

Local Development Plan (LDP) - Position
Paper

Employment & Industry



**Ards and
North Down**
Borough Council

Contents

Executive Summary	5
Introduction	6
Regional Planning Policy Context	7
Regional Development Strategy 2035 (RDS)	7
Strategic Planning Policy Statement (SPPS)	9
Relevant Operational Planning Policy	10
Existing Local Development Plan Context	12
Ards and Down Area Plan 2015.....	13
North Down and Ards Area Plan 1984-1995 (NDAAP), Belfast Urban Area Plan, draft Belfast Metropolitan Area Plan 2015 (dBMAP) and Belfast Metropolitan Area Plan 2015 (BMAP)	14
Council Plans and Strategies	14
The Council's Corporate Plan 2015-2019.....	14
'The Big Plan for Ards and North Down – Creating Positive Outcomes for Everyone 2017-2032	15
Other Relevant Documents	16
NI Executive: Programme for Government	16
Sustainable Development Strategy (SDS)	16
Economy 2030 – Consultation on an Industrial Strategy for Northern Ireland .	17
Innovation Strategy for Northern Ireland 2014-2025.....	17
Anti-Poverty and Social Inclusion Strategy for Northern Ireland	18
Employment/Industry Profile – Current Plan Designations	19
Newtownards	19
Comber	21
Ballywalter – Industrial Policy Area (IPA 1).....	22
Bangor	22
Donaghadee	23
Review of Uptake of Industry/Employment Zonings	24
Use Class Profile of Development Built on Zoned Employment/Industry Land	25
Settlements Without Specific Employment/Industry Zoning	27
Portavogie.....	27
Holywood	27
Economic Profile - Ards and North Down Context	28
Business Stock	30
Employment Base.....	31
Labour Market Structure	36
Key Findings	38

Conclusion	40
Glossary	41
The Planning (Use Classes) Order (Northern Ireland) 2015	41
Map Booklet Location of Extant Zonings	42
Newtownards	42
Location of Extant Zonings - Comber	43
Location of Extant Zonings - Bangor.....	44
Existing Industry Zoning - Donaghadee.....	45
Map showing context of 800ha extant zoning – Belfast	46
Appendix 1	47
Employment Land Evaluation Framework – RDS 2035.....	47
Appendix 2	48
Uptake of Industrial Land across the Borough – Employment Land Review Report November 2018	48
Appendix 3	50
Survey of use classes in the existing buildings on zonings in Ards and North Down.	50
References and Useful Links	61

Executive Summary

This Position Paper provides the Council with an overview of the Employment and Industry baseline position identified for the Ards and North Down Council area, to consider and assist in identifying the key future direction for the LDP up to 2030.

It is important to stress that in compiling the paper the best information available has been used.

The paper will provide a foundation of evidence to bring forward proposals in the Preferred Options Paper (POP) and also form a starting point with the views of members generated as part of the engagement event. The POP is the earliest stage of plan preparation and will form the basis for consulting with the public and stakeholders on a range of options for dealing with key issues in the Borough. It shall also allow members to commence consideration of how economic policy may be formulated within the context of the Regional Development Strategy (RDS 2035) and the Strategic Planning Policy Statement (SPPS).

The evidence base on this topic will need to be further informed by more detailed surveying and evaluation of existing industrial land and zoned industrial land, a Sustainability Appraisal and public consultation. An addendum to this paper will be provided at a later stage in the plan process. This will provide an indication of how many jobs are required to cater for a growing population and to consider influencing factors such as unemployment and deprivation. How jobs can be accommodated across employment sectors and translated into a need for additional employment land within the Borough up to 2030 will also be considered.

Any future decision making will need to be made within the context of a Sustainability Appraisal (SA) under the provision of Planning (Northern Ireland) Act 2011. This paper is therefore intended to generate members' ideas on how planning can best meet the future employment/industry requirements for the Ards and North Down Borough Council area.

Introduction

- 1.1 The aim of this paper is to provide baseline evidence which will inform Members and enable meaningful participation in the Local Development Plan (LDP) workshop on Employment and Industry.
- 1.2 Key findings, as a result of the evidence collated, are outlined as main areas of consideration in the ongoing preparation of the Borough's new LDP. The paper concludes with a brief overview of the envisaged next steps in the process, with regard to this topic area, particularly with regard to the Preferred Options Paper and Plan Strategy stages.
- 1.3 Uses associated with employment and industry are generally considered to be those identified in Part B (Industrial and Business Uses) of the [Schedule to the Planning \(Use Classes\) Order \(Northern Ireland\) 2015](#) – incorporating Use Classes B1 (Business), B2 (Light Industrial), B3 (General Industrial) and B4 (Storage or Distribution) (see glossary for terms from the Use Classes Order).
- 1.4 Statistical data relating to employment and industry is subject to regular amendment. The Labour Market Report, which provides an overview of economic activity, employment and unemployment in Northern Ireland, is published on a monthly basis, (latest release 16 August 2017).
- 1.5 Spatial planning and related infrastructure development is essential to enable a working economy. Whilst it is not the role of the Local Development Plan to create employment, the LDP Proposals can seek to promote and encourage job creation by establishing a framework, which is supportive to employment and business needs and responsive to the needs of the community. The LDP will also link with all the work the Council brings forward with regard to masterplans, supporting town and village centres and the role carried out with regard to supporting business start-ups and enterprises through the Economic Development Section.

- 1.6 The LDP has a key role to play in achieving a vibrant economy and facilitating employment whether through the zoning of land or the development of appropriate local planning policy to support business development and job growth. The Plan also has an important role in supporting the vision and aims of the ITRDS by ensuring that sufficient and suitable land is provided in the appropriate places to retain existing businesses and attract new investment to our Borough. The LDP evidence shall therefore take account of the data and bespoke evidence collated by the consultants for the Integrated Strategy.

Regional Planning Policy Context

[Regional Development Strategy 2035 \(RDS\)](#)

- 2.1 The Regional Planning Policy Context is provided by the Regional Development Strategy (RDS) 2035 and regional planning policy statements.
- 2.2 The RDS 2035 sets a policy direction to ‘Ensure adequate supply of land to facilitate sustainable economic growth’¹. Advocating that the land should be accessible and located to make best use of available services, the RDS sets out that the focus will be on larger urban centres and regional gateways taking advantage of their locations on the regional transport network.
- 2.3 The RDS directs Development Plans to assess the quality and viability of sites zoned for economic development. A three stage framework² is set out that seeks to enable planning authorities to identify robust and defensible portfolios of both strategic and locally important employment sites in their development plans as follows: (see appendix 1).
- (i) consideration of existing lands,
 - (ii) understanding anticipated future need,
 - and (iii) the identification of a range of new sites based upon an established appraisal criteria.

¹ RDS 2035 page 31, RG1

² RDS 2035 pages 31-32

The RDS considers that the framework shall 'safeguard both new and existing employment areas for employment rather than other uses'.

- 2.4 Strategic Guidance points to the promotion of economic development opportunities at Hubs (of which Newtownards is recognised as a Main Hub within the Borough). In essence the RDS directs that by protecting zoned land through the development plan and by promoting potential for economic development at hubs, and clusters of hubs first, then development can capitalise on the opportunity for the concentration of people and goods and existing infrastructure³.
- 2.5 It also recognises the importance of sustaining rural communities by facilitating rural industries, business and enterprises in appropriate locations. This means not only farming, forestry and fishing related businesses, but other industries such as tourism which can provide further jobs and opportunities in rural areas as long as they are integrated appropriately within a settlement or rural landscape⁴.
- 2.6 In the local context, the RDS notes that many of the population of Bangor commute to Belfast to work and recognises that Bangor is an important retail and commercial centre. The RDS identifies Newtownards as a '*vibrant service, commercial and shopping centre serving an extensive hinterland in the Ards Peninsula and North Down with potential to develop as a "growth pole" for the clustering of economic development*'.
- 2.7 The RDS regards Newtownards to be one of the towns in Northern Ireland which can provide a counter balance to the Belfast Metropolitan Area. As a main hub, Newtownards is expected to be the major location for employment, services and a range of cultural and leisure activities.

³ RDS 2035 page 72 SFG11

⁴ RDS 2035 page 74 SFG 13

Strategic Planning Policy Statement (SPPS)

- 2.8 The SPPS (published September 2015) includes as a core planning principle: 'to support sustainable economic growth'. The Regional Strategic objectives for facilitating economic development through the planning system are to:
- promote sustainable economic development in an environmentally sensitive manner;
 - tackle disadvantage and facilitate job creation by ensuring the provision of a generous supply of land suitable for economic development and a choice and range in terms of quality;
 - sustain a vibrant rural community by supporting rural economic development of an appropriate nature and scale;
 - support the re-use of previously developed economic development sites and buildings where they meet the needs of particular economic sectors;
 - promote mixed-use development and improve integration between transport, economic development and other land uses, including housing; and
 - ensure a high standard of quality and design for new economic development.
- 2.9 The SPPS sets out a hierarchy for economic development, that is, within larger settlements such as cities and towns, planning decisions must, to a large extent, be informed by the provisions made for economic development through the LDP process. Furthermore the SPPS indicates that in these larger settlements appropriate proposals for Class B1 business uses (such as offices and call centres) should be permitted if located within city or town centres, and in other locations that may be specified for such use in a LDP, such as a district or local centre. Elsewhere, such proposals should be determined on their individual merits, taking account of the potential impacts and the likely economic benefits, both local and regional. Within villages and small settlements, the LDP will not normally zone land for economic development purposes, as this could inhibit flexibility. However, favourable consideration should be given to an economic development

proposal where it is of a scale, nature and design appropriate to the character of the particular settlement and subject to meeting normal planning criteria such as compatibility with nearby residential use.

- 2.10 In acknowledging that not all economic development is restricted to urban areas, the SPPS aims to sustain vibrant rural communities through the provision of support for rural economic development of an appropriate nature and scale.

Relevant Operational Planning Policy

- 2.11 Current operational planning policy with regard to economic development is contained within [Planning Policy Statement 4: Planning and Economic Development](#) (PPS 4) and [Planning Policy Statement 21: Sustainable Development in the Countryside](#) (PPS 21). Until a new Plan Strategy is adopted by the Council, transitional measures allow for the retention of the policy provisions contained within PPS 4 and PPS 21.
- 2.12 Both PPS 4 and the SPPS set regional policy objectives underpinning the RDS and which are equally relevant to local development plans, in terms of the economy. PPS 4 shares the same policy objectives of the SPPS (listed above at 2.8). The aim of PPS4 is to facilitate economic development in ways which are consistent with the environment and the principles of sustainable development. Safeguarding of the environment and the fostering of a clean green image can provide economic advantages and employment.
- 2.13 PPS4 may also be applicable to assessing proposals for other 'sui generis' employment uses which are land uses which do not fall into any particular use class in the Use Classes Order.
- 2.14 The key aim of this PPS is to facilitate the economic development needs of the Region in ways consistent with protection of the environment and the

principles of sustainable development. It recognises that changing patterns of employment in NI require a more flexible approach when determining the types of economic development that are acceptable in particular locations. For instance, high technology, knowledge-driven enterprises and light industry and Class B1 high technology office uses may be compatible within an area allocated for general industrial development or modern low impact industries within residential areas without causing unacceptable disturbance and adverse impact upon amenity. It also directs Development Plans to include the safeguarding of existing expansion of this use. PPS4 details particular matters that should be assessed as appropriate in the course of preparing a development plan. A development plan will therefore provide information such as acceptable employment uses, key site requirements and economic needs etc.

2.15 Under the provisions of PPS4, industrial zonings can comprise of proposed and existing industrial lands and consideration should be given to identifying these as economic zonings to protect the land for economic purposes.

2.16 Operational planning policies within PPS 4 relate to:

- Economic Development in Settlements (Policy PED 1);
- Economic Development in the Countryside (Policy PED 2);
- Expansion of an Established Economic Development Use in the Countryside (Policy PED 3);
- Redevelopment of an Established Economic Development Use in the Countryside (Policy PED 4);
- Major Industrial Development in the Countryside (Policy PED 5);
- Small Rural Projects (Policy PED 6);
- Retention of Zoned Land and Economic Development Uses (Policy PED 7);
- Development Incompatible with Economic Development Uses (Policy PED 8); and
- General Criteria for Economic Development (Policy PED 9).

- 2.17 The primary aim of PPS 21 – Sustainable Development in the Countryside, is to manage development in the countryside that is in a manner consistent with the RDS, and which strikes a balance between the need to protect the countryside from unnecessary or inappropriate development, whilst supporting rural communities. It sets out planning policies and main planning considerations in assessing proposals for development in the countryside.
- 2.18 Relevant operational planning policies contained within PPS 21 relate to:
- Development in the Countryside (Policy CTY 1);
 - The Conversion and Re-Use of Existing Buildings (Policy CTY 4);
 - Ribbon Development (Policy CTY 8);
 - Farm Diversification (Policy CTY11);
 - Agricultural and Forestry Development (CTY12);
 - Integration and Design of Buildings in the Countryside (Policy CTY 13);
 - Rural Character (Policy CTY 14);
 - The Setting of Settlements (Policy CTY 15); and
 - Development Relying on Non-Mains Sewerage (Policy CTY 16).
- 2.19 [Planning Policy Statement 16: Tourism](#) was published in June 2013, and one of the objectives of this PPS is to contribute to the growth of the regional economy by facilitating tourism growth.

Existing Local Development Plan Context

- 3.1 A local development plan establishes a settlement hierarchy upon which future development or growth is based. A settlement hierarchy is a way of categorising an area's settlements to recognise their different roles and help decide which settlements are most suitable to accommodate growth. The main towns are the focus for most development with the smaller towns and villages identified as local centres serving the needs of their rural hinterlands.

- 3.2 In Ards and North Down Borough Council the relevant development plans are Ards and Down Area Plan 2015, for the legacy Ards area and for the legacy North Down area - North Down and Ards Area Plan 1984-1995, draft Belfast Metropolitan Area Plan 2015, and Belfast Metropolitan Area Plan 2015 (BMAP)

[Ards and Down Area Plan 2015](#)

- 3.3 The Ards and Down Area Plan 2015 (ADAP) was prepared by the Department of the Environment (DOE), under the provisions of Part III of the Planning (Northern Ireland) Order 1991. The principal purpose of the Plan was to establish physical development policies for the legacy Ards Borough (as well as the Down District) and its surroundings up to 2015. It was adopted in March 2009.
- 3.4 The Plan objectives include promotion of Newtownards as a 'main town within Northern Ireland' and strengthening the role as the principal administrative, trade, employment and residential centre within the Plan area, and facilitation of the creation of employment, taking into account the Governments' Strategy on Anti-Poverty and Social Exclusion in Northern Ireland.
- 3.5 The Industry section of the Plan sets out two policies, one dealing with the existing industrial sites and the second looking at proposed industrial land within Ards Borough. The policy states that existing sites shall be safeguarded against inappropriate development, and that favourable consideration will be given to development proposals on land zoned for industry.

[North Down and Ards Area Plan 1984-1995 \(NDAAP\), Belfast Urban Area Plan, draft Belfast Metropolitan Area Plan 2015 \(dBMAP\) and Belfast Metropolitan Area Plan 2015 \(BMAP\)](#)

- 3.6 The Belfast Metropolitan Area Plan 2015 was prepared under the provisions of Part 3 of the Planning (Northern Ireland) Order 1991 by DOE. The Plan was adopted on 9 September 2014, however that adoption has since been quashed as a result of a judgment in the Court of Appeal delivered on 18 May 2017.
- 3.7 As a consequence of this, the North Down and Ards Area Plan 1984-1995, the Belfast Urban Area Plan, and Bangor Town Centre Plan 1995 are now the statutory Development Plans for the North Down area with draft BMAP remaining a material consideration.
- 3.8 The draft BMAP employment strategy seeks to sustain balanced economic growth and job creation by promoting city and town centres; providing a generous and continuous supply of land and promoting a balanced portfolio of sites throughout the plan area.
- 3.9 In terms of cross-boundary matters, cognisance should be given to the existing employment/ industry zoning at Belfast Harbour (included in map booklet on page 43) which is located on land which lies in close proximity to the boundary with North Down and adjacent to Belfast City Airport.

Council Plans and Strategies

[The Council's Corporate Plan 2015-2019](#)

- 4.1 The Ards and North Down Borough Corporate Plan gives articulation to the promotion of economic investment in the Borough. The plan indicates that the Council shall seek to:

- Attract and promote economic investment
- Support business start-up, development and growth
- Enhance the visitor experience to increase visitor spend
- Develop a thriving rural economy

['The Big Plan for Ards and North Down – Creating Positive Outcomes for Everyone 2017-2032](#)

4.2 This is the Council's Community Plan and there is a statutory obligation for the LDP to take account of the Community Plan. The Community Plan provides an overarching framework setting out a shared vision and ambition that Ards and North Down's Strategic Community Planning Partnership has agreed to work towards over the next 15 years. The five outcomes listed in the plan are ambitious statements that aspire to reflect the situation of the people who live in Ards and North Down by the year 2032. The Community plan sets out 5 overarching outcomes, of which the aspiration of outcome 4 is 'All people in Ards and North Down benefit from a prosperous economy'. The plan states that 'we will work towards this outcome by addressing deprivation and ensuring people have the financial resources to meet their everyday needs by growing a sustainable economy with a skilled workforce, access to employment and effective economic investment'.

[The Integrated Strategy for Tourism, Regeneration and Economic Development](#)

4.3 The Integrated Strategy is the Council's Borough-wide strategy centred around three key themes: place, visitor and investment. Six thematic priorities focus on a partnership based approach to achieve job creation, increase economic productivity and visitor overnight trips and expenditure. These thematic priorities provide a framework within which specific actions are identified as being of strategic importance to the Borough.

Other Relevant Documents

[NI Executive: Programme for Government](#)

- 5.1 The draft Programme for Government Framework 2016-2021 sets out the ambition of the Northern Ireland Executive to move forward with a new approach which focuses on the major societal outcomes that the Executive wants to achieve and provides a basis for all sectors to contribute to the development of plans and actions. The overall purpose articulated in the framework is 'Improving wellbeing for all – by tackling disadvantage, and driving economic growth'. A key outcome listed in the framework is that 'We prosper through a strong, competitive, regionally balanced economy.' Indicators listed which explicitly refer to the economy include - increase the size of the economy, increase the competitiveness of the economy and increase innovation in our economy.

[Sustainable Development Strategy \(SDS\)](#)

- 5.2 One of the six Priority Areas for Action outlined in the SDS relates to 'Building a dynamic, innovative economy that delivers the prosperity required to tackle disadvantage and lift communities out of poverty'. Objectives relate to increasing the number of jobs in the low-carbon economy, increasing energy efficiency, and ensuring that the population possess the necessary skill sets for these jobs. Another Priority Area is associated with 'Driving sustainable, long- term investment in key infrastructure to support economic and social development'. This requires that we ensure all economic development activities (including physical regeneration and investment in infrastructure) are carried out in a sustainable way, and that transport infrastructure is integrated and accessible to all members of society.

[Economy 2030 – Consultation on an Industrial Strategy for Northern Ireland](#)

(published by Department for the Economy in January 2017 with consultation closing 25 April 2017).

- 5.3 The draft Strategy sets out '5 pillars' for growth -
- Accelerating Innovation and Research
 - Enhancing Education, Skills and Employability
 - Driving Inclusive, Sustainable Growth
 - Succeeding in Global Markets
 - Building the Best Economic Infrastructure
- 5.4 The draft strategy indicates milestones for 2030 with regard to the growth of the private sector, putting Northern Ireland in the top three most competitive small advanced economies and creation of 80,000 jobs in the knowledge economy, along with increasing annual spend on R&D and maintaining the highest level of well-being in the UK.
- 5.5 There is no methodology available regarding the 80,000 jobs target. The Council's Regeneration and Development Committee considered a report by the Head of Economic Development in April 2017 and accepted the recommendation to respond to the consultation.

[Innovation Strategy for Northern Ireland 2014-2025](#)

- 5.6 The DETI Innovation Strategy (published September 2014) champions the vision that by 2025 Northern Ireland will be recognised as an innovation hub and will be one of the UK's leading high-growth, knowledge-based regions which embraces creativity and innovation at all levels of society. The strategy aims to achieve this through cultural change; knowledge generation; knowledge exchange through engaging and collaboration between businesses and academia and knowledge exploitation through the transformation into products and services which can be exported.

5.7 The NI Innovation Strategy promotes key market sectors where Northern Ireland has both the capability and the potential to compete on a global basis, as following:

- Agri-food technology: Integrated value chain, traceability, niche / functional food, packaging and shelf life;
- Advanced manufacturing and materials: Advanced engineering, composites, electronics and electrical components;
- ICT: Software engineering, Big Data / Data Analytics, Cyber Security, Capital Markets and Digital Content).

[Anti-Poverty and Social Inclusion Strategy for Northern Ireland](#)

5.8 The Government's Anti-Poverty and Social Inclusion Strategy (Lifetime Opportunities) was published by the Office of the First Minister and Deputy First Minister (OFMDFM) in 2006. It outlines a set of long-term goals and targets to work towards eliminating poverty and social exclusion in Northern Ireland by 2020. Public policy in general is expected to take account of anti-poverty/social inclusion considerations, for example through enabling disadvantaged groups and communities to benefit from better access to employment opportunities. One of the main functions of an LDP is to facilitate development and create a land use framework that will allow investment to take place. For instance, the reuse of previously developed land has an important role to play not only in the supply of sites for economic development, but it can also support the Anti-Poverty and Social Inclusion Strategy, and assist with economic regeneration and physical renewal. This can help to stimulate enterprise in the most disadvantaged areas in order to tackle long-term unemployment and issues of employability.

5.9 The Government commissioned the Northern Ireland Multiple Deprivation Measure (NIMDM 2005) to identify small area concentrations of multiple deprivation across Northern Ireland. Policy needs to focus on the most persistently and acutely deprived areas through Neighbourhood Renewal.

The Local Development Plan should assist in identifying where deprivation exists and develop policies to address it.

Employment/Industry Profile – Current Plan Designations

- 6.1 Both draft BMAP and ADAP have a range of land designated for Employment/Industrial Land use. Bangor and Newtownards are the Borough's strategic locations for employment/industrial development. Within both Plans, there is a total of over 200 ha. zoned. The quantum remaining as undeveloped land is examined further later in this paper. Bangor and Newtownards are both also the focus of Invest NI's landholdings in the Borough (a serviced site at Ballyharry, Newtownards, part of lands comprising NS 31 zoning; and another serviced site at Balloo South Industrial Estate, Ballyhenry, comprising lands on zoning BR 08.

Newtownards

- 6.2 The Ards and Down Area Plan (ADAP) 2015 comments, 'in keeping with the status of Newtownards as a main hub and to allow it to develop as a major location providing employment, it is proposed to zone some 27 hectares of industry/employment land within the proposed Settlement Limit'.
- 6.3 The ADAP 2015 notes that 'Of the 47 hectares previously zoned for industry within the Ards Borough, approximately 29 hectares remain undeveloped'.
- 6.4 Proposal IND 2 relates to- 'Proposed Industrial Land, Ards Borough'. The ADAP notes that 'a total of approximately 32 hectares of land are zoned for industry in Ards Borough, comprising:
- 27 hectares in Newtownards
 - 5 hectares in Comber

6.5 The plan policy stated that ‘Favourable consideration will be given to development proposals on land zoned for industry, provided that it is accordance with the requirements and guidance set out for each of these areas.’

6.6 ADAP notes that the previous plan (North Down and Ards Area Plan 1984 – 1995) zoned areas of land for industry within Newtownards and there are pockets within some of these sites which remain undeveloped or vacant.

Table 1: Location of Land Zoned for Industry – Newtownards

Plan Zoning Ref.	Location	Land Zoned (ha)
NS 28	Bangor Road	5.87
NS 29	Comber Road	4.51
NS 30	Comber Road	8.19
NS 31	Donaghadee Road, (1) north and (2) south	5.04
NS 32	South of Belfast Road and east of Milecross Road	2.97

6.7 Proposal NS 33 relates to ‘Existing Industrial Sites’. Four sites were identified in the plan as Existing Industrial sites as follows:

Table 2 – Land Zoned ‘Existing’ in ADAP 2015

Plan Zoning Ref.	Location	Land Zoned (ha)
NS 33	Jubilee Road	23.3
NS 33	Kiltonga	11.4
NS 33	Donaghadee Road	4.05
NS 33	Comber Road	10.3

Comber

- 6.8 At the time of adoption, the Plan noted that Comber had an existing industrial site on the Newtownards Road, the site of a carpet underlay factory, and at Park Way, where old industrial premises contained a variety of workshops and stores, including building supplies. There are two small businesses on the western edge of the Town Centre in Mill Street, and two former industrial sites in Castle Lane and Bridge Street. The former Albion factory in Castle Lane was vacant for some time and has now been redeveloped for housing. Andrew's Mill at Ballygowan Road was vacant and approved for conversion to residential apartments and housing and development is well underway.
- 6.9 The Plan proposed an additional 4.66 hectares on land to be developed for a mixture of industrial uses to the east of the town (CR 10) in accordance with Policy SETT 1 and Proposal IND 2 in Volume 1 of the Plan as indicated on Map No. 2/003a, Comber Settlement Map.
- 6.10 A planning application has been recently granted for housing on land of zoning CR11 – Existing Industrial Land, Newtownards Road, Comber.
- 6.11 Zoning CR 10 - zoned as Proposed Employment, has extant outline permission for a mixed use development with housing, as follows:
X/2009/0858/O - Lands South East of Comber by-pass - 'Mixed use development involving residential, retail, nursing home, sheltered accommodation, crèche, Business Park (A1, B1, B2 and B4) and extension to salt marsh. Permission Granted 22/12/2016 – application processed by Department for Infrastructure (Dfi).
- 6.12 The first of the reserved matters applications has been received (LA06/2017/0778/RM - Land immediately adjacent to and south east of Copelands Link Roundabout at the Comber Bypass) and proposes 'Residential development comprising 168 housing units, open space, access roads, pumping station and other associated works.'

The application was received on 21/06/2017 by DfI and will be determined by DfI.

Table 3: Land Zoned in Comber

Plan Zoning Ref.	Location	Land Zoned (ha)
CR 10	Riverside, Land south of Comber Bypass Stage 2	4.66
CR 11	Newtownards Road	1.32

[Ballywalter – Industrial Policy Area \(IPA 1\)](#)

- 6.13 The Ards and Down Area Plan designated the existing Builder’s Merchants on Greyabbey Road, Ballywalter as an Industrial Policy Area (IPA 1). This builder’s merchant’s complex was a replacement for the previous site in the centre of the village. It was recognised at the time as a major employer in the area and providing a service for the local construction industry and the Plan stated that it was important to retain it for this purpose.

[Bangor](#)

- 6.14 In the legacy North Down Borough, within draft BMAP, existing employment zonings are listed in Bangor as:
- BR 06 Newtownards Road, Bangor
 - BR 07 Balloo Road/Newtownards Road/South Circular Road
 - BR 08 Balloo Road/Newtownards Road
 - BR 09 Greenways Industrial Estate, Green Road
 - BR 10 Newtownards Road
 - BR 11 Clandeboye Road
 - BR 12 Clandeboye Road
- 6.15 Draft BMAP includes a zoning BR 06 relating to land zoned for employment land. The zoning comprises 17 ha., located at Newtownards Road, Bangor.

This zoning was accompanied by ‘Key Site Requirements’ specifying the need for acceptable use classes, a comprehensive masterplan, a Transport Assessment, buildings to exhibit variety in elevational treatment and heights, and a comprehensive landscaping scheme. The plan also noted requirements for detailed consultation with statutory authorities for Roads, Rivers, Built Heritage and NI Water and that a foul sewage pumping station and upgrading of the existing foul sewerage system may be required to serve the site. No proposals have come forward for this site to date.

Table 4: Employment / Industry Zonings Bangor - Draft BMAP

Plan Zoning Ref.	Location	Land Zoned (ha)
BR 06	Lands at Newtownards Road	17
BR 07	Balloo Road/ Newtownards Road/ South Circular Road	55.22
BR 08	Balloo Road/ Newtownards Road	28.07
BR 09	Greenways Industrial Estate, Green Road	6.64
BR 10	Newtownards Road	1.76
BR 11	Clandeboyne Road	2.38
BR 12	Clandeboyne Road	1.22

[Donaghadee](#)

- 6.16 The North Down and Ards Area Plan 1984 –1995 zoned two sites on either side of a factory on the High Bangor Road for industrial use. The ADAP noted that a significant portion of these had been recently developed for other purposes.
- 6.17 A Waste Water Treatment Works was constructed on part of the land to the west of the former factory (now demolished) to serve Bangor, Donaghadee and Millisle. Housing was granted by the Planning Appeals Commission on land to the east of the former factory.

- 6.18 The lands are designated as DE 15 – High Bangor Road, Donaghadee (existing employment as indicated on Map No. 2/004a, Donaghadee Settlement Map).
- 6.19 Planning application LA06/2017/0439/F - Lands at former carpet factory at High Bangor Road, approximately 270m west of 2 Rocklyn Avenue and 50m east of 43 High Bangor Road, for 'construction of 58no. residential dwellings' has been granted permission from the Council.
- 6.20 Previous approvals for residential development on the site were granted through planning applications:
- X/2004/0685/F – for a 'Housing Development and Associated Site Works including part demolition of an existing factory building, right turning lane, engineering works and landscaping' which was allowed by appeal (Planning Appeals Commission ref. 2004/A546) on February 2009;
 - X/2007/1146/F, for residential development consisting of 204 no. units, granted April 2011;
 - X/2013/0311/F for Residential development of 30 dwellings with associated garages car parking and landscaping (change of house types to previous approval X/2007/1146/F) granted July 2013; and
 - X/2014/0316/F Residential development of 162 Dwellings with associated garages and car parking and landscaping (change of house types to previous approval X/2007/1146/F).

Review of Uptake of Industry/Employment Zonings

- 7.1 A substantial portion of land zoned in Newtownards from the extant plan remains undeveloped (approx. 38%), while in Bangor there has been proportionally more development on industrial land with approx. 30% remaining undeveloped.

Table 5: Uptake of Industrial Zonings in Ards and North Down

Area Plan	Location	Comment	Area Zoned(ha)	Area Developed (ha)	Area Remaining(ha)
dBMAP 2015	Bangor		112.29	78.24	34.05
ADAP 2015	Newtownards		75.63	47	28.63
ADAP 2015	Comber		5.98	5.98	0
ADAP 2015	Donaghadee		9.33	9.33	0
Totals			203.23	140.55	62.68

7.2 Previous surveys of employment on industrial estates (carried out by DOE Planning Service in 2006) suggested that for every hectare of operational industrial land, approximately 50 jobs are provided. On that basis an estimation could be made that the remaining zoned land would provide for up to 3680 jobs. It is acknowledged that not all new jobs will be on zoned economic land given that businesses may be able to expand elsewhere on their current footprint or use available properties in town centres or other suitable locations. It is important to review this aspect in the form of the employment land framework and in context of priorities for the Council which are articulated in the Integrated Tourism, Regeneration and Development Strategy.

[Use Class Profile of Development Built on Zoned Employment/Industry Land](#)

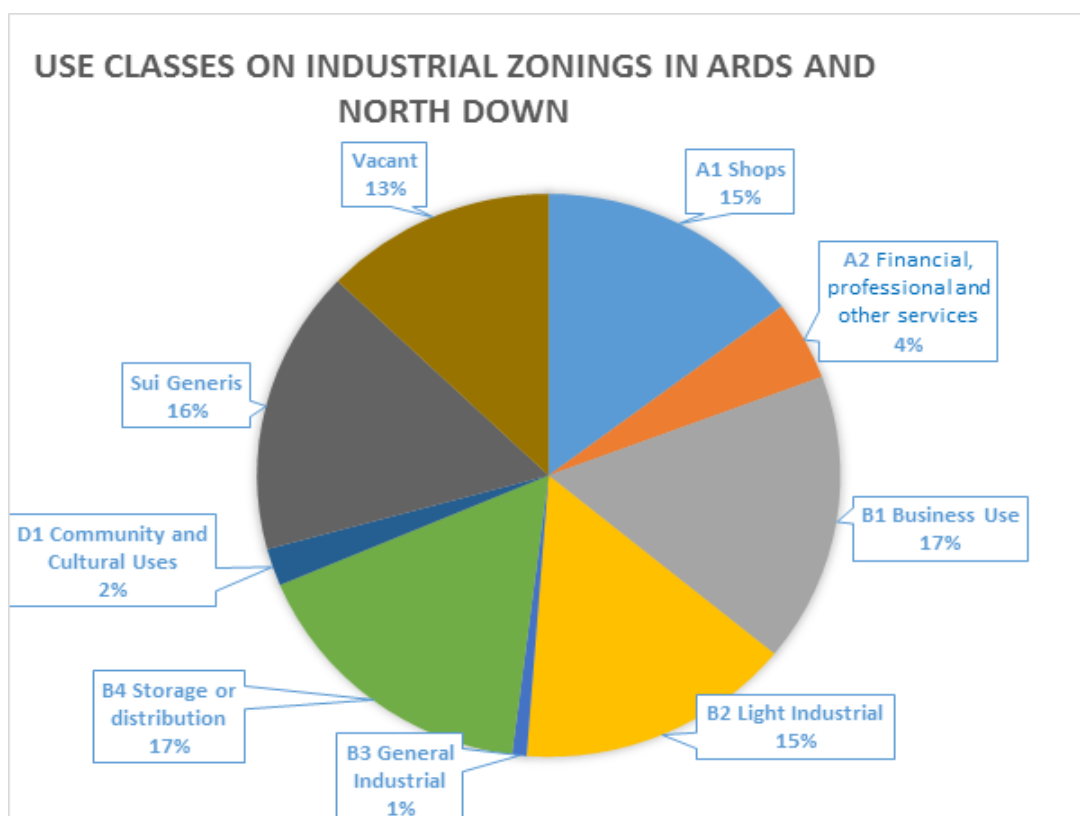
7.3 Of the development carried out on land zoned for employment/industry, a breakdown of the use class of the occupants was observed across the sites. The survey indicates that 50% of development across the Borough's extant employment/industrial zonings relates to Use Class B – Industrial and

Business uses defined in The Planning (Use Classes) Order (Northern Ireland) 2015. (set out in glossary)

7.4 The survey also indicates that of the development carried out 13% is vacant, while there is a similar amount of retail occupiers (15%). Sui generis uses make up 16%, while A2 Financial uses are estimated at a modest 4%.

7.5 Figure 2 reflects current occupants of sites (at this time it does not reflect housing under construction at Donaghadee).

Figure 1: Current Use Classes of Employment/Industrial Zonings in Borough



Settlements Without Specific Employment/Industry Zoning

Portavogie

8.1 Portavogie has the second largest commercial fishing port in Northern Ireland. The fishing fleet catches mainly prawns and herring. While Portavogie has no specific zoning for employment/industry it is clear that from LDP survey work that employment/industry uses are located on a small area of Princess Anne Road and the harbour area. The majority of the occupied units are involved in the fish processing industry as follows:

- a transport /logistics firm,
- a boat repair business,
- fuel lorry depot,
- fish export and wholesalers.

8.2 Other occupants include Fisherman's mission charity and another building which is used as a training facility. There are also a number of units which were vacant at the time of the survey visit.

Hollywood

8.3 While Hollywood has no specific zoning for Industry/Employment, Members will note from the paper on Town Centres and Retailing that in Hollywood financial, professional and other service uses falling within Class A2 of the Use Classes Order comprise some 17% of the total non-residential units within the town centre. Other B1 office uses comprise a further 6% giving a total of 23% for office based uses within Hollywood Town Centre. This exceeds the offering in Bangor and Newtownards at 14% and 16% respectively.

Economic Profile - Ards and North Down Context

- 9.1 An understanding of the Borough's economic performance is one of the key factors to take account of when assessing the employment and industry potential of the area. Reference may also be made to the regional situation for the purposes of context. Statistical data is drawn upon to provide a narrative for the Ards and North Down Borough area, building on that taken into account in the Community Plan and shall be reviewed in future to take account of data presented by the Integrated Tourism Regeneration and Development Strategy.
- 9.2 Department for the Economy, (DfE) Economic Commentary – June 2017 indicates that the Northern Ireland economy has continued to show strength in a number of areas including around an improving labour market, particularly on unemployment, and strong export performance. Set alongside this, however, there has been a slowdown in the growth of employee jobs.
- 9.3 The Borough's population at 2015 is estimated at 158,797. This is representative of 9% of the total Northern Ireland population. The working age population for the Borough at 2015 was approximately 96,866 (61% of the population aged 16-64, males and females).

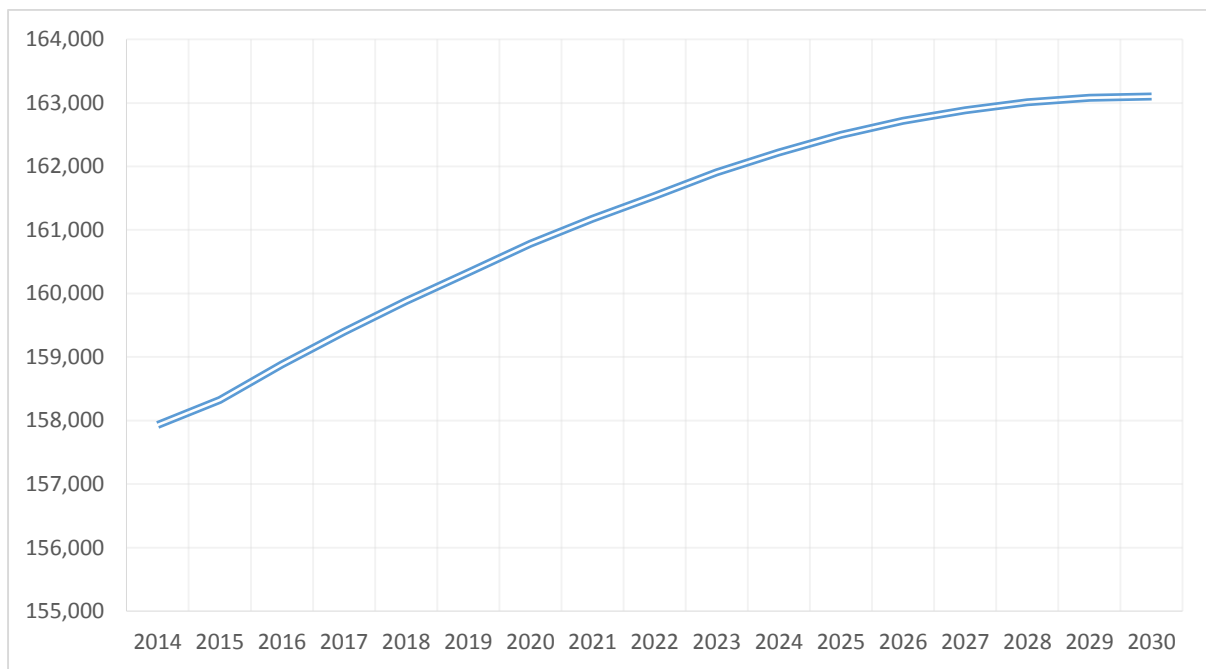
Figure 2: Infographic – Invest NI – Briefing



Statics derived from NISRA Population estimates.

9.4 The current (mid-2016) proportion of the population of those aged 65 or over is 20%. This is projected to rise to 24% by 2025 and 28% by 2032. Whilst the Borough's population is anticipated to increase through to the end of the LDP period, as with the NI regional trend, it will continue to age i.e. the population aged 65 and over is expected to increase.

Figure 3: Population Projection for Ards and North Down Borough Council 2014- 2030



Source 2014 Based population projections – published by NISRA October 2015

9.5 Employment is generally expressed in terms of three sectors: primary, secondary and tertiary. Primary sector includes agriculture, fishing, forestry and the mining and quarrying of natural resources. The Secondary sector is related to manufacturing and the processing of natural resources. The Tertiary sector refers to the service sector, and includes retailing, hospitality, transportation and distribution. Similar to trends in the UK overall, manufacturing employment is expected to continue declining with a shift towards more exportable service sectors such as administrative and

professional services, software and ICT, scientific/technical and retail to drive job creation.

Business Stock

- 9.6 In Northern Ireland, agriculture, forestry and fishing is the largest single industry group representing over one quarter (25%) of all businesses operating that are registered for VAT and/or PAYE. The construction sector remains the second largest industry group and accounts for 14% of businesses operating in Northern Ireland; whilst retail and professional, services and technical are joint third largest industry group, accounting for 8% of businesses each. Together, these four industries represent over half (55%) of all VAT and/or PAYE registered businesses in Northern Ireland.
- 9.7 In the local context, as of 2018 there were 4,670 VAT/PAYE registered businesses in Ards and North Down. This accounts for 6.3% of the Northern Ireland total. The largest sector in the Ards and Down Borough area is that of the tertiary/service sector - 67% of total registered business stock is within this sector. Agriculture 13%, construction 13% and production including manufacturing, accounts for 7% of the business stock. (NISRA Inter-Departmental Business Register 2018)



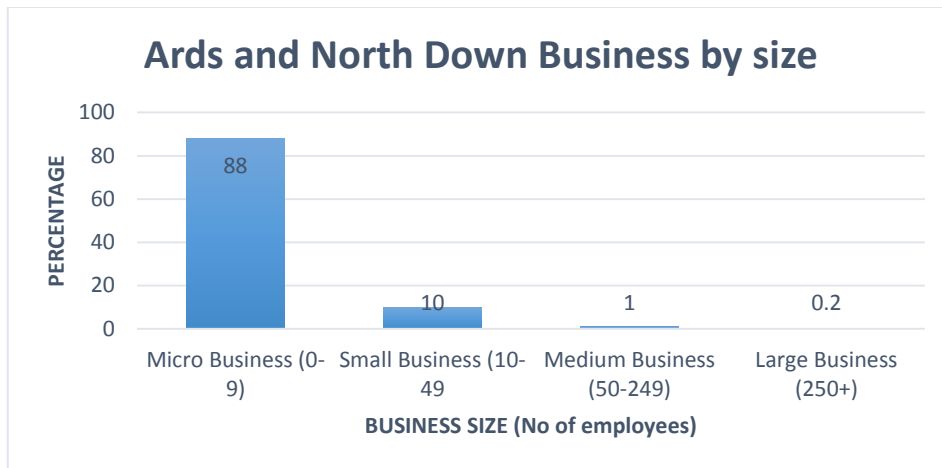


Figure 4: Invest NI infographic – Ards and North Down Businesses Vat registered businesses and Businesses by Size

9.8 The NISRA Interdepartmental Business Register 2018 shows that the majority of the businesses in Ards and North Down are Micro – that is 1-9 employees (88%).

Employment Base

9.9 The Business Register and Employment Survey (BRES), estimates that at September 2017, the total number of employee jobs⁵ in Northern Ireland was 756,365 showing an increase of 16,750 jobs (2.3%) since September 2016. The increase in employee jobs was driven mainly by growth in the service industry (11,477 jobs). The manufacturing sector increased by 3.6%, construction by 4.7% and public sector by 1.3%.

9.10 Employee jobs in the NI context were comprised as follows:

- 81% (615,563) in the Services industry

⁵ BRES counts the number of **jobs** rather than the number of persons with a job. As a result, a person holding both a full-time job and a part-time job, or someone with two part-time jobs, will be counted twice. **(NB any figures do not include Non PAYE workers- ie the self-employed. Any figures prior to Sept 2017 do not include agriculture)**

- 11% (83,374) in the Manufacturing industry
- 5% (34,607) in the Construction industry
- 3% (22,822) in the 'Other' industry

9.11 The BRES indicates the following: -

The District Council Areas with the highest number of employee jobs were Belfast (224,149), Armagh City, Banbridge and Craigavon (76,247) and Antrim and Newtownabbey (60,233).

9.12 The District Council Areas with the lowest number of employee jobs were Fermanagh and Omagh (43,540), Causeway Coast and Glens (41,797) and Ards and North Down (39,306) with the Borough employee jobs as equivalent to 5.2% of the Northern Ireland total. (NISRA, BRES 2017 Table 2).

9.13 The number of employee jobs in Ards and North Down increased by 2.2% from September 2016 to September 2017.

Table 6: Jobs by Industry

	Total No. of Jobs	% Jobs in Manufacturing	% Jobs in Construction	% Jobs in Services	% Jobs in Other
Ards and North Down	38,746	7	3	89	1
Northern Ireland	756,365	11	5	81	3

9.14 The BRES reports that Belfast has the highest proportion of employee jobs in the Services industry (92% of Belfast employee jobs), followed by Ards and North Down (89%). The majority of employee jobs in each District Council Area are in the Services industry.

Table 7: Ards and North Down Borough Council area – Employee Jobs at September 2017

Headline Sector	Number of Employee Jobs						
	Male Full-Time	Male Part-Time	Male	Female Full-Time	Female Part-Time	Female	Total
Construction	979	95	1074	85	153	238	1,312 (3%)
Manufacturing	2,055	111	2,166	509	209	718	2,884 (7%)
Other ¹	332	11	343	13	11	24	367 (1%)
Services	8,872	4,182	13,054	9,240	11,889	21,129	34,183 (89%)
Total	12,238	4,399	16,637 (43%)	9,847	12,262	22,109 (57%)	38,746

Source: NI Business Register and Employment Survey (BRES) September 2017.

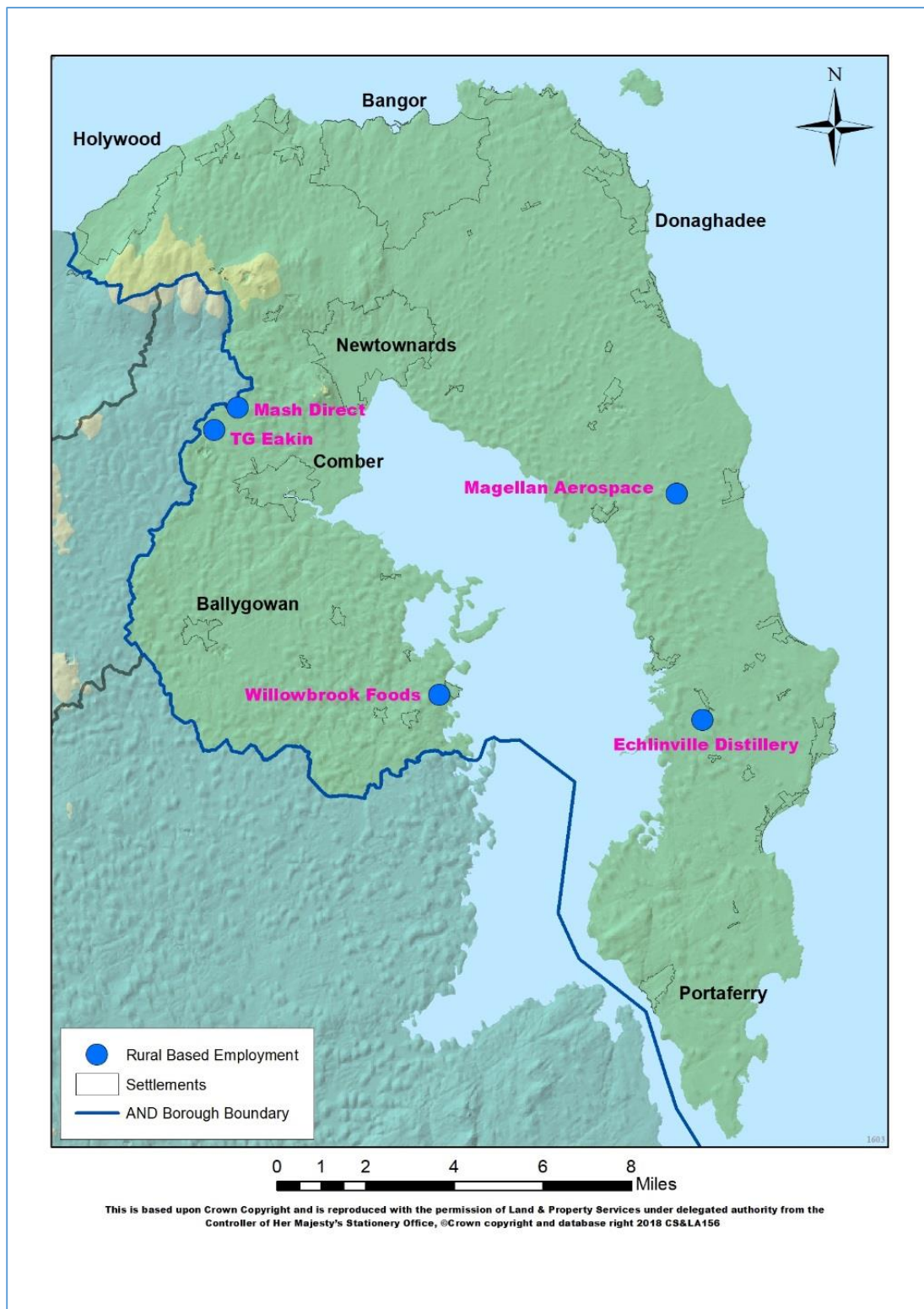
9.15 Jobs within the manufacturing sector remain modest and reflective of historic downturn within this sector on the basis of wider economies of scale and job displacement. Manufacturing businesses have experienced challenges from wider global downturn in economy, competition from cheaper production costs and exports emerging from ‘low cost economies’. In some areas, there are strong signs of recovery. Forecasts predict substantial growth in aerospace, agri-food and sustainable energy by 2020. Northern Ireland is a global leader in many manufacturing sub-sectors, such as aerospace technology and materials handling. This Borough has a portfolio of top performing companies across these sectors. The Invest NI Southern Sector Focus 2016 highlights top performing businesses in the Borough as detailed below.

9.16 Ards and North Down is home to world class advanced manufacturing companies including Munster Simms Engineering (‘Whale pumps’), specialists in water pumps; Denroy Plastics - designer and manufacturer of plastic moulded components (and other products under Denman International Ltd, such as the Denman hair brush and hair care products); and Magellan Aerospace supplies machined components, sub-assemblies and logistics to

the global aerospace and defence industry, (located at Tullykevin Road, Greyabbey).

- 9.17 The Agri-food sector is represented in the Borough by Prichitts, part of Lakeland Dairy Group which produces powdered milk products, Mash Direct and Willowbrook Farms, which produce fresh and ready-made vegetable products, and Clandeboye Estates' production of hand crafted yoghurts. Echlinville Distillery produces a gin product stocked on a UK wide scale in Asda, Sainsburys, Tesco and Marks and Spencer and the company is seeking to expand options for an export market to the USA.
- 9.18 'Life and Health Science' is also recognised as a strategically important growth sector in the NI economy. TG Eakin Limited, a medical device manufacturer, dedicated to the production of high-quality skin protection products for use in stoma and wound care is located at Ballystockart Road, Comber and received planning permission to extend the premises in 2008 and 2011.
- 9.19 Rural - based enterprise is clearly important to the Borough as is fishing. Fishing has been a major industry in the area for many years with local communities (such as Portavogie - which is the second largest fishing port in Northern Ireland after Kilkeel) remaining at the centre of the trade today.
- 9.20 The LDP process shall take account of opportunities to facilitate economic development needs in villages, small settlements and the open countryside in line with the policy direction of the SPPS and the RDS. Forthcoming position papers on Tourism and Minerals shall comment further on employment within these areas.

Figure 5: Rural based employment/industry in Borough



9.21 In providing employment, Ards and North Down has a high proportion in the Service sector which is higher than the regional average. Employee jobs in tourism - characteristic industries relate to a number of different business areas, most notably hotels and restaurants. In total, in 2016 there were an estimated 739,615 employee jobs in Northern Ireland, of which 61,000 or 9%

were in tourism characteristic industries. Within Northern Ireland, Belfast LGD accounts for 30% of the total, however, when looking at the relative importance of the tourism industry within the local context of Ards and North Down, local employment in the tourism industry is relatively higher in the Borough at (13%), followed by Causeway Coast & Glens accounting for 12%.

Figure 6: Tourism jobs infographic- Invest NI Ards and North Down Council Area Profile July 2018.

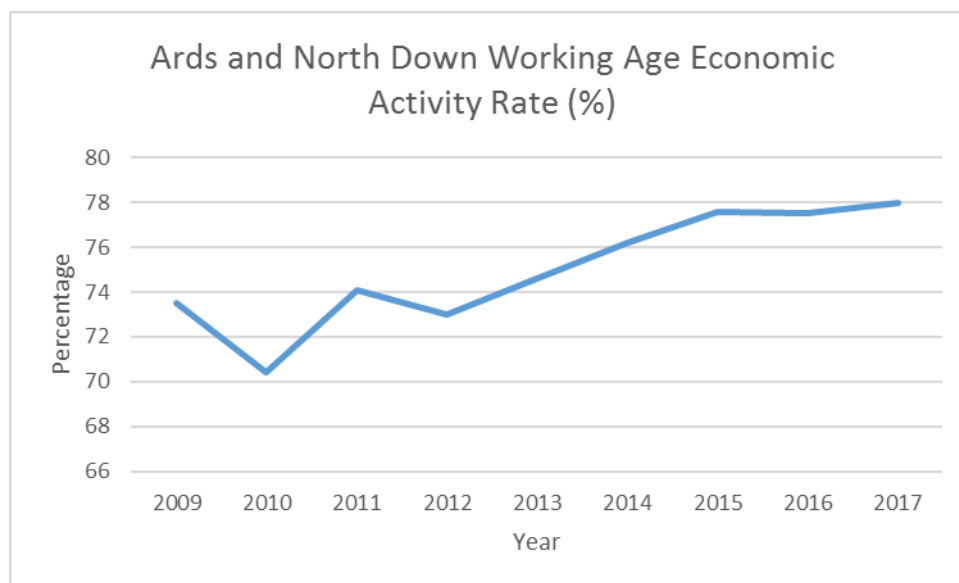


9.22 Jobs within the construction sector remain as showing the effects of the economic downturn and numbers have declined with the sector now representing 3% of employee jobs within the Borough (just below the NI average of 5%).

Labour Market Structure

9.23 In terms of local labour market in Ards and North Down, it is broadly reflective of the Northern Ireland context.

Figure 7: Ards and North Down Working Age Economic Activity Rate



Source: The Labour Force Survey, NISRA (2017)

- 9.24 Labour Force Survey 2017 (published by NISRA 25 September 2018) regarding the Labour market, indicates that in 2017, the working age (ages 16-64) employment rate in Ards and North Down was 75.9% -19 percentage points higher than the lowest rate, which was recorded in Derry City and Strabane (56.8%). Furthermore, the survey highlights that Ards and North Down has the second highest employment rate (16-64) of LGD's in NI and is higher than the Northern Ireland rate (69.0%).
- 9.27 The NI unemployment rate (NI Labour Market Report December 2018) was 3.9% which is below the UK rate (4.1%), the European Union (6.7%) and the Republic of Ireland (5.4%) rates for September 2018.

Key Findings

- 10.1 The evidence presented in this section has led to the identification of the following key findings:
- 10.2 The tertiary (service) sector dominates the local employment market in terms of jobs and the number of VAT/PAYE registered businesses. There are apparent relationships, in the context of the labour market, between the Borough and neighbouring council areas – particularly Belfast City to where many of our residents commute, and from where many of our Borough’s workforce travel.
- 10.3 Whilst the Borough’s population, economic activity and employment rates continue to increase, and unemployment and claimant count rates fall, the working age population is declining. Based upon 2014 projections, the number of residents at working age (16-64) will fall by 6% between 2014 and 2030; potentially resulting in a decline in the number of residents in employment at the end of the Plan period should current employment rates remain constant.
- 10.4 The LDP will need to provide land for employment, industry and economic development. The council will need to take decisions regarding the allocation of such land as defined by the LDP spatial strategy. This decision will be informed by the work undertaken in the Employment Land Evaluation Framework as set out in the RDS. The Preferred Options Paper shall set out options and a Council ‘Preferred Option’ which is subject to consultation.
- 10.5 The supply of existing land zoned for employment must be considered in defining the preferred option. The Council will be required to monitor employment land supply on an annual basis as part of the annual monitoring Report⁶. Such monitoring will highlight any issues which may arise and will

⁶ Part 6 of [The Planning \(Local Development Plan\) Regulations \(Northern Ireland\) 2015](#)

allow assessment of plan policies and proposals with the potential for formal review if necessary.

- 10.6 Approximately 203 hectares of land within the Borough are identified (in current Development Plans) as areas of existing or future employment and industry use. It is estimated that approximately 63 hectares of land identified as employment and industry use remain available for development. Of this, 54% is located within Bangor, with 46% located in Newtownards. This reflects the position of Bangor and Newtownards in terms of the employment land framework and context of regional planning policy but also the need for further assessments to be carried out with regard to future land requirements. Projections based on past take up will not provide a robust assessment for future requirements. The SPPS requires that LDPs provide not only an ample supply of economic development land for the Plan period, but also a range and choice of sites in terms of size and location to promote flexibility and provide for the varying types of economic activity. This requires further bespoke studies.

Conclusion

- 11.1 In order to plan for the future development of employment and industry in the Borough, it will be necessary to assess the Borough's existing zonings and remaining availability alongside economic trends, the requirements of potential investors and how sites can be connected to existing transportation infrastructure in order to improve sustainability and accessibility. This process will be carried out in accordance with the Regional Development Strategy's Employment Land Evaluation Framework as outlined earlier in this paper.

Glossary

The Planning (Use Classes) Order (Northern Ireland) 2015

A statutory rule which specifies classes of use of buildings or other land for the purposes of section 23(3) of the Planning Act (Northern Ireland) 2011. Section 23(3) specifies operations or uses of land which shall not to be taken for the purposes of that Act to involve development of the land which therefore do not require planning permission.

Class A2 - Financial, professional and other services

Use for the provision of services which it is appropriate to provide in a shopping area, where the services are provided principally to visiting members of the public including—

- (a) financial services; or
- (b) professional services.

Class B1 - Business use -

(a) as an office other than a use within Class A2 (Financial, professional and other services);

(b) as a call centre; or

(c) for research and development which can be carried out without detriment to amenity by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit.

Class B2: Light Industrial

Use for any industrial process which can be carried out without detriment to amenity by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit.

Class B3: General Industrial

Use for the carrying on of any industrial process other than one falling within Class B2.

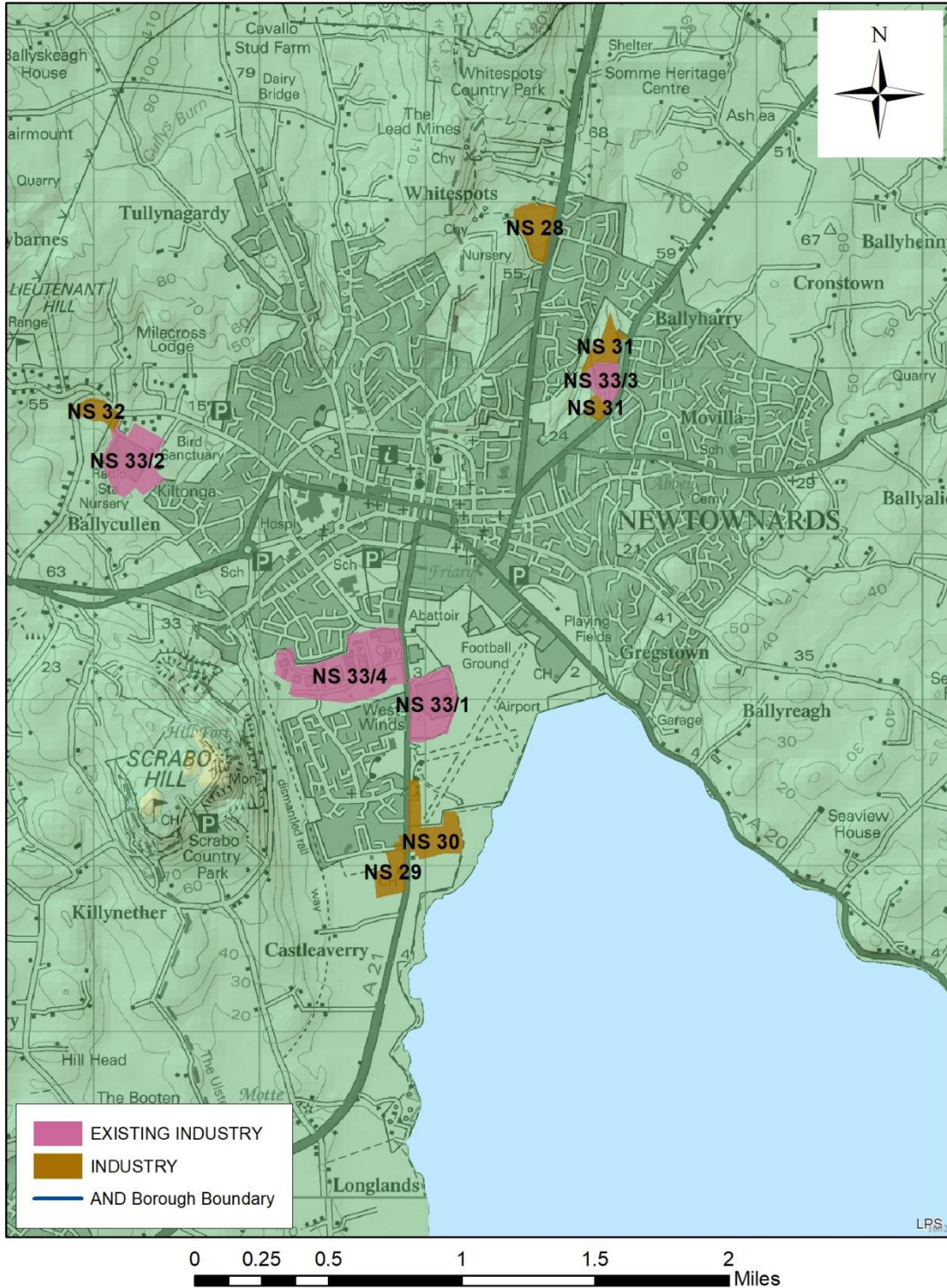
Class B4: Storage or distribution

Use for storage or as a distribution centre.

Sui Generis: 'of its own kind': in this context, refers to land uses which do not fall into any particular use class in the Planning (Use Classes) Order (Northern Ireland) 2015. See details in Use Classes Order, such as hotel, scrapyards, motor sales, betting office, swimming pool.

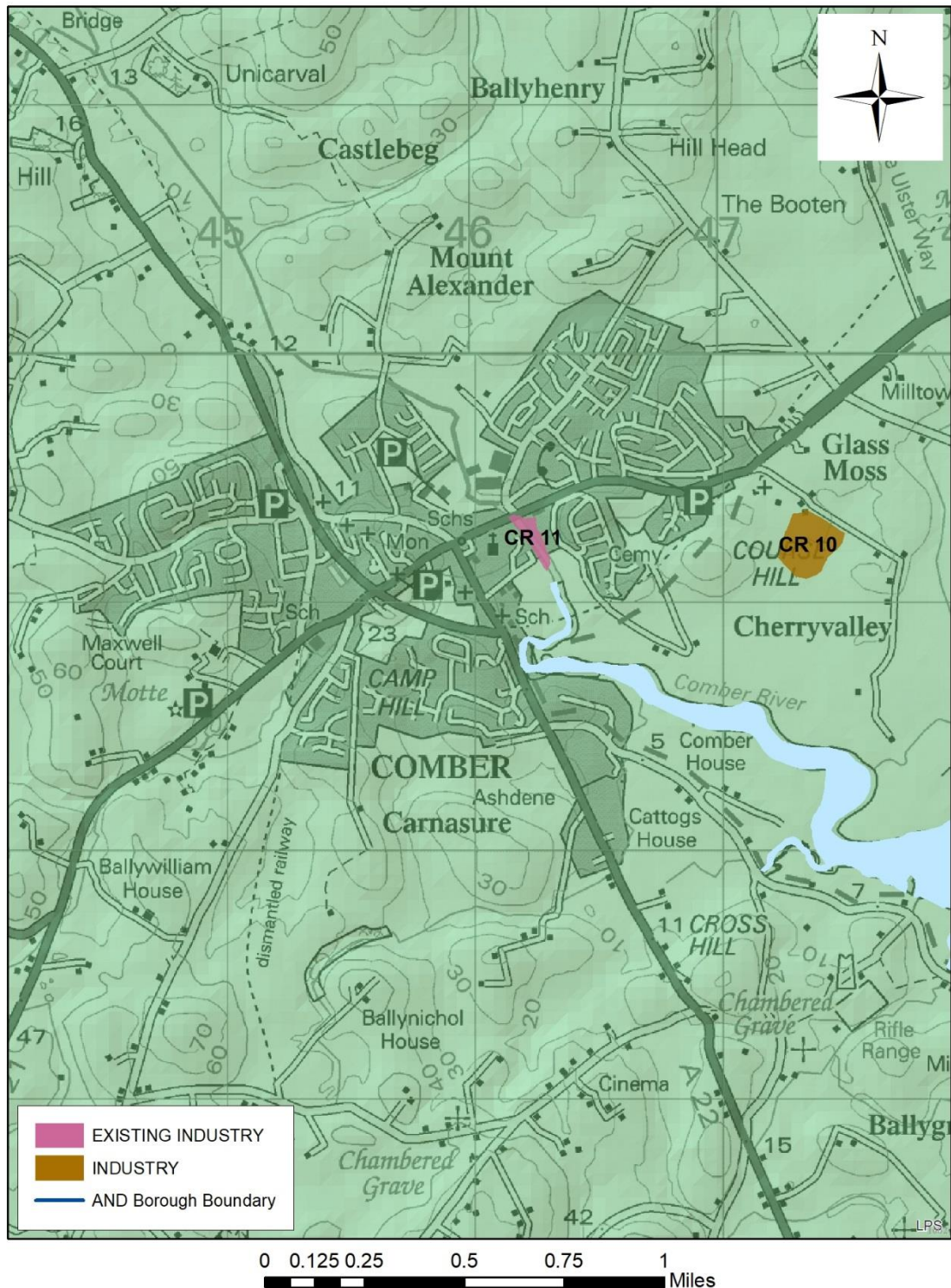
Map Booklet Location of Extant Zonings

Newtownards



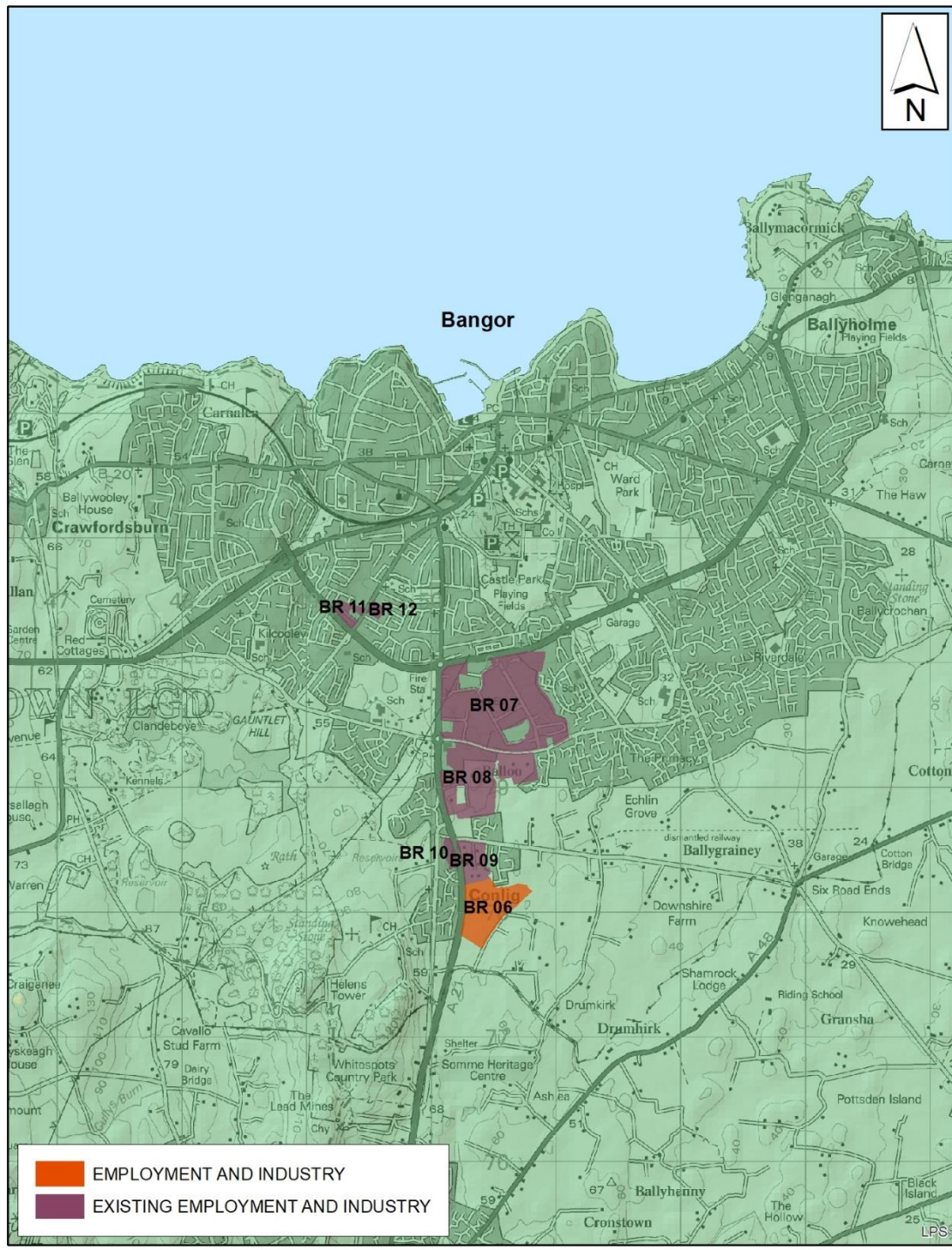
This is based upon Crown Copyright and is reproduced with the permission of Land & Property Services under delegated authority from the Controller of Her Majesty's Stationery Office, ©Crown copyright and database right 2018 CS&LA156

Location of Extant Zonings - Comber



This is based upon Crown Copyright and is reproduced with the permission of Land & Property Services under delegated authority from the Controller of Her Majesty's Stationery Office, ©Crown copyright and database right 2018 CS&LA156

Location of Extant Zonings - Bangor



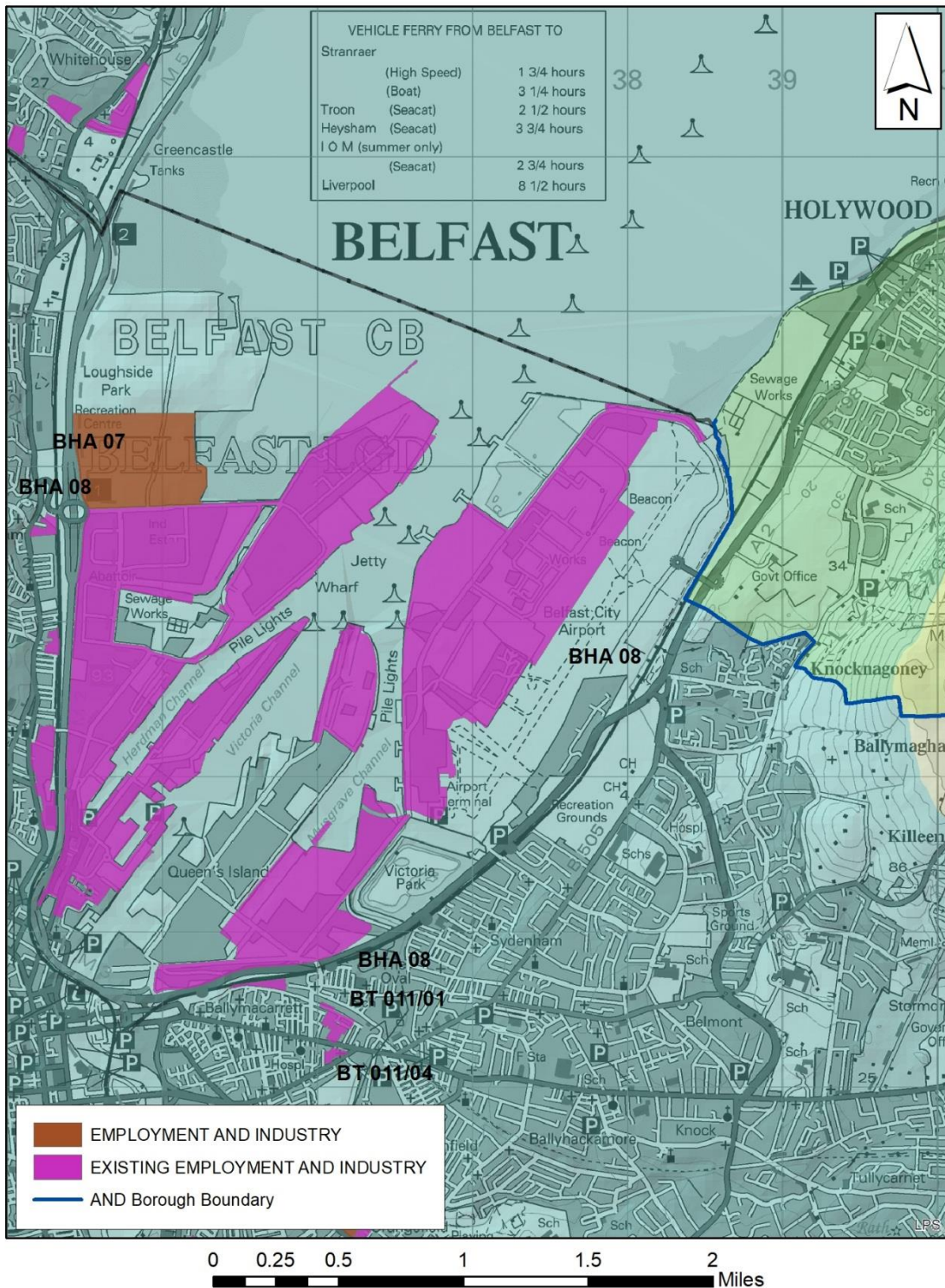
This is based upon Crown Copyright and is reproduced with the permission of Land & Property Services under delegated authority from the Controller of Her Majesty's Stationery Office, ©Crown copyright and database right 2018 CS&LA156

Existing Industry Zoning - Donaghadee



This is based upon Crown Copyright and is reproduced with the permission of Land & Property Services under delegated authority from the Controller of Her Majesty's Stationery Office, ©Crown copyright and database right 2018 CS&LA156

Map showing context of 800ha extant zoning – Belfast



This is based upon Crown Copyright and is reproduced with the permission of Land & Property Services under delegated authority from the Controller of Her Majesty's Stationery Office, ©Crown copyright and database right 2018 CS&LA156

Appendix 1

Employment Land Evaluation Framework – RDS 2035

TABLE 3.1: The Employment Land Evaluation Framework	
<p>Stage 1</p> <p>Taking Stock of the Existing Situation</p>	<p>An initial assessment of the 'fitness for purpose' including the environmental implications of the existing employment land portfolio. This is principally in order to identify the 'best' employment sites to be retained and protected and identifying sites that should clearly be released for other uses.</p>
<p>Stage 2</p> <p>Understanding Future Requirements</p>	<p>Quantify the amount of employment land required across the main business sectors during the development plan period. This is achieved by assessing both demand and supply elements and assessing how they can be met in aggregate by the existing stock of business premises and by allocated sites.</p> <p>Account should also be taken of turnover of existing sites due to relocation or closures. Both short/medium term and strategic provision need to be considered in this process.</p>
<p>Stage 3</p> <p>Identifying a 'New' portfolio of sites</p>	<p>Devise qualitative site appraisal criteria to determine which sites meet the occupier or developer needs. Confirm the existing sites to be retained, replaced or released, and any gaps in the portfolio. In this allocation, consideration should be given to previously used sites, and in the reallocation, the environmental impact of one site relative to others should be included. The results of Stage 2, together with this site-appraisal should provide a robust justification for altering allocations for employment land.</p>

Appendix 2

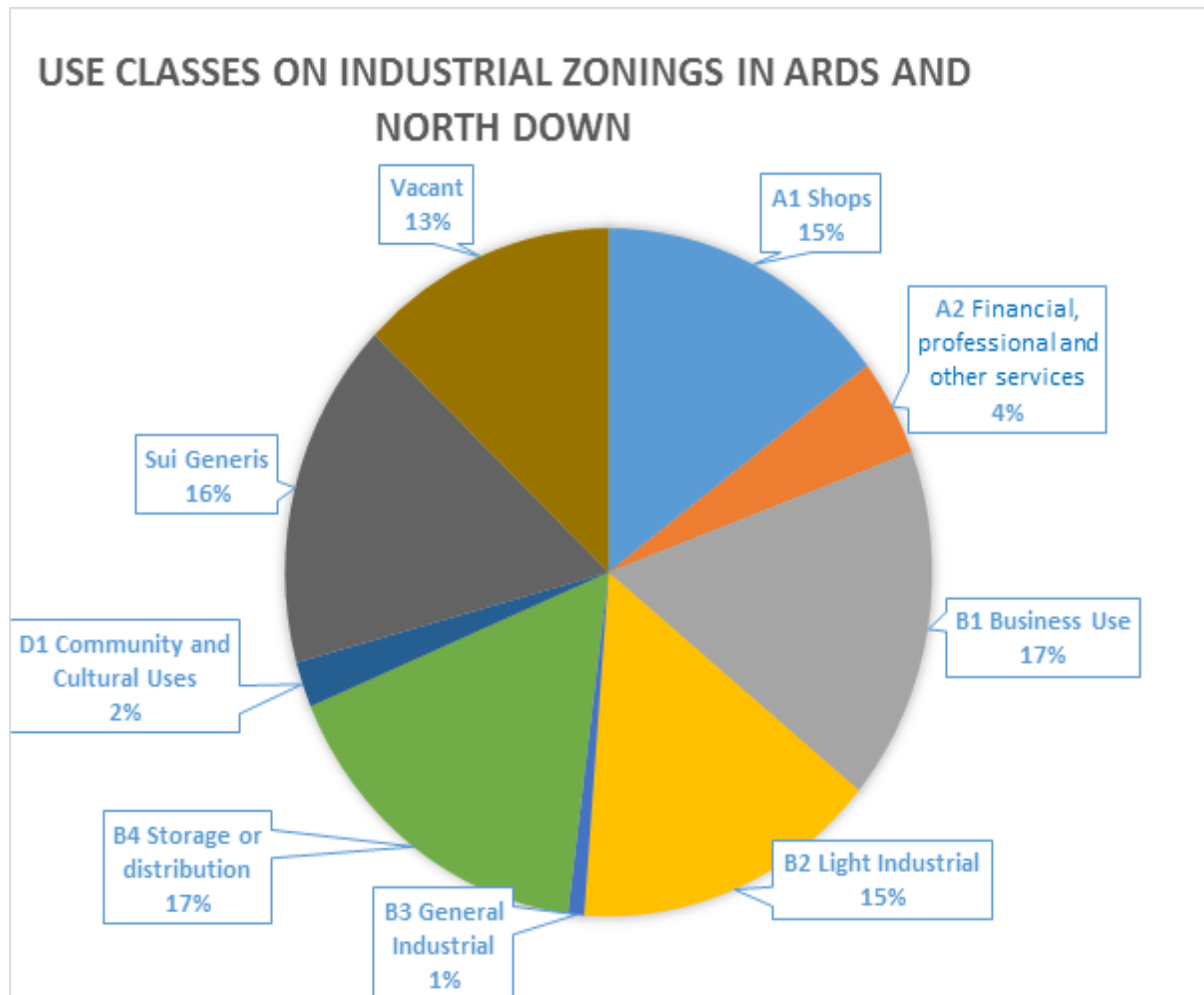
Uptake of Industrial Land across the Borough – Employment Land Review Report November 2018

	Reference	Location	Area Zoned (ha)	Area Developed (ha)	Area Remaining (ha)
Draft BELFAST METROPOLITAN AREA PLAN 2015	Bangor				
	BR 06	Lands at Newtownards Road	17	0	17
	BR 07	Balloo Road/ Newtownards Road/ South Circular Road	55.22	50.55	4.67
	BR 08	Balloo Road/ Newtownards Road	28.07	15.92	12.15
	BR 09	Greenways Industrial Estate, Green Road	6.64	6.64	0
	BR 10	Newtownards Road	1.76	1.76	0
	BR 11	Clandeboye Road	2.38	2.38	0
	BR 12	Clandeboye Road	1.22	0.99	0.23
		Sub total	112.29	78.24	34.05
ARDS AND DOWN PLAN 2015	Newtownards				
	NS 28	Bangor Road	5.87	0	5.87
	NS 29	Comber Road	4.51	0	4.51
	NS 30	Comber Road	8.19	0.98	7.21
	NS 31	Donaghadee Road	5.04	1.62	3.42
	NS 32	Milecross Road	2.97	0	2.97
	NS 33	Jubilee Road	23.3	20.14	3.61
	NS 33	Kiltonga	11.4	11.4	0
	NS 33	Donaghadee Road	4.05	3.19	0.86
	NS 33	Comber Road	10.3	10.12	0.18

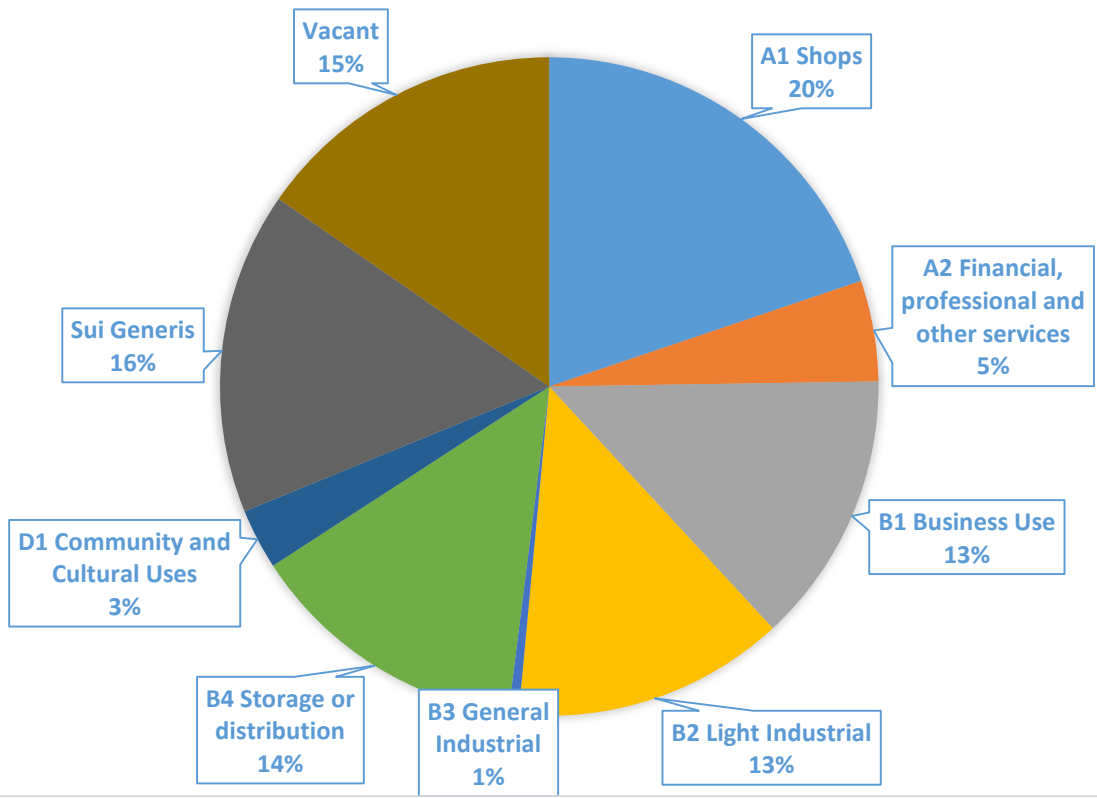
	Sub total	75.63	47	28.63
Comber				
CR 10	Riverside, Land south of Comber Bypass Stage 2	4.66	4.66	0
CR 11	Newtownards Road	1.32	1.32	0
	Sub total	5.98	5.98	0
Donaghadee				
DE 15	High Bangor Road	9.33	9.33	0
Total		203.235	140.55	62.68

Appendix 3

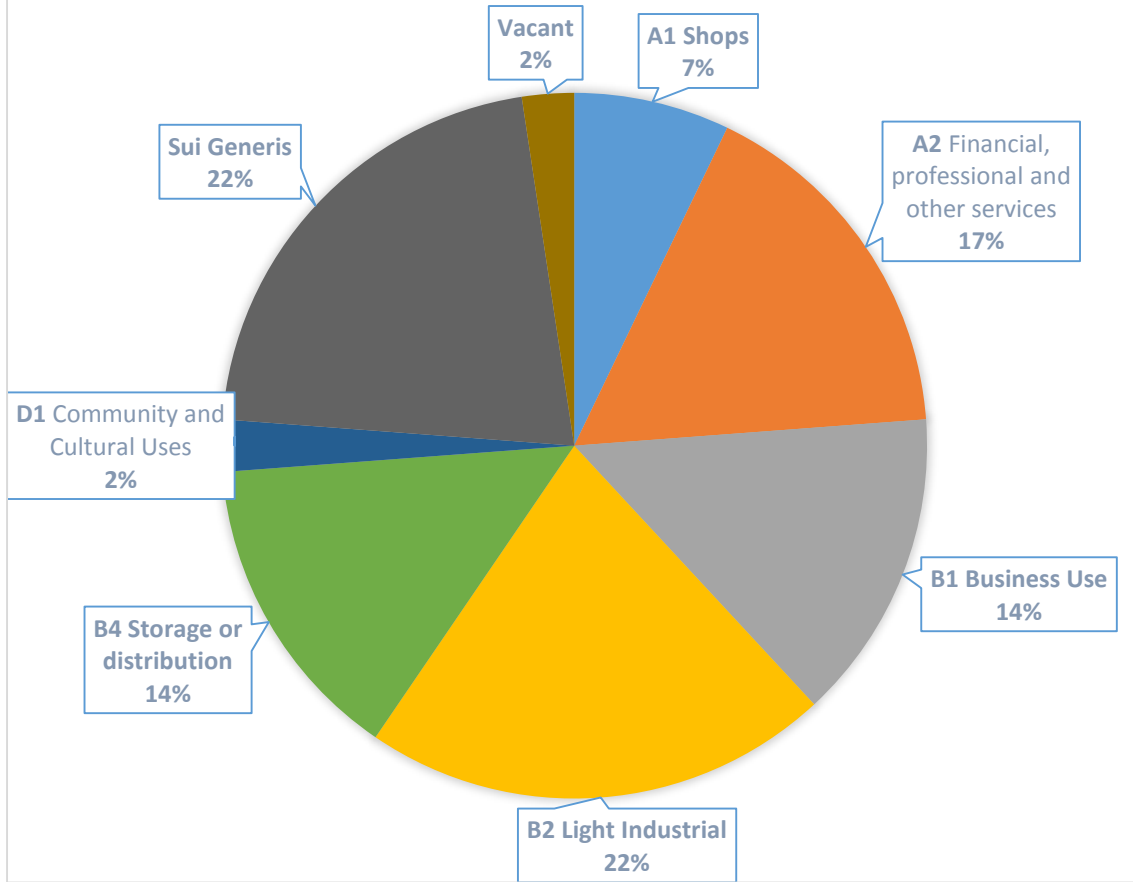
Survey of use classes in the existing buildings on zonings in Ards and North Down.



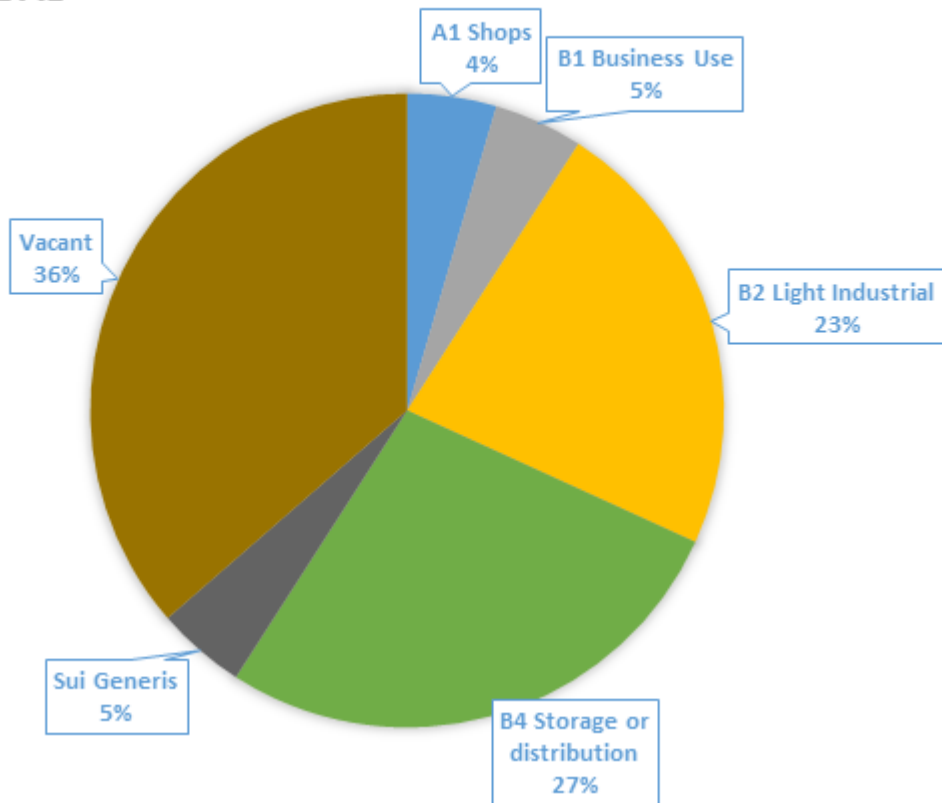
BR 06 BALLOO ROAD/NEWTOWNARDS ROAD/SOUTH CIRCULAR ROAD



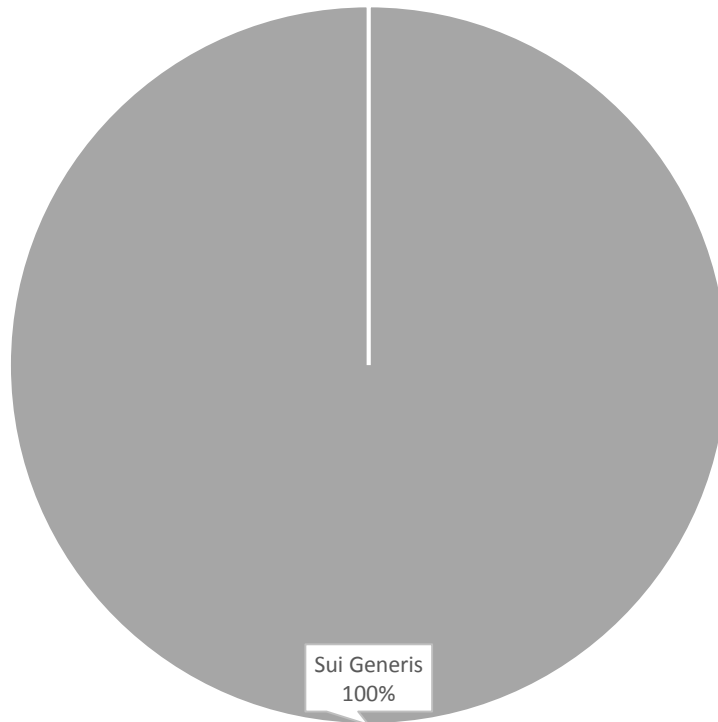
BR 07 BALLOO ROAD/NEWTOWNARDS ROAD



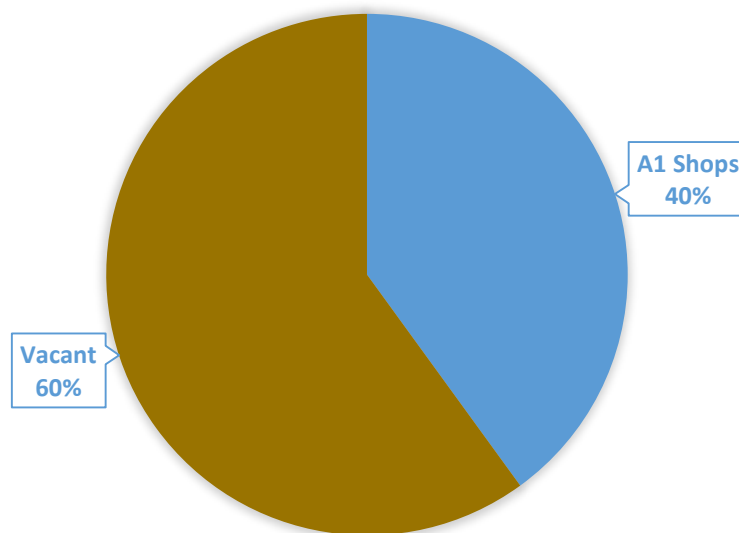
**BR 08 GREENWAYS INDUSTRIAL ESTATE
GREEN ROAD**



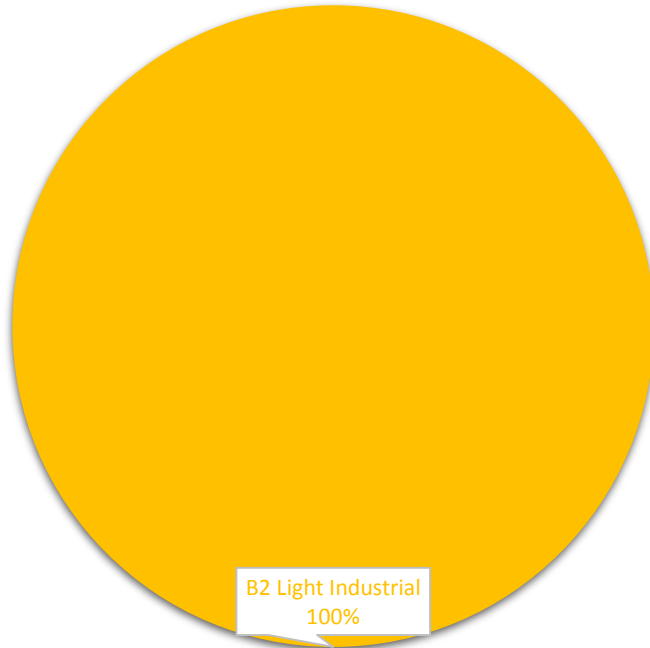
BR 09 NEWTOWNARDS ROAD



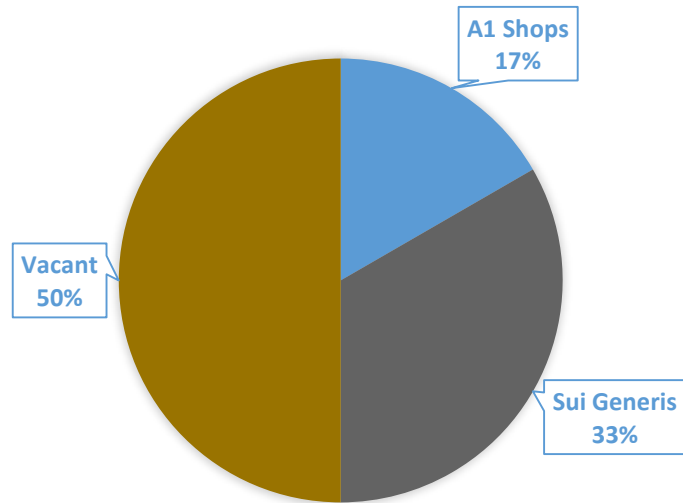
BR 10 CLANDEBOYE ROAD



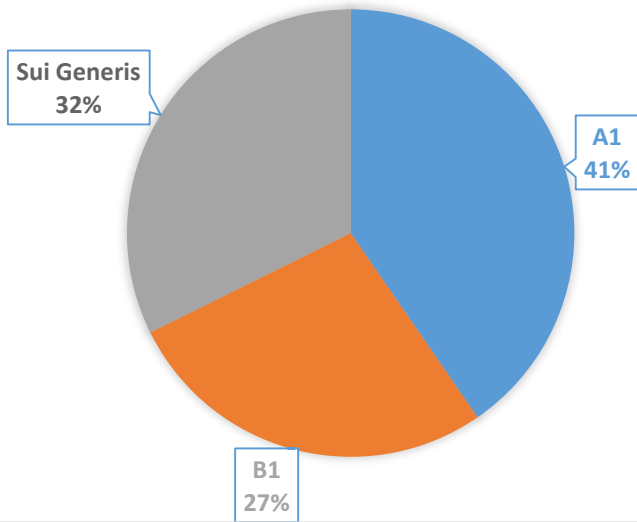
BR 11 CLANDEBOYE ROAD



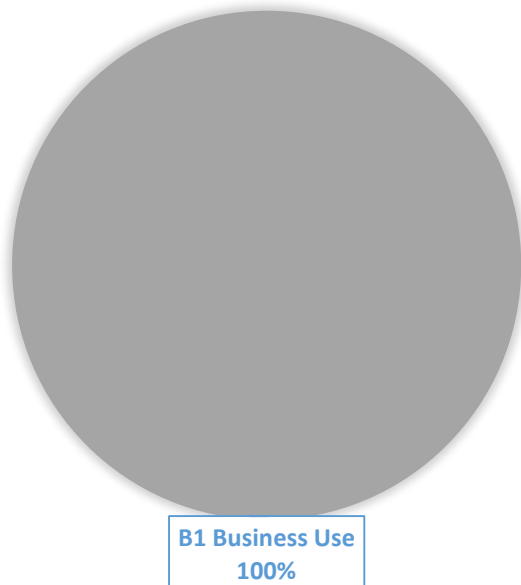
NS 29 COMBER ROAD NEWTOWNARDS



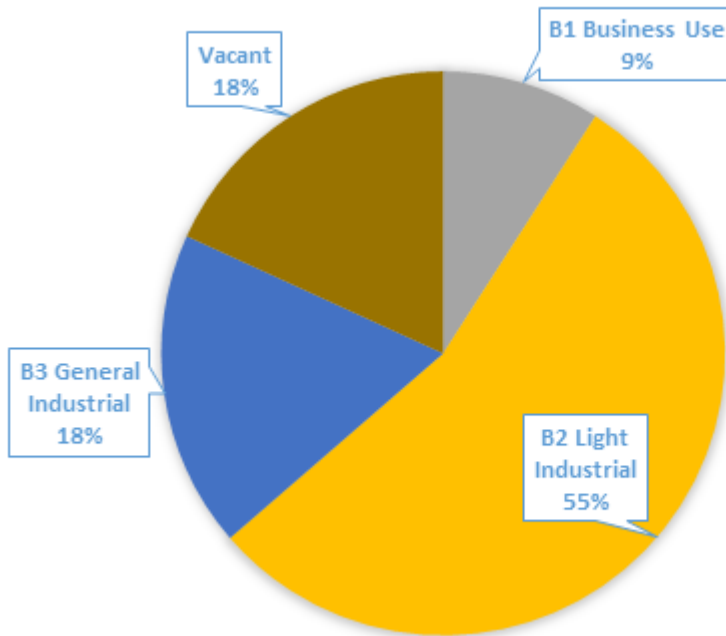
NS 30 COMBER ROAD NEWTOWNARDS



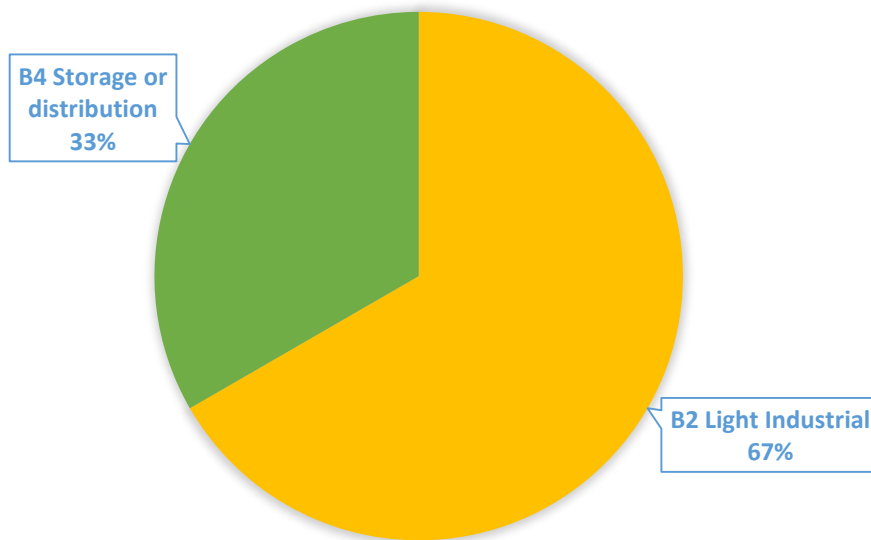
**NS 31 DONAGHADEE ROAD
NEWTOWNARDS**



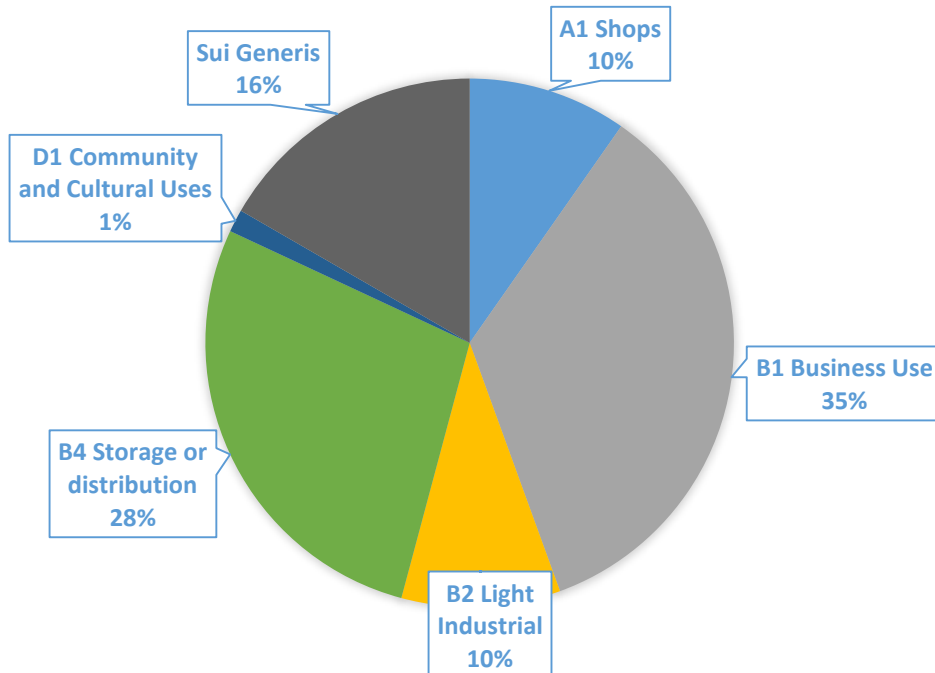
NS 33 KILTONGA INDUSTRIAL ESTATE



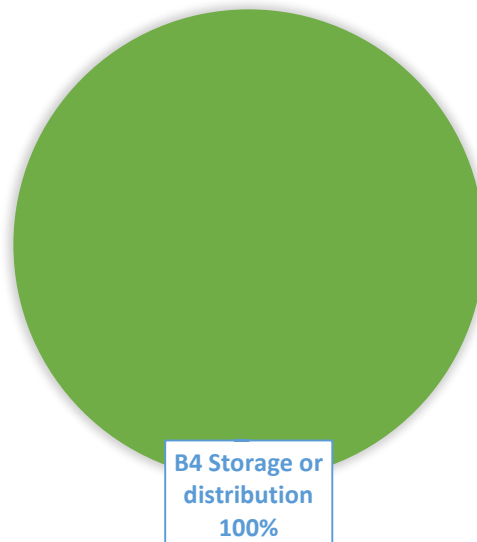
NS 33 DONAGHADEE ROAD NEWTOWNARDS



NS 33 JUBILEE ROAD INDUSTRIAL ESTATE NEWTOWNARDS



IPA 1 GREYABBEY ROAD BALLYWALTER



BRES Number of Employee Jobs 2017

District Council Area	Number of Employee Jobs						
	Male	Male	Male	Female	Female	Female	Total
	Full- Time	Part- Time		Full- Time	Part- Time		
Antrim & Newtownabbey	25,487	5,189	30,676	14,120	14,951	29,071	59,747
Armagh, Banbridge & Craigavon	29,339	6,254	35,593	19,097	19,178	38,275	73,868
Belfast	89,526	20,421	109,947	64,309	49,841	114,150	224,098
Causeway Coast & Glens	14,274	4,356	18,630	9,767	12,159	21,926	40,556
Derry City & Strabane	20,213	5,534	25,747	15,512	14,562	30,074	55,821
Fermanagh & Omagh	14,865	4,353	19,218	11,143	11,403	22,546	41,764
Lisburn City & Castlereagh	21,770	5,108	26,878	14,683	14,466	29,149	56,027
Mid & East Antrim	17,539	4,003	21,543	10,071	11,877	21,947	43,490
Mid Ulster	25,703	4,116	29,819	12,020	12,417	24,437	54,256
Newry, Mourne & Down	20,492	5,474	25,966	14,620	15,498	30,118	56,084
Ards & North Down	12,238	4,400	16,637	9,848	12,261	22,109	38,746
Total	291,446	69,208	360,654	195,190	188,613	383,802	744,457

¹ Employee job figures by District Council Area presented in this report include agriculture figures. Previous reports in this series did not include agriculture job figures at District Council Area level.

Source: NI Business Register and Employment Survey (BRES) - December 2017.

Public/Private sector Jobs , Business Register and Employment Survey 2017

District Council	Public Sector	Private Sector	Totals	Public Sector %	Private Sector %
Antrim and Newtownabbey	13,919	45,828	59,747	23%	77%
Armagh City, Banbridge and Craigavon	18,901	54,967	73,868	26%	74%
Belfast	68,189	155,909	224,098	30%	70%
Causeway Coast and Glens	10,208	30,348	40,556	25%	75%
Derry City and Strabane	17,852	37,969	55,821	32%	68%
Fermanagh and Omagh	12,637	29,126	41,764	30%	70%
Lisburn and Castlereagh	17,838	38,189	56,027	32%	68%
Mid and East Antrim	10,030	33,460	43,490	23%	77%
Mid Ulster	9,399	44,857	54,256	17%	83%
Newry, Mourne and Down	14,167	41,917	56,084	25%	75%
Ards and North Down	9,086	29,660	38,746	23%	77%
Total	202,226	542,230	744,456	27%	73%

Sub-Northern Ireland analysis from the BRES is primarily based on the location of the jobs, not on the home address of the employees. However, in a small number of instances where employers were not able to provide figures by actual location employees are assigned to the head office.

Source: NI Business Register and Employment Survey (BRES) - December 2017.

References and Useful Links

The Planning (Local Development Plan) Regulations (Northern Ireland) 2015

http://www.legislation.gov.uk/nisr/2015/62/pdfs/nisr_20150062_en.pdf

Regional Development Strategy 2035

<https://www.infrastructure-ni.gov.uk/publications/regional-development-strategy-2035>

Strategic Planning Policy Statement

<http://www.planningni.gov.uk/index/policy/spps.htm>

Ards and Down Area Plan 2015

https://www.planningni.gov.uk/index/policy/dev_plans/devplans_az/ardsdown_2015.htm

Belfast Metropolitan Area Plan 2015

https://www.planningni.gov.uk/index/policy/dev_plans/devplans_az/bmap_2015.htm

'The Big Plan' Ards and North Down Community Plan

http://www.ardsandnorthdown.gov.uk/downloads/The_Big_Plan_Second_Edt_d2.pdf

Labour Force Survey August 2017

<https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/G7ft9W-labour-market-report-august-2017.PDF>

The Labour Force Survey (LFS) is a household sample survey carried out by interviewing individuals about their personal circumstances and work. It provides a rich source of information on the labour force using internationally agreed definitions. However, the estimates from it are subject to sampling error and care should be taken when making inferences from them

Royal Town Planning Institute (RTPI) Policy paper – Planning for the growth of the technology and advanced manufacturing sectors

<http://rtpi.org.uk/media/1720882/Planning%20and%20tech%20-%201.3.16.pdf>

RTPI Policy paper – **The Digital Economy and Town Planning** - Planning's role in the growth of the new economy

http://rtpi.org.uk/media/2346274/digital_economy_and_town_planning2.pdf