



Newry, Mourne & Down District Council

Employment Space Demand 2022-2035: Updated Analysis

November 2023

Eoin Magennis

Ulster University Economic Policy Centre

Contents

1. Introduction	2
2. Economic overview and forecasts, Autumn 2023	3
2.1 Recent performance to 2022.....	3
2.2 Sectoral Composition of the local economy.....	5
2.3 The District Electoral Area (DEA) Profile.....	6
2.4 The employment outlook to 2035	8
3. Estimating Employment Space Demand to 2035	10
3.1 Local Council Impacts	10
3.2 Sensitivity Analysis	12
Appendices.....	13
Appendix 1: Study Methodology.....	13
Appendix 2: Use Class by Sector.....	15

1. Introduction

1. Newry, Mourne and Down District Council (NMDDC) has supported the work of the Ulster University Economic Policy Centre (UUEPC) since 2016 as a local government sponsor. This has enabled the work of developing a Local Government Economic Forecast Model, which now forecasts a variety of labour market, demographic & economic output variables for each of the 11 Northern Ireland (NI) Local Councils.
2. Under the sponsorship agreement the UUEPC provides NMDDC with a series of economic forecasts and presentations based upon the outputs of the local model as well as additional economic research and analysis when requested. One request, initially in 2019-20 and the more recently, has been to provide an estimate of future demand for employment space within the council area to assist with the Council's Local Development Plan (LDP).
3. An initial estimate was provided in October 2020 in the middle of the Covid-19 pandemic and based on 2018-2030 forecasts which preceded the economic shock of the pandemic. A first draft of the 2020 report was presented to the LDP Steering Group meeting in January 2020 in advance of the COVID-19 pandemic and the final draft, submitted in October 2020 did take an initial view on the impact of the unfolding events, as well as the potential shape of the economic recovery then beginning and the implications of this for demand for employment space.
4. The UUEPC have been asked to revisit the analysis of employment space demand in NMDDC based on two changes to the original work:
 - To use the most recent local model forecasts from the UUEPC, namely those from June 2023 which cover both the post-pandemic recovery and the impacts of the geo-political uncertainty, in particular the war in Ukraine after the Russian invasion of February 2022; and
 - A revision of the LDP time period from 2030 out to 2035.

2. Economic overview and forecasts, Autumn 2023

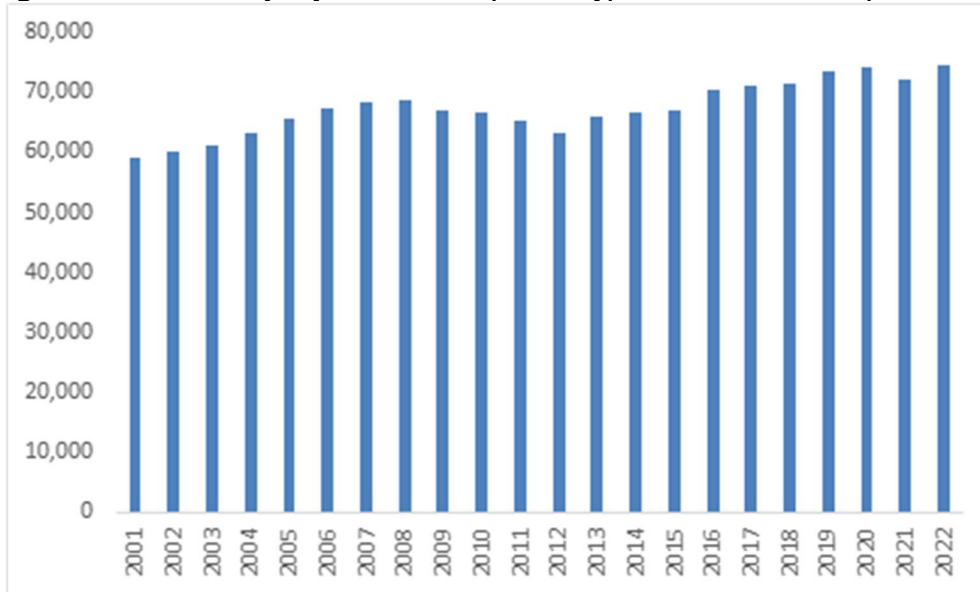
1. This section provides a review of the recent performance of the labour market in NMDDC and an employment forecast out to 2035 on which the subsequent demand for employment space will be based. The uncertainties around the economic outlook and forecasts remain greater than they were before the Covid-19 pandemic, but the upside and downside risks are now much better understood than they were at the end of 2021.
2. The general consensus among economic commentators is now that the global economy will avoid a serious recession in 2023 but is likely to see several years of low growth (less than 2% per annum) and this could continue into the medium term (into the next decade and therefore the time period of the LDP). Although the recent cost-of-living crisis has not seen the same levels of government and Central Bank intervention that were seen in 2020-21, this remains an age where serious economic shocks brought by external events do prompt packages of supports for businesses, employees and households that were generally unheard of before 2020.
3. The inflation surge of the past 18 months has prompted a more traditional response by Central Banks, ie: a sharp rise in interest rates and a growing belief that these will remain elevated even as inflation appears to be coming under control or is forecast in the UK to reach the 2% target in 2025. These interest rates and the impacts of inflationary prices are resulting in consumer spending and business investment at a standstill with a knock-on effect on economic output and thus a sharp slowdown in the employment growth that we had seen in 2021-22.
4. In summary, the prospect of recession in the Northern Ireland and UK economies is now less likely than believed earlier in the year but 2023 will see little or no growth.¹ Even the normally-buoyant Irish economy has been seeing a downward revision of forecasts for 2023 to 1.8% growth followed by 2.4% in 2024.²

2.1 Recent performance to 2022

5. Our focus is on workplace employment within the Council area as this best reflects the demand for employment space within NMDDC. In 2022 there were a total of 74,420 people employed in the NMDDC council area, standing at a new historic high after a Covid-related dip in 2021. This means that almost 8.5% of the total people employed in NI work in the council area.
6. Since 2001 an additional 14,652 jobs have been added in the NMDDC area, an average of 700 jobs per year. The two sectors which have driven this growth have been Retail and Health which have jointly added 6,300 jobs or 43% of the total. Other sectors, such as Agriculture and Construction have had contrasting fortunes, the first losing jobs in a structural change and the second with 2,800 fewer jobs than existed at the peak of the 2004-2008 boom. Newer sectors have also emerged, such as Professional Services and ICT, both of which have doubled in size since 2001.

¹ Office of Budget Responsibility (UK), *Economic and Fiscal Forecasts* (November 2023).

² ESRI *Quarterly Economic Commentary* (October 2023).

Figure 1: Total Employment Level, Newry; Mourne & Down, 2001-22

Source: NISRA (BRES) & UUEPC Local Model Spring 2023 Outlook

7. It is worth noting that Figure 1 shows how employment trends, while positive in the longer run, have not been smooth. The boom in employment growth to 2008 was followed by a sharp recession. The post-2012 economic recovery set new employment records by 2016 and continued up to the Covid-19 pandemic with a particularly strong year of growth in 2019.

Table 1: Total Employment Change by sector, Newry, Mourne & Down, 2001-22

	Net Change			Total Employment
	2001-2012	2012-19	2020-2022	2022
Agriculture	-400	-400	-800	3,900
Mining and quarrying	-100	0	0	100
Manufacturing	-1,800	2,400	700	9,000
Utilities	0	0	0	100
Water supply & waste	200	200	0	1,100
Construction	-1,800	1,400	-600	6,400
Retail	2,000	600	100	13,700
Transportation	0	500	100	2,400
Accommodation	300	700	200	5,300
Information & Comm's	500	500	100	1,200
Financial activities	0	100	0	900
Real estate	300	0	0	500
Professional & scientific	800	700	300	3,000
Administration services	1,600	500	300	3,400
Public Admin' & defence	100	-600	100	2,000
Education	300	100	100	7,200
Health & social work	1,300	2,000	300	10,400
Arts and entertainment	100	300	0	1,800
Other services	300	1,000	-100	2,000
Total	3,700	10,000	800	74,400

Source: NISRA (BRES); UUEPC analysis

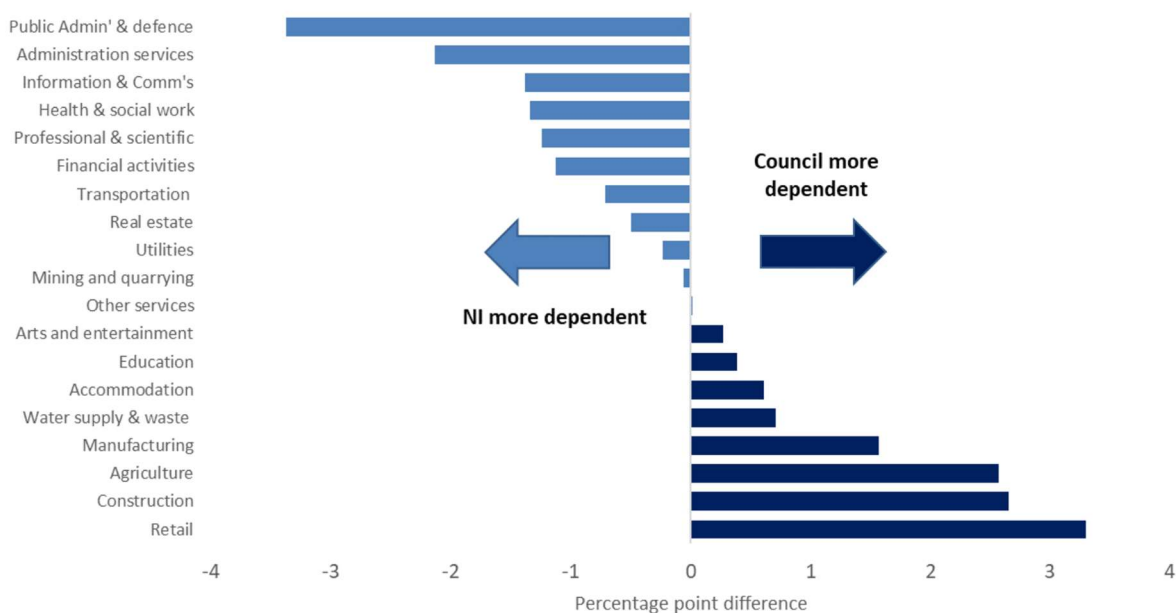
Note: Totals may not add due to rounding

8. Table 1 above shows the recent sectoral performance of the NMDDC labour market in three phases since 2001: 2001-2012 (boom and recession), the 2012-2019 recovery and the 2020-2022 pandemic years. This detail on the sectors in the Council area is analysed further in the next section as it is crucial for understanding employment space demand.
9. Table 1 also shows how the economy in NMDDC in 2012 – despite the severe recession after 2008 – was still ahead of where it had been in 2001 in terms of total employment. This was then followed by a strong recovery up until 2019 across every sector bar two – Agriculture and Public Administration, the latter being depleted by austerity and public sector job losses. Despite the subsequent job losses that occurred during the Covid-19 pandemic which were driven by falls in the number of self-employed (seen most clearly in the Construction, Agriculture and Other Services sectors), the local economy rebounded well and actually saw some employment growth.

2.2 Sectoral Composition of the local economy

10. The local economy in NMDDC is more heavily balanced to the private sector than is the case in NI more generally (74% of employment compared to 71% in 2022). Public sector employment – taken up by the Public Administration, Health and Education sectors – accounts for the remaining 26% employment share with Health making up about half of these jobs based either in hospitals, primary health centres or social care.
11. Figure 2 over shows how the sectoral mix in 2022 in NMDDC compares to the shares taken by sectors across NI. The first and most important to make is that the sectoral structure is not that different – sectors are mainly between 2.5% larger or 2.5% smaller in share than the average.
12. Those sectors in the upper part of Figure 2 are ones in which NMDDC has smaller shares than would be found in NI with more Public Administration (civil service) jobs found in other Council areas as well as other sectors such as ICT and Financial Services where the large urban centres, especially Belfast, will have larger shares of employment.
13. The two largest employing private sector sectors are Retail and Manufacturing, with these sectors making up 29% of total employment. Their share in NMDDC is a little larger than the 25% share of total employment in NI. Agriculture and Construction are two other sectors with a larger share than can be found elsewhere, a reminder that much of the local economy is either found in rural areas or in smaller towns with a connection to their local hinterland.

Figure 2: Sectoral structure, Newry, Mourne and Down vs NI, 2022



Source: NISRA (BRES) & UUEPC Local Model Spring 2023 Outlook

Note: Totals may not add due to rounding

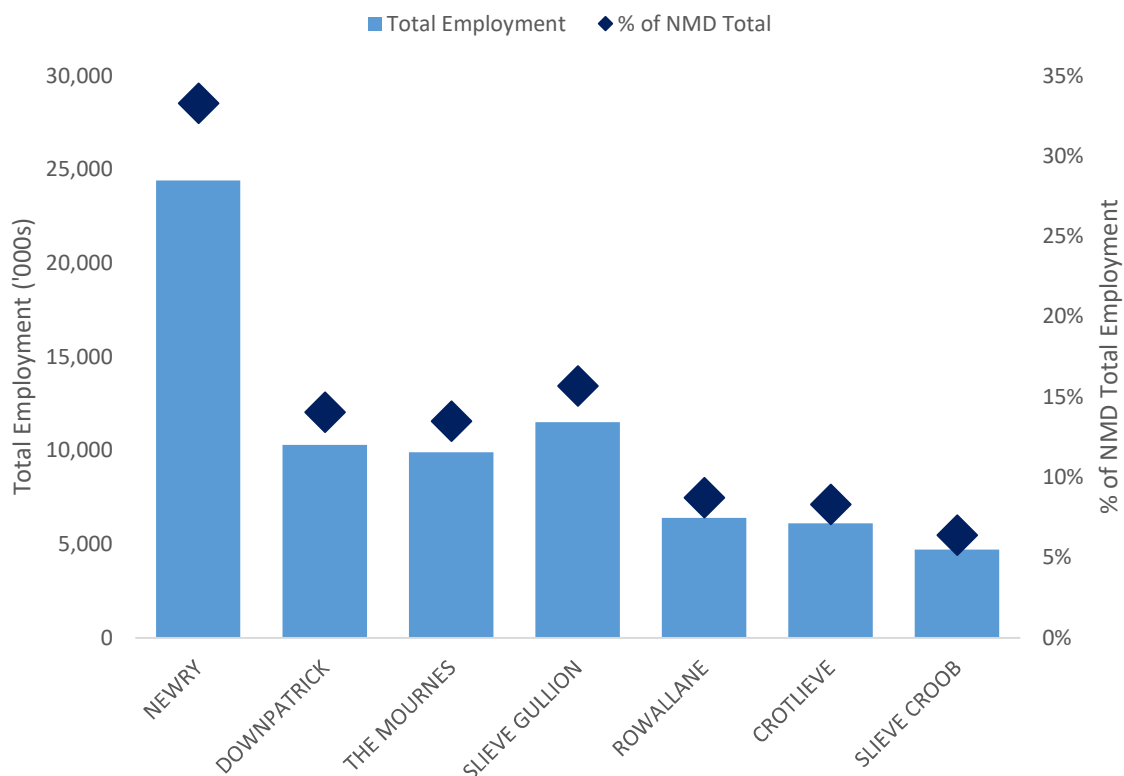
14. Importantly for the purposes of this report, **the non-retail Services sectors³ have more than doubled their share since 2001 to employ 20% of those working in the NMDDC area.** This may remain a small over share of total employment (just a little bigger than Retail alone) but it does point to a changing type of employment space over the long term.

2.3 The District Electoral Area (DEA) Profile

15. Economic activity is unevenly spread in NMDDC, similar to other Council areas which are made up of larger, smaller towns and rural areas. Thus, the demand for employment space is also going to be unevenly spread.
16. We have tried to provide a more granular analysis of economic activity, as supplied from the BRES data at District Electoral Area (DEA) in 2019. Figure 3 over shows the total workplace employment for each of the seven DEAs in 2019. Newry DEA had the highest share of total employment in the NMDDC area, with around 24,400 people employed there or 33% of total employment. Between 2013 and 2019 total employment in Newry DEA has increased by over 2,300, which accounts for more than a quarter of all new jobs in the NMDDC area.

³ This includes Professional Services, Administrative Services, ICT, Financial Services, Real Estate and Other Services (which can include personal services such as hairdressers, etc).

Figure 3: Total Employment (Nos & % of Total), Newry, Mourne & Down DEAs, 2019



Source: NISRA (BRES) & UUEPC Analysis

17. The BRES data allows the profiling of four broad sectors – Construction, Manufacturing, Services⁴ & Other⁵ – for the DEAs for 2019. The analysis shows, as might be expected, that the DEAs with the largest towns – Newry and Downpatrick – have a higher dependence on service-based sectors – and thus the type of employment space which supports these workforces. In comparison, Services sectors have a lower share of total DEA employment in more rural DEAs (such as Slieve Gullion).
18. The Manufacturing sector (and therefore industrial employment space) is a key employer in at least three rural DEA areas (The Mournes, Slieve Gullion and Crotlieve) with shares of total local employment up to a quarter (in Slieve Gullion). The importance of one large employer in a DEA can be summed up by the example of the airplane seat manufacturer, Rockwell Collins, which is based in the Mournes DEA.
19. Table 2 shows the sectoral concentrations at a DEA level which are compared to the entire NMDDC area (in the Total column). The Newry DEA has the highest proportion of service-based sectors within the NMDDC area, with more than a third (38%) of all service jobs located in Newry. Between 2013 and 2019 the service sector in Newry DEA expanded strongly, creating more than 1,300 additional (or 95% of all jobs created in the Newry DEA). Part of this is the growth in ICT, given the continued expansion of First Derivatives and the success and growth of STATsports in recent years.

⁴ The broad Services group includes the larger Public sector services and Retail, and the smaller Professional, ICT and Financial Services.

⁵ Other is made up of the following sectors: Agriculture, Mining & Quarrying and Utilities (Electricity and Water Supply).

Table 2: Total Employment by Broad Sector (% of NMD total), Newry, Mourne & Down DEAs, 2019

	% of Council Total				
	Construction	Manufacturing	Other	Services	Total
CROTLIEVE	23.9%	16.5%	4.5%	8.2%	10.8%
DOWNPATRICK	5.1%	2.6%	14.0%	17.0%	13.7%
NEWRY	16.9%	15.5%	32.0%	37.2%	33.5%
ROWALLANE	10.3%	7.7%	5.2%	8.3%	8.3%
SLIEVE CROOB	11.2%	10.0%	7.8%	6.6%	7.4%
SLIEVE GULLION	14.6%	25.6%	25.2%	9.2%	11.9%
THE MOURNES	18.0%	22.1%	11.3%	13.5%	14.4%
NMD Council Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NISRA (BRES) & UUEPC Analysis

20. As for Manufacturing, Table 2 shows how The Mournes and Slieve Gullion DEAs have the highest proportions of the Council area's employment in this sector. The two DEAs contribute almost half (48%) of all employment in Manufacturing for the NMDDC area and reflects the continuing importance of Manufacturing in some of the more rural DEAs.
21. Finally, almost a third (32%) of all 'Other' employment in the NMDDC area is in the Newry DEA, most likely due to higher concentration of Utilities workplaces in the area. Crotlieve DEA has the highest concentration of Construction workers of all DEA's in the NMDDC area, accounting for almost a quarter (24%) of that sector's total employment.
22. Another important point to make is that in most of the DEAs, Newry perhaps being an exception, the sectoral shares have changed little since 2013. Local economies change slowly unless visited by an external shock.

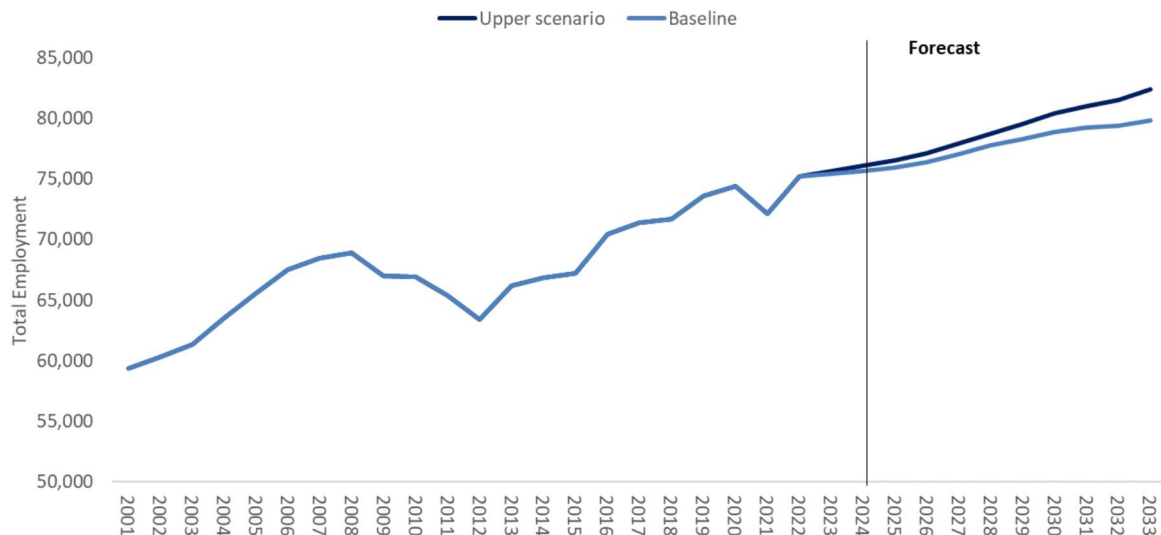
2.4 The employment outlook to 2035

23. This section outlines the potential future performance of the labour market across the NMDDC area out to 2035 using forecasts from the UUEPC Spring 2023 Economic Outlook and subsequent research on likely employment scenarios under different investment plans for the City and Growth Deals in NI.
24. The outlook has two scenarios, both of which incorporate a different potential outcome based on NI, UK and global economic trends and events. The scenarios are:
 - Baseline** – this scenario assumes a policy neutral position where higher interest rates and inflationary pressures on public spending all contribute to sluggish rates of growth for much of the 2020s and employment rates increase to 78% in NI against the backdrop of a tight labour market; and
 - Upper** – higher growth rates improve due to a series of public investments and private sector productivity improvements leading to the employment rate converging with the UK one.
25. Figure 4 shows the total employment performance since 2001 and under the two scenarios out to 2035. In the Baseline scenario the total employment for the NMDDC area is expected to reach almost 82,000 jobs, marking an increase of 7,740 over the period or growth of 10.4%. In the Upper scenario

the forecast is that total employment will increase by 9,440 jobs, reaching a total employment of 83,900 by 2035.

26. **It is important to say that the Baseline jobs outlook is stronger than the original 2020 forecast because the pre-pandemic recovery proved stronger than anticipated (especially in 2019) and the employment rebound from Covid-19 more rapid.**

Figure 4: Total Employment Outlook, Newry, Mourne & Down, 2001-35



Source: NISRA (BRES) & UUEPC Local Model Spring 2023 Outlook

27. In the Baseline scenario, Manufacturing, Professional Services and Health are expected to be the largest growth sectors out to 2035 with more than 2,000 jobs created across the three sectors. In contrast, Retail is expected to lose a small amount of jobs, perhaps 100 albeit from its very large overall share of employment.
28. Health, Manufacturing and Construction are forecast to be the main drivers of employment growth in the Upper scenario with 2,800 jobs forecast to be created between the three sectors. Professional Services will also add further jobs under the Upper scenario as the sector benefits from the growth of this sector more generally in NI but also its growing concentration on the economic corridor between Belfast and Dublin.

3. Estimating Employment Space Demand to 2035

1. This section of the paper applies the anticipated change in total employment in the NMDDC area to estimate the demand for workspace that this is likely to give rise to. The approach used, detailed in the appendix, forms the basis of similar LDP projects that the UUEPC completed for Belfast City Council (2016) and Mid & East Antrim Borough Council (2018).
2. In completing such estimates there are some caveats to consider, including:
 - a) The significant challenges posed by using a longer-term forecasting period, not least the greater risk of assuming that the factors which impinge upon the economy can be taken as 'givens' and therefore the models can miss the unexpected events, such as the COVID-19 pandemic or other geopolitical events with wider implications.
 - b) More topically, is that the estimates of employment space demand must increasingly account for the rise of hybrid working in the NI economy, as elsewhere.⁶ It is difficult to envisage this increased trend towards remote working not resulting in more fluid office designs and therefore lower employment densities over time. The sensitivity analysis below (section 3.2) will make some allowance for these trends.
 - c) A decade is also long enough to make major structural shifts in either the economy or the use of technology more likely. The employment forecasts include impacts from Brexit and early estimates of the impact of greater use of automation⁷, but there may be other floor space implications not built into the employment space estimates, such as the drive to Net Zero in buildings or an accelerated use of AI in business processes.

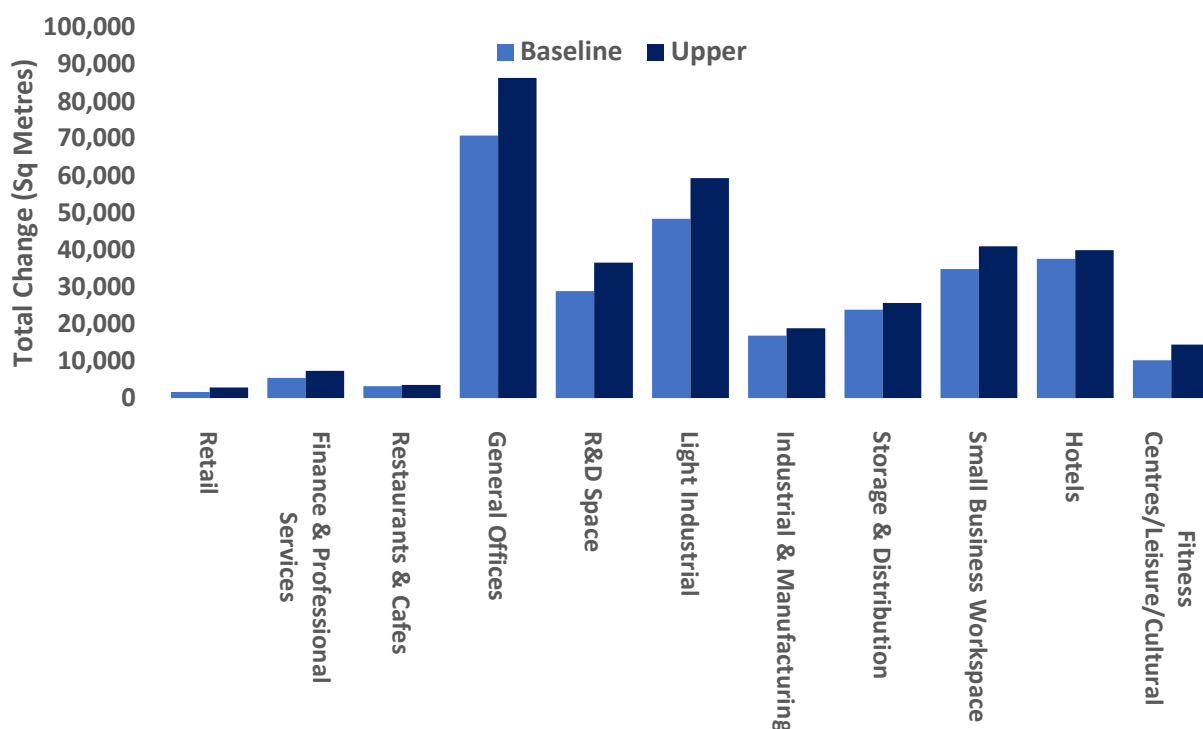
3.1 Local Council Impacts

3. This section of the report outlines the expected changes in demand for employment space in the NMDDC area using the Baseline and Upper scenarios as set out in Section 2.4.
4. Figure 5 shows the change in employment space demand over the 2022-35 period for the two scenarios. In the Baseline scenario – where an additional 7,740 jobs are created in the NMDDC area by 2035 – it is estimated here that an additional 281,400 sq. metres of employment space would be required to meet the projected employment growth. Under this scenario the General Office space (Use Class B1A) would require the most additional space at around 70,000 sq. metres. This is in part due to the increase of Professional Service & ICT jobs which jointly create more than 1,000 jobs by 2035. There is also expected to be a requirement for further Small Business Workspace and Hotels (Use Classes B Mixed and C1) of around 35,000 sq. metres each. How far each of these can be served by extensions to current provision or the supply of new builds will be something that further research will help establish.

⁶ Research prior to 2020 – see CIPD, *Working Lives UK* (April 2018) – suggested that working patterns were changing but had not had the significant impact expected on workspace. The impacts of greater levels and a potential longer-term shift towards remote working on office space, in particular, are still being debated over.

⁷ UUEPC, 'Intelligent Futures: Working with automation and digitisation to deliver sustainable employment and growth' (December 2019).

Figure 5: Total Anticipated Employment Space Demand Change by Business Class Use & Scenario, Newry; Mourne & Down, 2022-35



Source: NISRA (BRES) & UUEPC Local Model Spring 2023 Outlook

5. In the Upper scenario there is an estimated additional requirement in the NMDDC area of 335,400 sq. metres of employment space. Here, General Office and Light Industrial space are likely to see the greatest level of demand, as a result of increased levels of Professional Services and Manufacturing employment.
6. In both scenarios it is forecast that there will be a demand for additional General Office, Small Business Workspace and R&D Space. This is in line with the expected job creation that is forecast to occur with the roll-out of City Deal and possible Dublin/Belfast Economic Corridor investments. The requirement for additional R&D employment space, if designated as innovation space aimed at start-ups and smaller firms looking to add scale to their business, could lead, in time, to the development of the next wave of successful global firms, following Glen Electric, Norbrook and First Derivatives.
7. While the small sample sizes mean it is not possible to profile the expected employment space demand for each of the seven DEA's, it is possible to offer a proxy of the potential employment space demand using the current employment share of each sector in the NMDDC area total. As the Newry DEA in 2019 contained over a third of all service-based⁸ jobs in the Council area, we could assume that this DEA required a similar level of the service-based employment space in that year and might take up a third of any additional requirement for this Use Class.

⁸ The broad Services group includes the larger Public sector services and Retail, and the smaller Professional, ICT and Financial Services.

3.2 Sensitivity Analysis

8. The estimates of employment space demand in section 3.1 are based on the current work structure remaining unchanged and that hybrid or remote working will not influence employment space use in the future. They also must take account of the fact that many additional jobs will be accommodated within the current footprint.
9. This section of the report will try to incorporate the likely change in working environments and work structure by conducting some sensitivity analysis with 10% and 20% of employment growth being absorbed by the current provision of space. These assumptions can be revised with greater availability of data and knowledge on the likely impact of relevant variables such as changing work environments with the likelihood of the 20% capacity absorption being a starting point.
10. Table 3 shows the 10% to 20% absorptions applied to the Baseline scenario and shows how, when the sensitivity analysis is applied, the employment space demand decreases to a range of approximately 225,100 to 253,300 sq metres.

Table 3: Total Employment Space Demand Change by Business Class Use (10% to 20% Capacity absorption), Newry, Mourne & Down, 2022-35

		No Capacity Absorption	10% Capacity Absorption	20% Capacity Absorption
Class	Use	Baseline	Baseline	Baseline
A1	Retail	1600	1440	1280
A2	Finance & Professional Services	5400	4860	4320
A3	Restaurants & Cafes	3200	2880	2560
B1A	General Offices	70800	63720	56640
B1B	R&D Space	28800	25920	23040
B1C	Light Industrial	48400	43560	38720
B2	Industrial & Manufacturing	16800	15120	13440
B8	Storage & Distribution	23800	21420	19040
B Mixed	Small Business Workspace	34800	31320	27840
C1	Hotels	37600	33840	30080
D2	Fitness Centres/Leisure/Cultural	10200	9180	8160
	Total	281400	253260	225120

Source: Home and Communities Agency, Employment Densities Guide 3rd Edition (Dec 2015) & UUEPC Local Model Spring 2023 Outlook

Note: Totals may not add due to rounding

Appendices

Appendix 1: Study Methodology

1. Since the mid-1960s a research literature has developed which might be called a judgemental or applied employment space demand analysis. This analysis was based first on population ratios and then, from the 1970s, increasingly on sectoral employment numbers and varying types of workspace. The analysis has developed over time to reflect other variables such as rental values, vacancy rates and other changes in supply (obsolescence, demolition, etc).⁹
2. The methodology used by the UUEPC is one which converts forecast employment by sector into square metre requirements for various types of employment space. To do this the UUEPC uses the third edition of the *Employment Densities Guide*, published by the then Home and Communities Agency for England (now Homes England) in November 2015. The guidance includes an estimate of the average density of Square Metres per Full-Time Equivalent employee for different business sectors and sub-sectors described as Use Classes (eg: A1-Retail-High Street) as detailed in Table 4.
3. The steps followed in the UUEPC methodology include the following:
 - The UUEPC have estimated an Adjusted Mid-point density figure (m²) for each sub-sector. The guidance uses a series of 'First Measures' (eg: GIA¹⁰, GEA¹¹ and NIA¹²) and, for consistency and ease of comparison, the UUEPC has converted each of these into GIA. This measure has been chosen as both NIA and GEA can be converted into GIA.
 - The conversion assumptions used by UUEPC are taken from the *Employment Densities Guide*. To convert NIA to GIA, a reduction of 15-20% acts as a suitable assumption for converting gross to net areas in non-industrial properties. To convert GEA to GIA, the general benchmark is a reduction of 5%.
 - In the next step the UUEPC calculated a matrix for class use by sector, which is presented in Appendix 2. This matrix is used in order to convert employment data (by UK Standard Industrial Classification or SIC) into Use Class categories (A1 to D2 as in Table 6). For example, for those employees who work in the Manufacturing sector, 30% of those are

⁹ For a survey of this literature see Rabianski, J.S. & Gibler, K.M. (2007), 'Office demand analysis and estimation techniques: A literature review, synthesis and commentary', *Journal of Real Estate Literature*, 15(1), 37-56.

¹⁰ GIA or Gross Internal Area refers to 'the entire area inside the external walls of a building and includes corridors, lifts, plant rooms, service accommodation (e.g. toilets).' GIA is a widely used for calculating building costs, marketing, valuation, property management and rating (in England and Wales) of industrial buildings (including ancillary offices), warehouses and leisure units.

¹¹ GEA or Gross External Area includes walls, plant rooms and outbuildings, but excludes external space such as balconies and terraces. GEA is more narrowly used for calculating building costs for large industrial and warehouse buildings, planning applications and approvals, council tax banding, and rating in Scotland for industrial buildings.

¹² NIA or Net Internal Area is commonly referred to as the 'net lettable or 'usable' area of offices and retail units, which includes entrance halls, kitchens and cleaners' cupboards, but excludes corridors, internal walls, stairwells, lifts, WCs, etc. NIA is a metric widely used for marketing, valuation, property management and rating for offices, shops and supermarkets.

classified as belonging to the R&D space, 20% as Industrial & Manufacturing and 50% as Light Industrial.

- Finally, the projected employment by sector under each of the three UUEPC scenarios between 2022 and 2035 is applied to the use class by sector matrix to calculate a sq metre demand by year out to 2035.

Table 4: Employment Densities, England 2015

Use class	Sub category	Sub sector	Density (Sq. metres)	First Measure	Adjusted Mid- Point (Sq. metres)
A1	Retail	High street	15-20	NIA	20.6
		Foodstore	15-20	NIA	20.6
		Retail warehouse	90	NIA	105.8
A2	Finance and professional services		16	NIA	18.8
A3	Restaurant and Cafes		15-20	NIA	20.6
B1A	General offices	Corporate	13	NIA	15.3
		Prof Services	12	NIA	14.1
		Public sector	12	NIA	14.1
		TMT (Tech, media & Telecoms	11	NIA	12.9
		Finance and insurance	10	NIA	11.8
		Call centres	8		9.4
B1B	R&D Space		40-60	NIA	58.8
B1C	Light industrial		47	NIA	55.2
B2	Industrial and Manufacturing		36	GIA	36.0
B8	Storage and Distribution	National distribution centre	95	GEA	90.3
		Regional distribution centre	77	GEA	73.2
		Final mile distribution centre	70	GEA	66.5
B Mixed Classes	Small business Workspace	Incubator	30-60	B1a, B1b	52.9
		Maker spaces	15-40	B1c, B2, B8	27.6
		STUDIO	20-40	B1c, B8	28.9
		Co-working	10-15	B1a	14.7
		Managed workspace	12-47	B1a, b, c	34.7
B8 / SUI Generis	Data centres	Wholesale	200-950	NIA	675.6
		Wholesale dark site	440-1400	NIA	1081.0
		Co-location facility	180-540	NIA	423.0
C1	Hotels	Limited service/budget	1 per 5 beds	GIA	50.0
		Mid-scale	1 per 5 beds	GIA	50.0
		Upscale	1 per 5 beds	GIA	50.0
		Luxury	1 per 5 beds	GIA	50.0
D2	Fitness centres	Budget	100	GIA	100.0
		Mid-market	65	GIA	65.0
		Family	65	GIA	65.0
	Cinema		200	GIA	200.0
	Visitor and cultural attractions		30-300	GIA	165.0
	Amusement and entertainment centres		70	GIA	70.0

Source: Home and Communities Agency, *Employment Densities Guide* 3rd Edition (Nov 2015)

Note: The adjusted Mid-Point represents the sq. metres employment density in GIA terms

Appendix 2: Use Class by Sector

	Sector																							
				Agriculture	Mining and quarrying	Manufacturing	Utilities	Water supply & waste	Construction	Retail	Transportation	Accommodation	Information & Comm's	Financial activities	Real estate	Professional & scientific	Administration services	Public Admin' &	Education	Health & social work	Arts and entertainment	Other services	Total	
Class	A1	Retail	High Street	0%	0%	0%	0%	0%	0%	45%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	45%	
	A1		Foodstore	0%	0%	0%	0%	0%	0%	18%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	18%	
	A1		Retail Warehouse	0%	0%	0%	0%	0%	0%	9%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	9%	
	A2		Finance and professional services	0%	0%	0%	0%	0%	0%	9%	0%	0%	0%	0%	70%	0%	8%	0%	0%	0%	0%	0%	87%	
	A3		Restaurants & Cafes	0%	0%	0%	0%	0%	0%	18%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	25%	
	B1A	General Offices	Corporate	0%	0%	0%	0%	0%	0%	0%	14%	0%	7%	0%	30%	0%	16%	0%	30%	30%	14%	15%	157%	
	B1A		Prof services	0%	0%	0%	0%	0%	0%	0%	0%	0%	33%	0%	70%	38%	16%	0%	0%	0%	0%	0%	158%	
	B1A		Public sector	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	15%	8%	100%	70%	70%	0%	0%	263%	
	B1A		TMT (Tech, media & telecoms)	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	20%	0%	0%	0%	8%	0%	0%	0%	0%	0%	28%
	B1A		Finance and insurance	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	30%	0%	0%	0%	32%	0%	0%	0%	0%	0%	69%
	B1A		Call centres	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	B1B		R&D Space	0%	0%	30%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	15%	0%	0%	0%	0%	0%	0%	45%
	B1C		Light Industrial	50%	0%	50%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	8%	0%	0%	0%	0%	0%	0%	108%
	B2		Industrial and manufacturing	0%	0%	20%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	20%
	B8	Storage and distribution	National distribution centre	0%	0%	0%	0%	0%	0%	0%	0%	29%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	29%
	B8		Regional distribution centre	0%	0%	0%	0%	0%	0%	0%	0%	29%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	29%
	B8		Final mile distribution centre	0%	0%	0%	0%	0%	0%	0%	0%	29%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	29%
	B Mixed Class	Small Business Workspace	Incubator	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	0%	8%	4%	0%	0%	0%	7%	8%	33%
	B Mixed Class		Maker spaces	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	0%	8%	4%	0%	0%	0%	7%	8%	33%
	B Mixed Class		Studio	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	0%	0%	4%	0%	0%	0%	14%	15%	40%
	B Mixed Class		Co-working	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	0%	0%	4%	0%	0%	0%	14%	15%	40%
	B Mixed Class		Managed workspace	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	0%	0%	4%	0%	0%	0%	7%	8%	26%
	B8	Data centres	Wholesale	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	B8		Wholesale dark site	50%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	50%
	B8		Co-location facility	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	C1	Hotels	Limited service/budget	0%	0%	0%	0%	0%	0%	0%	0%	0%	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	25%
	C1		Mid-scale	0%	0%	0%	0%	0%	0%	0%	0%	0%	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	25%
	C1		Upscale	0%	0%	0%	0%	0%	0%	0%	0%	0%	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	25%
	C1		Luxury	0%	0%	0%	0%	0%	0%	0%	0%	0%	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	25%
	D2	Fitness centres	Budget	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	D2		Mid Market	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	D2		Family	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	8%	15%
	D2		Cinema	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	8%	15%
	D2		Visitor and cultural attractions	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	8%	15%
	D2		Amusement and entertainment centres	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	8%	15%
			Total		100%	0%	100%	0%	0%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	