North York Moors National Park Authority

Report on the Economy of the North York Moors National Park (2015)

Final Report

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No.	Details	Date
1	Draft report for comment	25/02/2015
2	Final Report	06/05/2015

Executive Summary

Purpose of Report

This report provides an analysis of the economy of the National Park in order to inform the assessment of a planning application for a new mine from York Potash Ltd (YP). The report has not been produced to establish the impacts of the application but provides a description of contemporary North York Moors economy. The report also provides commentary on the future economic prospects of the Park, this assessment has not factored in potential economic effects from current proposals for the Potash Mine and associated development, the intention of the report is to aid North York Moors National Park (NYMNP) put potential effects arising from the development into context.

The report has been based on a critical examination of existing publicly available data, alongside data provided by the York, North Yorkshire and East Riding Local Enterprise Partnership (LEP). The report has considered future employment prospects for a period up to 2020, but drawn on demographic forecasts over a much longer timeframe - to 2037[1]. Secondary research rather than bespoke local economic forecasts have been used to help compile this report. The data is drawn from the 2001 and 2011 Census National Park Dataset and also draws on ward level data, to provide greater detail on a wider range of variables and to reflect functional relationships with towns in the vicinity of the Parks administrative boundary. A commentary on the differences between the two is provided, where relevant.

The Park Today

The principal attraction of the National Park is its peace, tranquillity and natural beauty. The population of the Park in 2011 was some 23,400. Of these some 17,500 were economically active, with some 11,500 people in employment. Its desirability as a place to live is reflected in the commuting patterns of the Park's resident employees, slightly less than half (44%) live and work in the park. Many run their own business with some 19% of Park residents self-employed. Around 7,000 employees leave the Park[2] and its immediate surrounding communities each day to work to a range of destinations, with the vast majority likely to be using a private car, though it is noted that there are reasonable rail connections within the Park and within a relatively short drive of the Park itself.

The Parks population is relatively stable – decreasing by some 2% between 2001 and 2011, the numbers of young people have decreased, whilst the numbers of older people increasing, likely the result of some in migration but also reflecting an ageing population.

Economic activity rates are relatively high and have increased; likely to reflect the changes in demographic composition of the Park's population, with fewer working age people residing in the Park in 2011 than in 2001.

Employment and the Economy

Recorded unemployment is generally very low in the Park and this has changed very little during the recession. There is limited evidence of seasonal changes in unemployment.

The number of businesses per 10,000 population, the rate of new business start-ups and survival rates in the surrounding area are generally good, particularly in Hambleton and Ryedale.

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[1] These timeframes reflect the periods over which employment and population forecasts are available. These were from the York, North Yorkshire and East Riding Local Enterprise Partnership and the Office of National Statistics, respectively.
[2] Commuting data is not available for the Park's administrative boundary so this data draws on ward level data which relates to both the Park and a small number of surrounding villages/communities.

Many of the Park's businesses are tied to and derive their income from the landscape. Agriculture, forestry and fishing accounts for almost half (40%) of the Park's businesses; comprising dairy, crop, timber production/sawmills and grouse shooting. The major economic sector is tourism and recreation, estimated to support some 4,000 Full Time Equivalent (FTE) jobs in the park and up to 7,800 in the wider area.

Whilst the population declined marginally between 2001 and 2011, the numbers of people employed within the Park grew by some 125 jobs (some 1%). In 2011, there were approximately 11,500 jobs physically located inside the Park boundary. The data suggests that some jobs would have been lost in the recession, but that numbers overall have been relatively stable. When data on employment in the Park and a small number of villages in the immediate surroundings areas is also considered, this suggests employment growth was somewhat higher.

Housing Market

Owner occupation in the Park is high. The private rented sector as a proportion of total dwellings is only marginally smaller than the surrounding areas and the social rented sector is small. Around 6% of stock is second homes or holiday accommodation.

Housing affordability is a key issue within the Park with houses approximately eight times average household income, making home ownership unaffordable for many local families.

Future Prospects

Consistent with the remit of the Park, existing economic policies relate to supporting the rural Park economy focus largely on 'organic growth'; supporting the tourism by raising awareness, encouraging increased visitor days (whilst reducing seasonal variation); and encouraging farm diversification.

The latest employment forecasts expect some 7,200 additional jobs to 2020 in Scarborough, Ryedale and Hambleton Districts. Data for Redcar and Cleveland is not available, but it would be unlikely for employment forecasts to be substantially different in terms the overall outlook, compared to the three other Local Authorities. Notwithstanding the one ward which is within Redcar and Cleveland (Westworth, located to the south of Guisborough), these additional jobs would include those expected to be located in the Park. Based on employment forecasts provided by the LEP it is estimated that around 12% to 14% of all employees in Hambleton, Scarborough and Ryedale are likely to be resident within the Park *or its immediate surrounding area*, which implies between 850 to 1,000 jobs in the Park and adjoining villages to 2020. This would constitute an increase over 2012 numbers of around 7%, however historic growth rates suggests numbers within the Parks administrative boundary would be lower than this. This would be influenced by wider economic fortunes which, whilst the outlook is positive, remain uncertain and this high level assessment presumes growth rates locally are broadly in line with that expected for these Local Authorities.

In terms of population, the long term expectation for the four Local Authorities which comprise/adjoin the Park is that their combined population levels will increase slowly, by around 8,600 people by 2037. However, past trends show the working age population has decreased and that there is an ageing population in the Park and this trend is expected to continue. Whilst this may be offset by later retirement ages by 2037, it poses some longer term challenges for the labour supply in the Park.

Despite this, the future prospects of those residents within the Park is expected to be similar or relatively better than those in surrounding area, given qualification levels and the relatively low unemployment.

Contents

1. Introduction

1.1 Scope

This report has been prepared on behalf of the North York Moors National Park Authority (NYMNPA) who, as part of the assessment process for a planning application from York Potash Ltd (YP), require an analysis of the economy of the National Park in order to inform their assessment of the application. This report updates a previous assessment submitted to the NPA in June 2013. As such data that relates to periods before 2013 have not been updated. The report does not establish the impact of approval of the application, but describes the contemporary North York Moors economy and provides a commentary on its future economic prospects, to aid the NYMNP consider the relative effects of the proposals on the economy.

The report is based on a critical examination of existing publicly available data, not on bespoke local economic forecasts of economic output or employment expectations within the Park. The report will consider future economic prospects as far as the data is available and reasonable judgements can be made on the evidence. Where we have insufficient evidence to make detailed predictions or where there are significant uncertainties, these are explained.

1.2 Data Sources and Geographies

In chapter two, data from the National Park Census Dataset in 2001 and 2011 are examined, this data accurately presents socio-economic characteristics within the administrative boundaries of the Park. In chapters three, four and five North York Moors National Park (NYMNP) data has been analysed by combining ward level data for a total of 16 wards that best conform to the Park Boundary. The wards used are set out in Appendix A. However, the administrative boundary of the National Park does not conform to ward boundaries, hence the wards for which data has been collected 'straddles' the boundary in some cases. A number of settlements such as Helmsley, as well as employment sites, such as the Whitby Business Park, lie across the Park Boundary. This means that these data includes some areas which administratively lie outside of the Park itself. Moreover all socio-economic data are prone to some error and uncertainty, particularly when dealing with small areas. As such the data analysed cannot be taken as an absolute and precise representation of the Park, but rather indicative of the Park and a small number of villages outside that are functionally intertwined with it. The villages which surround the Park are likely to be sources of employment for Park residents as well as sources of employees for Park businesses, both now and in the future. They also serve as important service centres for the Parks population. Given this, it is not practicable or helpful to examine future prospects in isolation from these areas. To highlight differences in scale, population numbers are shown for both data sources, below.

	All people 2011 (National Park Census data)	All people 2011 (based on total from wards in Appendix A)
North York Moors National Park	**23,380**	**46,637**

Where ward level data isn't available, Local Authority data is provided. The Park falls within the Local Authority areas of Ryedale, Scarborough, Hambleton and Redcar and Cleveland meaning that data for these Local Authorities also contains parts of the Park, these are referred to as 'constituent Local Authorities'. Data has also been presented for these areas, providing context and illustrating trends in the 'non Park' areas of those Districts. Given the size of the urban communities to the north around Middlesbrough and Stockton on Tees, and given that some Park residents commute to work in these areas, data for these are also provided, where available. This local information has also been compared with the region and nationally, for context.

1.3 The North York Moors National Park

The North York Moors National Park (NYMNP) was established by the ‘National Parks and Access to the Countryside Act 1949’ and designated as a National Park 1952. Administratively, the North York Moors National Park Authority is charged with two purposes ‘conserving and enhancing the national beauty, wildlife and cultural heritage of the Park; and to ‘promote opportunities for the understanding and enjoyment of the special qualities of the Parks by the public’. In pursuing these two purposes the Park also has a duty to ‘seek to foster the economic and social wellbeing of local communities’.[3]

The Park comprises 1,436 square kilometres of historic villages, coastline and significant areas of unbroken moorland. The Park sits south of large urban communities around Teesside, whilst the smaller towns of Scarborough and Whitby are closer, to the east. The town of Pickering lies immediately to the south of the Park boundary; Thirsk and Northallerton lie to the west.

Helmsley is the main service centre within the environs of the Park, with a population of some 1,620[4] a range of local services and employment opportunities. It is a popular tourist destination with public transport links to Thirsk and Pickering. A number of ‘service villages’ are also located within the Park. Each of these serves an everyday function enabling local people to purchase food, send children to primary school or access public transport, without necessarily using a private car. Many of these are on the edge (or lie partially outside) of the Park boundary and include Ampleforth, Easington, Guisborough, Scalby, Sleights, Thornton le Dale and West and East Ayton. There are more numerous ‘local service’ and ‘other villages’ described in the Park’s Local Development Framework.

Figure 1.1 North York Moors National Park[5]

[4] Source: Ryedale Local Plan, Background Paper 5: Housing and Population

[5] Copyright (C) 2013 Free Software Foundation, Inc.

1.4 Report Structure

Following this introduction:

- Chapter two examines data taken from the bespoken National Park dataset published by the office for National Statistics (ONS). This data set adheres to the Park Boundary more accurately than the ward based data analysed in the remainder of this report. For absolute employment and population numbers for the Park excluding any of the surrounding communities, the reader is referred to this chapter.
- Chapter three examines local economic linkages, including in/out commuting patterns, transport accessibility and certain data on utilities, such as access to broadband. The aim is to establish how the Park functions in the wider sub-region and how the towns and cities around it affect the Park's economy and the employment prospects of its residents.
- Chapter four examines the local economy and examines data relating to the Park and a small number of villages around the Park Boundary, based on wards data. The chapter examines employment growth, key sectors and highlights key trends. Wider economic context is also summarised. Data on local housing is presented, such as the overall housing stock, tenure and issues associated with affordability. We also briefly examine the local business base including start-ups and survival rates, the geographical distribution of businesses across the Park, including key employment sites.
- Chapter five examines the characteristics of the local population, focussing on demographic data and changes in its demographic composition. The local labour market is also examined, including local skill levels, unemployment and economic activity rates.
- Chapter six provides an assessment of future prospects. It draws on any publicly available data and an assessment of policy aspirations.
- Conclusions are provided in chapter seven. Key messages are provided at the start of each chapter.

2. National Park Census Dataset

Box 1 Key Messages – National Park Census Dataset

This section summarises key data from the ONS National Park 2001 and 2011 Census datasets. The dataset adheres to the National Park boundary more accurately than the ward based data drawn upon in later sections (this ward based data allows for more issues to be examined and includes a small number of communities around the edges of the Park Boundary). The 'Park numbers' in this section are therefore smaller and enable the reader to observe trends in the Park in isolation from these villages.

Key Messages

- The Park covers 1,436 square kilometres, and although managed by the National Park Authority, parts of the Park lie within the Local Authority areas of Ryedale, Scarborough, Hambleton and Redcar and Cleveland. These are referred to as the 'constituent Local Authorities'.
- The Park population is declining. At the time of the 2011 Census, the resident population of the Park was 23,380 a decline of some 2% since 2001. This compares to growth of around 2% in Scarborough and Ryedale and 6% in Hambleton. Redcar and Cleveland's population had declined at a marginally faster rate than the Park.
- The Parks population is ageing. Just less than half of the population was aged between 18 and 59 in 2011 a decrease of some 5% since 2001. Those aged under 18 comprised some 17%, a decrease of some 2% since 2001. Conversely, those aged 60 and over comprised 35% of the population in 2011, an increase of some 8% since 2001.
- The number of households inside the Park is increasing. There were 12,500 households inside the Park, an increase of some 850 from 2001 (7%). The rate of increase is higher than Redcar and Cleveland but lower than the other constituent Local Authorities. This will be driven by a rise in single person households, given the population decline.
- The Park contains some 17,500 economically active residents in 2011. A similar proportion of employees are employed on a part time basis, but fewer people are employed on a full time basis and self-employment rates are markedly higher in the Park than the surrounding areas. Unemployment, including youth and long term unemployment, is low.
- Qualification levels of the Parks resident population are generally high. Fewer people have no qualifications (21%) than all surrounding areas (with the exception of Hambleton). More people are educated to degree level or higher than all constituent Local Authorities.
- There were some 11,500 jobs located in the Park at the time of the 2011 Census. The Park has seen overall employment growth between 2001 and 2011 of just over 1% (some 125 additional jobs). The wider area has seen faster employment growth over the same period; (some 8% in Hambleton and Scarborough; 6% in Ryedale and 4% in Redcar and Cleveland).
- Wholesale and retail was the largest employment sector in 2011, likely to be driven by visitor spending given that a further 11% are employed in accommodation/food services, the proportion employed in this sector is higher in the Park than the surrounding areas – with the exception of Scarborough. Health and social work employs a further 11%. Construction employed some 8% of people in 2011; a similar proportion to the surrounding areas. Some 11% of Park residents were employed in Education and around 9% in Agriculture – higher proportions than in the constituent Local Authorities.
- Almost half of the resident population own their home outright. The social rental sector is very small, but the private rental sector is a similar size to the surrounding areas. Proportionality, slightly more people live rent free than in the constituent Local Authorities.

2.1 Introduction

This section summarises key data from the ONS National Park 2001 and 2011 Census datasets. The dataset adheres to the National Park boundary more accurately than the ward based data drawn upon in the previous sections; hence 'the Park numbers' are typically smaller. Certain villages, such as Helmsley, 'straddle' the boundary, with approximately half its population residing within the boundary, half outside of it. Both datasets are relevant in understanding the economy today and understanding future economic prospects. But given the jurisdiction of the National Park Authority, and certain differences in policy, it is necessary to consider the Park in isolation[6].

[6] Data from the 2011 Census was been provided to AMEC for the original 2013 study as percentages only. The raw data is limited to base numbers or totals. Actual numbers have been derived from these, where possible. Footnotes are provided, where relevant, to indicate this. Given that data relates to 2011 this data has not been updated for this version of the report.

2.2 Findings

Demographics

The population of the Park is declining Table 2.1 shows the Park contained some 23,380 people in 2011; some 2% less than in 2001 (23,939). This was in contrast to national population growth of slightly less than 8% and regional growth of some 6% across the same period. Locally, Redcar and Cleveland also witnessed population decline at a marginally higher rate than the Park, but Hambleton grew at a similar rate to the region and about 1% faster than North Yorkshire. Ryedale and Scarborough grew, but at slower rates than the surrounding areas at just under and just over 2%, respectively.

Available numbers from the 1991 census are also included, for reference. These longer term trends suggest increasing rates of population growth nationally and regionally. More locally the picture is somewhat mixed. Hambleton has experienced sustained and strong population growth of around 6% since 1991. Ryedale's population grew quickly between 1991 and 2001 but in the last ten years the rate has slowed. Scarborough population remained static between 1991 and 2001, but has grown slowly since then. Redcar and Cleveland's resident population appears to be in long term decline, but the rate has slowed over the last decade.

Table 2.1 Resident Population 1991 to 2011

	All people 1991	**All people 2001**	**% change (1991-2001)**	**2011 Resident Population**	**% change (2001-2011)**
England	47,055,205	49,138,831	4.43	53,012,456	7.88
Yorkshire and the Humber	4,836,625	4,964,833	2.65	5,283,733	6.42
North Yorkshire	535,862	569,660	6.31	598,376	5.04
Hambleton	79,425	84,111	5.9	89,140	5.98
Ryedale	46,171	50,872	10.18	51,751	1.73
Scarborough	106,221	106,243	0.02	108,793	2.40
Redcar and Cleveland UA	145,123	139,132	-4.13	135,177	-2.84
North York Moors National Park	**N/A**	**23,939**	**N/A**	**23,380**	**-2.34**

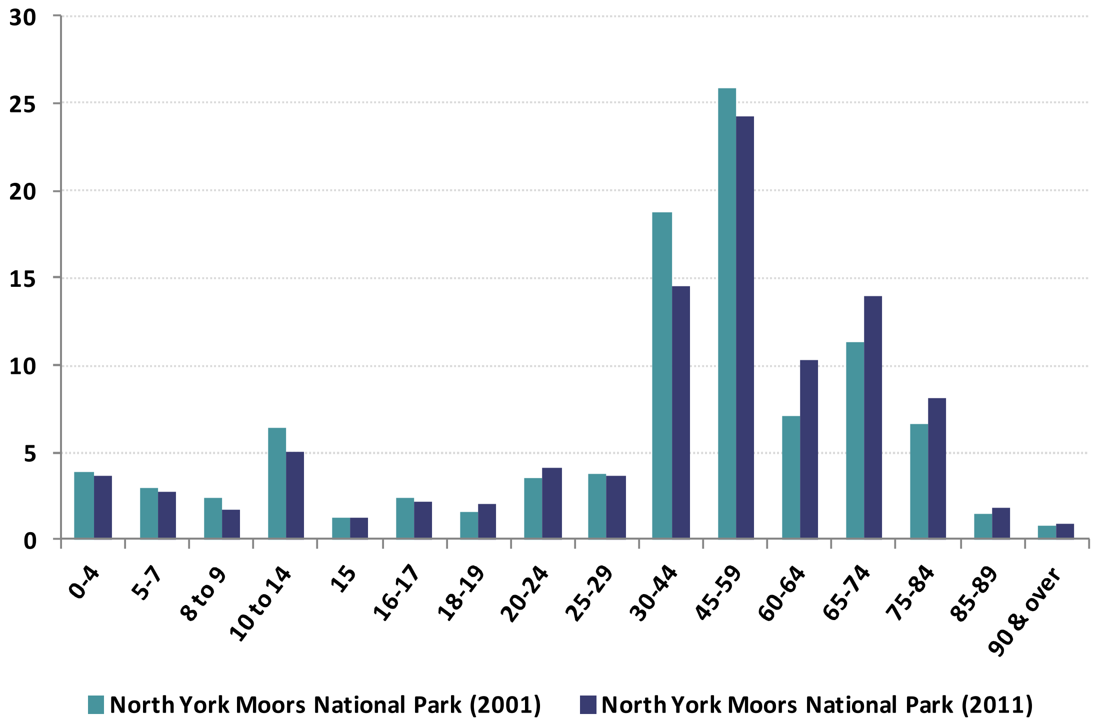
Source: 2001 and 2011 Census. (National Park Data set). 2011 data for surrounding areas downloaded from Nomis www.nomisweb.co.uk .

Figure 2.1 provides further detail of demographic trends inside the Park between 2001 and 2011; it shows percentages of the Park's total resident population that are comprised by various age groups, at the time of both Censuses. Those aged under 18 years of age formed a smaller part of the population in 2011 than in 2001 in each age category, although the proportion of those aged 15 was stable. In contrast the proportion of the population aged between 18 and 24 increased slightly (the proportion aged between 25 and 29 changed very little).

The proportion of the Parks population aged between 20 and 44 declined by the largest margin (some 5%). Those aged 60 and above comprise more of the parks population than they did ten years ago. Those between 60 and 64 increased at the largest proportional rate; slightly above those between 65 and 74.

Table 2.2 shows overall trends in context, in wider age groupings, comparing the park with the wider area. It shows a declining number of people of working age inside the Parks, a decline of young people aged under 18 and an increasing number of those of retirement age. These trends are common across the UK, but are more pronounced inside the Park.

Figure 2.1 Age Structure NYMNP (age categories as % of total population) 2001-2011



Source: 2001 and 2011 Census. (National Park Data set).

Table 2.2 Age Structure in context (2001-2011)

	2001			2011		
	Age 0-17	**Age 18-59**	**Age 60 to 90+**	**Age 0-17**	**Age 18-59**	**Age 60 to 90+**
England	22.7	56.6	20.8	21.4	56.3	22.4
Yorkshire and the Humber	23.0	55.9	21.1	21.4	55.9	22.7
North Yorkshire	21.9	54.3	23.8	19.9	52.1	28.1
Hambleton	21.6	55.0	23.5	19.3	51.4	29.2
Ryedale	21.1	52.2	26.7	19.2	48.9	31.6
Scarborough	20.7	51.8	27.5	18.3	50.4	31.2
Redcar and Cleveland	23.3	54.2	22.5	20.6	52.9	26.5
North York Moors National Park	**19.2**	**53.6**	**27.2**	**16.5**	**48.5**	**35.0**

Source: 2001 and 2011 Census. (National Park Data set). 2011 data for surrounding areas downloaded from Nomis www.nomisweb.co.uk . Note that the age categories do not conform precisely to 'working age' groups, which differ from Males and Females, the categories are shown to illustrate general trends.

The table below shows changes in the number of household spaces. A household space is defined as the accommodation that an individual household occupies (typically, but not always, an unshared dwelling). Overall there are some 12,500 households within the park, some 850 more than there were in 2001 (an increase of 7% - some 85 per year). This rate of change is similar to the region, but somewhat lower than Hambelton (10%), Ryedale (9%) and Scarborough (9%). Given the decrease in the resident population in the Park, the figures are likely to reflect a rise in single person households alongside some modest housing growth.

Table 2.3 Number of individual households 2001 – 2011.

	All household spaces 2001	All Household spaces 2011	% change 2001-2011
England	21,262,825	23,044,097	8.4
Yorkshire and the Humber	2,160,612	2,324,385	7.6
North Yorkshire	253,854	278,115	9.6
Hambleton	36,315	39,923	9.9
Ryedale	22,765	24,743	8.7
Scarborough	51,868	56,720	9.4
Redcar and Cleveland	59,915	61,965	3.4
North York Moors National Park	**11,657**	**12,500**	**7.2**

Source: 2001 and 2011 Census. (National Park Data set). 2011 data for surrounding areas downloaded from Nomis www.nomisweb.co.uk .

Economic Activity and Labour Market

Some 17,500 Park residents were classified as economically active in the 2011 Census (Table 2.4). The proportion of people employed on a part time basis was similar to the surrounding area (some 14%, compared to between 15% and 16% in the constituent Local Authorities). This is likely to reflect the importance of the visitor economy. The proportion employed on a full time basis was lower; some 29%, compared to between 31% and 39% in the constituent Local Authorities). At some 21% the proportion of those who are self-employed was markedly higher than the surrounding areas and approximately double the national rate. Unemployment was low, similar to Hambleton and Ryedale, but markedly lower than in Redcar and Cleveland. There were few full time students.

Table 2.4 Economically active population (2011 % of all usual residents aged 16-74)

	Economically active residents	Employee: Part-time	Employee: Full-time	Self-employed	Unemployed	Full-time student
England	27,183,134	13.7	38.6	9.8	4.4	3.4
Yorkshire and the Humber	2,649,975	14.6	37.0	8.4	4.8	3.5
North Yorkshire	314,100	15.1	38.2	13.0	3.0	2.5
Hambleton	47,068	15.1	38.9	13.4	2.6	2.2
Ryedale	26,644	15.4	34.0	16.6	2.7	2.2
Scarborough	52,245	16.2	30.7	11.7	4.2	3.0
Redcar and Cleveland	63,530	15.4	33.6	5.9	6.6	2.5
North York Moors National Park	**17,521**	**14.0**	**28.8**	**20.8**	**2.2**	**2.1**

Source: 2011 Census. (National Park Data set). 2011 data for surrounding areas downloaded from Nomis www.nomisweb.co.uk.

Below, Table 2.5 details the composition of the economically inactive population. Those who are retired comprise the largest category at some 22% (note that the data excludes those aged over 75). Unemployment both amongst young and older people is low. Long term unemployment is low and there are not significant numbers of residents in the Park who have never worked. The proportion of people who are long term sick or disabled is small, marginally higher than Hambleton and Ryedale, but lower than elsewhere.

Table 2.5 Economically inactive population (2011 % of all usual residents aged 16-74)

	Retired	Student (incl. full-time)	Looking after home or family	Long-term sick or disabled	Other	U/E: (16 -24)	U/E: (50-74)	U/E Never worked	Long-term U/E
England	13.7	5.8	n/a	4.0	2.2	1.2	0.8	0.7	1.7

	Retired	Student (incl. full-time)	Looking after home or family	Long-term sick or disabled	Other	U/E: (16 -24)	U/E: (50-74)	U/E Never worked	Long-term U/E
Yorkshire and the Humber	14.7	5.9	n/a	4.5	2.2	1.5	0.8	0.8	1.9
North Yorkshire	17.3	3.3	n/a	2.8	1.4	0.8	0.7	0.3	1.1
Hambleton	18.1	3.0	n/a	2.3	1.4	0.7	0.6	0.3	0.8
Ryedale	18.6	3.4	n/a	2.5	1.4	0.8	0.7	0.3	1.0
Scarborough	20.3	4.0	n/a	4.7	1.8	1.2	0.9	0.4	1.7
Redcar and Cleveland	19.4	4.2	n/a	5.9	2.1	2.1	1.2	1.2	2.7
North York Moors National Park	**21.5**	**3.0**	**3.3**	**2.9**	**1.4**	**0.7**	**0.6**	**0.3**	**0.7**

Source: 2011 Census. (National Park Data set). 2011 data for surrounding areas downloaded from Nomis www.nomisweb.co.uk.

The Parks resident population is well qualified. Although some 21% of the population have no qualifications. This is less than the national average, similar to North Yorkshire, and lower than the surrounding areas (with the exception of Hambleton). Similarly those who hold NVQ level 4 (i.e. degree level) qualifications or higher stood at some 33% in 2011. This was similar to that of Hambleton, but higher than all other areas. A lower proportion of the 16-74 year old population hold level 1 to level 3 qualifications than the surrounding areas.

Table 2.6 Qualifications of resident population aged 16-74 – 2011

	No quals.	Level 1	Level 2	Apprenticeship	Level 3	Level 4 (+)	Other
England	22.5	13.3	15.2	3.6	12.4	27.4	5.7
Yorkshire and the Humber	25.8	13.6	15.5	4.2	12.8	23.3	4.9
North Yorkshire	20.8	12.7	16.4	4.3	12.1	29.2	4.6
Redcar and Cleveland	28.4	13.5	16.4	5.7	13.1	18.9	3.9
Hambleton	19.6	12.0	16.1	4.1	12.2	32.1	4.0
Ryedale	24.0	12.6	16.3	4.1	11.3	27.3	4.4
Scarborough	26.0	12.9	16.3	5.3	12.1	22.7	4.8
North York Moors National Park	**20.6**	**11.1**	**14.9**	**4.7**	**11.3**	**33.2**	**4.1**

Source: 2011 Census. (National Park Data set). 2011 data for surrounding areas downloaded from Nomis www.nomisweb.co.uk.

Employment

Whilst the population declined marginally between 2001 and 2011, the numbers of people employed within the Park grew by some 125 jobs (some 1%). This was supported by generally buoyant national economic growth up to 2008/2009 - and strong employment growth; nationally (12%), regionally (11%) and locally (between 6% and 8% in Ryedale, Scarborough and Hambleton) and growth of some 4% in Redcar and Cleveland. In 2011, there were approximately 11,500 jobs physically located inside the Park boundary.

Table 2.7 Employment growth 2001 – 2011 (All people aged 16-74 in employment)

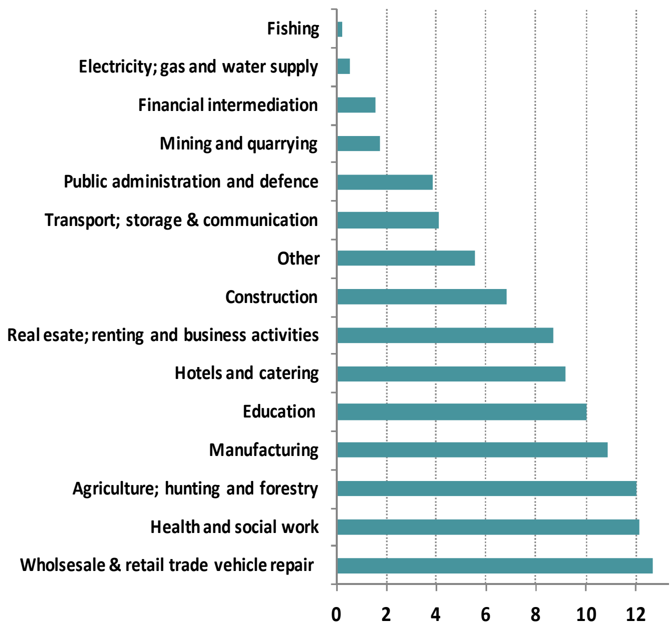
	2001	2011	% change 2001 – 2011
England	22,441,498	25,162,721	12.1
Yorkshire and the Humber	2,182,839	2,428,074	11.2
North Yorkshire	274,535	299,201	9.0
Hambleton	41,890	45,255	8.0
Ryedale	24,184	25,504	5.5
Redcar and Cleveland	54,295	56,354	3.8

	2001	2011	% change 2001 – 2011
Scarborough	44,976	48,359	7.5
North York Moors National Park	**11,354**	**11,478**	**1.1**

Source: 2001 and 2011 Census. (National Park Data set). 2011 data for surrounding areas downloaded from Nomis www.nomisweb.co.uk .

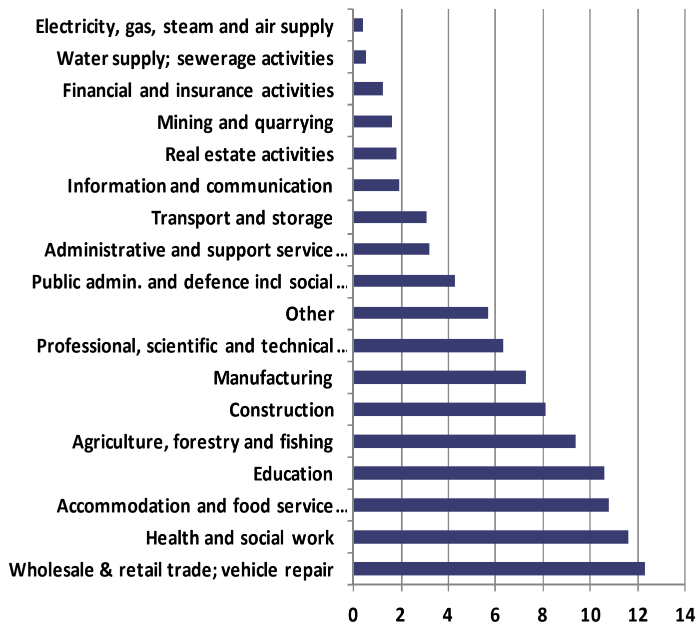
The two charts below look at employment by sector in 2001 and then again in 2011. The tables show the percentage of employment in the Park, by sector. It should be considered in the context of overall employment growth (although this was very small). The sector categorisations differ somewhat between the two Censuses; hence the data is not combined.

Figure 2.2 NYMNP Employment Structure 2001 (%)



Source: 2001 Census. (National Park Data set)

Figure 2.3 NYMNP Employment Structure 2011 (%)



Source: 2011 Census. (National Park Data se

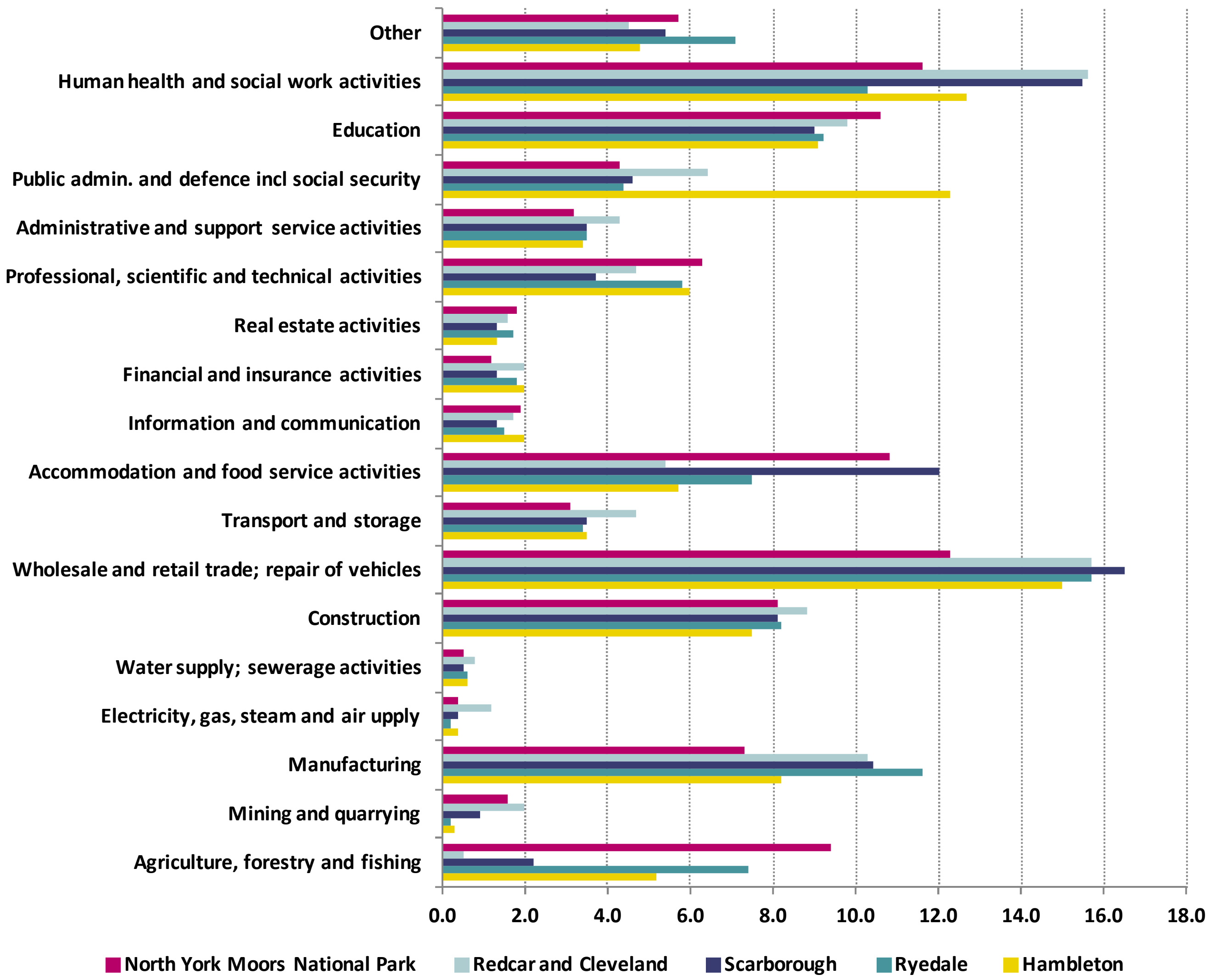
In both cases wholesale and retail is the largest employment sector (employing around 12% in 2001 and 2011). It is likely that a significant proportion will be driven by visitor spending, given 'hotels and catering' (renamed 'Accommodation and food services' in 2011 Census), employed a further 9% in 2001; which had increased to 11% in 2011. This suggests that the employment growth seen overall was, at least partly, driven by the visitor economy.

Health and social work is the second most important employment sector, employing around 12% in 2001 and a similar proportion of people in 2011. Education employed a little over 10% in 2011, a similar proportion to 2001. The numbers suggest a small number of jobs have been lost in agriculture; it employed around 9% in 2011, from 12% in 2001, but the sector still remains important as the fifth largest employment sector. The numbers employed in manufacturing fell from 11% to 7%, a similar story to much of the UK, but the sector still remains important, likely serving a largely local/sub-regional market.

The professional, scientific and technical sector is likely to include those employed at RAF Fylingdales – some 6% were employed in the sector 2011. Around 7% were employed in Construction in 2011, an increase of 1% since

2001. Figure 2.4 shows the same data, but includes the adjoining Local Authorities for context and comparison (NYMNP data is represented in the top bar). The importance of the agriculture and associated activities, of education, and of the professional and scientific occupations discussed above is clear. In context the Parks construction employment looks sizable, given the relatively small population and low housing density. The importance of accommodation and food services is clear, alongside that of retail.

Figure 2.4 Employment Structure in context (2011 - % of total in employment)



Source: 2001 and 2011 Census. (National Park Data set). 2011 data for surrounding areas downloaded from Nomis www.nomisweb.co.uk .

Housing Tenure

Almost half of all Park households own their property outright; significantly higher than the surrounding areas and nearly 20% higher than the national average. Rates of shared ownership are low; not significantly different than the surrounding area. The social rented sector is significantly smaller; just 2% of homes are rented from the public sector; compared to between 12% and 19% in the surrounding areas. The private rented sector is relatively large at nearly 16% of households. This compares to some 15% in Hambleton and similar to the region as a whole, but less than Scarborough (20%) and Ryedale (17%). Proportionality more Park households live rent free (some 3%) than the surrounding areas – although the rate is very similar to Ryedale.

Table 2.8 Housing Tenure (2011 % of total households)

	Owned outright	Owned with mortgage or loan	Shared ownership	Social rented	Social rented: Other	Private rented	Private rented: landlord or agency	Private rented: Other	Living rent free
England	30.6	32.8	0.8	17.7	8.3	16.8	15.4	1.4	1.3
Yorkshire and the Humber	30.6	33.5	0.4	18.1	5.8	15.9	14.4	1.5	1.5
North Yorkshire	38.4	31.2	0.5	11.2	7.2	16.8	14.3	2.4	1.9
Hambleton	39.7	29.8	0.4	12.9	11.9	15.1	12.1	3.0	2.0
Ryedale	41.4	25.7	0.4	12.9	11.9	16.8	14.7	2.0	2.9
Scarborough	39.1	26.7	0.6	12.4	10.1	19.5	17.8	1.7	1.7
Redcar and Cleveland	33.2	33.4	0.4	19.4	9.3	12.5	11.2	1.2	1.1
North York Moors National Park	**47.7**	**24.8**	**0.5**	**1.8**	**6.3**	**15.7**	**13.6**	**2.1**	**3.2**

Source: 2011 Census. (National Park Data set). 2011 data for surrounding areas downloaded from Nomis www.nomisweb.co.uk.

3. Economic Linkages

Box 2	Key Messages – Economic Linkages
	• Notwithstanding the rural nature of the Park, road connections from the Park to key towns in the sub-region are reasonable, although key routes can become congested in the summer months. The A1(M) motorway is some 10km from Thirsk, itself in close proximity to the Park. • Rail connections from Scarborough provide journey times to York of some 50 minutes; connections from Thirsk link York (20 minutes); Middlesbrough (50 minutes) with similar connections from Northallerton. The Esk Valley line provides important links within the Park, between Whitby and Middlesbrough. • Superfast (25 mgps) broadband coverage is planned or already deployed across North Yorkshire, which includes several villages across the Park which is likely to significantly increase internet speeds for residents and businesses. • In 2001, some 9,600 people both lived and worked inside the Park and its immediate surrounding communities; some 45% of the total resident employees (of some 21,800). The remaining 66% (12,200) commute out of the Park to work each day. The most common destination were Scarborough (16%); Redcar and Cleveland (10%) and Ryedale (7%). A further 7% commuted further afield to Middlesbrough. Changes in employment and earnings growth in these locations is likely to affect Park residents and households. • Some 5,150 commute into the Park and its immediate surroundings to work, predominately from the adjoining parts of Scarborough and Redcar and Cleveland. • Within the Park there are no significant commuter flows; people live and work very locally.

3.1 Connectivity

Transport Links

There are reasonable road connections on the edge of the Park; the A170 connects Thirsk, Helmsley, Pickering and Scarborough along the southern border. The A169 links Whitby with Pickering, via Levisham, Goathland and Grosmont, and the A171 links Whitby and Scarborough close to the coast, these two routes providing the only main roads through the interior. The A174 links Whitby with Middlesbrough/Stockton on Tees, to the north. To the west, the A19 links Middlesbrough with Northallerton, Thirsk and York. The A1(M) is some 10km to the south west of Thirsk.

Rail connections from stations in relative proximity to the Park provide reasonable links to a number of towns and cities, although accessing these stations for commuting purposes would require the use of a car. To the east of the Park, there are regular trains from Scarborough to York with journey time of some 50 minutes. On this route, services call at Seamer and Malton and go on to Liverpool Lime Street (journey time of some three hours) also calling at Leeds, Huddersfield and Manchester. To the south west, Thirsk is connected to York (20 minute journey time), and with Middlesbrough and Newcastle to the North (with 40 minute and 1.5 hour journey times, respectively). Northallerton, some 5-10 km to the west of the Park is 30 minutes by train from both Middlesbrough and York[7]. Within the Park itself, the Esk Valley Line provides a west-east rail link across the Park between Middlesbrough and Whitby. The service calls at 13 stations and runs all year round, with a journey time of 1.5 hours[8] . The North Yorkshire Moors railway operates predominantly steam locomotives in the summer months, connecting Whitby and Pickering, with a link to the Esk Valley line at Grosmont, journey times are approximately 1.5 hours[9].

[7] http://www.nationalrail.co.uk/
[8] http://www.eskvalleyrailway.co.uk/map.html
[9] http://www.nymr.co.uk/wp-content/uploads/2013/01/NYMR_TT_2013_v2_webNEW.pdf

Broadband

Broadband connections can play an important part in enabling businesses in remote or rural locations to operate; to access their clients and to handle web based purchasing effectively. North Yorkshire County Council administers a number of community broadband initiatives and provides a broadband coverage map that includes the Park[10]. It indicates there are a number of 'no spots' on the coast at Staintondale and Ravenscar (between Whitby and Scarborough); to the South of Guisborough around Danby, towards the centre of the Park around Thorgill. In contrast there are areas within the Park with relatively good coverage (2 mega bytes per second or over), including at Goathland, Grosmont, Glaisdale, Sleights and Briggswath along the Esk Valley Line, towards Whitby and at Levisham toward Pickering. Overall, whilst there are gaps across the Park, coverage appears no worse than the County as a whole.

However, as part of the UK superfast broadband initiative a venture between North Yorkshire County Council, BT and the European Union, funded through the European Regional Development Fund (ERDF) 'superfast' – 25 megabytes per second - fibre broadband is being installed across North Yorkshire from 2014. An interactive map is available which shows deployed or planned broadband around a number of the villages across the Park including Castleton; Lythe and an area to the North of Hinderwell (both North West of Whitby); Robin Hoods Bay; Brisgwell; Sleights and Goathland[11].

3.2 Commuting Patterns

The data in this section is based on ward level information (see appendix A for a list of wards used) and therefore includes a small number of settlements/ villages on and outside the Parks administrative boundary, hence the numbers will be greater than those set out in the previous chapter. Data from the 2011 Census is available on distances travelled by Middle Level Super Output Area (MSOA)[12]. This data shows that the average distance commuted was between 22km (an area around Helmsley in Ryedale) to 8km (an area around Guiseborough), with an overall average of nine MSOAs that broadly comprise the Park – of 16km.

However the 2001 Census remains the most recent data which shows origin-destination data at ward level and is shown below. Overall, the Park experiences a net loss of a little over 7,000 employees per day. There are just under 10,000 Park residents of working age who also work inside the Park; a self-containment rate of 44%. The remaining 66% of Park resident employees (some 12,000 people) commute outside of the Park, predominantly to Scarborough (16%), Redcar and Cleveland (10%) and Ryedale (7%). A similar proportion of Park residents commute further afield to Middlesbrough, some 1,400 people (or 7%). At the same time, a smaller number of people (some 5,100) commute into the Park to work each day, predominantly from Scarborough (11% - or some 1,600 people), with around 800 people (5%) commuting into the Park from Redcar and Cleveland.

Table 3.1 Out commuting from the National Park (and immediate surrounding areas)

Place of work	Residents in Employment	Percent of total NYMNP residents in employment	Cumulative Percent
National Park Residents who both live and work in the Park	9,610	44%	44%
Out commuting:			
Scarborough	*3,445*	*16%*	*60%*
Redcar and Cleveland	*2,134*	*10%*	*70%*

[10] http://maps.northyorks.gov.uk/connect/broadband.jsp?mapcfg=Broadband_7xHt9r47aLp
[11] http://www.superfastnorthyorkshire.com/wherewhen
[12] These MSOAs do not conform to the Boundary of the Park and are shown as an illustration. The MSOA's that have been selected are as follows: Ryedale, 001, 002 and 003; Scarborough 002 and 004; Hambleton 001 and 002; and Redcar and Cleveland 016 and 020. An interactive maps showing the extent of these areas are available at www.nomisweb.com

Place of work	Residents in Employment	Percent of total NYMNP residents in employment	Cumulative Percent
Ryedale	*1,487*	*7%*	*77%*
Middlesbrough	*1,431*	*7%*	*84%*
Hambleton	*1,062*	*5%*	*89%*
Stockton on Tees	*840*	*4%*	*93%*
Total Out commuting	**12,205**	**56%**	**100%**
Total NYMNP Resident Employees	**21,815**	**100%**	

Source: 2001 Census. Note: Numbers relate to those aged between 17-64 and in employment. *Later analysis of employment data suggests that these numbers may be overstated somewhat and are revised downwards – no revision have been made to the data in this section, which are shown to illustrate broad patterns.

Table 3.2 In commuting into the National Park (and immediate surrounding areas)

Place of residence	Non- residents in employment	Percent of total employment based in NYMNP	Cumulative Percent
National Park Residents who both live and work in the Park	9,610	65%	65%
In Commuting:			
Scarborough	*1,600*	*11%*	*76%*
Redcar and Cleveland	*770*	*5%*	*81%*
Hambleton	*584*	*4%*	*85%*
Middlesbrough	*411*	*3%*	*88%*
Stockton on Tees	*261*	*2%*	*90%*
Total In Commuting	**5,145**	**35%**	**100%**
Total NYMNP Employees	**14,755**	**100%**	

Source: 2001 Census. Note: Numbers relate to those aged between 17-64 and in employment. *Later analysis of employment data suggests that these numbers may be overstated somewhat and are revised downwards – no revision have been made to the data in this section, which are shown to illustrate broad patterns.

Table 3.3 provides further detail of the commuting patterns of those 10,000 people who both live and work inside the Park, it does not show those who commute outside of the Park, or those who commute in. As above, the data is based on the 2001 Census and has been built up from ward level data[13]. It shows that the jobs based inside the Park are overwhelmingly of a very local nature. The most significant sources of local employment are at Helmsley, a little over 1,000 employees, almost all of which reside very locally. A similar pattern is evident at Thornton Dale. To the east of the Park, the wards lose employees each day, with the exception of Fylingdales, where the RAF base draws in a small net increase. The largest net increase of employees is at Broughton and Greenhow, of some 120, with most of these in commuters residing in nearby Great Ayton.

Table 3.3 Commuting patterns within the National Park (based on ward data)

District	Place of Residence	Place of work	Net change
Ryedale (North of A170)			
Ampleforth	473	474	1
Cropton	343	327	-16
Dales	491	479	-12
Helmsley	1,022	1,063	41

[13] 2003 CAS Wards, see Appendix A for a list of wards used.

District	Place of Residence	Place of work	Net change
Thornton Dale	746	788	42
Scarborough (Vicinity of Whitby)			
Danby	720	710	-10
Esk Valley	985	907	-78
Fylingdales	531	583	52
Mulgrave	770	734	-36
Scarborough (*Vicinity of* Scarborough)			
Derwent Valley	773	757	-16
Scalby, Hackness and Staintondale	520	552	32
Hambleton (Western)			
Broughton and Greenhow	293	422	129
Great Ayton	809	721	-88
Osmotherley	400	394	-6
Swainby	333	317	-16
Redcar and Cleveland (South of Guisborough)			
Westworth	401	382	-19
Total North York National Park	***9,610***		***0***

Source: 2001 Census. Note: Employees is defined as those aged between 17-64 and in employment.

Relatively large numbers of Park residents commute out to Scarborough and Redcar and Cleveland, but also to Ryedale and Middlesbrough. Economic and employment growth or decline in these locations is therefore likely to affect earnings and employment prospects of Park residents. Of those that live and work in the Park, the picture that emerges is of a very localised labour market, with Park residents both living and working locally with no particular flows across the Park.

Economic Linkages

There is no further public data on the extent of economic linkages between the Park and the surrounding communities. These linkages can arise from two principal sources. First, economic linkages arising from the purchases of business located within and around the Park. These support further purchases by firms along their supply chain. An example here would be a local shop purchasing stock from a wholesaler, requiring additional purchases by the wholesaler from their suppliers etc. This is referred to as indirect multiplier effects as these multiply through the economy. Second, linkages associated with local expenditure from employees who live or work in the park or who benefit from the supply chains described above, this is referred to as an induced multiplier.

The extent of economic linkages then depend on where companies procure their goods to sell and where their employees spend their money. The commuting data suggests that whilst many employees work locally the surrounding area – Scarborough, Redcar and Cleveland, Ryedale and Middlesbrough is the place of work for many park residents who will spend a proportion of their income there.

In addition, the York and North Yorkshire and East Rising Local Enterprise Partnership (LEP), present information on 'local economic areas' – described as functional areas with their own distinctive features, assets and opportunities recognised by people and businesses based there. Three areas are described which cover the administrative boundary of the Park; 'coast' which covers the eastern side of the Park; 'Moors' and 'upland rural' which relates to the largely rural areas of the centre of the Park; and 'A1/A19 corridor' to the east[14].

[14] 'Summary statement on the Local Economic Partnerships position on NYM/2014/0676/MEIA – Application for the winning and working on polyhalite etc'. 16 December 2014. Paragraph 2.11

4. The Local Economy

Box 3	Key Messages – The Local Economy

- The period under analysis has witnessed markedly different economic conditions at a national level and includes a period of sustained national growth and relatively low unemployment leading up to 2008-2009, with weak economic output and unemployment at higher rates than historically for much of the period thereafter. Economic conditions are now improving, with positive expectations for economic and employment growth in the UK in the medium term.
- More locally, given the NYMNP is a relatively small area, data on employment is prone to sampling errors and is subject to some uncertainty, however overall the data suggest employment has been increasing, by around 5% between 2003 and 2009 and by around 8% between 2009 and 2013, which appears to be at odds with the national picture. In 2013 there were some 13,900 people in employment in the NYMNP area. This growth appears to have been driven by several sectors, notably accommodation and food services, alongside education and manufacturing. The two largest single employers are the Boulby Potash Mine (c.1000 employees) and RAF Fylingdales (c.360 employees).
- Three quarters of homes are owned either outright or with a mortgage; some 10% higher than regional and national figures. The Park supports a relatively small social rented sector, but a similar proportion of households rent privately as in neighbouring areas.
- Some 6% of the housing stock is second homes or holiday accommodation, a similar proportion to Scarborough (some 5%).
- At an average of some £250,000, average house prices in the Park are substantially more expensive than the Regional average and housing affordability is a key issue. Detached homes in the more rural parts of the Park were on average some £333,000 in 2013.
- There were some 1,900 businesses in the Park as of 2008. Some 790 are classified as 'agriculture, forestry and fishing' and a further 200 as wholesale and retail; accommodation and food services account for a further 10%.
- There were more businesses per 10,000 population in both Ryedale and Hambleton than the national and regional averages. Similarly Hambleton had a higher business registration rate and three year business survival rate than the national and regional average.

4.1 National Economic Context

The economic context has changed dramatically in the last five years. Whilst uncertainty remains, the short and mid-term prospects for the UK economy appear to be generally good, despite poor economic performance across Europe amid concerns over deflation alongside the knock on implications of a potential Greek exit from the Eurozone. In the UK in 2009 some 4.9% of output was lost[15] and the UK's subsequent economic performance has been mixed – although is now improving. Growth in 2010 was less than 1%[16]. Thereafter GDP declined from around 2% between January and August 2011, to 0.5% in December 2011. GDP growth continued to deteriorate throughout 2012[17] but remained positive throughout 2013, despite decreasing through the summer - at around 1%[18]. However, the assessment for 2014 and 2015 is much more positive, with GDP expected to continue to improve[19].

The decreases in public expenditure that were announced in the government's initial emergency budget in 2011 are expected to continue to result, nationally, in a drop in public sector employment numbers and also affect private sector business providing services to the public sector. For those parts of the Country where the public sector provides a relatively large proportion of total jobs and average public sector salaries compare favourably with those

[15] Source: HM Treasury Budget 2010 http://cdn.hm-treasury.gov.uk/junebudget_complete.pdf
[16] Source ONS cited in Budget 2012 http://cdn.hm-treasury.gov.uk/budget2012_complete.pdf
[17] Monthly GDP data taken from TM Treasury Forecasts for the UK Economy: A comparison on independent forecasts, December 2012. https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/221477/201212forecomp.pdf
[18] Monthly GDP data taken from TM Treasury Forecasts for the UK Economy: A comparison on independent forecasts, December 2013 https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/266744/201312forecomp.pdf
[19] Monthly GDP data taken from TM Treasury Forecasts for the UK Economy: A comparison on independent forecasts, December 2014. https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/387996/forecomp_201412.pdf

in the private sector, the implications have been and are likely to continue to be difficult. Nationally, employment is rising slowly but expected to increase at a faster rate through 2015, unemployment has fallen and is expected to fall further, alongside increases in average incomes. Inflation was rising faster than average wages, meaning that the cost of living was rising for many households[20], but this situation is expected to improve nationally, with stronger increases in average incomes from 2014/2015[21]. A drop in fuel prices from late 2014 has meant that inflation is lower than expected[22].

4.2 The Local Economy

Employment within the Park (2003-2008 & 2009-2013)

Please note that the data in this section is based on ward level information and therefore includes a small number of settlements/villages on and outside the Parks immediate boundary. In this chapter this area is hereafter referred to as 'the Park' or 'NYMNP'. Wards used are set out in Appendix A. Moreover the dataset providing information on employment was changed between 2008 and 2009, meaning that comparisons over time are complicated.

In 2003 there were some 11,000 employees[23] in the Park, in some 1,800 workplaces[24]. According to Annual Business Inquiry (ABI) data this had increased to some 16,000 by 2008, representing an increase of 47% from 2003. It should be noted that this increase reflects a large increase in the job numbers (an increase of some 4,500 reported in the transport and communication sector in 'Dales' ward (within Ryedale Local Authority) from 2005. The ABI data is based on a sample; it follows that it the data is generally less reliable for smaller and/or less populated areas and sample errors do occur in the data. After consultation with Ryedale District Council and cross referring with BRES data, it appears this is a data error. It is included in the table below, alongside 'revised' data – where the large increase noted above has been removed and replaced with the employment figure for that ward and sector in 2004. The figure would also influence the growth figures in Ryedale (note that the numbers for Ryedale have not been changed)[25]. Note also that ABI data excludes the self-employed and armed forces personnel[26].

The revised figure indicates the total number of jobs in the Park in 2008 would be some 11,600 – a 5% increase since 2003 (Table 4.1). In contrast between 2003 and 2008 Scarborough, Hambleton and Redcar and Cleveland lost jobs, between -2% and -6%. Job numbers in Middlesbrough had stood up relatively well, declining by only -1%. The number of jobs in the sub region and the Region grew by 1%; nationally job numbers grew by 4% (Table 4.3). Notwithstanding the warning noted above, the data suggests the general trend was that employment was growing up to 2008.

More recent data is shown in Table 4.2. It shows both employee (I.e. excluding self-employed) and employment (I.e. including it) from 2009 to 2013. The data suggests that a small number of jobs were lost between 2009 and 2010 – in line with much of the rest of the Country, recovering thereafter. The data suggests that from 2013 employee numbers increased relatively strongly and stood at some 13,500 in 2013, when the self-employed are included the figure stood at some 14,900, increases of 18% and 16% respectively. As with the ABI data a large one

[20] York and North Yorkshire Economic Assessment, October 2010 (National and Regional Context).
[21] HM Treasury Budget 2014 Table D1: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/293759/37630_Budget_2014_Web_Accessible.pdf
[22] http://www.theguardian.com/business/2015/feb/17/uk-inflation-new-low-petrol-price-record
[23] An employer survey of the number of employees within the firm. This excludes the self-employed.
[24] The data are 'data units'. They are roughly equivalent to workplaces but because of the way the data are collected two or more units can be present in the same workplace. For example, a bank may have several branches and offices in a city, each one of these would be counted as a separate data unit.
[25] If the large number of jobs in Dale were excluded, the job numbers in Ryedale would have decreased by some 5% between 2003 and 2008.
[26] Office of National Statistics https://www.gov.uk/government/publications/sub-regional-public-and-private-sector-employee-job-estimates

off increase has been removed from the data as this is potentially an error, so a revised figure is also shown, indicating growth of 8% to 9%.

Table 4.1 NYMNP Year on Year Employment Growth (2003-2008) [Note the data has been revised)

Total Jobs by year	NYMNP*
2003	11,001
2004	10,397
2005	11,009
2006	11,882
2007	11,616
2008	11,605
Percentage increase (after revision) 20003-2008	***5%***

Source: ABI 2003, 2008. *Note in each year a large one off increase in the transport sector has been removed and replaced with the figure as of 2004. Any actual growth in this sector will not therefore appear in the numbers.

Table 4.2 NYMNP Year on Year Employment Growth (2009-2013)

Total Jobs by year	NYMNP Employment	NYMNP Employees	Revised NYMNP Employment*	Revised NYMNP Employees*
2009	12,882	11,400	12,882	11,400
2010	12,467	11,221	12,467	11,221
2011	12,876	11,360	12,876	11,360
2012	14,322	13,104	13,488	12,271
2013	14,881	13,428	13,884	12,475
Percentage change (2009-2013)	***16***	***18***	***8***	***9***

Source: BRES 2009-2013. Source www.nomisweb.co.uk
* Note Around 1,000 additional employees/numbers in employment were recorded in 'Broughton and Grerenhow' ward in the NYMNP in 2012. The scale of this change suggests it may be a data error. Comparing this number with total employment/employee changes across the constituent Local Authorities indicates changes at this level of some 2,400 employees and some 620 people in employment. This compares to an increase recorded in the Park of some 2,000 employment/employees, which suggests the 'Broughton and Grerenhow' number is an error. The 2012 data in this ward has been replaced with the 2011 data. Any actual growth in the ward will not therefore appear in the numbers.

Employment Growth in Context (2003-2008 & 2009-2013)

Table 4.3 below provides data in a wider context for the Park and surrounding areas between 2003 and 2008. It shows both employee numbers alongside workplace numbers (I.e. number of distinct places of work). The effect of the revision to the data described above is also shown, suggesting that employment growth was closer to around 5% to some 11,600. It shows that number of workplaces increased by some 19% between 2003 and 2008. Further analysis of the sectors driving this change is provided later in this chapter.

Table 4.3 Employment Growth 2003-2008 (ABI)

	ABI – Employee Analysis			ABI – Workplace Analysis		
	2003	**2008**	**%**	**2003**	**2008**	**%**
NYMNP*	**11,001**	**16,193**	**47**	**1,803**	**2,137**	**19**
NYMNP (Revised)	**11,001**	**11,605**	**5**	**n/a**	**n/a**	**n/a**
Middlesbrough	63,196	62,408	-1	3,492	3,668	5
Redcar and Cleveland	42,145	39,807	-6	3,085	3,300	7
Stockton-on-Tees	77,716	79,050	2	4,894	5,663	16
Hambleton	39,213	37,397	-5	3,785	4,464	18

	ABI – Employee Analysis			ABI – Workplace Analysis		
	2003	2008	%	2003	2008	%
Ryedale*	23,191	26,637	15	2,583	2,781	8
Scarborough	39,955	39,246	-2	4,076	4,317	6
York, North Yorkshire and East Riding	460,745	464,300	1	42,759	48,539	14
Yorkshire and The Humber	2,199,385	2,232,344	1	167,174	182,437	9
England	22,286,260	23,073,714	4	1,952,242	2,161,305	11

Source: Annual Business Inquiry Employees and Workplace Statistics – Downloaded from www.nomisweb.com February 2013.*note this includes a large single increase and should be treated with caution.

The Business Register and Employment Survey (BRES) was introduced in 2008, replacing the ABI and containing data on employees[27] and employment[28] between 2008 and 2013. The numbers should be considered in the context of the 2009 recession and weaker national demand and business confidence for much of the period thereafter. There are some methodological inconsistencies between years so the numbers should be treated as illustrating employment levels, rather than outright change. In the period, there was a small national increase in employees/employment of 2% and a loss across Yorkshire and Humberside of between 1% and 2%, alongside a marginally higher loss across the LEP area. Locally, whilst data for smaller geographies are prone to greater likelihood of sampling errors, the data suggests that both employees and employment amongst those living in the Park increased strongly – particularly after 2012 - from between 18% and 16% respectively. This compares to modest changes in the constituent Local Authorities - of between -5% and 2% over the same period. A 'reality check' of this data (see notes in Table 4.2) suggests that employment growth is likely to have been more modest closer to 8%-9%.

Table 4.4 Employment Growth 2008-2013 (BRES)

	BRES - Employees			BRES – Employment*		
	2009	2013	% change	2009	2013	% change
NYMNP	**11,399**	**13,428**	**18**	**12,882**	**14,881**	**16**
NYMNP (Revised)*	**11,399**	**12,475**	**9**	**12,882**	**13,884**	**8**
Hambleton	37,813	38,177	1	40,299	40,340	0
Ryedale	21,168	21,520	2	23,030	23,223	1
Scarborough	41,583	40,400	-3	44,835	42,687	-5
Middlesbrough	63,336	58,864	-7	64,963	60,326	-7
Redcar and Cleveland	37,883	40,737	8	39,481	42,016	6
Stockton-On-Tees	78,997	77,545	-2	81,008	79,088	-2
York, North Yorkshire and East Riding	468,115	456,579	-2	494,573	477,809	-3
Yorkshire and The Humber	2,224,415	2,195,330	-1	2,329,121	2,286,867	-2
England	23,064,674	23,631,920	2	24,068,097	24,552,352	2

Source: Business Register and Employment Survey – Downloaded from www.nomisweb.com February 2015. *Note in 2012 a large increase occurred in the Broughton and Greenhow' ward, whilst this may reflect a single large increase, a reality checking exercise (discussed above) suggests it may be a data error. The 2012 data in this ward has been replaced with the 2011 data. Any actual growth in the ward will not therefore appear in the numbers. *The data in the 2011 Census (table 3.2 indicates the numbers are slightly different at 14,755).

[27] An employee is anyone aged 16 years or over that an organisation directly pays from its payroll(s), in return for carrying out a full-time or part-time job or being on a training scheme. It excludes voluntary workers, self-employed, working owners who are not paid via PAYE.

[28] Employment denotes employees and working proprietors, including sole traders, sole proprietors, partners and directors. It does not apply to registered charities.

Overall, whilst there are some inconsistencies between the ABI and BRES data, comparing the employee numbers from both datasets suggests that Park employees increased between 2003 and 2013, in the order of some 2,400. For the reasons outlined above – this is likely to overstate employment growth within the Park somewhat.

Figure 4.1 and Figure 4.2 below examine employment in the Park by sector. Both the ABI[29] and BRES data are presented. Below these, Figure 4.3 puts the ABI numbers in context, by comparing the Park data with the adjoining Local Authorities and the wider area. Key local messages **from the ABI data** are:

- The importance of tourism to the local economy is clear; some 2,500 people were employed in the hotels and restaurants sector in 2008 an increase of some 300 people since 2003. The wholesale and retail sector is also significant employing a further 1,400 people in 2008; whilst this will serve local communities, it is also likely to rely to a significant extent on the expenditure of visitors. The data suggests that retail employment had however declined marginally (by some 130 jobs) between 2003 and 2008.
- Real estate, renting and business activities were a significant source of employment which has remained stable. It employed some 1,600 people in 2008. Manufacturing jobs appear stable, in contrast to declining numbers elsewhere across the Country, suggesting the sector serves a local market. It employed some 1,200 in 2008. Similarly Construction, employing around a thousand people – some 250 more than in 2003.
- The public sector is similarly important, particularly education and has been a stable source of jobs for Park residents. Around 2,400 people worked in Education, Public Administration and Health and Social Work (of which some of the latter will be provided in the private sector) in 2008, comprising some 20% of all employee jobs.
- Agriculture, forestry and fishing employs some 200 people (however the data excludes farm agriculture). Again it is likely that some of this employment may be visitor related, which is discussed further below.

Key local messages **from the BRES data**, which examines more recent employment trends, and with greater sectoral detail are:

- The importance of the visitor economy to the Park is restated. The two largest sectors are accommodation and food service, (which has grown between 2009 and 2013 employing over 3,000 people in 2013) and wholesale and retail, where employment numbers appear stable at just below 2,000.
- Both the manufacturing appears to be growing, employing some 1,500 people in 2013 - consistent with a general recovery in economic demand, however in contrast construction appears to have lost a small number of jobs.
- The data suggests a very large growth in 'administrative and support services', which should be treated with caution[30].
- In other sectors, modest growth has been witnessed in Education, which is the third largest sector by employment, in human health and social work and in professional, scientific and technical activities.

Figure 4.3 provides a wider comparison of job numbers between 2003 and 2008, **taken from the ABI data**. The data for the Park itself, the adjoining/constituent Local Authorities, and the Authorities that form the wider area have been combined and are compared, for ease of reference. Actual numbers are used, as percentage increases fluctuate, given the small numbers. The key messages are:

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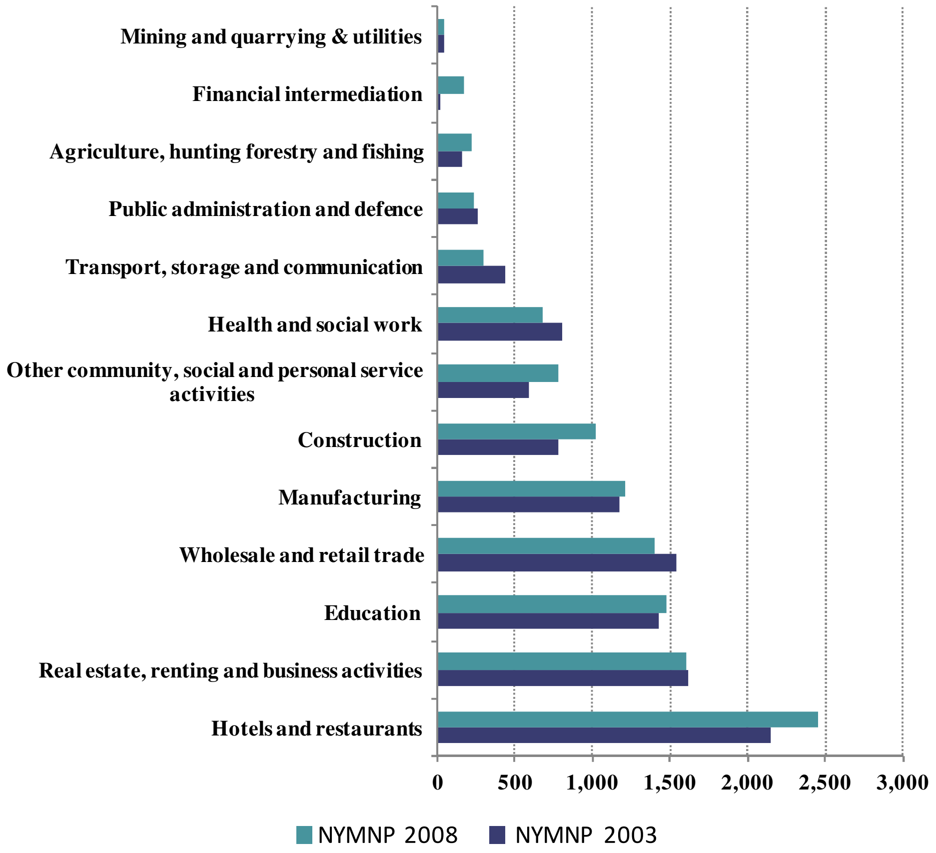
[29] The data is presented with the 'Dales' figure removed.
[30] This is the data from the Broughton and Grerenhow which shows a large increase in 2012.

- Outside of the Park, the largest sectors in Ryedale, Scarborough and Hambleton and further afield in Middlesbrough, Stockton on Tees and Redcar and Cleveland are in wholesale and retail. Overall the numbers employed in the sector has remained stable but at a more local level Middlesbrough has lost around 1,000 jobs, the surrounding authorities have gained smaller amounts, with the exception of Ryedale and Scarborough who have together lot about 600 retail/wholesale jobs.
- Real estate, renting and business activity job numbers have remained stable in the Park. The overall numbers across Ryedale and Scarborough have remained largely stable, albeit with some growth in Hambleton. In the wider area (Middlesbrough, Stockton on Tees and Redcar and Cleveland), the sector has grown, driven by growth of some 3,000 jobs in Stockton on Tees.
- Public sector employment is important sub-regionally[31]. Overall it accounts for some 2,400 jobs inside the Park around 20% of total employment. In Middlesbrough, nearly 27,000 are employed in the public sectors, predominantly in Health; in total some 43% of jobs. Elsewhere, the sector accounts for around 30% of employment in Stockton on Tees, Redcar and Cleveland, Hambleton and Scarborough. In contrast it accounts for just 17% in Ryedale. Ongoing cuts to public services, alongside continuing declines in manufacturing employment therefore pose a substantial challenge for the economy.
- Manufacturing remains an important source of employment across the region, In Middlesbrough, Stockton on Tees and Redcar and Cleveland, numbers have collectively fallen by a little over 5,000 between 2003 and 2008. Most of these job losses were within Redcar and Cleveland and Stockton on Tees, Middlesbrough's sector stood up relatively well. Overall, the sector remains the fourth largest in terms of employment. More locally, around 2,500 jobs have been lost in manufacturing in Scarborough, Hambleton and Ryedale; in 2008 the sector was the second largest employer.

Future drivers of jobs growth in the sub region growth have been identified as the cultural creative and visitor economy, the higher education and science sectors and the low carbon economy[32].

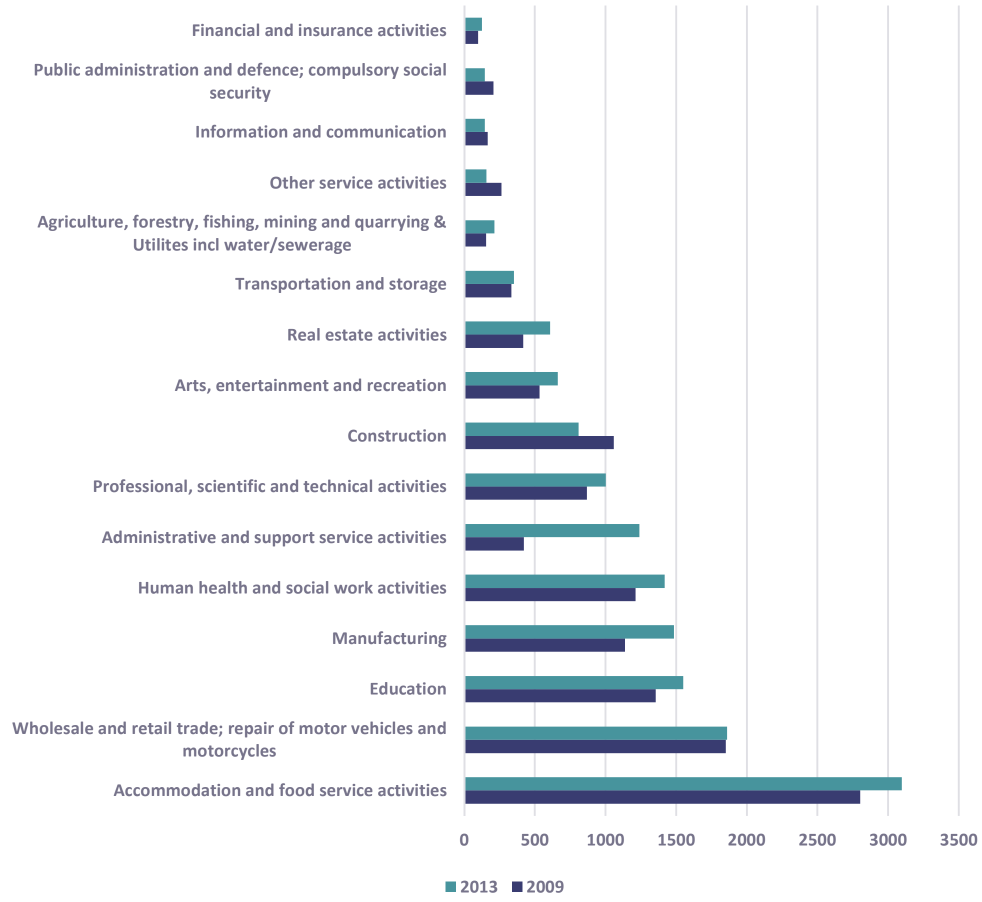
[31] The data is presented in three main components, Public Administration and Defence, Education and Health and Social Work. The latter is likely to comprise some private sector provision in social/personal care and it is likely that this accounts for the growth seen in this sector in recent years.
[32] North York Moors National Park Management Plan. Page 63.

Figure 4.1 Employees by Sector - 2003-2008 (ABI)



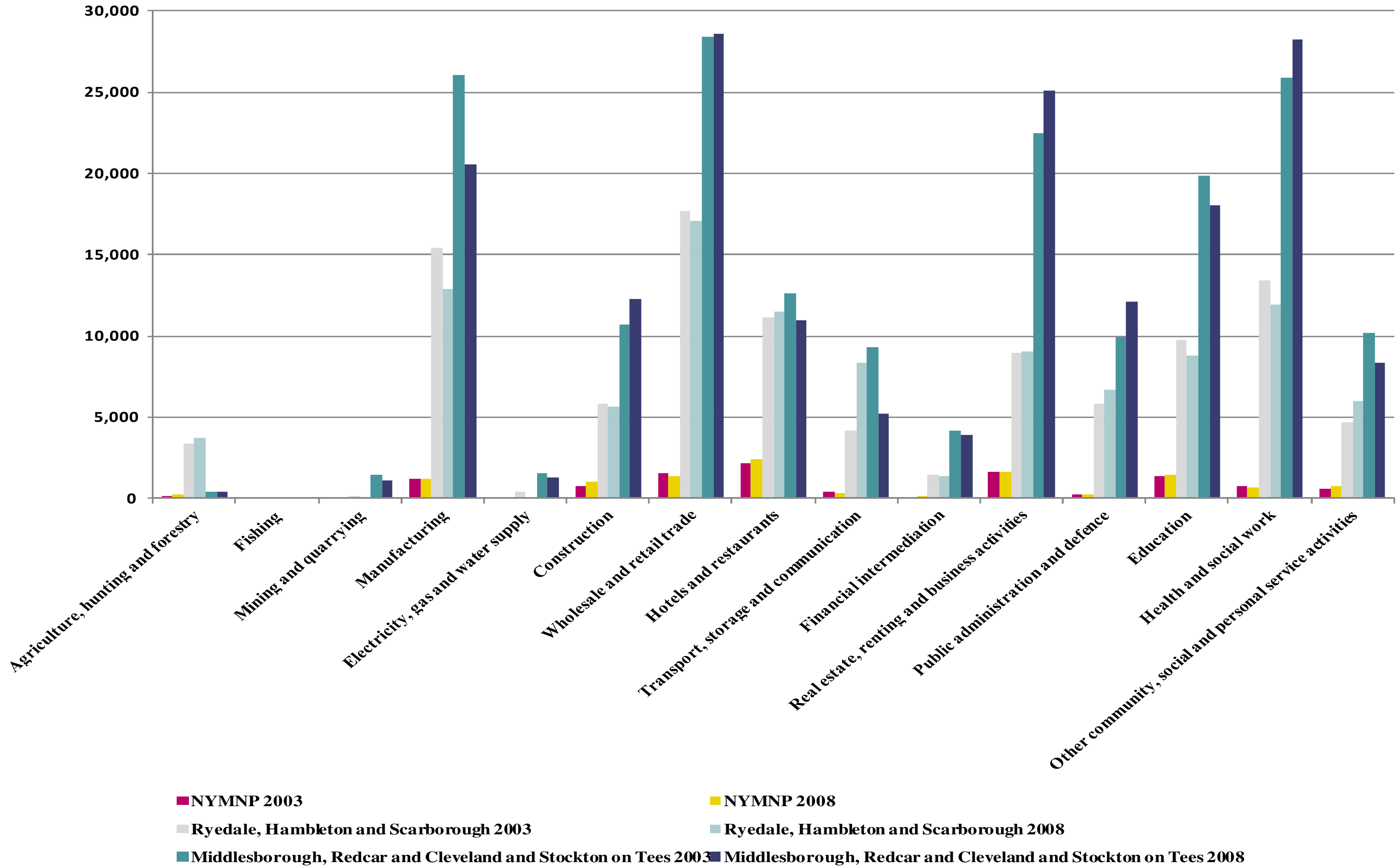
Source: ABI 2003 – 2008. NOMIS

Figure 4.2 Employment by Sector - 2009-2013 (BRES)



Source: BRES. NOMIS Numbers are 'Employment' which comprise employees + working proprietors. Working Proprietors are sole traders, sole proprietors, partners and directors. This does not apply to registered charities.

Figure 4.3 Employment Growth in Context – 2003 and 2008 (ABI)



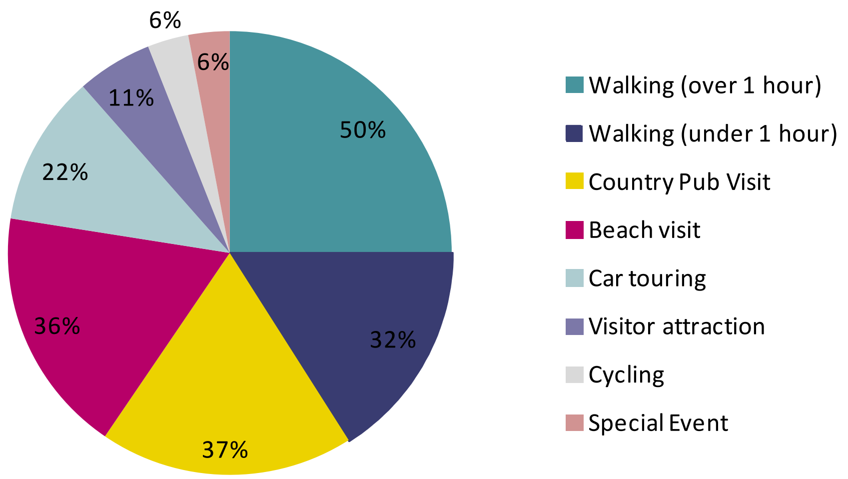
Source: ABI 2003 – 2008. NOMIS

4.3 Important Sectors and Activities

Tourism and Recreation

This section provides commentary from the Parks Management Plan 2012, which examines important economic activities. A major component of the Park's economy relates directly and indirectly to the activities and spending of visitors and of leisure and recreation pursuits. These include walking, horse riding, mountain biking (the mountain bike world cup was held in the Park at Dalby forest and investment in other cycle trails have been made), sailing, shooting and fishing, seaside visits and visiting heritage sites and museums. The Yorkshire Gliding Club is also located within the Park. It is well served by public rights of way and open access land, trails and cycle routes. Events on the North Yorkshire Moors Railway and at Robin Hood's Bay to the east of the Park also draw in visitors. The most common recreation activities are summarised below.

Figure 4.4 Recreation activities most often undertaken during a Park visit in 2011



Source: North York Moors National Park Management Plan, June 2012. Page 53, based on Casual User Survey 2011.

In 2010, 6.4 million visitors spent a total of 10.2 million days (i.e. an average length of stay of 1.6 days) in and around the Park. These numbers of visitor days have grown slowly (by some 1-2% per year on average, between 1998 and 2012), but with significant fluctuations within that time. For instance after a peak of some 10.7 million visitor days in 2007, between 2007 and 2010 there was a reduction of some 5% of visitor days and of visitors. This is likely to reflect the recession and corresponding fall in average earnings/income; however trips to the region between 2006 and 2010 have increased by a similar amount (6%)[33]. Tourism is worth some £416 million to the local economy and supported some 4,000 FTE jobs in the Park; some 7,800 in the wider area[34]. Visitor numbers are seasonal, however, with numbers typically around 80% higher in August than January. Whilst the visitor numbers do result in some congestion in the summer months, current damage and disturbance caused by tourism

[33] Source: North York Moors National Park Management Plan, June 2012. Page 51 and 52.
[34] Source: North York Moors National Park Management Plan, June 2012. Page 63, taken from Scarborough Tourism Activity Monitor 2009. It is not clear if the data is economic output or spending.

is considered by the Park Authority to be limited and localised. There is spare capacity at hotels, hostels and camp sites.[35]

Shooting and Fishing

Grouse shooting employs some 50 gamekeepers within the Park. Some 130 shooting days are run each year, where further, predominantly local staff, are employed. Associated visitors occupy some 340 bed spaces per year. Lowland shooting for pheasant and partridge is similarly important[36].

Agriculture

Farming plays an important role in the economy of the Park, for sales of 'locally branded' food as well as wider supply and in the provision of other ecosystem services. A report cited in the Park Management Plan, prepared in 2009 on agricultural output in the Park[37] indicated total value of the sector has been estimated at £56 million (2009). Dairy accounts for around a quarter of this, so too does crops. The sector accounts for around 2,500 jobs of which more than half are part time jobs. This would be substantially larger than stated in the ABI data analysed in this chapter, although the latter excludes farm agricultural employees and can be prone to sampling errors in small/rural areas. The report does however state that job numbers, particularly full time jobs in the sector, have declined in the last 20 years and it relies heavily on payments provided by the Common Agricultural Policy (CAP), from which some £16 million of payments are made annually.

The report states there is potential for growth in energy crops (miscanthus and willow) and in the mid-term, the potential for growth in the biofuels market may affect the composition of crop types, alongside further development and promotion of local/organic foods and the 'North York Moors brand'.

Forestry and Woodland

Timber production is an important economic activity for estates and local sawmills and a necessary part of the Park's environmental management. The largest timber producer is the public forest estate, its activities are estimated to be worth some £10 million to the economy, employing some 150 in timer production management and tourism and recreation related activities.[38]

4.4 Housing

2001 Census data indicates there were some 21,800 dwellings, which had increased to around 23,300 ten years later (Table 4.5) an increase of 7% or some 150 units per year, only slightly below the rate across the Region and Nationally[39]. At the same time, numbers increased in Ryedale and Scarborough by some 9%, in Hambleton by 10%. Housing numbers in both Middlesbrough and Redcar and Cleveland were somewhat lower at 2% and 3% respectively. Further local data is provided in Table 4.5 and indicates that the largest house number increases were in Esk Valley, Helmsley, Great Ayton (note that this includes the village of Great Ayton, which lies just outside of the Park boundary). The numbers are therefore likely to overstate housing growth which has taken place physically within the Park. Please refer to chapter five for the further details.

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[35] Source: North York Moors National Park Management Plan, June 2012.
[36] The North York National Park Management Plan 2012
[37] Askham Bryan College, 2011, cited in The North York National Park Management Plan 2012, Page 66.
[38] Source: The North York National Park Management Plan 2012
[39] Note whilst the analysis has attempted to keep to the boundary of the national Park as far as is possible, some of these houses are likely to have been constructed outside of the boundary and should be used for illustrative purposes only.

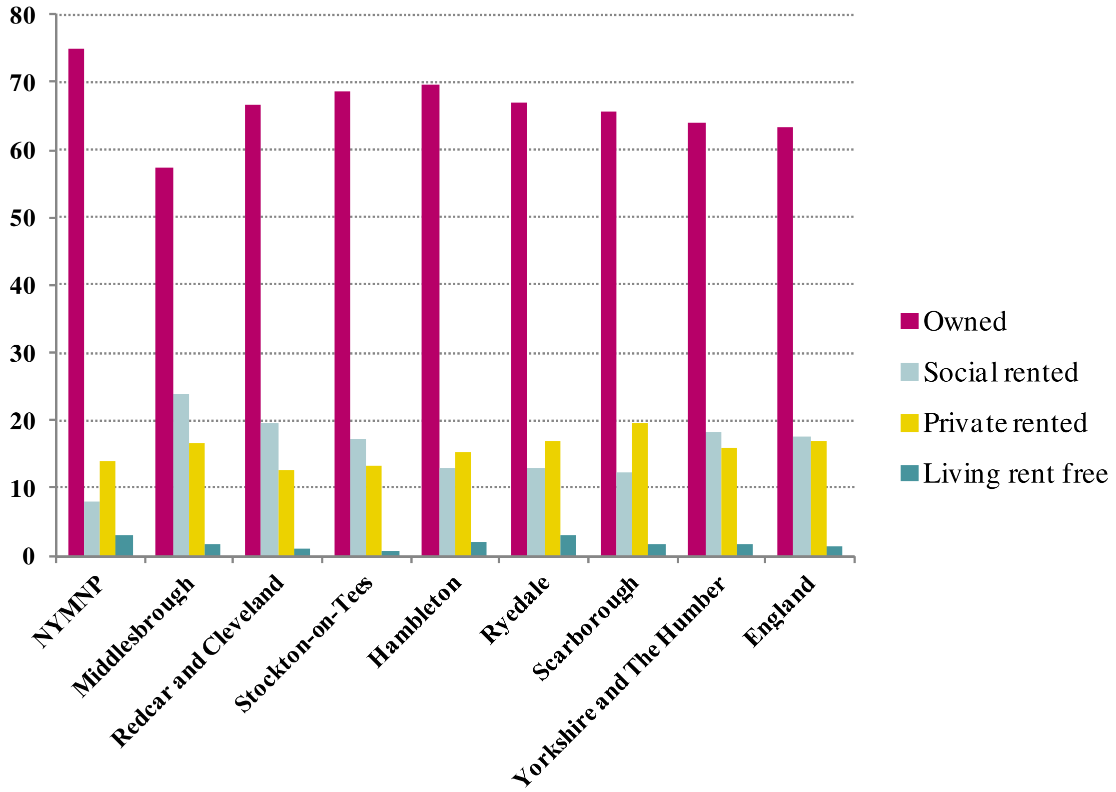
Table 4.5 Dwelling Numbers in the Park and environs (2001 and 2011)

	2001	2011	Change (actual numbers – unless stated)
Ampleforth	687	721	34
Cropton	711	763	52
Dales	791	835	44
Helmsley	1,508	1,663	155
Thornton Dale	1,586	1,687	101
Danby	842	952	110
Derwent Valley	2,012	2,091	79
Esk Valley	2,085	2,282	197
Fylingdales	1,190	1,259	69
Mulgrave	2,077	2,175	98
Scalby, Hackness and Staintondale	1,860	1,969	109
Broughton and Greenhow	715	761	46
Great Ayton	2,293	2,457	164
Osmotherley	761	829	68
Swainby	797	870	73
Westworth	1,871	1,983	112
NYMNP – Total	***21,786***	***23,297***	***7%***
Middlesbrough	58,784	59,956	2%
Redcar and Cleveland	59,862	61,899	3%
Stockton-on-Tees	76,059	82,237	8%
Hambleton	36,309	39,896	10%
Ryedale	22,758	24,743	9%
Scarborough	51,694	56,443	9%
Yorkshire and The Humber	2,154,702	2,319,910	8%
England	21,206,804	22,976,066	8%

Source: 2001 and 2011 Census

Around 75% of these homes were owned either outright or with a mortgage; a figure which is around 10% higher than the national and regional averages. The Park supports a relatively small social rented sector (less than 10% of the stock, compared to around 18% across the region and nationally). The private rented sector, as a proportion of the total housing stock was around 15%, not significantly smaller than the surround areas, although around 20% of Scarborough's stock is privately rented. A slight higher proportion of Park households do not pay rent, although the numbers are not significant.

Figure 4.5 Housing Tenure - 2011 (Households)



Source: 2011 Census. NOMIS. Data is based on household spaces.

There were some 1,394 homes registered at the time of the 2001 Census as second homes or holiday accommodation; some 6% of the total dwellings in the Park. Most of these, some 600 were located in Mulgrave and Fylingdales wards to the east of the Park, with around 250 more in Thornton Dale and Dale wards. The proportion was greater than all surrounding areas, although Scarborough's figure stands at 5%. Around 3% of Ryedale dwellings were classified as second homes at that time. This data is not available from the 2011 Census in the same format, but some 6% of residents in the Park an immediate surroundings were classified as having second addresses, somewhat higher than Ryedale, Scarborough and Hambleton (all around 5%), and Redcar and Cleveland (3%)[40].

Table 4.6 Second and Holiday Homes - 2001

	Total Dwellings	Second Residence/ Holiday accommodation	%
NYMNP	21,786	1,394	6.4
Middlesbrough	58,784	94	0.2
Redcar and Cleveland	59,862	168	0.3
Stockton-on-Tees	76,059	109	0.1
Hambleton	36,309	374	1.0

[40] Based on 2011 Census questions 'QS106EW - Second address', figures are a proportion of those with an address reporting that they had a second address. Source. www.nomisweb.co.uk

Ryedale	22,758	672	3.0
Scarborough	51,694	2,748	5.3
England	21,206,805	134,180	0.6
Yorkshire and The Humber	2,154,702	10,745	0.5

Source: 2001 Census

The average household income of households inside the Park was some £32,974 in 2010, marginally above the corresponding figure for the Yorkshire and Humber Region (£32,405).[41] Table 4.7 provides information on average house prices, based on Land Registry data in 2009. It also shows the average house prices, as multiples of the average income described above. Table 4.8 and Table 4.9 provide the most recent data, but in a slightly different format, so both are shown.

Overall, houses in the Park are significantly more expensive than the Regional average, particularly detached houses where the average price is some ten times average household income. The 2009 data indicates that semi-detached properties in the 'urban' areas of the Park are cheaper than the regional average. This may reflect the stipulations the Park requires for affordable housing and for occupants of new build properties to demonstrate family and/or historical ties with the Park; by definition however the number of such houses is likely to be small. The 2013 data shows a similar story and indicates that detached properties are significantly more expensive overall; at some 10 times average household income and semi-detached some seven times. Flats in the Park are less expensive, but the stock is likely to be small.

Clearly the Park is and will remain a desirable place to live, it is likely that these prices reflect in migration of early retirees and retirees (discussed further in the chapter on the Park's people below) reflected in the tenure structure in the Park noted above. Overall, access to sufficient affordable housing is a key issue.

Table 4.7 Average House Prices (2009)

	NYMNP			Yorkshire and Humber		
	All	**Urban' (Villages)**	**Rural**	**All**	**Urban**	**Rural**
Overall	250,000	122,400	255,000	153,200	141,500	195,900
Detached	336,000	~	337,000	249,700	236,100	271,400
Semi-Detached	185,000	130,000	189,500	140,900	136,700	158,200
Terrace	185,300	~	188,400	113,100	108,000	140,400
Overall	7.6	3.7	7.7	4.7	4.4	6.0
Detached	10.2	~	10.2	7.7	7.3	8.4
Semi-Detached	5.6	3.9	5.7	4.3	4.2	4.9
Terrace	5.6	~	5.7	3.5	3.3	4.3

Source: Land Registry Sales data 2009. Taken from 'North York Moors National Park: Economic Profile, Defra Rural Statistics Unit, July 2010.

Table 4.8 House Prices (January to December 2013)

	Detached	Semi-detached	Terraced house	Flat	Average
Ryedale	£287,622	£175,932	£166,023	£125,205	£217,858
Scarborough	£233,942	£151,441	£139,357	£108,898	£158,721
Hambleton	£314,841	£183,104	£172,047	£126,568	£236,350
Redcar and Cleveland	£203,082	£120,102	£86,924	£88,941	£130,471
Yorkshire and the Humber	£250,798	£144,761	£119,036	£115,950	£159,188
North Yorkshire	£295,209	£184,095	£163,694	£110,404	£211,568

[41] Source CACI Paycheck data, mid-year estimates 2009-10. Taken from North York Moors National Park: Economic Profile, Defra Rural Statistics Unit, 2010.

North York Moors National Park	**£322,775**	**£218,515**	**£189,840**	**£129,593**	**£249,896**

Source: North York Moors National Park Annual House Price Survey 2014. Page 4.
http://www.northyorkmoors.org.uk/planning/framework/housing-policies/House-Price-Survey-2014.pdf

Table 4.9 Housing affordability (2014 Prices as multiples of average 2011 household income)

	Average Household Income	**Detached**	**Semi-detached**	**Terraced house**	**Flat**	**Average**
Yorkshire and the Humber	£32,405	7.7	4.5	3.7	3.6	4.9
North York Moors National Park	£32,974	9.8	6.6	5.8	3.9	7.6

Source: Average household income is CACI Paycheck data, mid-year estimates 2009-10. Taken from North York Moors National Park: Economic Profile, Defra Rural Statistics Unit, 2010. House price data is based on North York Moors National Park Annual House Price Survey 2014. Page 4.

4.5 Businesses

The two largest employers inside the Park are the Boulby Potash mine (some 1,000 employees) and RAF Fylingdales which provides a ballistic missile warning and surveillance service and employs some 360 people[42]. Data from the MINT database available from Yorkshire Forward (but not publishable due to copyright) shows the geographical distribution of the Parks businesses, from 2010. It indicates that the majority of the Park's businesses are located in the Esk Valley, around Whitby and across the eastern coastline boundary of the Park, with particular concentrations around Robin Hoods Bay. In this data, the predominance of 'primary' (i.e. agricultural related) and of hotel and catering businesses is clear. There is also a cluster at Helmsley to the west, which contains a small industrial estate, (although this is physically outside of the Park boundary). There are further small workshop/estate and office complexes at Hinderwell and Hutton-le Hole. The largest employment site is Whitby Business Park (which straddles the Park boundary) containing tool hire, seafood processing, garages and coach hire firms.

Data from the interdepartmental business register (2008) provides a count of the Park's businesses by activity. It suggest there were a total of 1,935 businesses in the Park, of which some 790, (some 40%) were classified as 'agriculture, forestry and fishing'. A further 205 (11%) were classified as 'wholesale and retail trade, repair of motor vehicles' (likely to be predominantly retail businesses). Accommodation and food services accounted for a similar amount (some 185 businesses or 10% of the total stock), compared to 7% across the Region. The Park's, agricultural business base is markedly more significant than across the Region, (5%). Construction and retail firms account for less of the business base in the Park than across the region (8% and 11% in the Park, compared to 12% and 22% across Yorkshire and the Humber).[43]

Data on business starts up, survival rates and stock is not available at Ward level and hence data can't be analysed for the Park itself. However 2008 data suggests that there were some 750 businesses per 10,000 population in Ryedale, some 650 in Hambleton, both higher than the national (some 425) and regional averages (some 350). Scarborough had fewer businesses relative to its population (some 400) a rate between the regional and national average figures.[44]

Similar patters emerge from business registration data. In Hambleton in 2008 some 58 new businesses were created for every 10,000 resident adults; the second highest in York and North Yorkshire and above the national average (56). The comparative figures for Ryedale was 55; for Scarborough some 42. Nationally around 65% of businesses established in 2005 were trading three years later; the figures for the region were 63%. In Hambleton some 67% were still trading; in Ryedale, 61% and in Scarborough, 58%[45].

[42] https://www.bgs.ac.uk/mineralsuk/planning/mineralPlanningFactsheets.html http://www.raf.mod.uk/raffylingdales/aboutus/
[43] Source: North York Moors National Park: Economic Profile, Defra Rural Statistics Unit July 20102. Data is based on 2008.
[44] Source: York and North Yorkshire Economic Assessment 2010. Prepared by the York and North Yorkshire Partnership Unit.
[45] Source: York and North Yorkshire Economic Assessment 2010. Prepared by the York and North Yorkshire Partnership Unit.

5. The Local Population

Box 4 Key Messages – The Local Population

- This section draws on ward level information as hence includes a small number of communities outside of the administrative boundary of the Park. Whilst some of this section replicates that in section 2 it allows additional issues to be examined and allows analysis of several settlements that are functionally intertwined with the Park as residents will work, employ or spend income there.
- The resident population of the Park and immediate surrounding area stood at some 46,600 in 2011, having decreased by around 1% since 2001.
- Over that time number of younger people aged 14 and under and immediate surrounding area has decreased alongside those between 25 and 59, particularly those aged 30 to 44. Numbers aged 60 or over has increased with particular increases from those at or near retirement age (60 to 64). There have been strong increases in all age groups over 60 years of age between 2001 and 2011.
- Economic activity rates stood at 67% in 2011; marginally lower than the national (70%) and regional (68%) figures. The rates are similar to Scarborough 66%, but lower than Ryedale and Hambleton (71% and 72% respectively).
- Self-employment rates were however substantially higher at 19%, almost double the national rate.
- The resident workforce has greater proportions of its workforce in managerial and professional occupations and generally lower proportions in elementary occupations than the surrounding areas. The workforce is better qualified with fewer people who hold no or only basic qualifications and higher proportions holding level 4 and above, than the surrounding areas.
- Claimant unemployment has remained low for much of the past decade; showing little change (an increase of c1%) through the 2009 recession, currently standing at some 1.2%. Claimant unemployment reflects a degree of seasonality, with rates somewhat higher in winter than in summer, but the effect is not marked. Unemployment across the wider area reflects the different economic and skills base – rates in Ryedale and Hambleton were generally low, whilst those in Scarborough, Stockton, Redcar and Cleveland and Middlesbrough were much higher. The latest data shows claimant unemployment is now decreasing throughout the area.

5.1 Demography

The population of the Park and settlements in the immediate area has remained stable in the last decade. In 2001 the population stood at some 47,100 persons; in 2011 this had declined marginally to 46,700, a decline of some 1 per cent (Table 5.1). In contrast the populations of Scarborough and Ryedale both increased by around 2% and Hambleton grew by some 6%, in line with the Region, which itself grew at some 2% less than compared with England as a whole. Elsewhere, strong population growth was seen in Stockton on Tees, offset by a decline in Redcar and Cleveland.

Table 5.1 A Stable resident population

	2001	2011	Percentage change
NYMNP – Total	***47,180***	***46,637***	***-1.2***
Middlesbrough	134,860	138,412	2.6
Redcar and Cleveland	139,145	135,177	-2.9
Stockton-on-Tees	178,417	191,610	7.4
Hambleton	84,129	89,140	6.0
Ryedale	50,873	51,751	1.7
Scarborough	106,252	108,793	2.4
Yorkshire and The Humber	4,964,833	5,283,733	6.4
England	49,138,831	53,012,456	7.9

Source: 2001 and 2011 Census. Based on CAS 2003 Wards and 2011 Wards. See Appendix A for the list of wards used.

Table 5.2 overleaf compares the prevailing age structure in 2001 and 2011 in the Park and immediate surrounding area with that of the constituent Local Authority areas. It shows a clear pattern; those aged 45 and over comprised some 58% of the Park's resident employees in 2011; compared to 50% in the constituent Local Authorities. The number of people aged between 0 and 14 years of age declined between 2001 and 2011. This was partially offset by an increase in those aged between 15 and 24. However a key working age group, those between 25 and 59 decreased by some 14% or 3,200 people. Strong growth was seen in the 60-64 age groups (retirees and early retirees), likely to be driven at least partly by in-migration. All age groups from 65 and above have grown by 20% or more in the last ten years. In 2011 some 35% (some 16,300) of the population was 60 or over. This compares to 29% in the constituent Local Authority areas.

Table 5.2 Population characteristics 2001 and 2011

	NYMNP				Ryedale, Scarborough, Hambleton and Redcar and Cleveland			
	2001	**2011**	**% Change**	**% of total (2011)**	**2001**	**2011**	**% Change**	**% of total (2011)**
Age 0-4	1,926	1,747	-9	4	19,466	19,603	1	5
Age 5 to 9	2,598	2,097	-19	4	23,315	19,178	-18	5
Age 10 to 14	3,091	2,596	-16	6	25,695	21,663	-16	6
Age 15 to 19	2,851	2,901	2	6	22,786	23,739	4	6
Age 20 to 24	1,608	1,784	11	4	17,032	20,994	23	5
Age 25 to 29	1,719	1,639	-5	4	18,973	19,277	2	5
Age 30 to 44	8,977	6,754	-25	14	79,088	65,137	-18	17
Age 45 to 59	11,493	10,806	-6	23	80,196	82,936	3	22
Age 60 to 64	3,160	4,489	42	10	22,751	29,469	30	8
Age 65 to 74	5,391	6,460	20	14	37,695	44,619	18	12
Age 75 to 84	3,237	3,992	23	9	24,937	27,703	11	7
Age 85 to 89	769	905	18	2	5,638	6,991	24	2
Age 90 and over	360	467	30	1	2,827	3,552	26	1
Total	***47,180***	***46,637***	***-1***	***100***	***380,399***	***384,861***	***1.2***	***100***

Source: 2001 and 2011 Census. Based on CAS 2003 Wards and 2011 Wards. See Appendix A for the list of wards used.

There is no data on migration patterns for the Park itself, but Local Authority level data suggests that population growth within both Ryedale and Hambleton has not come from natural change, but from in-migration. Between 2001 and 2009, the population of Ryedale grew by some 5%; Hambleton by some 4% and Scarborough by some 2%. Natural change accounted for none of this growth in either Hambleton or Ryedale and Scarborough lost some 3% of its population through natural change in this period. Net in migration accounted for some 3,100 people between 2001 and 20009 in Hambleton; 3,700 people in Ryedale and 5,200 in Scarborough[46].

5.2 Labour Market

2011 Census data indicates there were just under 23,000 economically active[47] people resident in Park and immediate surrounding area (some 67%), an increase of some 2,700 (or 2%), since 2001, a similar rate to Scarborough and to the region, but lower than nationally. The data suggests greater proportions of economically active people in those parts of Ryedale and Hambleton that lie outside of the Park boundary.

[46] Source: York and North Yorkshire Economic Assessment 2010. Prepared by the York and North Yorkshire Partnership Unit.
[47] Economically active refers to people either in employment, or actively seeking employment.

Table 5.3 Economic Activity rates

	2001	%	2011	%
NYMNP	***22,607***	***65***	***22,848***	***67***
Middlesbrough	55,842	58	63,582	63
Redcar and Cleveland	59,787	60	63,530	64
Stockton-on-Tees	82,829	64	96,259	68
Hambleton	43,207	71	47,068	72
Ryedale	24,989	68	26,644	71
Scarborough	47,914	63	52,245	66
England	23,756,707	67	27,183,134	70
Yorkshire and The Humber	2,328,541	65	2,649,975	68

Source: 2001 and 2011 Census. Based on CAS 2003 Wards and 2011 Wards. See Appendix A for the list of wards used.

In contrast self-employment rates are almost double the national average and numbers have grown across the last decade. In 2011 some 6,100 people were registered as self-employed, comprising some 20% of the economically active population.

Table 5.4 Self Employment Rates

	2001	%	2011	%
NYMNP	***5,772***	***18***	***6,081***	***19***
Middlesbrough	3,789	4	5,171	5
Redcar and Cleveland	4,771	5	5,864	6
Stockton-on-Tees	6,311	5	8,941	6
Hambleton	8,003	13	8,739	13
Ryedale	5,675	16	6,252	17
Scarborough	8,308	11	9,302	12
England	2,954,988	8	3,793,632	10
Yorkshire and The Humber	258,816	7	325,432	8

Source: 2001 and 2011 Census. Based on CAS 2003 Wards and 2011 Wards. See Appendix A for the list of wards used.

The area has a relatively mixed occupation profile (Table 5.5). Based on 2011 census data around a third of residents were employed in managerial or professional occupations. Although the number had fallen since 2001, more people were employed in professional occupations. A further 20% were employed in skilled trades, which had changed little since 2001. Jobs in personal services (likely to include some leisure/visitor related activities) employed around 10% of people in 2011. The data indicates a very similar number of employed people in 2011 as in 2001, at just fewer than 22,000. Table 5.6 provides a comparison of the occupation profile with that of the surrounding authorities, the region and nationally.

Table 5.5 Occupations in 2001 and 2011 of NYMNP Residents

	2001	%	2011	%
Managers and Senior Officials	3,614	17	3,092	14
Professional Occupations	2,997	14	4,051	18
Associate Professional and Technical Occupations	2,442	11	2,053	9
Administrative and Secretarial Occupations	2,078	10	1,946	9
Skilled Trades Occupations	4,041	19	4,162	19
Personal Service Occupations*	1,366	6	1,902	9

	2001	%	2011	%
Sales and Customer Service Occupations	1,231	6	1,174	5
Process, Plant and Machine Operatives	1,497	7	1,332	6
Elementary Occupations	2,518	12	2,245	10
Total	21,784	100	21,957	100

Source: 2001 and 2011 Census. Based on CAS 2003 Wards and 2011 Wards. See Appendix A for the list of wards used. *Note: 2011 Census equivalent category is called 'Caring, leisure and other service occupations'.

Table 5.6 Occupation Profile 2011, (% of those in each occupation)

	Managers, directors, senior officials	Prof.	Associate prof. and technical	Admin. and secretarial	Skilled trades	Caring, leisure other service	Sales, customer service	Process, plant, machine	Elementary
NYMNP	**14**	**18**	**9**	**9**	**19**	**9**	**5**	**6**	**10**
Middlesbrough	7	13	10	10	12	12	11	10	15
Redcar and Cleveland	8	13	11	11	14	12	9	10	13
Stockton-on-Tees	9	16	12	11	12	9	11	8	12
Hambleton	13	17	14	11	15	8	6	6	10
Ryedale	13	14	9	9	19	9	6	8	12
Scarborough	12	13	9	9	16	11	9	8	14
England	11	18	13	12	11	9	8	7	11
Yorkshire and The Humber	10	15	11	11	12	10	9	9	13

Source: 2011 Census

Reflecting the above, the skills profile of residents is relatively high. Only 20% of residents have no qualifications; lower than the regional and national average. Lower proportions of the resident workforce are qualified to Level 1 (11%), compared to 14% regionally and 13% nationally. Similarly, higher proportion are qualified to level four (University degree) and above (34%), compared to 23% regionally and 27% nationally.

Table 5.7 Skills Profile 2011, (% of those who obtained qualification levels specified)

	None	Level 1	Level 2	Apprenticeship	Level 3	Level 4 and above	Other
NYMNP	***19.7***	***10.9***	***15.5***	***4.5***	***11.5***	***34.0***	***3.9***
Middlesbrough	29.9	13.6	15.3	4.4	13.2	18.5	5.0
Redcar and Cleveland	28.4	13.5	16.4	5.7	13.1	18.9	3.9
Stockton-on-Tees	23.8	13.9	16.9	5.2	13.6	22.8	3.9
Hambleton	19.6	12.0	16.1	4.1	12.2	32.1	4.0
Ryedale	24.0	12.6	16.3	4.1	11.3	27.3	4.4
Scarborough	26.0	12.9	16.3	5.3	12.1	22.7	4.8
Yorkshire and The Humber	25.8	13.6	15.5	4.2	12.8	23.3	4.9
England	22.5	13.3	15.2	3.6	12.4	27.4	5.7

Source: 2001 and 2011 Census. Based on CAS 2003 Wards and 2011 Wards. See Appendix A for the list of wards used.

Table 5.8 compares average resident and workplace earnings across the Local Authority areas; data at ward level is not available. Overall, the highest average resident earnings were in Stockton on Tees, the highest workplace earnings in Redcar and Cleveland both figures at some £26,200. There was some, limited, difference between resident and workplace earnings, the most marked in Middlesbrough which suggests local residents do not generally access the highest paying jobs, which are held by those who reside outside of the District and commute in. Conversely, data for Ryedale and Scarborough suggests that residents commute out of the District to higher paying jobs elsewhere. The skills and occupation profile of residents would suggest the same pattern would occur in the Park and immediate surrounding area.

Table 5.8 Resident and Workplace Earnings (2014)

	Annual Gross Pay Resident	Annual Gross Pay Workplace	Resident as a % of Workplace
Middlesbrough	£22,689	£23,972	95%
Redcar and Cleveland	£25,186	£26,211	96%
Stockton-on-Tees	£26,159	£25,232	104%
Hambleton	#	#	~
Ryedale	£22,535	£21,441	105%
Scarborough	£24,696	£23,860	104%
Yorkshire and The Humber	£25,000	£24,999	100%
England	£27,500	£27,487	100%

Source: Annual Survey of Hours and Earnings, 2012. # data suppressed due to statistical unreliability.

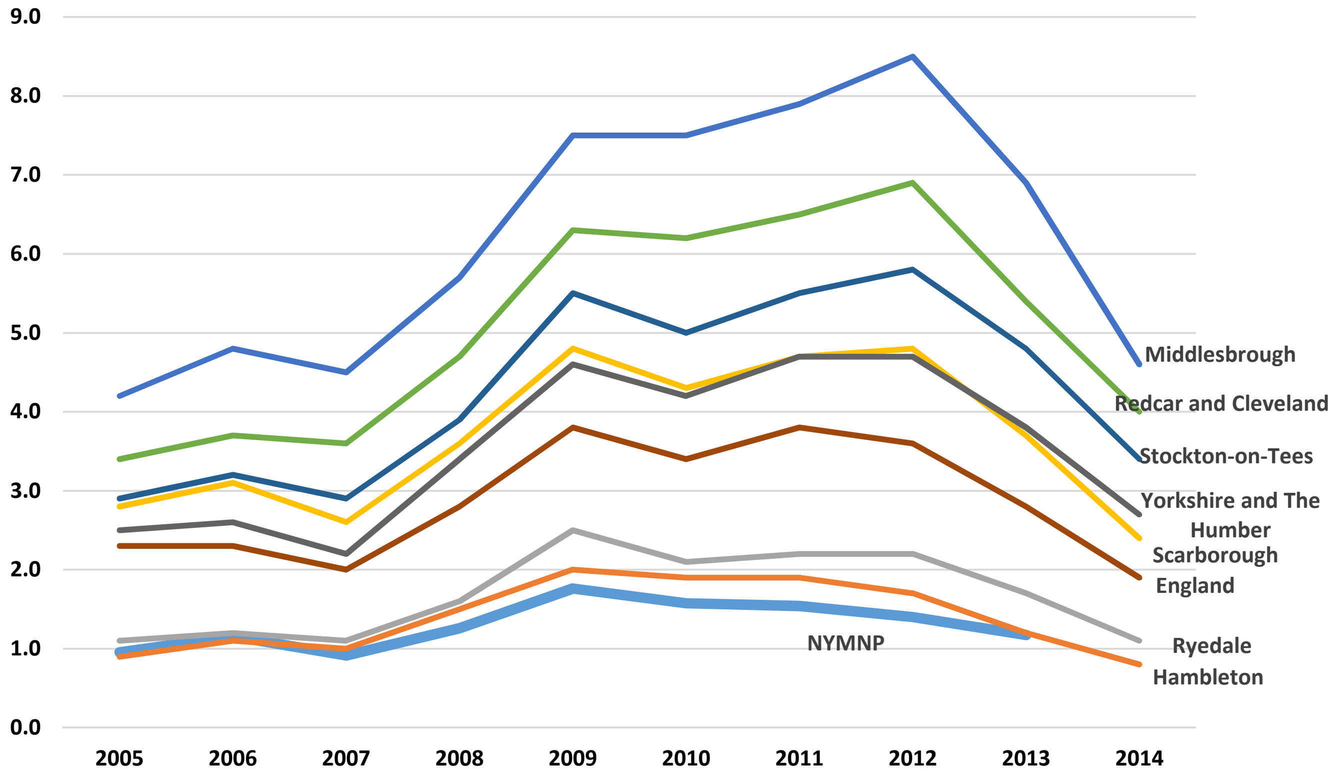
Figure 5.1 below shows claimant unemployment rates (i.e. those people out of work and claiming job seekers allowance - JSA) between 2005 and 2014. In each year the data relates to December. Note that the international labour organisation (ILO) measure of unemployment, includes all those out of work and actively seeking employment – but not necessarily claiming JSA, can be up to 50-100% higher.

The figures show that unemployment was increasing leading up to the recession in 2009 and the subsequent weak/temporary recovery thereafter. In all Local Authorities, unemployment fell or remained stable between 2009 and 2011, thereafter differences emerge. The Local Authorities to the north of the Park showing increased rates of unemployment to 2012. The constituent Local Authorities of Hambleton and Ryedale, experienced below average unemployment rates throughout the period, which stood at around 1% in 2014. Scarborough had rather higher rates – but no greater than the region as a whole. Rates in the Park and its immediate surrounding area remained relatively stable at between 1% and 2% - although this may mask some seasonal or ‘hidden’ unemployment. As of December 2014, claimant unemployment in all Local Authorities was at or approaching pre-recession levels.

Given the importance of the visitor economy to the Park, there is some evidence of seasonality in the labour market; historical data suggests claimant unemployment was marginally higher in January/December than in June and August, but the effect is small. More pronounced effects are observed in Scarborough[48].

[48] Based on a review of data from January to August 2014 for the NYMNP and from January to December 2014 the constituent Local Authorities – source Claimant Count Statistics, Job Centre plus, Via NOMIS. Data are resident based proportions. Note NYMNP is derived from an unweighted average of ward level data.

Figure 5.1 Claimant Unemployment Rates (2005 -2014)



Source: Claimant Count Statistics, Job Centre plus, Via NOMIS. Data are resident based proportions. Note NYMNP is derived from an unweighted average of ward level data.

6. Future Prospects

Box 5	Key Messages – Future Prospects

- Whilst there are wider economic risks, the future prospects for the UK economy are positive with projections of strong economic growth of some 3% for 2015 and rates of over 2% to 2019, driven by private sector investment. Nationally, unemployment is expected to decrease slowly and employment increase slowly, alongside increases in average wages and salaries.
- Within NYMNP prospects may be a little brighter than for the rest of the UK, given the skills levels of the resident population and with the park somewhat insulated from some of the wider economic challenges.
- Local policy aspirations envisage 'organic' growth in the Parks economy through more visitors, staying longer and participating in more recreational activities; a strengthened and diversified agricultural sector (including timber); improving broadband connectivity and improving opportunities for residents to live and work in the park, through allocating additional employment land, where this is appropriate with the aims of the Park.
- New development related to the approved offshore wind farm at Dogger Bank could provide some additional demand for employment space at Whitby Business Park, for which an area action plan has now been adopted, alongside an expansion at the Governments Food and Environment Research Agency (FERA) located in Ryedale, providing potential direct employment opportunities for Park residents and indirect opportunities for existing businesses.
- The most recent economic forecasts suggest employment growth of some 7,200 jobs may be expected between 2012 and 2020 in Ryedale, Hambleton and Scarborough.
- The area as a whole faces both a decline in working age populations and an increase in retired population, which is also likely to be reflected in the Park. In the long term the balance between retirees and working age people is expected to be particularly acute in Hambleton and Ryedale,

6.1 National Prospects

Economic Growth (GDP)

Looking forward, Table 6.1 sets out OBRs central forecast for the UK. 2013 is outturn data, whilst 2014 to 2019 are forecast data (although published in December 2014). The overall figures for 2013 are 1.7%, reflecting improving GDP data towards the end of 2013. They expect this trend to continue with stronger growth in 2014 of 3.0, weakening slightly thereafter but still a relatively strong rate, with 2.4% in 2015 and remaining above 2% to 2019.

Various components of GDP growth are also shown, for context. The forecast indicates growth in household consumption (spending) of over 2% year on year, but the main driver of growth is expected to be business and private investment. Fixed government investment decreased in 2013 but is expected to increase by between 1 and 3% per year to 2019. General government consumption is expected to increase in 2014 but decrease steadily from 2015 onwards, reflecting a recovering labour market (discussed later).

Table 6.1 OBR Central Forecast for the UK Economy – 2014-2019

	Outturn	Forecast					
	2013	2014	2015	2016	2017	2018	2019
Gross domestic product (GDP)	1.7	3.0	2.4	2.2	2.4	2.3	2.3
Household consumption	1.6	2.3	2.8	2.2	2.4	2.3	2.4
Fixed investment (Business, government & private)	3.2	8.1	8.4	5.9	5.6	5.2	4.8
General government consumption	0.7	1.1	-0.4	-0.8	-0.9	-0.3	00

Source Office for Budget Responsibility, http://cdn.budgetresponsibility.independent.gov.uk/December_2014_EFO-web513.pdf All figures are percentage change on the previous year, unless stated. The forecast is December 2014.

Labour Market

Table 6.2 below provides a summary of the labour market components of the GDP forecast above. All figures are percentage changes on the previous year, unless stated. Again, 2013 is based on actual data; thereafter it is forecasted. Whilst it suggests reasonable recoveries in wages and salaries, growing by 3% in 2013, average earnings, whilst rising do so at a slower rate until 2015. Employment growth also remains relatively sluggish after 2015. In addition, whilst decreasing to 2015, claimant unemployment is expected to stabilise. Overall the situation is improving but challenges remain.

Table 6.2 OBR Forecast of UK Labour Market 2014- 2019

	Outturn	Forecast					
	2013	2014	2015	2016	2017	2018	2019
Employment (millions)	30.0	30.7	31.2	31.4	31.5	31.6	31.7
Wages and salaries	3.0	3.3	3.6	3.8	4.3	4.3	4.2
Average earnings[1]	1.8	1.8	2.0	3.1	3.9	3.9	3.8
ILO unemployment (% rate)	7.6	6.2	5.4	5.4	5.1	4.9	4.8
Claimant count (millions)	1.42	1.04	0.84	0.83	0.84	0.85	0.86

Source Office for Budget Responsibility, http://cdn.budgetresponsibility.independent.gov.uk/December_2014_EFO-web513.pdf Data taken from table 3.6 'Detailed summary of forecast'. All figures are percentage change on the previous year, unless stated. The forecast is December 2014.
Notes:
1 Wages and salaries divided by employees

6.2 Local Prospects

Local Policy Aspirations

North York Moors National Park - Management Plan (2012)

The Park Management Plan sets out a series of actions and polices aimed at supporting the sustainable development of the Park's important economic sectors over the next 15 years, to 2027. In relation to tourism and the visitor economy, the aim is to encourage more people to visit the Park, increase the number employed in activities related to it and support a local visitor economy that is less seasonal, whilst minimising user conflicts. In order to do this the Park will be promoted and awareness of its qualities and facilities raised.

The Park's Management Plan indicates that Visit England's Strategic Framework for Tourism sets out a 'headline' ambition' of some 3% in the value of tourism per year. This would equate to some 11.9 million visitor days and 7.5 million visitors by 2015, based on 2010 levels. The Park estimates that this may equate to some £65 million to the economy; or some 1,200 additional jobs. This would equate to over a million additional long/short walks, some 600,000 visitors to the beach and a similar number of additional visits to a local country pub. Given the economic effects associated with this additional activity, the Park Authority proposes to 'support and encourage' this level of growth, which it considers not inconsistent with protecting communities and the special qualities of the Park, provided the increases can be carefully promoted and managed. The focus should be on wise growth (i.e. increasing the value of visitors and visitor days).[49] Further policies related to the tourism sector are as follows:

- Visitor spend will have increased (policy B1), driven by a greater proportion of overnight visitors (B3) throughout the year (B2) and by higher quality, more varied facilities (B5). Opportunities for a range of recreational activities around existing 'hubs' (U2) will be encouraged;

[49] Source: North York Moors National Park Management Plan, June 2012. Page 52.

- Maintain the rights of way network and open access areas (U2) whilst widening opportunities for people to enjoy the Park (U3) and promoting the Park through a wider variety of media (U4) whilst minimising conflicts between user groups and conserving the Park (U5 and U6) and being mindful of the environment and resource efficiency (B5);
- Improving access to recreational activities for local people and engaging them in local access decisions and management (U8); and
- Opportunities to access the Park without a car (U9).

In terms of farming and agriculture, future prospects for the Parks farms could be supported by an increase in the number of Moorland sheep, which could be increased by some 6,000; increased output of livestock and milking, crop and grass output and better use of crop rotations.[50] In 15 years the Park authority aims for an agriculture sector that has increased food production, is more resilient through increased production and profitability of farms, makes greater use of technology (B6) and has a larger market for locally grown food (B9); has greater engagement in environmental stewardship schemes (B7); and promotes techniques such as dry stone walling (B11). Similarly the Park Authority will seek to support the use of local and recycled timber in sustainable construction (B12) and as wood fuel (B13). The Park's Management Plan aims to support Park business, including by allocated additional employment land where appropriate and where activities complement National Park purposes (policy B20), to support Park business to create employment and training opportunities (B21 and B23) to diversity the business base and create more opportunities to live and work in the Park, partly through improving broadband services (B22) building on the high rates of self-employment and through encouraging local food production and sale (B24).[51]

North York Moors National Park Authority – Local Development Framework, Core Strategy and Development Policies (2008)

Drawing on public consultation undertaken during its development, the Local Development Framework is organised to meet five main challenges, all of which relate in some way to the Park's economy and to the nature and likelihood of future economic growth. The five challenges are:

- **Protecting, enhancing and managing the natural environment**, including through promoting prudent use of natural resources and assisting in adaptation to the effects of climate change. Any new development must be at a scale or level of activity that doesn't have unacceptable impacts on the landscape, or the tranquillity of the Park;
- **Protecting and enhancing cultural and historic assets;** including through high quality design of new development;
- **Supporting the rural economy;** including supporting tourism and recreation through ensuring that development contributes to the local economy including through the provision of employment and training opportunities. The LDF aims to:
  - Support the diversification of the economy, though increased jobs in office, industrial creative and home based enterprises and though supporting farm diversification so that average earnings rise closer to regional averages.
  - Tourism is expected to remain important, through improvements to the quality of the offer, supporting more stable visitor numbers throughout the year, whilst balancing the environmental impact.

[50] The North York National Park Management Plan 2012, Page 68.
[51] Source: North York Moors National Park Management Plan, June 2012.

- New employment development should be focused at Helmsley and Whitby Business Park and local villages although these should be focussed on the re-use or expansion of existing premises, unless no alternative exists. Developments for employment and training are encouraged to be located in Helmsley or the larger villages, and the re-use or expansion of existing buildings. In the open countryside the reuse of existing buildings for employment or training is permitted, provided it doesn't require major alternation and space/storage and access is sufficient. Polices seek to retain existing employment, tourism and recreation sites and to encourage farm diversification and opportunities for tourism and recreation opportunities, where these do not adversely affect the special qualities of the Park.
- A mix of housing tenures will be sought to maintain the viability of existing communities, focussed on Helmsley and the service villages, with half of all housing units' affordable housing on plots of more than 0.1ha or where 2 or more units are built. Occupancy of local housing is focussed on those already residing and/or with family history in the Park. All new housing development is expected to be the result of windfalls, with the exception of that located in Helmsley. There are limited opportunities for new housing development and few new units are expected. Between 1991 and 2007 some 423 new units were built in the Park; and it is anticipated that some 26 units would be built per year, focussed on Helmsley and the service villages. Local occupancy conditions are applied to new build houses, to support local people obtain housing, this policy is anticipated to affect the market value for these properties, reducing them by some 15-20%.

- **Supporting healthy and sustainable communities;** through providing more affordable housing catering for local rather than external demand, helping retain young people in the Park and through the protection of key local services such as schools, healthcare and public transport.
- **Promoting accessibility and inclusion reducing the need to travel by car and enabling access to communications infrastructure**, partly through locating new services alongside existing, or where public transport access is good.

Key developments

Desktop research has identified further developments in the area, beyond the York Potash application. Proposals for a major wind farm development off Dogger Bank – some 80 miles off the Yorkshire Coast - were granted planning permission on 17 February 2015[52]. The investment is estimated at some £8 billion and may support up to 900 jobs and once developed may eventually generate up to 2.5% of the UK's electricity requirements[53].

An area action plan was adopted in November 2014 setting out the development strategy/policy for the Whitby Business Park to improve infrastructure, support new development and diversify employment opportunities in the Whitby area. The existing business park is around 23ha in size with some 40 occupants, collectively employing some 17% of the working age people in Whitby. The plan mentions potential opportunities related to the Dogger Bank proposals – given that Whitby is the closest operational port to the site. The action plan contains a target for 2,000 jobs to be accommodated there by 2026[54].

Scarborough has also been allocated funding under the extended Coastal Communities fund, plans include a £2.7 million investment in the Market Hall[55], whilst Redcar and Cleveland will receive a grant of £0.9 million or a catering

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[52] http://infrastructure.planningportal.gov.uk/wp-content/ipc/uploads/projects/EN010021/3.%20Post%20Decision%20Information/Decision/Notice%20of%20the%20Decision%20by%20the%20Secretary%20of%20State%20(Reg%2024).pdf

[53] http://www.theguardian.com/environment/2015/feb/17/worlds-biggest-offshore-windfarm-approved-for-yorkshire-coast

[54] Source: North York Moors National Park http://www.northyorkmoors.org.uk/planning/framework/whitby-business-park-area-action-plan/ADOPTED-PLAN.pdf

[55] http://www.bbc.co.uk/news/uk-england-york-north-yorkshire-30978667

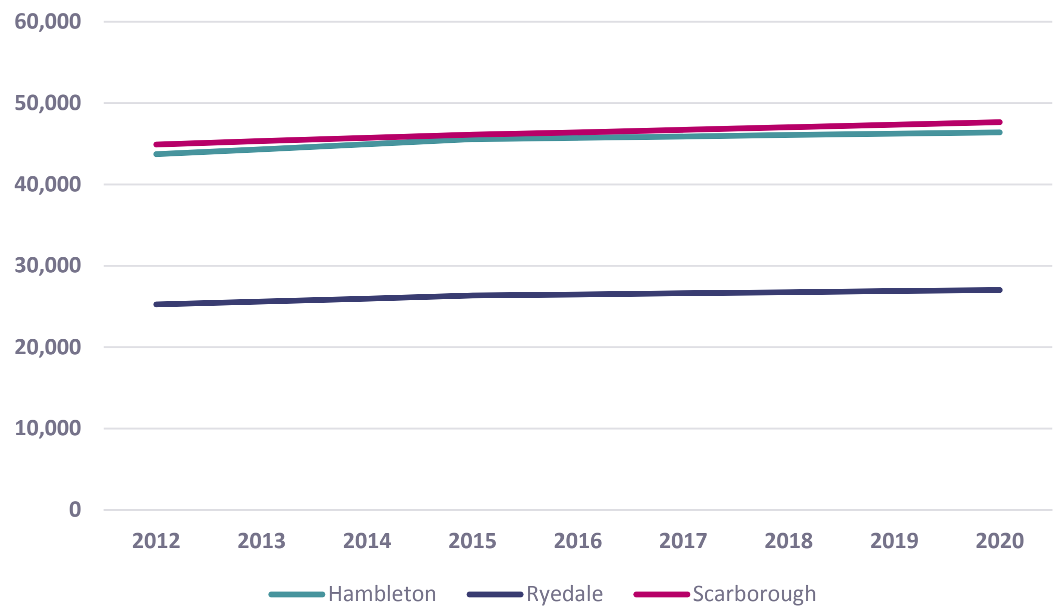
college[56]. Plans for the development of Derwent Park to accommodate some 1,200 new homes, an 8ha technology park, 8 ha employment land a 6ha of retail development as well as an expansion of the site of the Governments Food and Environment Research Agency (FERA), north of York are contained in the Ryedale Development Grant 'major projects' summary[57].

Employment Forecasts

This section presents publicly available forecasts of employment for Ryedale, Hambleton and Scarborough. The data is taken from the Regional Economic Model (REM) prepared by Experian and provided to AMEC Foster Wheeler via the York, North Yorkshire and East Riding Local Enterprise Partnership (LEP). There are no employment or GVA forecasts for the Park itself, however this data provides the most recent employment forecasts which have been used in several policy documents and have been prepared using a consistent methodology, base year and period of assessment.

Figure 6.1 shows overall trends, whilst Table 6.3 presents the underlying data. Overall it suggests employment – measured in this case by workforce jobs, which includes the self-employed and armed forces - is expected to continue to grow locally between 2012-2020, but at a relatively slow rate. Employment is expected to increase by a little over 4% in Ryedale and Hambleton but at a slower rate in Scarborough. This equates to a total of 4,100 additional jobs are expected across the three Local Authorities between 2012 and 2015. The period between 2015-2020, whilst more uncertain suggests employment growth will continue but at a slower rate than experienced up to 2015. In this period a further 3,100 jobs are expected across the three Local Authorities. Overall therefore, some 7,200 additional jobs are expected between 2012 and 2020. Data for Redcar and Cleveland is not available.

Figure 6.1 Forecast percentage rate of change in employees – 2012-2020



Source: Regional Economic Model (REM) prepared by Experian and provided to AMEC Foster Wheeler via the York, North Yorkshire and East Riding Local Enterprise Partnership (LEP). Note that data was provided for the years 2012, 2015 and 2020, the intervening years have been added, assuming linear year on year changes in employment.

[56] https://www.gov.uk/government/news/record-funding-for-36-seaside-towns-that-will-kick-start-jobs-and-apprenticeships
[57] http://democracy.ryedale.gov.uk/documents/s14064/3%20Part%20B%20-%20HEI%20-%20Ryedale%20Development%20Fund%20Annex%20A%20ON%20A3%20PAPER.pdf

Table 6.3 Employment Forecasts – 2012 to 2020 (Workforce Jobs, 000's).

	2012	2015	2020	2012-2015	%	2015-2020	%
Hambleton	43.71	45.55	46.40	1.8	4.2	0.8	1.9
Ryedale	25.24	26.35	27.03	1.1	4.4	0.7	2.6
Scarborough	44.92	46.10	47.64	1.2	2.6	1.5	3.3
North Yorkshire & East Riding LEP	535.44	558.90	577.02	23.5	4.4	18.1	3.2
United Kingdom	31,618.50	33,597.75	35,236.92	1,979	6.3	1,639	4.9

Source: Regional Economic Model (REM) prepared by Experian and provided to AMEC Foster Wheeler via the York, North Yorkshire and East Riding Local Enterprise Partnership (LEP).

The base year for these forecasts is 2012, however, more recent data is now publicly available via NOMIS Labour Market Profiles[58], these suggests that between October 2013 and September 2014, there were 27,500 people in employment in Ryedale[59]; some 40,900 in Hambleton[60] and some 44,700 in Scarborough[61]. This suggests that employment growth has been somewhat better than expected in Ryedale, indeed current numbers are similar to that expected by 2020, but somewhat lower than expected in Scarborough and Hambleton. Whilst this shows the uncertainties involved in forecasting in general, particularly for small areas – the overall actual number as of September 2014 is similar - around 4% lower - than expected by 2015 suggesting that the overall trends within the forecasts are reasonably accurate.

Table 6.4 Reality Checking Employment Forecasts

	2013-14 (Actual)	2015 (Forecast)	Difference (000s)	Difference (%)
Hambleton	40.9	45.55	-4.65	-10
Ryedale	27.5	26.35	1.15	4
Scarborough	44.7	46.1	-1.4	-3
Overall	113.1	118	-4.9	-4

Source: Amec, based on Regional Economic Model (REM) prepared by Experian and provided to AMEC Foster Wheeler via the York, North Yorkshire and East Riding Local Enterprise Partnership (LEP) and Labour Market Profiles from Annual Population Survey (2013-2014).

On this basis, it is difficult to estimate the number which could result in the Park with any accuracy, but in very broad terms and to illustrate scale, using 2012 BRES employee data, so as to use the same base year as the forecasts, suggests that the employees resident within the Park and a small number of adjoining villages/settlements account for between 12% and 14% of all employees in Hambleton, Scarborough and Ryedale, depending on which source is used. This implies up to some 1,000 jobs in the Park and adjoining villages to 2020.

This assumes that a) the forecast employment growth in the three Local Authorities transpires and b) employment growth in the Park is in line with the average of the three surrounding areas, which is by no means certain. The balance of likelihood is that the number inside the Parks would be less than this given the small population decline and relatively slow employment growth inside the park noted above. Any new employment growth in the villages

[58] These are not used for the employment section as more detailed information including local and sector information is available from BRES.
[59] https://www.nomisweb.co.uk/reports/lmp/la/1946157117/report.aspx#tabempunemp
[60] https://www.nomisweb.co.uk/reports/lmp/la/1946157114/report.aspx
[61] https://www.nomisweb.co.uk/reports/lmp/la/1946157118/report.aspx

immediately surrounding the park would be available to park residents, however and given the importance of self-employment indie the Park it is possible that additional jobs will be created, often through people working from their own homes.

Table 6.5 Potential NYMNP employment growth to 2020 (illustrative)

	Employment (BRES)	Employment (Forecasts)
2012 employment numbers		
NYMNP (BRES)	***14,324***	~
NYMNP (Revised)*	***13,488***	~
Hambleton	38,071	43,706
Ryedale	21,975	25,237
Scarborough	41,402	44,916
Total Employment in the three Local Authorities	101,448	113,859
Proportion of total employees comprised by NYMNP and immediate villages (Based on BRES)	14%	13%
Proportion of total employees comprised by NYMNP and immediate villages (Based on Employment Forecasts)	13%	12%
Forecast jobs		
Total additional jobs forecast to 2020 in three LA's	7,205	
Implied NYMNP jobs to 2020 (i.e. 12%-14% of 101,448 or 113,859)	1,000	850

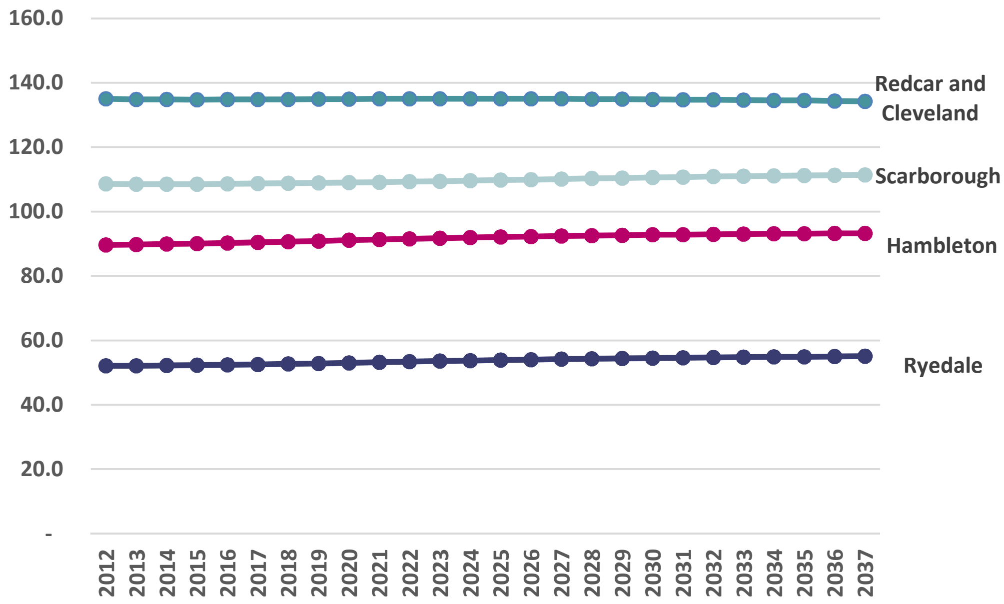
Source: BRES Employment data, 2012 and Regional Economic Model (REM) prepared by Experian and provided to AMEC Foster Wheeler via the York, North Yorkshire and East Riding Local Enterprise Partnership (LEP). Note the implied NYNMNP Jobs figures have been rounded. *Around 1,000 additional people in employment were recorded in 'Broughton and Grerenhow' ward from 2012, as noted in chapter four the numbers are likely to be overstated. On this basis, the calculations in the table have been carried out using the unchanged numbers shown in the BRES data and a revised version, which uses data from Broughton and Greenhow wards for 2011 which are more consistent with the data from previous years.

Population Forecasts

Figure 6.2 provides population forecasts for the four constituent Local Authorities, whilst not exactly the same as the Park itself, overall trends and changes in the age composition of these areas provides a broad illustration of what is likely to be observed inside the Park itself.

Redcar and Cleveland has the largest population as of 2012, of some 135,000 persons of all ages. This was expected to decrease very gradually, to 134,300 (-0.5%) in total by 2037. The populations of the remaining three constituent Authorities are expected to increase; by some 3,500 (4%) to 93,200 in Hambleton; by some 3,000 residents in Ryedale (6%) bringing the total to 55,100. In Scarborough a further 2,800 people are expected, an increase of 4% to 111,400. Overall between 2012 and 2037 an additional 8,600 people are expected to reside in the four Constituent Local Authorities, an average increase of a little over 2%. In contrast, the population of Yorkshire and Humberside is expected to increase at a faster rate, some 11%, to some 5,900,000 by 2037.

Figure 6.2 Population Forecasts by Local Authority 2010 – 2037 (Thousands)



Source: ONS Sub National Population Projections (2010-2035) Source: ONS http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-246448

Whilst the overall numbers are expected to change little there are demographic changes which may affect the economy. Figure 6.3 provides further detail of these by broad age group - the associated data is shown below the figure in Table 6.6. The data is summarised into three broad groups, for illustrative purposes: 'Children and young people' (those aged between 0 and 14); 'working age population' (those aged between 15 and 59) and 'Retirees' aged 65 and over.

Overall, whilst the age brackets are not precise, it suggests the working age population is anticipated to decrease from some 238,000 in 2012 to some 207,000 in 2037, a decrease of around 13%. This would, however, be offset overtime by changes to the statutory retirement age and expectation that people will be working longer. For instance, the default retirement age (DRA) was phased out in 2011[62] and a planned increase in the state pension age was brought forward from 2026 to 2020 in the 2011 Budget[63].

The decrease is strongest in Hambleton at 15% but the proportional decreases across all four constituent Local Authorities are similar (11% to 15%). The numbers of young people aged under 15, are also expected to decrease, but at a slower rate - with the exception of Ryedale where the numbers remain stable - by an overall rate of some 5% in the three Constituent Local Authorities to 2037. A greater decrease is expected in Hambleton (-7%) similar to the estimate for Redcar and Cleveland (-6%).

In contrast the number of people aged 65 or over is expected to increase by around 50%, from some 87,000 in 2012 to some 130,000 by 2037. The highest increase are expected in Hambleton (62%) and Ryedale (52%). For both Hambleton and Ryedale the current forecast is that the numbers of those at or approaching retirement age will be close to the working age population – suggesting that sustained economic growth over the longer term would be challenging without greater number of older people working longer, in-migration, in-commuting or increases in economic activity rates amongst the working age population.

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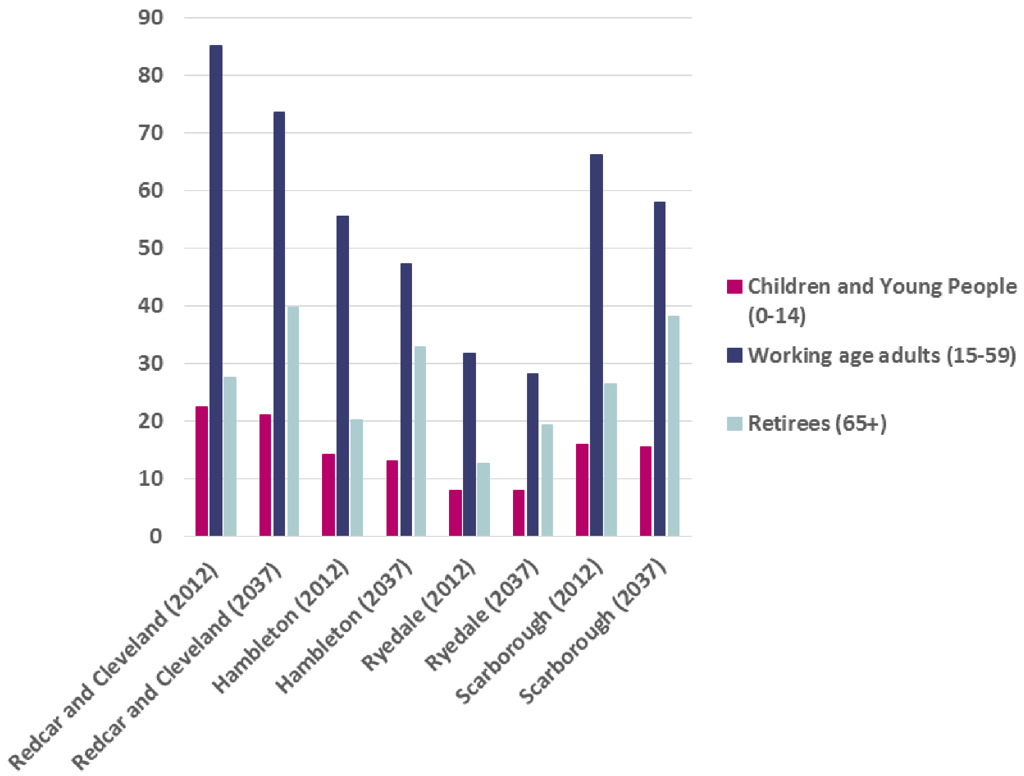
62 https://www.gov.uk/government/news/default-retirement-age-to-end-this-year
63 https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/247483/0836.pdf

Figure 6.3 Population by age band 2012 and 2037 (thousands)



Source: Table 2 ONS Sub National Population Projections (2012-2037) by Local Authority. Source: ONS
http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-335242

Table 6.6 Population by age band 2012 and 2037 (thousands)

	Children and Young People (0-14)	Working age adults (15-59)	Retirees (65+)
Redcar and Cleveland (2012)	22.4	85.1	27.5
Redcar and Cleveland (2037)	21.1	73.5	39.6
% change Redcar and Cleveland	*-6*	*-14*	*44*
Hambleton (2012)	14.1	55.4	20.2
Hambleton (2037)	13.1	47.3	32.8
% change Hambleton	*-7*	*-15*	*62*
Ryedale (2012)	7.8	31.7	12.6
Ryedale (2037)	7.8	28.1	19.2
% change Ryedale	*0*	*-11*	*52*
Scarborough (2012)	15.9	66.1	26.4
Scarborough (2037)	15.4	57.8	38.2
% change Scarborough	*-3*	*-13*	*45*
Overall (2012)	***60.20***	***238.30***	***86.70***
Overall (2037)	***57.40***	***206.70***	***129.80***
% change	***-5***	***-13***	***50***

Source: Table 2 ONS Sub National Population Projections (2012-2037) by Local Authority. Source: ONS
http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-335242

7. Conclusions

7.1 Key Messages

- Around half of all employees in the Park and adjoining villages work there. Scarborough is an important location of employment – some 16% work there. So too is Redcar and Cleveland (10%) and Ryedale (7%). Economic and employment growth in these locations are therefore important for the future employment opportunities of the Parks residents.
- The Park population declined slowly (by between -1 and -2% depending on the precise geography considered), a reflection of its population structure. This compares to a growing population in the majority of the surrounding areas. Young people and those of working age form a smaller proportion of the Parks population in 2011 than in 2001, those over 65 form a higher proportion. Economic activity rates will became an increasingly important measure as over the next 20 years people are likely to retire later. At the same time the number of individual households increased, at a similar rate to the surrounding areas, reflecting more single person households.
- Employment in the Park and adjoining villages appears to have increased and although there is some uncertainty the rate was around 5% between 2003 and 2008 and somewhat less than 10% between 2009 and 2013. The numbers employed in the Park also grew over a similar time frame - by around 1% from 2001 to 2011 – although the latter figure may have been subdued by the recession. Retail, the visitor economy, health and social care and agriculture are particularly important sectors. Manufacturing and construction are also important, likely serving local and sub-regional markets. Self-employment is markedly higher in the park than in the surrounding area. Qualification levels are generally high. Employment forecasts for 2012 to 2020 predict modest but steady employment growth of some 7,200 additional jobs in three of the four constituent Local Authorities, between 2% and 3% growth. A relatively check of this data suggests different rates of growth within each, but the overall trend suggested in the forecasts appears broadly accurate. Assuming that employment with the Park grows at a similar rate suggests around 1,000 jobs may be expected to be taken up by employees residing in or in the immediate vicinity of the Park.
- Claimant unemployment in the park and villages has been low, increasingly marginally over the recession, but rates are now declining again. Unemployment in the wider areas is also declining as of December 2014.
- Dwelling numbers in the Park and adjoining villages grew by around 7% between 2001 and 2011; the number of additional households inside the Park also grew by 7%, although numbers of additional dwellings stood at around 35 per year for much of that time. House prices inside the Park are particularly expensive. Owner occupation is very high - the private rental sector is similar to the surrounding areas as a proportion of overall tenure. The cost and availability of accommodation is likely to form a barrier for the retention of young people and families.

7.2 The Park Today

The Park and Adjacent Villages

This section summarises the results using the data built up at ward level, this is likely to include some villages outside of the boundary but functionally part of the Parks economy and way of life; affected by and affecting socio-economic trends. The next section considers differences between this information and that derived from the National Park Census dataset which more accurately covers areas within the Park's administrative boundary.

The principal attraction of the North York Moors National Park is its peace, tranquillity and natural beauty. The Park Authority is charged with conserving this, whilst enabling public access and enjoyment and supporting the wellbeing of its communities. The nature of its economy, the economic activities accommodated within it, the function of its town and villages and the aspirations and outlook of its employers, employees and residents are likely to reflect this.

Its desirability as a place to live is reflected in the commuting patterns of the Park's resident employees, whilst based on 2011 data the overall trends are unlikely have changed substantially. Slightly less than half (44%) live and work within the Park, often very locally, with many running their own businesses as some 19% Park residents are self-employed. RAF Fylingdales and the Boulby Potash mine are large local sources of employment, but many residents commute further afield to work, predominantly east to Scarborough, north to Redcar and Cleveland and south to Ryedale, with over 1,000 residents commuting the relatively long distance to Middlesbrough. Whilst this is offset by a smaller number of people commuting in to the Park (a little over 5,000); the net results is that around 7,000 employees leave the Park to work each day. The vast majority likely to be using a private car, although there are reasonable rail connections within a relatively short drive of the Park itself.

The skill profile of Park residents is high; a greater proportion of Park residents are educated to degree level than the surrounding areas, greater proportions are employed in managerial and professional occupations and fewer in elementary occupations, with no or low level qualifications. The proportion employed in skilled trades is higher than several of the surrounding areas, at around 20% of all occupations in 2011. This suggests that of the Park's employed residents, the out commuters generally travel to higher paying jobs and that the jobs within the Park pay, on average lower wages. This is reinforced by the fact that resident earnings in Scarborough and Ryedale outstripped workplace earnings.

Claimant unemployment is generally very low and the rates of those claiming in the Park changing little through the recession. There is some, limited evidence of seasonal changes in unemployment, with claimant unemployment increasing in the winter months decreasing in the summer. This may, however, reflect more pronounced seasonal changes that take place in Scarborough, given that some 3,500 Park residents work there. Given the importance of the visitor economy and the degree of self-employment it is likely that many businesses survive through the winter, based on earnings made in the summer. The number of businesses per 10,000 population, the rate of new business start-ups and survival rates in the surrounding area have been generally good, particularly in Hambleton and Ryedale.

Unsurprisingly many of the Park's businesses and employment are tied to and derive their income from the landscape. Agriculture, forestry and fishing accounts for almost half (40%) of the Parks businesses; comprising dairy, crop; timber production/sawmills and grouse shooting. But the major economic sector is tourism and recreation, estimated to support some 4,000 full time equivalent jobs in the Park and up to 7,800 in the wider area. The figure for supported employment in the wider area would imply a composite multiplier of 1.95, suggesting, if accurate, that almost all consumer spending from Park visitors and business to business spending, (from hotels and restaurants for instance), would be contained within the wider area (presumably North Yorkshire or Yorkshire). Visitor numbers are seasonal and spare capacity exists in the Parks stock of accommodation, with walking on the moors and coastline, visits to pubs and cultural visitor attractions common activities. The importance of the sector is reflected in the employment structure of the Park. Using the latest figures, and including the self-employed, accommodation and food services employed over 3,000 people in the Park in 2013; alongside a further 1,800 in wholesale and retail and another 600 in arts entertainment and recreation. Employment in these and a range of other sectors, such as transportation and storage and 'other services' are also likely to be, in part, supported through visitor spending.

Employment growth data has been analysed in two phases and from two sources, reflecting changes in the way such data is made available. The two sources, broadly, comprise 'pre-recession' (2003-2008) and 'recession & post-recession' (2009-2013). It suggests overall that whilst data for small areas are prone to greater uncertainty and error, that the Park experienced healthy employment growth during both periods, at levels generally similar to or better than the surrounding areas and the national average. As above, some employment growth will have physically taken place, physically outside of the Park, but 'pre-recession' employment numbers are likely to have grown by some 600 jobs, a 5% increase to stand at some 11,500 in 2008, in contrast with marginal declines in employment numbers in a number of the surrounding areas. Employment growth was largely driven by increases in hotels and restaurants.

More recently, whilst claimant unemployment rates have changed little and year on year comparisons of this data may be unreliable, overall it appears that employment numbers have again grown between 2009 to 2013 – by somewhat less than 10%, to stand at just under 14,000 in 2013[64]. This increase having been driven by employment growth in accommodation and food services, education, manufacturing health and social work, real estate activities and professional, scientific and technical jobs, offsetting losses in construction, 'other services' and a small number in public administration.

Perhaps a key aspect of the economy is the nature of the Park's housing market. Owner occupation in the Park is high. Whilst the private rented sector, as a proportion of total dwellings is only marginally smaller than the surrounding areas, the social rented sector is small. Around 6% of the stock is second homes or holiday accommodation. Demographic data indicates an increase in those of retirement age, likely to be moving into the Park and its environs. Housing affordability is a key issue within the Park, houses are approximately eight times average household income, making home ownership unaffordable for many local families. Some detached properties in the open countryside are around 10 times average household income. The data indicates that there are over 20,000 dwellings in the Park and surrounding villages and the number has grown in the last decade; this is likely to capture housing completions in the vicinity of the Park, but physically outside the boundary, such as at Great Ayton, Helmsley and Osmotherley.

In summary, the Park is largely unchanged in character and function over the past decade. The total population is relatively stable, losing young people and gaining older people, the result of some in migration and reflecting an ageing population. Self-employment and economic activity rates are high and stable. Housing numbers have increased slowly, but it is likely that the actual number of units constructed in the Park itself may be substantially less than implied, with many being constructed near to but physically outside of the Park, given planning policy. The number of workplaces has grown, but the numbers are low and as above, some will have been constructed outside the boundary of the Park itself. Economic activity rates are relatively high and have increased; likely to reflect the changes in the demographic composition of the Park's population, with fewer working age people residing in the Park in 2011 than in 2001. Employment has grown at a reasonably healthy rate, although there remains some uncertainty over precisely how much.

Trends Within the Park Boundary and Their Implications

This section briefly considers the findings from chapter two which looks at data from the National Park dataset from ONS that more accurately adheres to the National Park *administrative* boundaries. The key differences between this data and other sources which includes some surrounding villages which are *functionally* part of the Park are drawn out below:

- **Population and demography:** In 2011 the resident population of the Park was some 23,380 a decline of just over 2% since 2001. The population of the Park and the communities immediately around it was much higher at some 46,600 – although this too had declined by a little over 1% since 2001. The broad characteristics of both data sets suggest an ageing population. Some 35% of the population of the Park were over 60 in 2011, a slightly higher proportion than the surrounding areas.
- **Housing:** The numbers of *dwellings* in the Park and immediate surrounding grew by some 1,500 (or 7%) between 2001 and 2011. The same data is not available for the Park alone, but the number of individual *households* also increased by 7% in the same timeframe (some 850 households) to a total of 12,500 households within the Park in 2011. Data from the Park's LDF, noted above, indicates some 423 new units were built from 1991 and 2007; less than 30 per year. It suggests faster rates of house-building in the immediate environs of the Park but outside of the Boundary. This would be consistent

[64] Note this is the 'revised' figure after an apparent error was removed, the unchanged number was some 1,000 higher.

with local planning policy and also reflect the local occupancy conditions applied to new build housing inside the Park.

- **Employment:** Employment numbers appears to have grown overall during the period in question and the data suggests that employment rates were faster in the areas immediately surrounding the Park than within it – although this is uncertain.
  - National Park Census data indicates that within the Park itself, employment stood at some 11,500 in 2011 having increased only marginally by around 1% from 2001 (which equates to a little over 100 jobs).
  - In 2013 data on the Park and the immediate communities around it suggests there were around 13,900 employees in this area. On this measure the numbers had increased by somewhat less than 10% since 2009 (earlier data in the same format is not available).
  - The Parks employment structure appears largely unchanged. There are some differences between the sectors in the data sets, but the role of the visitor economy, agriculture, retail and the public sector, alongside that of heath/social care is clear.
- **Socio-economic characteristics:** Whilst there are subtle differences, the remaining trends that have been analysed appear broadly consistent between the ward data that includes certain villages around the park and the Census data that does not. Self-employment remains markedly higher compared to the Local Authorities surrounding/adjoining the Park; the population generally holds higher qualifications; unemployment is low; owner occupation is high; social renting is uncommon and the population structure is somewhat older.

7.3 Future Prospects

Nationally economic growth in the period under examination has been very mixed. Economic performance continued to disappoint after the 2009 recession, with a second recession in 2011, however the data suggests improvements through 2013 with expectations of strong national growth in 2014 and thereafter. Unemployment remained above the pre-recession levels for much of this time, but is now decreasing quickly; at or approach pre-recession levels at December 2014. Nationally, employment growth is expected to be relatively slow but with unemployment rates decreasing and average earnings rising. Economic growth forecasted to be c.3% by 2014 and above 2% to 2019.

Clearly this wider context affects local prospects, which appear to be improving. This is reflected in the employment forecasts which suggest modest but steady increases in job numbers, note that these were made in 2012 – all forecasts are prone to significant uncertainty and for this reason tend to be updated quite regularly. A reality check using more recent data suggests overall trends are broadly accurate.

Consistent with the remit of the Park, policies related to supporting the rural Park economy focus largely on 'organic growth'; supporting tourism by raising awareness, encouraging increased visitor days whilst reducing seasonal variation and encouraging farm diversification. Key developments in the area include opportunities for further development at Whitby Business Park, likely to result in new employment opportunities for Park residents and it is unlikely that the employment forecasts have taken account of the potential for opportunities from Dogger Bank, or the expansion at the FERA site in Ryedale. The latest employment forecasts expect some 7,200 additional jobs to 2020 in three of the four constituent Local Authorities - Scarborough, Ryedale and Hambleton. Data for Redcar and Cleveland is not available, but it would be unlikely for employment forecasts here to be substantially different in terms the overall outlook for employment growth. Notwithstanding one ward within Redcar and Cleveland (Westworth, located to the south of Guisborough), these 7,200 additional jobs would include those expected to be located in the Park. In broad terms to illustrate scale, up to some 1,000 jobs may be expected to be taken up by those in the Park and adjoining villages to 2020.

Nationally the population is ageing. The long term expectation for the four Consistent Local Authorities is that their combined population levels will increase slowly, by around 8,500 people by 2037, growth of some 2% overall, declining somewhat in Redcar and Cleveland, increasing by around 3% in the three others. Older residents aged 65 and over are expected to comprise a higher proportion of the resident population, some 130,000 people – an increase of over 50% from 2012.

In the Park itself, in 2011, the working age population comprised around 49% of the population compared to some 54% in 2001 (based on those aged 15-59). Those aged 14 and under comprised some 17% compared to 19% in 2001, whilst those aged 60 and over have increased to 35% compared to 27% in 2001. Over the longer term, if this trend continues, given the constraint on house building alongside the cost of housing, the relatively high economic activity rates and low unemployment, employees may well have to work longer or commute into the Park to fill local jobs, if existing employment numbers are to be maintained.

In general the future prospects of those residents within the Park is expected to be similar or relatively better than those in surrounding areas and in the UK as a whole, given qualifications levels and the relatively low unemployment. But numbers of working age people have declined and the Park has lost young people. The success (or failure) of the Management Strategy and in particular success of the tourism elements of that strategy will have a significant impact on the future prospects for residents within the Park, their employment prospects and their incomes.

Appendix A
Notes on Data

Table A.1 Wards largely or completely inside NP Boundary

Ryedale District	Scarborough Borough	Hambleton District Council	Redcar and Cleveland
Ampleforth Cropton Dales Helmsley Thornton Dale	Danby Derwent Valley Esk Valley Fylingdales Mulgrave Scalby, Hackness and Staintondade	Broughton and Greenhow Great Ayton Osmotherley Swainby	Westworth

Note: CAS 2011 Wards. There are discrepancies between the NP boundary and the various ward boundaries. The two do not match exactly.
Ordnance Survey Landranger Maps, Ward Maps available from NOMIS www.nomisweb.co.uk and the 'Business in the North York Moors National Park Area Map shown within the report above have been used to identify the relevant wards.
Note the Hambelton wards of Whitestoncliffe and White Horse have not been included. The former includes parts of Thirsk which is considered not to be representative of the nature of the Parks economy and the latter contains only a small part of the Park within the ward.