

Drivers Jonas Deloitte.

York Economic and Retail Analysis Literature Review

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1 Literature Review

This literature review has been compiled as part of the baseline research to support the production of the York Economic and Retail Vision 2012.

Report	Source	Date	Scope of Report	Key Findings	Issues to Consider
Economic Based Documents					
York Economic Strategy	City of York Council	2011-2015	Details the following: <ul style="list-style-type: none"> • The economic vision; • a number of performance indicators; • an analysis of the city's strengths, weaknesses, opportunities and threats; • 5 ambitions to achieve the vision; • Deliverables and performance indicators 	The economic vision is: " <i>for the City of York to become an international and enterprising city and in time, the most competitive city of its size, not only in the UK but globally, leading to increased growth in the overall economy and jobs.</i> "	This document paves the way for the establishment of the next economic vision. Establishing which elements have been achieved, which elements are still relevant and where ambitions need to be redefined, is a key part of the Economic and Retail Vision 2012. Therefore the key issues to consider are: <ul style="list-style-type: none"> • Is the ambition still relevant? • How have we moved on since this strategy was written? • What has been achieved? • Which areas require further work?
York Economic Strategy Delivery Plan	City of York Council	2011-2015	A strategic delivery plan for each of the 5 ambitions detailed within the Economic Strategy 2011-2015	Details the steps that are currently underway to pursue economic development in York including lead partners and timescales for the individual action points.	A number of the actions within the delivery plan present opportunities for further development within the Economic and Retail Vision. Those of particular importance relate to the physical development opportunities and the work around recognising, defining and leveraging the sector strengths. These areas have been highlighted and will be fed through into the final Vision for York.
York New City Beautiful-	Alan Simpson and others	2010	An Economic Vision for York with a strong emphasis on urban design. This document aims to direct York towards a 'City	A section is included on Castle Piccadilly, where development is recommended to take place in a phased and planned manner with York Central,	The analysis of the city's key development sites should be considered within the Strategy as they present useful analysis with regard to urban design. However, they present

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Towards an Economic Vision			Beautiful' by enhancing the city's natural assets e.g City Walls, the Rivers and the Parks. The document also analyses the city's key development sites.	but that the priority must be to address the City Centre first and to provide around 25,000 sq m of high quality retail space.	little information on sector employment opportunities or analysis of the barriers to development.
European Comparator City Report: York	Centre for Cities	2012	This report compares the economy of York with a number of selected comparator European cities to inform York's Economic Strategy 2011-2015. The report highlights York's key economic strengths including its highly skilled workforce and its growing population.	York's private sector performs well. It is in the top 10 for the number of firms with 1-250 employees and in the top 15 for the volume of firms with over 250 employees. This shows that the market environment is competitive with a mix of both large and small firms. However, York suffers from low levels of productivity per capita and the number of new businesses entering the market as a proportion of existing businesses is low.	A number of the key conclusions from this report can be carried forward into the economic evidence base for the Economic and Retail Vision. The concluding recommendation is: <i>"The challenge for York is to improve its economy without eroding the city as a place to live. It needs to be realistic about its ability to change the fundamentals of the economy but a focus on private sector involvement is the key. This could be achieved by aiming to facilitate business start-ups and self-employment, which would ease the unemployment issue and provide York with greater business dynamism."</i>
Cities Outlook	Centre for Cities	2012	Cities Outlook 2012 highlights some of the challenges confronting cities today: economic development, unemployment and changing demographics but most importantly the need to stimulate private sector growth.	The report stipulates that the economic outlook for 2012 has never been more challenging and achieving growth in our great cities is the only way for the UK to avoid a double dip recession, re-balance the economy and enable the UK to compete effectively in the global market. The priority for 2012 is to get the UK back on the path to private sector growth and job creation. Cities will have a vital role to play. York is shown to be resilient with low Job Seekers Allowance rate change and low levels of youth unemployment.	York has performed well over the last decade across a number of indicators, including unemployment and population changes. The challenge for the next decade and beyond is how to build on this strong position to deliver sustainable economic growth for the region.

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The Economic Contribution of the Visitor Economy	Deloitte	2010	A promotional brochure by Visit York which details that they are already one of the most successful tourism marketing organisations in Britain, with a private sector membership of over 700 and is supported with public funding from the City of York Council and the government's Regional Growth Fund. The document details their achievements to date and their plan for the coming year.	<p>York is a world class heritage city and tourism is a major economic driver, currently drawing 7.1 million visitors each year and contributing £443 million to the economy, helping to create over 23,000 jobs. The vision is to deliver long-term and sustainable growth in the value of the visitor economy for the benefit of visitors, businesses and residents by:</p> <ul style="list-style-type: none"> • Building on York's distinctiveness • Enhancing the quality of the visitor experience • Promoting York as a world-class visitor 	The visitor economy in York is clearly very successful. The Economic and Retail Vision will need to consider how to consider how to further leverage the success of this sector, whilst also seeking for improvements in quality to ensure this sector remains resilient.
York focus Investing in Success	Drivers Jonas Deloitte	2010	This paper looks at how York is positioned in terms of growth as the country emerges from the recession, and reviews the project currently underway or in the wings, which might allow the city to improve its economic standing and lead growth in the Yorkshire region.	This report concludes that delivering infrastructure will be key to unlocking strategic development sites and the City of York Council has an important role in looking for new ways of working and attracting project finance. In addition, budgetary pressures at all levels will emphasise the importance of innovative financing routes. As the nature of project financing changes, we expect to see the need for a cocktail of funding mechanisms to deliver strategic regeneration projects.	The severity of the recession has meant that York, like all other cities in the UK, has had to adjust its aspirations for short and long-term economic growth. In the longer-term York is at an advantage over many other regional cities due to the extent of its assets – a highly skilled workforce, its distinctive quality of life, a leading university and established science park which all provide the foundations for York to achieve economic success with the right leadership.
Planning Based Documents					
Local Plan Visioning	City of York Council	2012	A clear overview to inform the discussions surrounding the emerging local plan including: the local strategic context for	York is in good shape, with a strongly performing modern and mixed economy. The city offers a superb quality of life to residents. It has an	York faces some significant challenges in the coming years including: providing jobs for its growing population; a constraint on the availability of land due to its geography;

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Pack			York; a spatial portrait considering the key issues facing York's future development; and key questions for consideration in the consultation workshops.	outstanding built and natural environment, with iconic world class heritage and a wide variety of cultural opportunities. A number of issues are highlighted and considered and this paper provides a useful context for the 'City Conversations' discussions.	reducing carbon emissions; a changing retail and leisure environment; traffic congestion; housing affordability and flooding.
LDF Supporting Information-Economic Growth	City of York Council	September 2011	<p>The report provides a summary of the approach the Core Strategy takes to employment provision. It considers the level of employment growth in York and the subsequent future employment land provision in the City.</p> <p>Two Employment Land Reviews have been commissioned by the City of York Council. These are key parts of the evidence base to support York's Local Development Framework.</p>	<p>There have been a variety of structural changes in York's economy over recent years with decline in manufacturing, and growth in financial services, tourism, science and research and development sectors. York appears relatively resilient to the current economic climate and well placed to emerge with a strong economy and to continue to contribute to national economic recovery.</p> <p>Employment forecasts suggest annual jobs growth level of approximately 1,000 jobs per year. The total growth in jobs over each period is translated into planning use classes and floor area requirements. The locations for the land requirements are also detailed within the report.</p>	The land allocations for economic growth detail the expected number of jobs per site. However, the challenge for the Economic and Retail Vision lies in establishing which sectors of the economy are most appropriate to deliver these jobs, based on an analysis of the city's economic strengths and weaknesses. Some of the assumptions on job creation for the various sites need to be challenged when considered in terms of deliverability. Does York Central realistically have 2.2ha of deliverable space for offices?
LDF Supporting Information-Retail	City of York	2011	The report provides a summary of the approach taken in the Core Strategy to retail. It sets out a non technical commentary which explains the links between the evidence base and policy approach. It summarises the findings of the Retail Study (2008) prepared by GVA	The report replays the recommendations from the Retails Study (2008) that whilst the city centre is an attractive and vibrant retail destination there is a need to meet the growing demand from retailers who require larger, modern retail units. This includes the need to upgrade and enhance York's department store	The report establishes that due to growth in population and increases in expenditure on retail there is capacity to support additional comparison retail floorspace in York over the LDF period. If York is not adequately meeting the needs of modern retail units, how should the city adapt in an environment which is heavily protected in design terms and restricted by lack of deliverable development sites within the City Centre. Can other strategies be adopted to maintain the

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			Grimley.	offer.	market share for the retailers other than new development? Will Castle Piccadilly add to York's offer or detract if developed for retail?
Retail Planning Review of Planning Application at Monks Cross	Drivers Jonas Deloitte	2011	<p>The report reviews the retail planning aspects of two planning applications, submitted in relation to proposals in the Monks Cross area.</p> <p>The first application relates to the redevelopment of Huntingdon Stadium and surrounding land for a scheme that includes three large retail units. The second relates to changes to the Monks Cross Shopping Park including the re-configuration of retail units and the range of goods that can be sold from within them, together with the provision of new floor space.</p>	<p>The report concludes that:</p> <p><i>"The impact of the Proposals both individually and cumulatively raise significant concerns. The predicted retail trading impacts from the Stadium Development are considered to be relatively high and whereas those from the Monks Cross Shopping Park are considered to be more modest, they raise other concerns regarding the scale of units and the nature of goods to be sold. Cumulatively, the Proposals indicate impacts which are considered to be significantly adverse on the trade of the City Centre and undermine its vitality and viability in particular sectors."</i></p>	<p>The strategy for the City Centre will need to consider actions which will mitigate against the future impact of the two subsequently approved proposals.</p> <p>This will involve establishing the key threats to the City Centre retail economy and strategies that can be adopted to further protect and enhance the city centre environment for residents and visitors. This will involve considering a number of other factors such as transport, parking, the public realm, cultural facilities, hotels and office accommodation. A successful city centre encompasses high quality provision of a wide mix of uses and functions.</p>
Castle Piccadilly Planning Brief	City of York Council	2006	<p>The document provides guidance on the broad policy, development and design parameters that should guide any development proposals in the Castle Piccadilly area. The report also considers a number of planning considerations such as heritage and archaeology, parking, transport, flooding, noise and contamination.</p>	<p>The catalyst for regeneration is the requirement for additional retail provision within the city centre, to be provided as part of a mixed use development.</p> <p>The brief details that small scale office development would be supported as part of a mix of uses within the area. This would accord with the Council's objectives of supporting office development within the City Centre, as an</p>	<p>The planning brief is in response to the recognition that, in developing options for the regeneration of the area, there will be a tension between site viability and environmental sensitivity.</p> <p>This site has had numerous unsuccessful planning applications submitted and is evidently a difficult site to deliver. Consideration for its future use will need to be considered within the Economic and Retail Vision.</p>

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				accessible central location.	
York Central Retail Study	GVA Grimley	2008	The report establishes the extent to which the current retail provision in the city satisfies the level and nature of consumer demand within each catchment and Assesses the scope for new retail development and the potential to accommodate this within the City through a recommended retail implementation strategy. The report also reviews policy and trends current in 2009.	The report concludes that the challenge will be for York to bring forward key development opportunity sites in York City Centre in order to enhance the mainstream/ higher end/quality comparison retail provision whilst maintaining and protecting the niche specialist retailing element. The threat of no new development is a further decline in market share over the next few years. The report concludes that The Council should aim to increase the supply of modern retail units in York City Centre to meet the qualitative and quantitative need for a greater range and mix of quality comparison goods retail units.	There are a number of points which need to be considered within the emerging Economic and Retail Vision including: <ul style="list-style-type: none"> • Is Castle Piccadilly appropriate for additional city centre retail? • Does York City Centre require an additional department store? • Should York pursue one big 'game-changer' or should it pursue a series of smaller moves? • What other supporting investments are required in the city centre to enhance the retail offer?
Transport and Access Related Document					
York City Centre-Movement and Accessibility Framework Strategy and Proposals	Camlin Longsdale/ JMP/ PLB	2008	This report presents a Movement and Accessibility Framework for managing access and movement to and within York City Centre over the next 20 years. The overarching aim of the strategy is to support the vision to make "York City Centre the most special place in England by 2030" It does this by: Developing a long-term vision for managing movement and accessibility to and within the City Centre; and Identifying an action plan of shorter-term projects to realise the above.	There are many drivers of change including: demographic changes, lifestyle changes, the environment and mobility. The report stipulates that access needs to be managed by enhancing walking, cycling and public transport links to the City Centre, whilst restricting the amount of priority and space given over to motor traffic. The report details mode by mode recommendations in detail.	What recommendations can be carried through to the Economic and retail vision? The baseline document to be produced as part of the evidence base will identify the strategic vision for movement and accessibility.

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