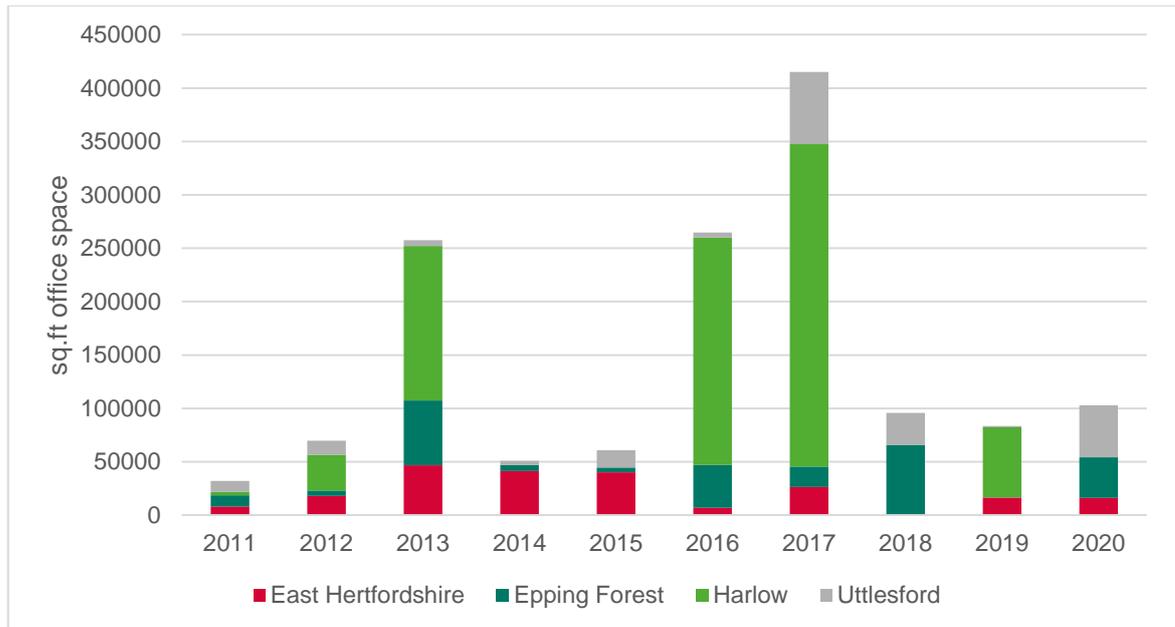


2.15 Recent new-build development of office space has been modest. The largest building constructed has been of 49,000 sq.ft at Innovation Centre, Parsonage Road for Weston Homes. Smaller schemes at Stansted Courtyard (9,476 sq.ft) and Thremhall Park (10,551 sq.ft) were completed in early 2020.

Freehold Activity

- 2.16 The chart below shows freehold sales of office space.² Over the last 10 years, CoStar records take-up of just over 200,000 sq.ft of office space (18,700 sq.m) in Uttlesford accounting for around 14% of the total across the Property Market Area. Year-on-year take-up can be significantly influenced by the larger deals.

Figure 2.6: Freehold Office Sales over Last 10 Years

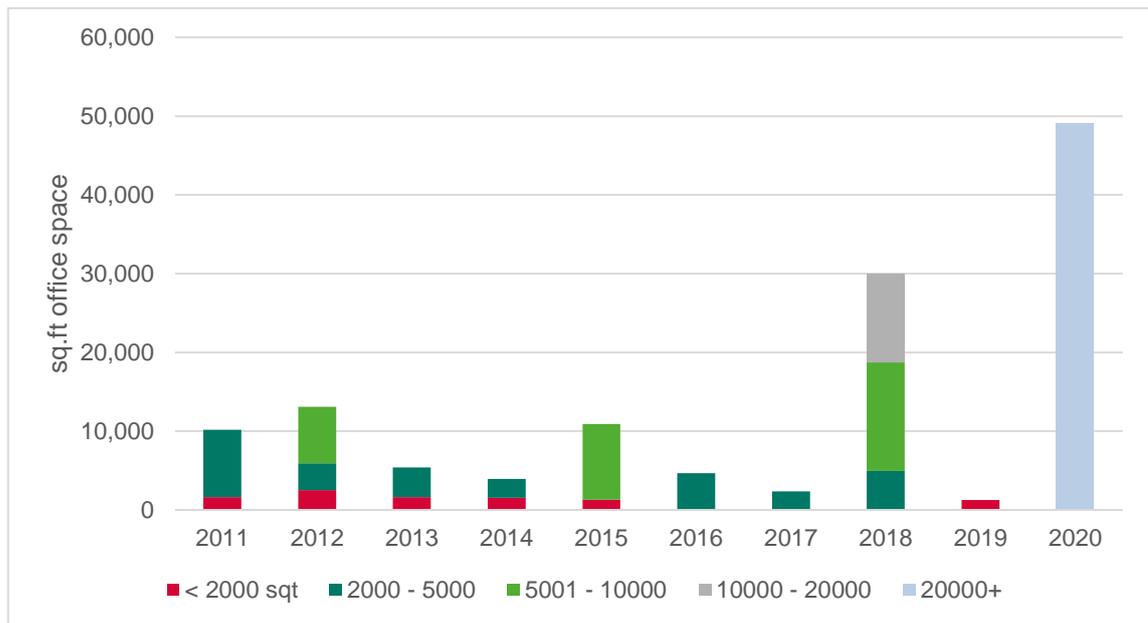


Source: Icen analysis of CoStar data

- 2.17 In most years, freehold activity in Uttlesford is focused on units of < 5,000 sq.ft. There have however been one recent deal: the delivery of an Innovation Centre at Parsonage Road for the Council, which completed in 2020.

² Icen has sought to exclude investment transactions

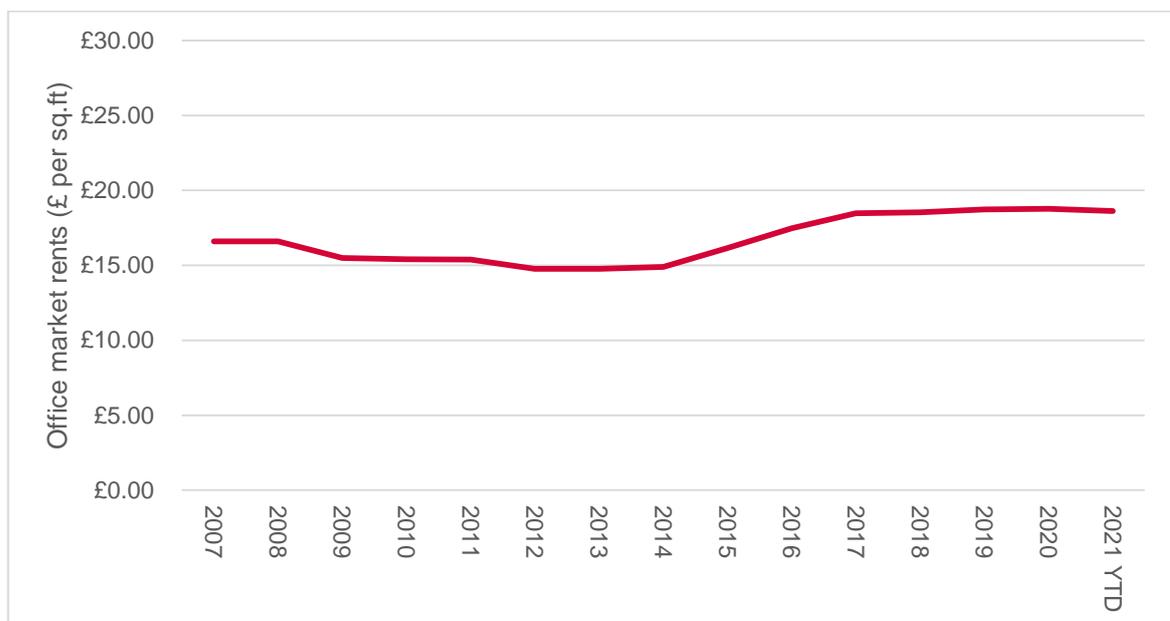
Figure 2.7: Freehold Sales in Uttlesford, 2011-20



Property Costs

2.18 As availability has fallen in recent years, rents have increased growing from £14.90 psf in 2014 to £18.70 psf in 2019. They have remained broadly stable since. The market expectation is that rents will weaken slightly in the short-term.

Figure 2.6: Office Rental Trend



Source: Icen analysis of CoStar data

2.19 Headline rents for new/refurbished stock appear to have hit around £20 psf. This is however not sufficient to support speculative development; and thus in the short-to-medium at least we would

expect pre-lets to be required before new office floorspace is brought forward. This compares for instance with headline rents of close to £50 psf in Central Cambridge and rents exceeding £40 psf for new-build fitted lab space.³

- 2.20 For freehold sales, the average value stands currently at around £214 per sq.ft based on CoStar data for Uttlesford.

Office Market Outlook

- 2.21 At the current time the market is relatively uncertain, not least due to uncertainties associated with how home working may change companies' office floorspace requirements, impacts of PDR/ further use class changes, and uncertainties as to whether some London-based firms may seek to open satellite offices in commuter-belt locations or move out of the City. Larger companies will principally seek high quality office space, with clear floor plates that allow for potentially more generous office spacing than pre-Covid.
- 2.22 Flexible working is long established in the UK, with Eurostat reporting that 22% of UK-based employees were occasionally working from home pre-pandemic – twice the EU average. Growth in home working, which seems likely, is therefore an acceleration of an existing trend.

Agent Feedback

- 2.23 Icenis has spoken to a number of commercially active local agents to understand current market conditions. Agents are clear that office demand is focused generally on local SME businesses and particularly space of up to 20,000 sq.ft. The market is difficult at the time of writing (July 2021) influenced by Covid-19. Coke Gearing report that outstanding requirements are all for small and medium-sized units, with little demand for larger HQ office space.
- 2.24 Headline rents are quoted at £21 psf for Grade A office space such as at Enterprise House, close to Stansted Airport, but rents of around £19 psf are achieved. Higher rents in the early 20s are required for speculative development. The new-build office scheme at Tristal Towers has been on the market for five years, but appears unlikely to come forwards in the short-term given viability challenges (influenced by the rental tone and high build costs) and poor access.
- 2.25 The local market in Saffron Walden is focused typically on units of 500 – 1,500 sq.ft. Deals of over 20,000 sq.ft are rare. It is clear that there has been relatively little activity in the office market over the last year (as supported by the CoStar data). Mullucks report some inquiries from small

³ <https://www.savills.co.uk/insight-and-opinion/savills-news/304868-0/cambridge-office-market-remains-resilient-despite-impact-of-covid-19>

businesses, particularly where the owner lives locally, for satellite offices instead of commuting to London or Cambridge.

3. INDUSTRIAL AND LOGISTICS MARKET

- 3.1 Whilst other sectors have witnessed disruption from Covid-19, warehousing and logistics is a property sector which has thrived driven in particular by the substantial growth seen in online sales, continuing (and accelerating) the trend we have seen in recent years of growing demand for logistics space.
- 3.2 Nationally LSH report that UK industrial and logistics take-up reached 59.7 million sq.ft in 2020, a record level, influenced in particular by strong take-up for large and extra large units (100,000 sq.ft+). Whilst this was influenced in particular by the very substantial (and partially temporary) shift towards online retailing, the logistics sector has been very active now for a number of years and there is no current evidence of this abating. Brexit is clearly disrupting some industrial activities, and LSH report that this may lead to some restructuring of supply chains which could demonstrate some additional demand for UK logistics if companies seek to keep increased stock volumes to mitigate potential impacts of trade disruption on sales. Brexit could also lead to some re-shoring of supply chains and/or restructuring to deliver separate EU and UK focused infrastructure.
- 3.3 Nationally the pandemic has had a smaller impact on speculative industrial development than initially feared, and despite strong delivery of new supply there has been ongoing rental growth which nationally averaged 4.2% for prime industrial units in 2020.
- 3.4 Whilst mid-box units have been the focus of speculative development activity in recent years, larger units (100,000 sq.ft+) saw the largest growth in 2010 and the pipeline nationally is skewed towards this sector. LSH report a more modest pipeline of 2.1m sq.ft of speculative development in the mid box market is anticipated in 2021. LSH describe the East of England as a real hotspot of speculative development with 1.4 million of new space being brought forward speculatively at the end of 2020.
- 3.5 Uttlesford is not however particularly a market for 'big box' logistics space which is more focused towards major motorway corridors such, within the East of England, the M1 corridor through Hertfordshire and Bedfordshire. As we set out later in this report, there is no evidence of big box take-up in the District over the last decade.
- 3.6 In the East of England, LSH report industrial take-up in 2020 which was 30% above the 5 year average at 5.2 million sq.ft. The available supply of units is 2.0 years for the mid-box units, and less than this for larger/ extra-large sizes.

Industrial Stock

- 3.7 Uttlesford accommodated around 20% of the FEMA's industrial stock, with a total of 459,000 sq.m of floorspace recorded by the VOA in 2020. The largest share of stock is seen in Harlow (with a quantity 60% greater than in Uttlesford).
- 3.8 The total industrial stock across the FEMA has declined in net terms over the 2010-20 decade, falling by a modest 4%, compared to a regional and national picture which is flat. However in Uttlesford, the VOA data points to modest growth in stock of 6% over this period. Industrial floorspace includes industrial and warehousing/logistics floorspace.

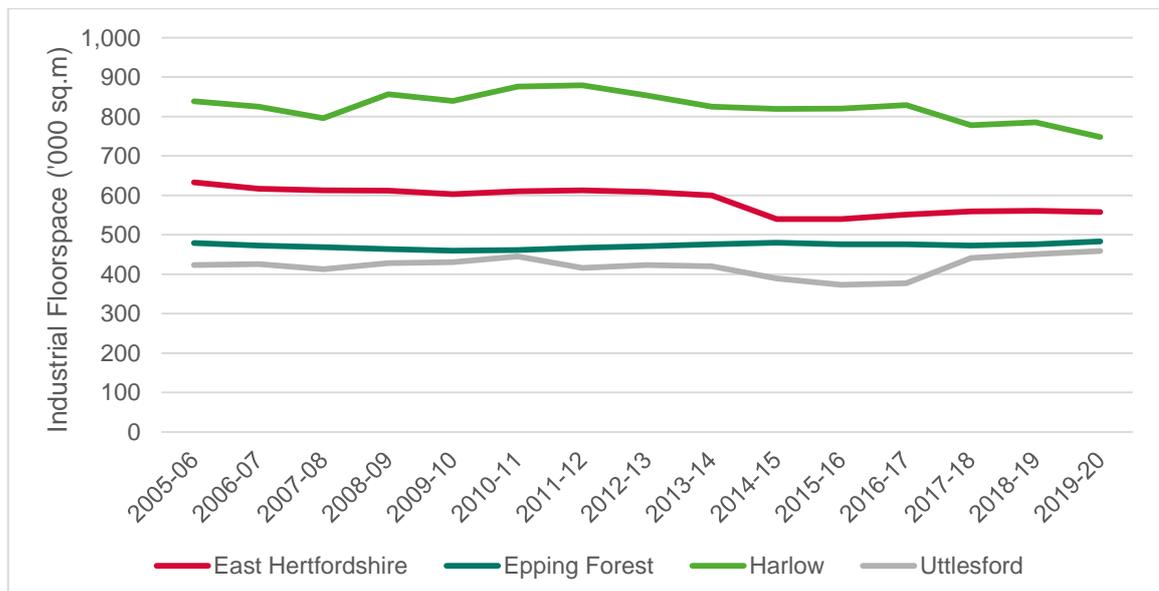
Table 3.1 Industrial Stock in the District and FEMA, 2019-20

	Stock, 2019-20 (sq.m)	% FEMA Stock	Stock Change, 2010-20	% Change, 2010-20
East Hertfordshire	558,000	24.8%	-45,000	-7%
Epping Forest	483,000	21.5%	23,000	5%
Harlow	748,000	33.3%	-92,000	-11%
Uttlesford	459,000	20.4%	28,000	6%
FEMA	2,248,000		-86,000	-4%
East of England	33,820,000		281,000	1%
England	311,632,000		-892,000	0%

Source: VOA Non-Domestic Rating Statistics

- 3.9 The chart below shows the trend in industrial floorspace by area. It shows that industrial floorspace in Uttlesford fell between 2009-16, but has been increasing since (with subsequent growth of 86,000 sq.m, 23%). A general downward trend is evident in East Herts and Harlow.

Figure 3.1: Change in Industrial Floorspace, 2005-20



Source: Icen analysis of VOA Non-Domestic Rating Statistics

-
- 3.10 The average size of industrial properties is below wider averages, indicating a focus of industrial stock and demand towards SME businesses. It is notable that the average size of industrial units in Harlow is more than twice that in Uttlesford, with Harlow more likely to cater for larger requirements.

Table 3.2 Average Size of Industrial Properties, 2020

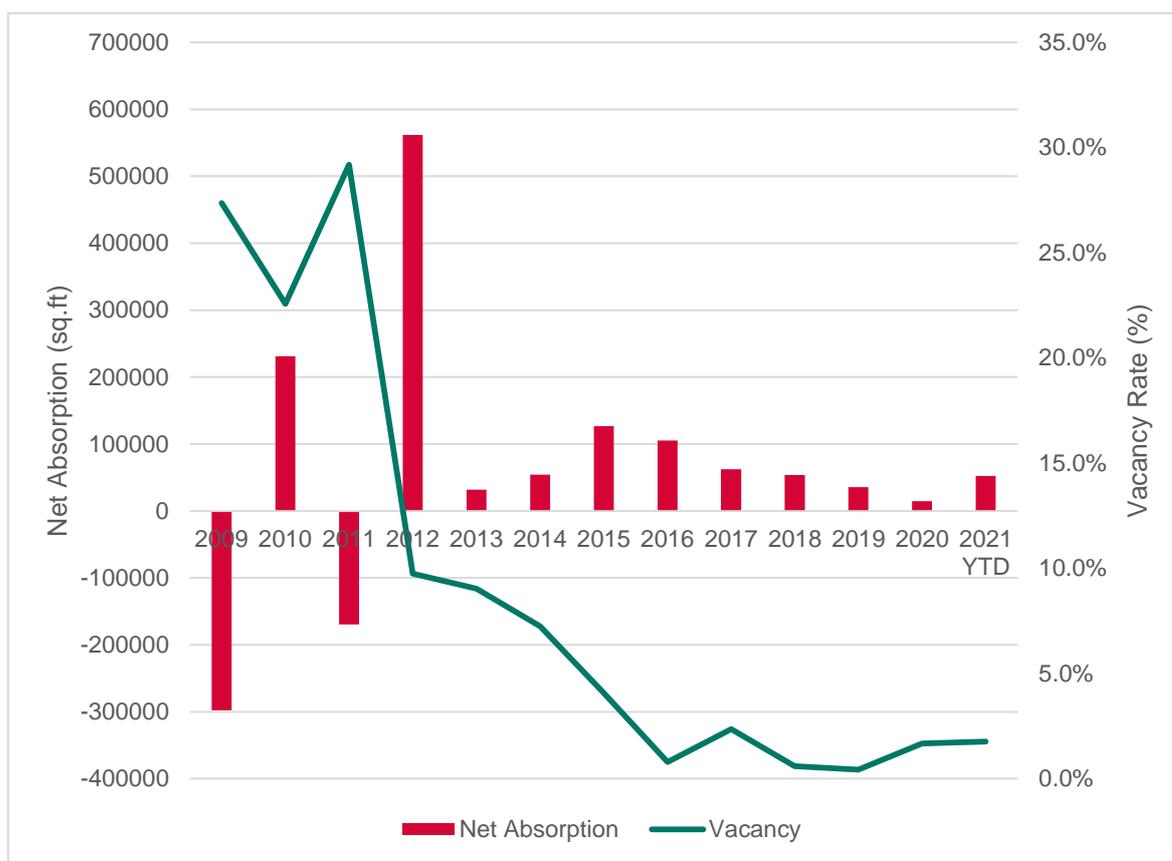
	Floorspace, 2020 (sq.m)	Rateable Properties	Average Floorspace (sq.m)
East Hertfordshire	558,000	1,440	388
Epping Forest	483,000	1,500	322
Harlow	748,000	850	880
Uttlesford	459,000	1,080	425
FEMA	2,248,000	4,870	462
East of England	33,820,000	57,770	585
England	311,632,000	507,060	615

Source: VOA Non-Domestic Rating Statistics

Take-Up and Net Absorption

- 3.11 The District has seen positive net absorption in the majority of years over the 2010-20 decade, meaning that more industrial floorspace was being take-up than coming onto the market (either through existing office space being vacated or new-build development). As the graph below shows, this has resulted in a reduction in the level of vacant floorspace which fell to a low-point of 0.4% in 2019.
- 3.12 Net absorption over the last 6 years has averaged 66,400 sq.ft (6,200 sq.m) per annum of industrial space in the District.

Figure 3.2: Industrial Net Absorption and Vacancy Rate – Uttlesford District



Source: Icen analysis of CoStar data

- 3.13 The current industrial vacancy rate stands at 1.8% in mid 2021 – a very low level. This is still representative of constrained supply and tight property market conditions. As the table below shows, there is a greater level of vacant space within the specialist industrial category (albeit with this the vacancy level is still comparatively low); whilst for both light industrial and logistics space a vacancy rate of 1.5% points to a tight market and need to bring forward further supply.

Table 3.3 Vacancy Rate for Different Types of Industrial Space – Uttlesford District

	Floorspace (sq.ft)	Vacancy Rate	Availability Rate
Logistics	2,384,277	1.5%	2.0%
Specialist Industrial	291,844	4.1%	4.1%
Light Industrial	467,938	1.5%	22.1%
All Industrial	3,144,059	1.8%	5.2%

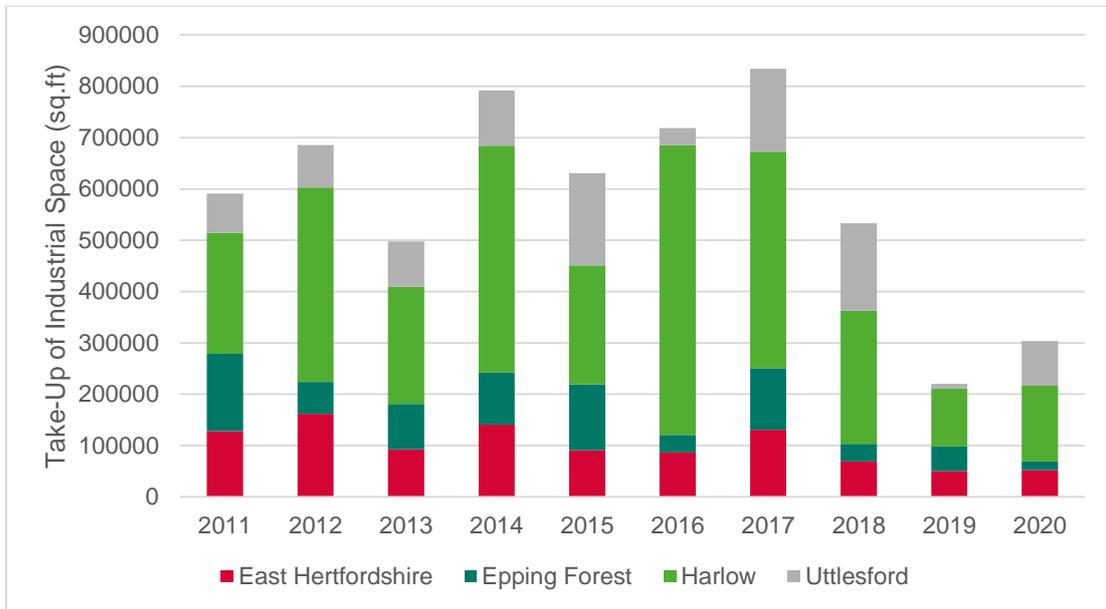
Source: CoStar

Leasing Activity

- 3.14 Across the PMA the average take-up of leased industrial space over the last 10 years has been 54,000 sq.m (580,600 sq.ft). Harlow has dominated industrial take-up, recording 52% of the PMA total. Uttlesford and East Hertfordshire have recorded 17% each, with Epping Forest 14%. Average take-up in Uttlesford has been 28,100 sq.m per annum.

3.15 As Figure 3.3 clearly shows, there has been a notable drop off in take-up over the last 3 years. This is likely to have been in part influenced by a constrained supply position. Take-up over this period has averaged just 33,000 sq.m across the 4 authorities.

Figure 3.3: Industrial Take-Up – Property Market Area

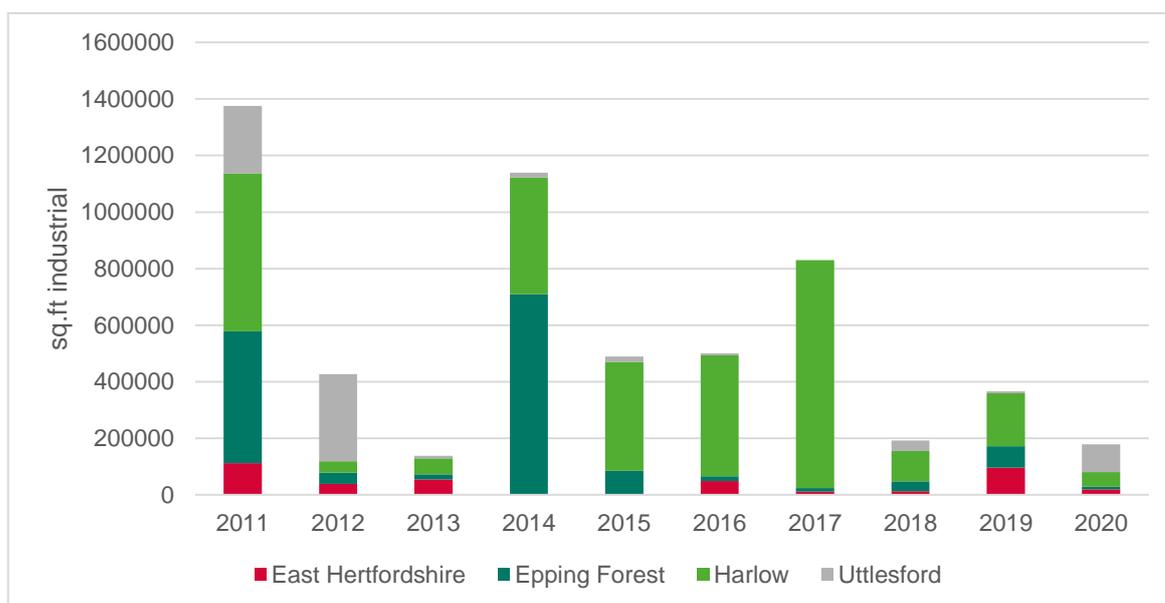


Source: Icen analysis of CoStar data

Freehold Activity

3.16 The level of freehold take-up is influenced by a number of larger deals, which saw much higher take-up across the PMA in 2011, 2014 and 2017. Uttlesford has accounted for a modest 7% of freehold take-up across the PMA since 2011 with 373,000 sq.ft (81,900 sq.m) of space being recorded as transacted, equivalent to an average 7605 sq.m per annum.

Figure 3.4: Industrial Freehold Transactions – PMA, 2011-20



Source: IcenI analysis of CoStar data

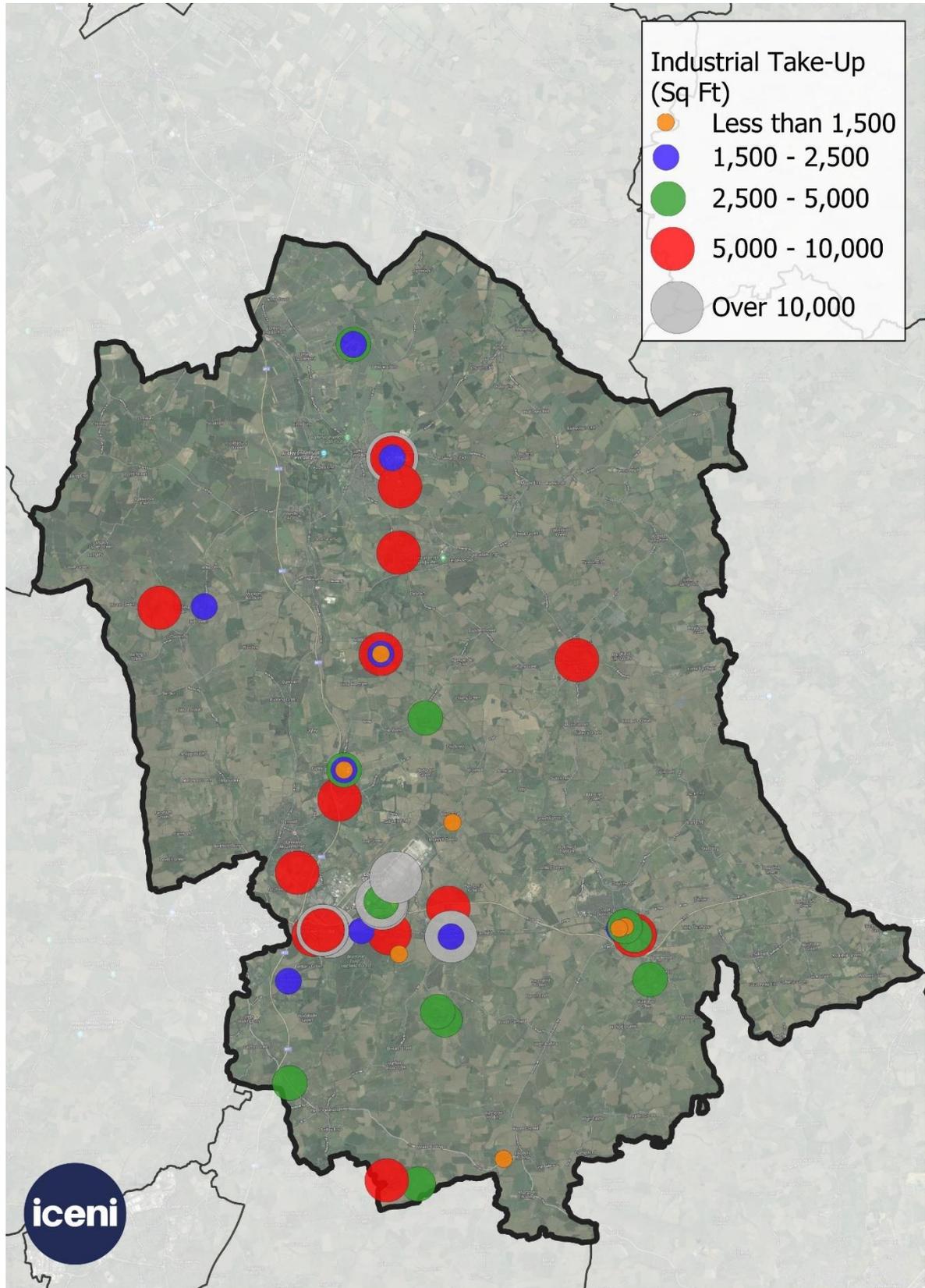
- 3.17 The focus of freehold deals in recent years has been on units of up to 22,000 sq.ft in Uttlesford; with the majority of deals for under 10,000 sq.ft of space.

Agent Feedback

- 3.18 IcenI has spoken to a number of commercially active local agents to understand current market conditions and gaps in supply. Coke Gearing note a lack of industrial supply within the market in Uttlesford and more generally within 10 miles of Bishops Stortford with a 98% occupancy level within the industrial market. This is consistent with the our findings from the CoStar data and our discussions with Mullucks. Demand outstrips supply and there is a need to bring forward new development.
- 3.19 Within a 10 mile radius of the Airport, Coke Gearing report current market requirements for 1.8 million sq.ft of industrial space as at July 2021. There is demand for industrial space in a range of size bands including 30,000 – 40,000 sq.ft units from established manufacturing businesses in the District, together with larger requirements – including for units of 60,000 sq.ft, 70,000 sq.ft and 130,000 sq.ft. They report that they have just done a letting to an Uttlesford occupier of a unit of 140,000 sq.ft in Braintree, who was unable to find suitable premises within the District. Mullucks appear more focused on smaller requirements of units of between 5,000 – 25,000 sq.ft.
- 3.20 Agents report a need to bring forward additional supply, particularly close to M11 Junction 8, which is the area of strongest occupier demand. The Saffron Malden market, in the north of the District, is tilted towards Cambridge and focused more towards R&D and bioscience activities; with industrial demand more limited influenced by the lack of decent access to the motorway.

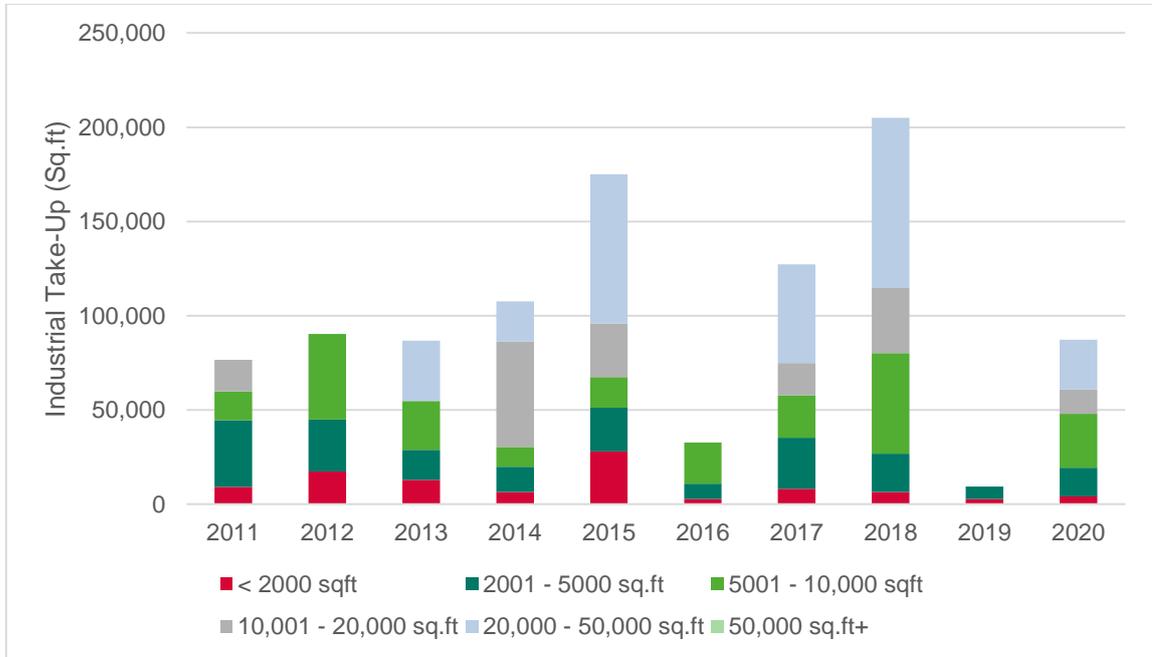
3.21 Figure 3.4 below shows the spatial distribution of industrial leasing activity in the District between 2015-20. The strongest cluster is around Stansted Airport and Takeley.

Table 3.4 Industrial Take-Up in Uttlesford (2015-20)



3.22 It is evident that there has been no take-up in the district of 'mid box' (50,000 – 100,000 sq.ft) or 'big box' industrial units (> 100,000 sq.ft) over the last decade. The largest units leased have been of around 35,000 sq.ft.

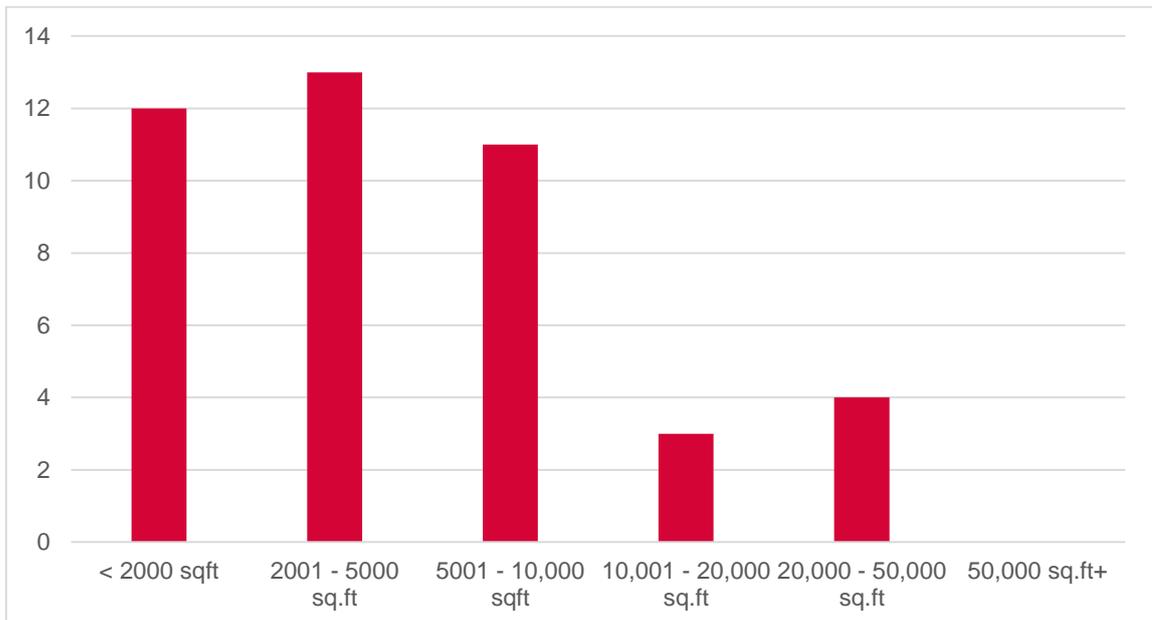
Figure 3.5: Industrial Take-Up by Size Band – Uttlesford District



Source: Icen analysis of CoStar data

3.23 The chart below shows the profile of leasing deals of different sizes. Activity is strongest for smaller units of < 10,000 sq.ft reflecting the focus of the economy on SMEs. However while leases of over 10,000 sq.ft units are rarer, but have driven overall take-up in the District.

Figure 3.6: Industrial Leasing Activity by Size Band – Uttlesford, 2018-20

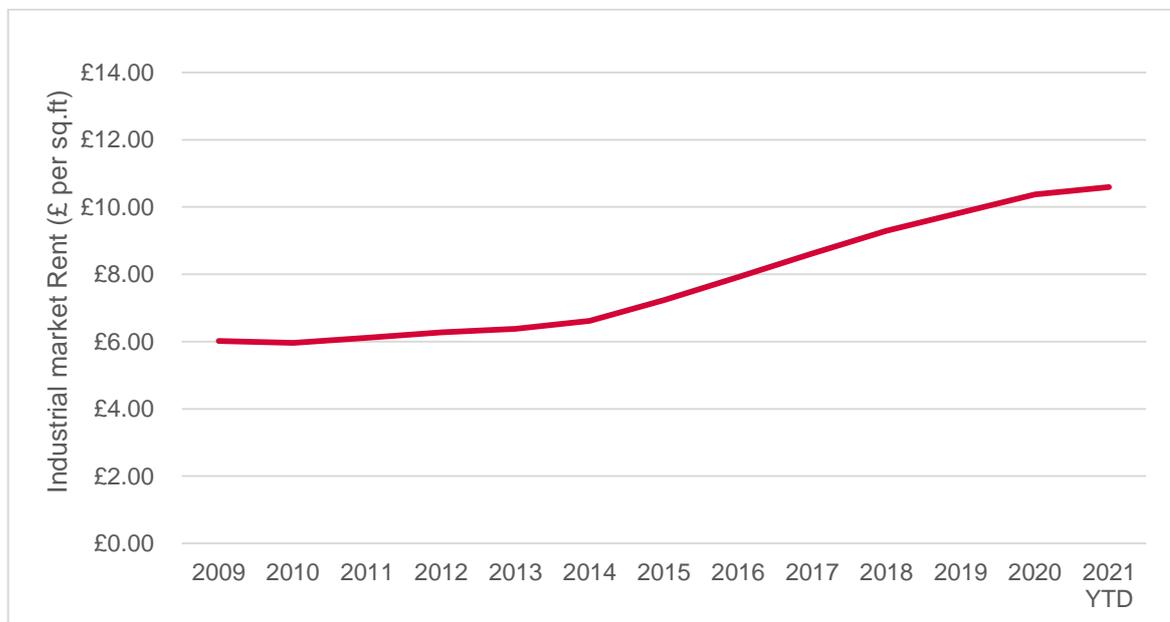


Source: Icen analysis of CoStar data

Industrial Rents

- 3.24 Market rents vary depending on the location and quality of the property, by CoStar record typical market rents of £10.35 psf for logistics space, £12.88 for light industrial and £8.88 psf for specialist industrial stock.
- 3.25 There has been relatively strong growth in industrial rents since 2014 as industrial supply has tightened.

Table 3.5 Industrial Rents – Uttlesford



Source: Icen analysis of CoStar data

- 3.26 Whilst typically you would expect positive rental growth and declining availability to have resulted in new supply coming forwards, CoStar report just 1,500 sq.ft of industrial space underway in the District. The outlook therefore points to further rental growth in the short-term.

Agenda Item 5

Committee: Local Plan Leadership Group

Date:

Title: Sustainable Density

Thursday, 29 July
2021

Report Author: Jack Bennett – New Communities Principal
Urban Design Officer

jbennett@uttlesford.gov.uk

Summary

1. New developments in Uttlesford need to be designed and built to levels of density which enable them to be sustainable. Low population density and current/potential availability of public transport options and other infrastructure constrain these densities and therefore the number of new homes that can be built in Uttlesford sustainably.

Recommendations

2. That LPLG endorses the development of a policy in the emerging Local Plan to deliver sustainable levels of density.

Financial Implications

3. The approved budget for the Local Plan in 2021-22 includes sufficient provision for the work needed through to the end of March.

Background Papers

4. The following papers were referred to by the author in the preparation of this report and are available for inspection from the author of the report:
 - Sustainable Density, Jack Bennett, 19.07.21.

Impact

- 5.

Communication/Consultation	This work has been informed by the first consultation on the Local Plan and will be subject to further consultation as the plan progresses
Community Safety	N/a
Equalities	Forthcoming policies will be subject to an Equalities and Healthy Impact Assessment (EqHIA)

Health and Safety	N/a
Human Rights/Legal Implications	Preparation of a local plan is a statutory duty. It needs to meet legal tests and comply with regulations.
Sustainability	Forthcoming policies will need to meet the sustainability objectives of the Council and the Local Plan will be subject to a Sustainability Appraisal.
Ward-specific impacts	All
Workforce/Workplace	N/a

Situation

- The Regulation 18 Local Plan is being prepared and will require density specifications to inform the spatial strategy. A density policy will assist in planning to address climate change, reduce the amount of land being developed and implement good design principles. Any policy should recognise the constraints of a rural area as outlined in the accompanying report.

Risk Analysis

7.

Risk	Likelihood	Impact	Mitigating actions
That no such policy is developed	1 the NPPF advises to address density	2 no policy on density would result in a greater land take and a risk of sprawl	The accompanying report sets out advice on appropriate considerations when developing a policy on density

1 = Little or no risk or impact

2 = Some risk or impact – action may be necessary.

3 = Significant risk or impact – action required

4 = Near certainty of risk occurring, catastrophic effect or failure of project.

Sustainable Density

Introduction

In Uttlesford, buildings and transport account for 88% of carbon emissions. The UK is also facing an acute housing crisis. The challenge then is to provide much-needed homes which are designed to be sustainable and help to mitigate climate change.

More sustainable towns that offer a high quality of life whilst also minimising resource consumption (such as energy, land, and water), require a minimum number of homes within a given area to enable sustainable (active and public) transport, economic viability, and support of non-residential uses such as commercial, retail, and education. This minimum sustainable number of homes within a given area could be referred to as a sustainable density.¹

It is generally accepted that these sustainable densities start at a minimum of 50 dwellings per hectare (dph) but ideally at least 65dph or over², with sustainability generally increasing with density as average resource use reduces and public transport and non-residential use options increase. A general profile of higher density towards the centre of a neighbourhood allows for lower densities towards any rural edges. However, smaller increases in density can still make a difference, by making places closer together they allow people to walk (or cycle) instead of drive, and it means that less land is required to be built upon.

Sustainable densities are achieved by utilising typologies such as terraces, courtyard houses, apartments, and mixed-use/shared-use³ buildings. These typologies would be used alongside detached and semi-detached homes (particularly in the context of Uttlesford) as a range of housing should be provided. Smaller and less connected settlements in Uttlesford will not be likely to technically support sustainable density of this kind, however, new settlements, towns, (and possibly village clusters in the vein of Velocity⁴) might. Fundamentally, densities are inextricably linked to transport options (and the availability of alternatives to the car).

Overall, this report aims to:

- Summarise the opportunities offered by building at sustainable densities.
- Summarise the challenges faced when building at sustainable densities.
- Differentiate between approaches taken for new settlements, extensions or infill to existing places, and smaller more remote places.
- Demonstrate that typologies associated with sustainable densities can create excellent places if well designed.

¹ The Essex Design Guide puts it this way: *'The location of substantial residential and business uses within easy walking distance of an urban or neighbourhood centre is the principal platform for sustainable development. This catchment of at least 5000 homes for a typical, sustainable neighbourhood can support a bus route and a variety of shops and services and can attract other commercial investment.'*

² The Essex Design Guide

³ Mixed use development refers to different co-located uses, which might be vertically mixed within a building (e.g. residential above retail) or neighbouring in the immediate area. Shared use refers to flexible properties which accommodate different users or uses at different times (e.g. a school which acts an out-of-school hours community resource) and/or cooperative type arrangements which share communal facilities for greater efficiency, e.g. co-housing and co-working (text from UDC Interim Climate Change Policy)

⁴ Please see introductory video: [| VeloCity \(velocityplacemaking.co.uk\) \(accessed 19.07.21\)](https://www.velocityplacemaking.co.uk)

Defining density

The Royal Institute of Chartered Surveyors defines **gross** density as: ‘...a measure that includes all aspects of a site of any size, including the housing, commercial space, roads, open and public realm, schools and their grounds, and other uses. It is calculated using site area.’

And **net** density as: ‘...a measure that includes everything that is developed but excludes major roads, open and public realm, schools, and their grounds, and commercial and community buildings. It is calculated using net development area.’

There are many measures of ‘amount of development per area’ including coverage rates, plot ratios, habitable rooms, bedrooms, or people per given area, but this report uses the most common measure of **net ‘dwellings per hectare’ (dph)**.

Uttlesford proposed density range

For reference, the information below has been reproduced from the Strategic Land Availability Assessment Methodology April 2021. Informed by assumptions used for the withdrawn Submission Local Plan, the densities in the following table are considered to reflect existing local densities.

Location	Density	Justification
Within Saffron Walden or Great Dunmow	35-67 dph	Allows a mix of housing types comprising houses, terraces, and apartments
Within any other settlement	30-50 dph	Respects the rural character of Uttlesford
Adjacent to any settlement	30-50 dph	Respects the rural character of Uttlesford
New settlement	30-67 dph	Allows a mix of housing types comprising houses, terraces and apartments

The estimation of development potential will be based on the net developable area of a site. Smaller sites will typically make use of existing roads and facilities, potentially enabling up to 100% of the site area to be developed. However, larger sites will require space for internal access roads, strategic open space, and landscaping so the developable area will be reduced. Informed by assumptions used for the withdrawn Submission Local Plan, the ratios identified in the following table will be used to calculate the net developable area of each site.

Site size	Gross to net ratio
Up to 0.4 hectares	100%
0.4 – 2 hectares	90%
2 – 15 hectares	75%
15 hectares and above	60%

Uttlesford Interim Climate Change Policy

Key points from the Uttlesford Interim Climate Change Policy about sustainable densities:

4.2 'More compact forms of development are fundamental to sustainable development patterns, not least by protecting the countryside and walkable access to it from self-perpetuating car-orientated sprawl. However, it needs to be tailored and selectively applied to the local context...'

4.3 'The design of higher density development needs to be focussed on enhanced efficiency and place-making, to maximise the benefits of close-knit communities, whilst mitigating possible problems, ensuring quality standards are still met...'

4.5 'There is growing recognition at the national level that sprawling single use developments such as out-of-town retail and office parks servicing suburban housing estates are damaging local communities and the environment, by fostering a self-perpetuating car-dependent society...'

Please see 'Development Densities' sections 4.2 – 4.36 for more detail.

Opportunities

Environmental

The top 3 factors for carbon emissions associated with new development are transport, 'embodied' carbon (carbon emissions associated with building materials and processes) and 'in-use' carbon (carbon emissions associated with heating, cooling, and using buildings).

Sustainable densities can reduce emissions associated with **transport** as they enable shorter travel distances which in turn: encourage greater modal shift towards public transport/active travel (walking, cycling etc), and increase viability of public transport, car share clubs, cycle and walking infrastructure etc. A reduction in car parking provision is generally enabled/required and can help make undercroft or basement parking viable. This reduction in car parking is what will make increased densities in much of Uttlesford challenging beyond a certain point, as the rural nature of the district makes low car ownership an unrealistic goal in many villages.

Sustainable densities can reduce emissions associated with **embodied carbon** as viability is increased and more innovative technologies such as mass timber and modern methods of construction are enabled. Terraced and apartment typologies enable a more efficient use of construction materials by volume but also general construction process (compared to detached/semi-detached homes).

Sustainable densities can reduce emissions associated with **in-use** (heating, cooling etc) carbon because terraced and apartment typologies enable a more efficient use of energy as they have a more efficient external envelope to floor space ratio (compared to detached/semi-detached homes).

Sustainable densities also have the following general benefits for the environment: Less pollution due to lower reliance on private cars, increased viability enables better public open space within and outside of new developments including maintenance, reduction of overall demand for development land reducing pressure on landscape assets, and higher efficiencies reduce resource consumption generally.

Economic

Sustainable density generally enhances the economic viability of development therefore enabling more elements which typically affect these calculations including affordable and social housing, non-residential uses, green and blue spaces including street trees and quality sustainable urban drainage. Increased viability also enables innovative delivery models to be part of a balanced solution including co-housing, self-build, custom-build, and community land trust models. Building at a sustainable density improves economies of infrastructure enabling new schools, roads etc to be funded, and local businesses and high streets benefit from higher footfall and activity.

Social

The wider range of typologies (terraces, apartments etc) that are required to achieve (and are therefore enabled by) sustainable densities help to meet a broader range of needs including first time buyers and downsizers, and enable innovative typologies that explore multigenerational, intergenerational, and co-living – helping to create mixed and balanced communities. Social proximity encourages positive interaction and diversity, improves viability of and access to community service, and enables more and better integrated social housing

Garden City Principles

Sustainable densities are inherent in the principles that define Garden Cities. Without providing the right employment, community facilities and range of housing, new garden communities risk becoming dormitory commuter suburbs which is the antithesis of the following principles:⁵

- Land value capture for the benefit of the community.
- Strong vision, leadership, and community engagement.
- Community ownership of land and long-term stewardship of assets.
- Mixed-tenure homes and housing types that are genuinely affordable.
- A wide range of local jobs in the Garden City within easy commuting distance of homes.
- Beautifully and imaginatively designed homes with gardens, combining the best of town and country to create healthy communities, and including opportunities to grow food.
- Development that enhances the natural environment, providing a comprehensive green infrastructure network and net biodiversity gains, and that uses zero-carbon and energy-positive technology to ensure climate resilience.
- Strong cultural, recreational, and shopping facilities in walkable, vibrant, sociable neighbourhoods.
- Integrated and accessible transport systems, with walking, cycling and public transport designed to be the most attractive forms of local transport.

⁵ The Town and Country Planning Association

Challenges

Perception that quality decreases with density

The Urban Design Compendium states that:

'Some people continue to equate higher densities with poor urban quality, such as overcrowding and reduced space standards. This misses a fundamental point. Density is only a measure. It is a product of design, not a determinant of it. The aim should therefore be not to achieve a given residential density, but to generate a critical mass of people able to support urban services such as public transport, local shops, and schools.'

Density is just one narrow measure of built form and cannot be used to determine what the resulting development will be like as a place. It is a high-level measure used to make general assumptions about a development. The quality of place is determined by the quality of the design process, not the density.

The average density of many well-loved Georgian, Victorian and Edwardian terraces is much higher than the density limits in many local plans yet they help to create very attractive townscapes.⁶ Higher densities are often equated with high rise, however, the tower blocks of the 1960s were actually built to low densities in ill-defined and poorly used open space, with neglectful management regimes, inappropriate materials, and with little regard to context.

Good designers now understand that when designing at sustainable densities it is possible to create high quality places by ensuring that buildings, streets and places are of a human scale; moderating the mass of a building or group of buildings in relation to other buildings and the landscape; and using high quality landscaping to soften perceptions of a place.

Designers also vary the density based on the location with higher densities towards the centre of a place (where main transport connections are) and lower densities towards the edges of a place, which are less connected to transport and interface with surrounding landscape. This also helps to create distinctive and varied places.

By contrast, poorly designed suburban neighbourhoods which have been based on an imposed density figure (i.e. driven by density rather than design) tend to be flat and featureless with no distinctive places or parts, with little hierarchy of activity or built form. If located in well-connected places, these kinds of development are a missed opportunity and are wasteful of land and infrastructure.

Best practice design is a process rather than purely an outcome. It considers much more than just aesthetics. High quality places can be made at any density when designed by a skilled and experienced team who holistically synthesise the following factors as a minimum:

- Environmental sustainability, economic, and social sustainability
- Heritage, conservation, character, and identity
- Landscape, ecology, open spaces, and amenity
- Movement, access, connectivity, transport
- Built form, materiality, uses, typologies, homes, and buildings

⁶ Contemporary terraces (if well designed) have much better spatial layouts and quality of internal space when compared to the heritage buildings mentioned here which were generally compromised.

Connectivity

The Essex Design Guide states that:

'It is important not to seek high-density development on land that is poorly connected to other places by public transport. Doing so increases the number of unnecessary journeys made by car, adding to local traffic congestion, pollution and carbon emissions. Such developments are the parts of an urban area that are least likely to become sustainable communities; in these situations, it is preferable to keep densities below 50 dwellings per hectare.'

With regards to public transport, 45dph is around the lower limit of density needed to support a bus service (dependent on overall size of settlement and the location of the settlement on any existing or potential public transport route)⁷ and these points are relevant in Uttlesford where poor public transport connectivity (and/or limited potential to improve) will limit possible densities, particularly in villages and some edge of settlement conditions. The issue is not so much density of individual places, but the numbers of homes in these places, and overall low population density of Uttlesford being generally unable to support the required level of public transport.

Broadly speaking, if sustainable transport cannot be provided to these places, then development should be limited in nature and large-scale development will need to be provided elsewhere. Provision of a varied approach to housing delivery across the district is the key challenge for Uttlesford. Sustainable transport improvements to enable expansion of existing settlements are required as new settlements cannot be solely relied upon to deliver new homes.

Flexible standards

The Urban Design Compendium states that:

'Research has shown that there is no correlation between [place] quality and density. Developments driven by average densities and shaped by blanket standards (relating to privacy, open space, parking and highway geometry, for example) stultify design and tend to produce lowest common-denominator blandness. The recommended approach is design-led, concentrating on sustainable quality [of place]. This ... makes density a measure of the product, not a determinant of it.'

This again highlights the importance of design, and the negative effect that blanket (rather than flexible) standards for parking, privacy, amenity, and highway geometry can have. This is explored in more detail below:

Car parking standards

Incorporating car parking is a design challenge common to all developments but is particularly relevant in Uttlesford where reliance on the car is so high. There are many examples of where car parking can be sensitively integrated into the street scene with careful placement and soft landscaping etc, but the specific challenge in relation to density and therefore sustainability, is the efficient use of land.

⁷ Research suggests net densities of 100 persons per hectare (pph) are necessary to sustain a good bus service (LGMB, 1995). Taking the 800m (10 minute) walking distance as a starting point (generating a walkable neighbourhood of 97.5 ha - see 3.1), this equates to 45 dph if the average UK household size of 2.2 persons is applied. In more central locations, 240 persons/ha (or 60dph) will sustain a tram service (urban design compendium)

Certain numbers of car parking spaces per dwelling are not achievable above a certain density, because the land take for the car parking spaces generally is so high. Provision of 2-3 parking spaces per home restricts densities to around 30-40dph and densities higher than this generally require a reduction in parking provision (see table on page 10 for more details). Solutions to mitigate this reduced provision include encouraging modal shift to other methods of transport to reduce reliance on the car, or more flexible provision, for example, on-street parking controlled by permit to enable parking to respond directly to need, rather than providing blanket maximum numbers of spaces.

Privacy and amenity (garden) standards

As mentioned previously, Georgian, Victorian, and Edwardian approaches to mass housing which are generally well loved achieved high densities. One way they did this was through smaller privacy and amenity standards than are generally included in most local plans, particularly rural plans such as Uttlesford. Large amenity areas of 100sqm+ and privacy distances of 22m+ generally restrict densities to around 30-40dph. To enable more sustainable densities these standards can be reduced, but only with input from skilled designers who holistically consider the issues alongside placemaking and landscape etc. Many innovative housing typologies exist which balance these issues carefully, including courtyard houses, and communal back gardens.

Highways standards

Designing for the largest vehicle (usually refuse or fire vehicles) and approaches to road safety which rely on placing the car at the top of the hierarchy result in much wider carriageways and layouts,⁸ radii etc which greatly increase land take. Taking a more people centred approach can result in reduction of the size of road infrastructure and therefore help to raise densities.

Scales of development

New settlements

New settlements in well-connected locations are a good way to achieve sustainable densities. At a high level a minimum 'sustainable unit' comprises 5000 people in ~2000 homes @ 65dph over min. 50 hectares within a circle of 400m radius.⁹

This represents a comfortable, 5-minute walking distance for most able-bodied people. These schemes should aim to contribute substantially to the employment needs of the town and be largely self-sufficient for all primary services. Projects would generally be expected to include sustainable energy and waste recycling infrastructure sufficient to meet 100% of the needs of the development.¹⁰

In forecasting pupil numbers ECC works on the basis that 100 houses will on average generate demand for 30 primary main stream state school places and 20 secondary school places (excluding 6th form). These estimates are halved for apartments and bungalows. There are also a number of dwelling types, such as single bedroom properties and others unlikely to house children, which are excluded from such calculations.

⁸ Manual for Streets 2007

⁹ Essex Design Guide 2018

¹⁰ Essex Design Guide 2018

Using the factor of 0.3 primary school pupils per house (30 per 100) a development of 700 houses would equate to demand for 210 primary school places, which is one form of entry i.e. seven year groups of thirty pupils in each class. It should be noted that the Education Funding Agency currently looks to establish two form entry primary schools (420 places) wherever feasible.

ECC supports this approach and, thereby, when considering new primary school sites an area of 2.1 hectares will usually be sought as a minimum. Generally, secondary schools accommodate at least four forms of entry (600 places). To ensure long term viability, ECC will usually look to establish a new school only where demand for six forms of entry has been established (approximately 4,500 homes).¹¹

Overall, the minimum requirement for a sustainable well-connected new settlement is around 4,500-5000 homes, in 'sustainable units' as above, with sites located next to existing facilities able to be viable and sustainable with fewer homes. The advantages of being able to provide a secondary school on site are considerable, as this means secondary pupils are able to access education without leaving the settlement.

Extensions to existing settlements

Existing settlements such as Great Dunmow and Saffron Walden can grow sustainably as far as the facilities and transport options at the existing settlement allow. Once this capacity is reached then more infrastructure (particularly sustainable transport, including better support for walking and cycling) is required, with these elements of infrastructure requiring a certain number of homes to be viably 'triggered' (see previous point about schools in 'New Settlements' section).

Infill within existing settlements

Infill within existing settlements will generally be sustainable as will likely be within close distance of existing facilities. The existing medieval and market town layouts of Saffron Walden, Great Dunmow and other settlements in Uttlesford lend themselves very well to typologies associated with sustainable densities such as terraces, apartments, and apartments over ground floor retail. The tight street layouts, access to facilities, and a general lack of space support a reduction of parking in these places, which is already seen in several developments in the district.

Smaller, village, and remote sites

Based upon the established principle that density is linked to connectivity, many remote and village sites in Uttlesford will be restricted to lower density development (~30dph) and will grow sustainably as far as the facilities and transport options at the existing settlement allow.

¹¹ Essex County Council's Neighbourhood Planning Guide 2019

General layout principles

The diagram below is from the Essex Design Guide and shows how places should ideally be considered in 'sustainable units' which have transport and other facilities within a 400m radius. This represents a 5 minute walking distance, which means a round walk across the neighbourhood (to pick up a pint of milk, or collect children from school, for example) takes 20 minutes.



- a. Settlement centre
- b. Neighbourhoods within settlement
- c. Sustainable extension to existing settlement
- d. Infill within existing settlement (large)
- e. Infill within existing settlement (small)
- f. Railway station (or Rapid Transit bus stop)
- g. Green space
- h. Bus route

The table below has been included to illustrate the general relationships between parking, housing typologies, and possible densities. It does not represent proposals for Uttlesford at this stage.

Residential typology	Storeys	Car parking spaces	
		High parking prov. (2-3 per dwelling)	Low parking prov. (1 per dwelling)
Arcadia (homes in landscape)	2	8 dwellings per hectare net (dph) ¹³ Parking on plot	<i>Rarely built</i>
Boulevard (tree lined boulevards)	2	13-20dph ¹⁴ Parking on plot	<i>Rarely built</i>
Letchworth Garden City	2-4	15-20dph Parking on plot	<i>Rarely built</i>
Standard suburban layouts (detached and semi-detached houses)	2	20-30dph ¹⁵ Parking on plot and on street	30-40dph (estimated) Parking on plot and on street
Terraced houses	2-3	Max 30dph ¹⁶	50-80dph ¹⁷ Parking on street
Maisonette and apartment (stacked)	3	Max 45dph ¹⁸ <i>Rarely viable</i>	50-75dph ¹⁹ Parking on street
Maisonettes (stacked)	4	Max 45dph ²⁰ <i>Rarely viable</i>	50-75dph ²¹ Parking on street
Apartments and terraced houses (50/50)	2-3	Max 40dph ²² <i>Rarely viable</i>	50-75dph ²³ Parking on street
Maisonettes (stacked) and apartments (50/50)	3-4	Max 45dph ²⁴ <i>Rarely viable</i>	75-100dph ²⁵ On street/undercroft
Apartments	3	Max 45dph ²⁶ <i>Rarely viable</i>	75-100dph ²⁷ On street/undercroft
Apartments with mixed-use ground storey	4	<i>Rarely viable</i>	75-100dph ²⁸ On street/undercroft
Apartments	4	<i>Rarely viable</i>	100-125dph ²⁹ On street/undercroft

¹³ [Criteria for Layout at Densities Below 20 Dwellings Per Hectare | Essex Design Guide](#) (accessed 17.06.21)

¹⁴ [Criteria for Layout at Densities Below 20 Dwellings Per Hectare | Essex Design Guide](#) (accessed 17.06.21)

¹⁵ The Housing Design Handbook (2nd edition)

¹⁶ Manual of Housing Density, Blue Pencil Designs, 2016

¹⁷ The Housing Design Handbook (1st edition)

¹⁸ Manual of Housing Density, Blue Pencil Designs, 2016

¹⁹ The Housing Design Handbook (1st edition)

²⁰ Manual of Housing Density, Blue Pencil Designs, 2016

²¹ The Housing Design Handbook (1st edition)

²² Manual of Housing Density, Blue Pencil Designs, 2016

²³ The Housing Design Handbook (1st edition)

²⁴ Manual of Housing Density, Blue Pencil Designs, 2016

²⁵ The Housing Design Handbook (1st edition)

²⁶ Manual of Housing Density, Blue Pencil Designs, 2016

²⁷ The Housing Design Handbook (1st edition)

²⁸ The Housing Design Handbook (1st edition)

²⁹ The Housing Design Handbook (1st edition)

Sustainable density example places

Precedents shown here explore the terraced, maisonette, and apartment typologies which would be required to reach sustainable average densities over 50dph. Typologies associated with lower densities such as detached and semi-detached homes are not explored here as they are already well understood and represented in Uttlesford (it is important to note there should always be innovation with these typologies/densities too as shown by the the Velocity³⁰ proposal, and The Avenue³¹). The Council's emerging Building for Healthy Life document explores examples of good existing schemes in Uttlesford, some of which are towards the end of this document ('Example places within Uttlesford' section).

The density pyramid

The higher density typologies would be part of a mixed solution depending on the context and size of site. As a rule, for new settlements and settlement extensions, the 'density pyramid' can be employed. This requires the positioning of lower density (~30dph) forms at the edges of the project and the higher density (~70dph+) forms around and in the local centre, with a gradation of types and sizes in-between, creating an overall average density (~50dph+).³² This approach is particularly relevant in Uttlesford where developments are likely to have sensitive landscape edges.

Low rise, sustainable density

From the Urban Design Compendium:

'In many ... situations [low] rise, [sustainable] density buildings (of about 3 – 4 storeys) in general provide an optimum form that maximises density whilst minimising perceived intensity or overcrowding. They can also be designed to be attractive, energy efficient and mixed use, whilst reducing costs of land acquisition and site infrastructure; avoiding costs of lifts and other services; providing a robust form that allows for changes in use over time; and forming terraces or low-rise apartments (the most cost-effective building form in housing). These types of buildings can also provide desirable features of typical suburban places namely private entrances at ground level, adequate garden sizes, convenient car parking, significant public space and a pleasant aspect for windows.'

³⁰ [VeloCity \(velocityplacemaking.co.uk\)](http://velocityplacemaking.co.uk) accessed 18.06.21

³¹ [The Avenue → Pollard Thomas Edwards](#) accessed 18.06.21

³² Urban Design Compendium 2007

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Example places

Design for Homes have produced the following videos (please follow the link – all accessed 19.07.21) which explore some exemplar places which are of a relevant density and context to this report and Uttlesford.

Infill within existing settlements

[Tibby's Triangle, Southwold | Design For Homes](#)

Themes: Existing settlement infill, local vernacular, private terraces. mixed-use, houses, apartments

[Hortsley, Seaford | Design For Homes](#)

Themes: Existing settlement infill, over 55s, apartments, local materials, good transport connections

[Parkside, Matlock, Derbyshire | Design For Homes](#)

Themes: Existing settlement infill, over 55s, apartments, local materials, mixed-use

Extensions to existing settlements

[Officer's Field, Osprey Quay, Portland | Design For Homes](#)

Themes: Environmental sustainability, local materials, innovative house and parking typologies

[Goldsmith Street, Norwich | Design For Homes](#)

Themes: Environmental sustainability, terraced homes, apartments, innovative streets and gardens

New settlements

[Hanham Hall, Near Bristol | Design For Homes](#)

Themes: Environmental sustainability, terraced homes, apartments, landscape setting, open space

['Be', New Hall, Harlow | Design For Homes](#)

Themes: Courtyard homes, apartments, local vernacular, landscaped streets

[Abode, Great Kneighton | Design For Homes](#)

Themes: Innovative typologies, landscaped streets, apartments, courtyard homes

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Example places within Uttlesford

Saffron Walden Market Square - These apartments are positioned over ground floor retail units and the building is arranged to form one side of the market square.



The Avenue, Saffron Walden - This image shows the age restricted housing (over 55s) part of this scheme which is an apartment block in the 'Essex barn' style.



19.07.21

Audley End and Wendens Ambo terraced cottages - These represent well-built terraced homes, and the 1.5 storey cottages could be a model for older people's housing which is more sociable and land efficient than a bungalow, with a 'room in the roof' for visitors or carers to stay.



19.07.21

Reynhams, Saffron Walden This scheme is an example of terraced townhouses on an infill site in Saffron Walden. The development takes advantage of an existing basement to create underground parking, and detailing is high quality using reclaimed historic materials and components (image rights Design for Homes).



Thorpe Lea Close, Great Chesterford is an example of an extension to an existing settlement which has a good variety of typologies from terraced homes to farmstead. (image rights Design for Homes).



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Mill End, Thaxted utilises existing heritage buildings in a sensitive and resourceful way. The development also includes apartment and terraced typologies (image rights Design for Homes)



Dairy Lane, Stansted Mountfitchet is a well-designed scheme which utilises typologies from apartments, to terraces, semi-detached and detached, with a good mix of on-plot and on-street parking.



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Further examples (national)

Marmalade Lane, Cambridge is a co-housing development which utilises terraces and apartments arranged around an open green space with allotments



The Piggeries, Frome — Town centre mixed housing development providing 70 units on steeply sloping south facing site within conservation area (More details in Urban Design Compendium).



Timekeeper's Square 36 townhouses in Salford. The development in a conservation area with the neo-classical Grade II* listed St Phillips Church at its centre.



Accordia, Cambridge is a well-established exemplar housing scheme which has typologies including terraces, apartments, and innovative courtyard homes.



Springhill Cohousing, Stroud is another co-housing scheme which has houses and apartments and includes a common house with some shared facilities such as café, dining, laundry etc.



Channels, Chelmsford has recently won a Housing Design award and has detached, semi-detached, terraced and apartment homes which draw from the Essex vernacular.

