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Employment Change in Exeter

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1 Introduction

- 1.1 The Regulation 19 Publication Draft Exeter Local Plan did not set out the likely amount of employment change that will occur in Exeter during the plan period.
- 1.2 This document explores the employment change forecasts in the Greater Exeter EDNA and considers the amount of employment growth that could occur within Exeter over the plan period

2 Forecast employment change in Exeter

- 2.1 Within the EDNA, employment change has been derived from GVA and employment forecasts purchased from Cambridge Econometrics (CE) and Experian. Forecasts were provided for each of the four local authority areas and then aggregated. The forecasts include figures for employment change by sector for the period from 2020 to 2040.
- 2.2 The Mid-Point employment change scenario for the City of Exeter (mid-way between the CE and Experian forecasts) shows a net gain of 13,450 full-time equivalent (FTE) jobs over this period. There is a forecast net gain of 34,600 FTE jobs across Greater Exeter. Therefore, the Exeter economy is forecast to generate 39% of the net additional jobs growth in the wider FEMA. Exeter is the greatest contributor to total employment growth in the FEMA.
- 2.3 The figure below also shows employment change in the Clean Growth scenario; this provides a view of potential employment change if policy aspirations to support some sectors (e.g. transformational sectors) are achieved.

Figure 2.1: Total Forecast Employment Change 2020 to 2040

	Greater Exeter	East Devon	Exeter	Mid Devon	Teignbridge
CE	33,900	6,500	13,500	4,600	9,300
Experian	35,300	10,400	13,400	4,800	6,600
Mid Point	34,600	8,450	13,450	4,700	7,950
Percentage of GE total	-	24%	39%	14%	23%
Clean Growth	37,900	9,400	14,900	5,000	7,100
Percentage of GE total	-	25%	39%	13%	19%

Source: Greater Exeter EDNA, Figure 4.4 and paragraphs 9.1.2, 10.1.2, 11.1.2, and 12.1.2

- 2.4 However, only some sectors in the economy require employment land (in Use Classes B2, B8, and E(g)), so only a part of the total employment growth will require employment sites and premises. The majority of new jobs in Exeter will not require employment sites and premises.

3 Employment growth potential in Exeter

- 3.1 There are several components that make up the City of Exeter's employment growth potential over the period from 2020 to 2040.

Employment outside of employment sites

- 3.2 Drawing from the figures above, total forecast employment growth in the City of Exeter economy is 13,450 FTE jobs under the Mid-Point Scenario and 14,900 FTE jobs under the Clean Growth scenario. Subtracting the jobs in the employment use class sectors leaves between 11,300 and 11,900 FTE jobs that do not require employment land.

Existing employment land

- 3.3 The Greater Exeter EDNA considers potential employment sites in the City of Exeter. With the exclusion of sites proposed for allocation within the Publication Draft Local Plan, there was potential availability of 2.39 ha of land suitable for offices and 2.85 ha of land suitable for industrial at the time of drafting the EDNA.
- 3.4 Using the same calculations and assumptions as in the EDNA, these sites could accommodate between 140 and 300 FTE jobs in industrial use class sectors (B2, B8, and E(g)iii), and between 720 and 1,800 FTE jobs in office use class sectors (Use Classes E(g)i and ii); so a total of between 870 and 2,100 FTE jobs.

Proposed employment allocation sites

- 3.5 The Publication Draft Local Plan does not indicate the amount of employment that could be accommodated on the three proposed employment allocation sites. It does state the sites are intended for transformational sector employment, and this is mostly in Use Class E(g) . However, a potential modification to the Local Plan is intended and this would remove this restriction.
- 3.6 If a less prescriptive approach to the use of the sites was taken and the 15.5 ha of proposed employment allocations was developed one third for Use Class E(g), one-third for Use Class B2, and one-third for Use Class B8, then they could accommodate between 1,390 and 1,800 FTE jobs .If the sites are developed wholly for offices and R&D at 100% site coverage, they could accommodate up to 5,100 jobs.

4 Implications for employment growth

- 4.1 Over the period from 2020 to 2040, the City of Exeter is expected to see growth of **between 11,300 and 11,900 FTE jobs that do not require employment premises**. Some of these jobs may be in the transformational sectors.
- 4.2 Existing employment land identified in the Greater Exeter EDNA could accommodate **up to 1,800 office use class FTE jobs and up to 300 industrial use class FTE jobs**.
- 4.3 The proposed employment allocations sites could accommodate up to 1,800 FTE jobs in a mix of Use Classes and **up to 5,100 FTE jobs** if development is in Use Class E(g) only.

- 4.4 Adding together the above figures suggests the potential for employment growth within the City of Exeter to exceed the EDNA clean growth forecast of 14,900 FTE jobs.



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