Yorkshire Dales National Park Authority

Socioeconomic Wellbeing Assessment - YDNP

Appendix – District Sub Areas

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1 Socioeconomic Baseline: District Sub Areas

1. This Appendix document provides further detail on key social and economic indicators in the YDNP's constituent district sub areas:
   - Richmondshire
   - Craven
   - Eden
   - South Lakeland
   - Lancaster
2. The material contained herein has informed the analysis of the socioeconomic baseline of the YDNP as a whole in the main Socioeconomic Wellbeing Assessment Report.

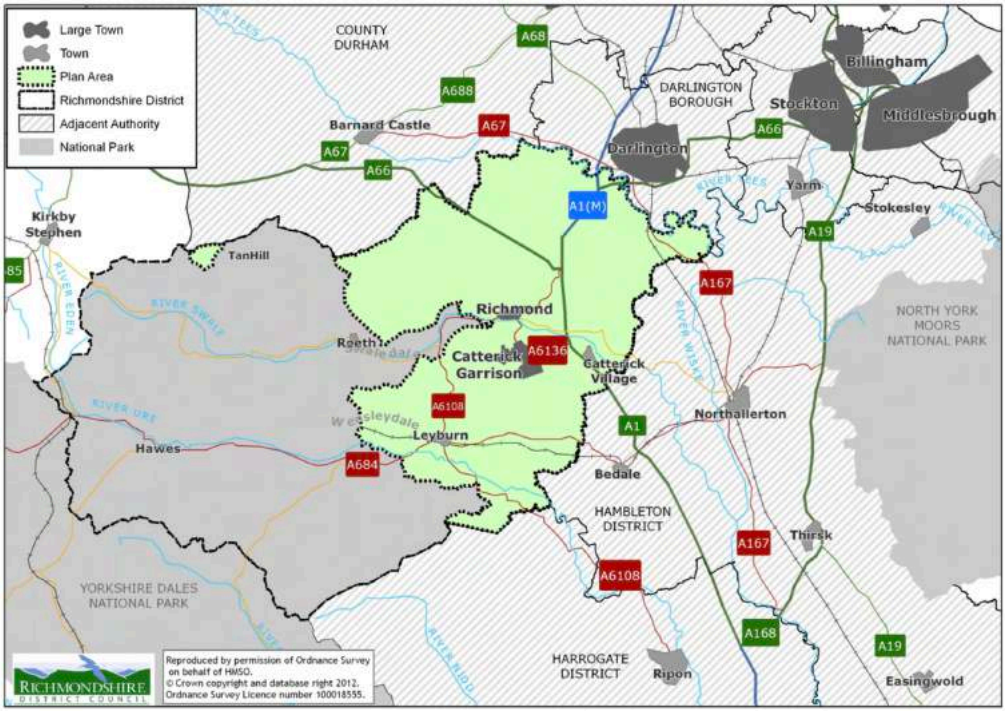
2 Richmondshire

2.1 Overview

3. Richmondshire District is located in North Yorkshire and is predominantly rural in character. The western part of the District is situated within the YDNP. This accounts for a large proportion of the area of both the YDNP and Richmondshire District.

4. Richmondshire has one of the smallest populations of any local authority (ranking 317 of 326 districts with 53,700 residents[1]) but covers one of the largest geographic areas. The District is characterised by a good quality of life and rich natural environment. Key road connections in the District include the A1 that runs north-south thorough its eastern part providing access to Tees Valley and the A684 that runs east-west through the YDNP.

Figure A2.1: Richmondshire District



Source: RDC.

5. A brief overview of Richmondshire's **key settlements within the YDNP** is as follows:

- **Hawes** – Hawes is a popular visitor destination and is the home of many of the YDNP's attractions including the Wensleydale Creamery and the Dales Countryside Museum. The town has also maintained elements of its heritage and is using these as a visitor attraction, including rope making, craft workshops, and the converted Gayle Mill;

- **Reeth** – Reeth, situated in Swaledale is a smaller and remote settlement. The relative isolation poses unique challenges but also provides opportunities to

[1] 'Population Estimates for UK, England and Wales, Scotland and Northern Ireland, Mid-2016', ONS.

realise a sustainable approach to growth and regeneration whilst maintaining the vitality and vibrancy of the village; and

- **Aysgarth** – Aysgarth is focus for visitor activity around Aysgarth Falls and nearby YDNP Centre. It is also the location of the Aysgarth Falls Hotel and Yore Mill.

6. A brief overview of Richmondshire's **key settlements <u>outside</u> of the YDNP** is as follows:

   - **Richmond** - Richmond is the historic administrative and service centre of the District. It has a population of around 8,400 people[2]. Key attractions in the town include the Georgian Theatre Royal and Richmond Castle. Due to its historic environment, opportunities for physical expansion in Richmond are relatively limited;

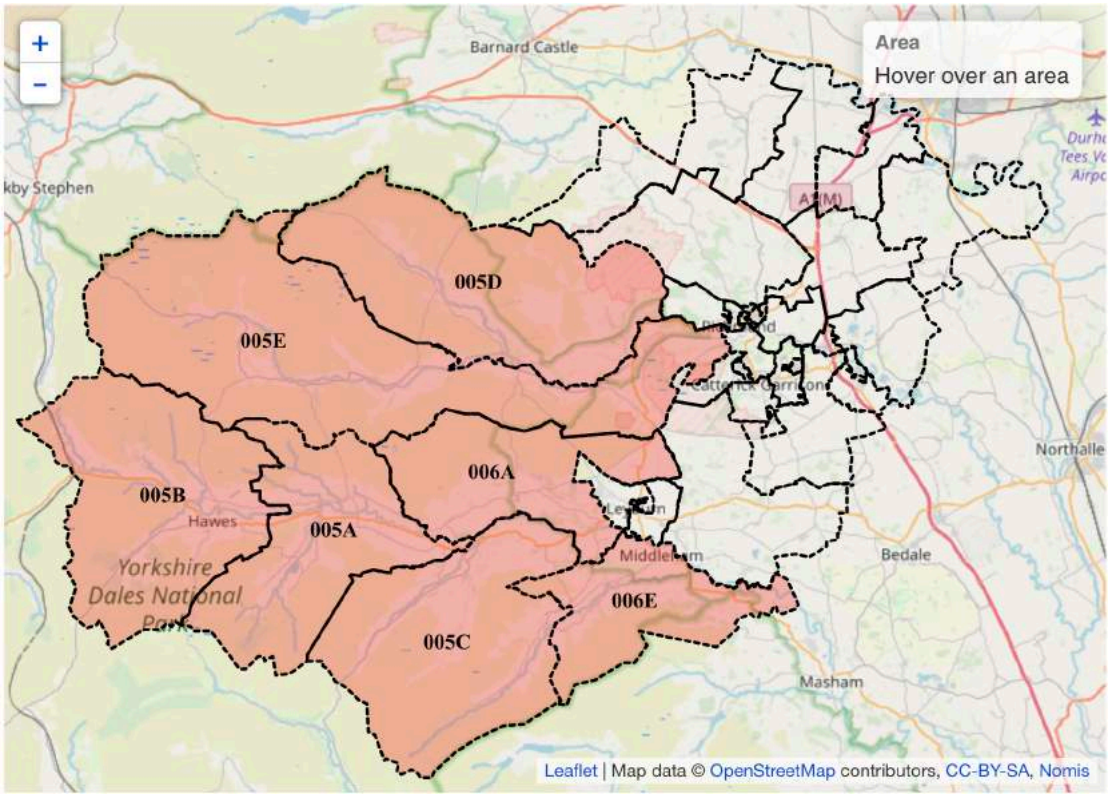
   - **Catterick Garrison and Colburn** – The area generally known as Catterick Garrison includes the parishes of Hipswell, Scotton and Colburn as well as the Catterick Garrison main military site. Catterick Garrison is the largest British Army Garrison and has a population of around 12,000. In policy terms, it is considered to have the capacity for balanced development of housing, employment and town centre facilities. Colburn is located close to Catterick Garrison Town; and

   - **Leyburn** - Leyburn is a market town in Wensleydale with a population of about 2,200 residents. Leyburn offers a range of facilities including shopping, education and offices. It is also home to Tennants Auctioneers, the largest auction house in Europe. Leyburn is a significant tourist destination with its population swelling in summer months. It has featured in the Tour de France and 2012 Olympics torch relay. The economy has diversified to compensate for the decline in local quarrying employment (Leyburn Business Park has been particularly important in supporting this diversification).

7. The analysis examines data for Richmondshire within the YDNP at Lower Super Output Area (LSOA) level, as shown in the following map. In some cases a proportion of the LSOAs are applied to best fit the YDNP boundary. This area is referred to as the Richmondshire Sub Area in subsequent analysis.

[2] 2011 Census.

Figure A2.2: LSOAs used to construct Richmondshire Sub Area



005A - Askrigg, Bainbridge, Aysgarth

005B - Hawes

005C - West Burton, West Witten, Carlton

005D - Reeth, Marrick, Marske

005E - Grinton, Low Row, Gunnerside

006A - Carperby

006E - Melmerby, West Scrafton, Coverham, East Witton

Source: ONS

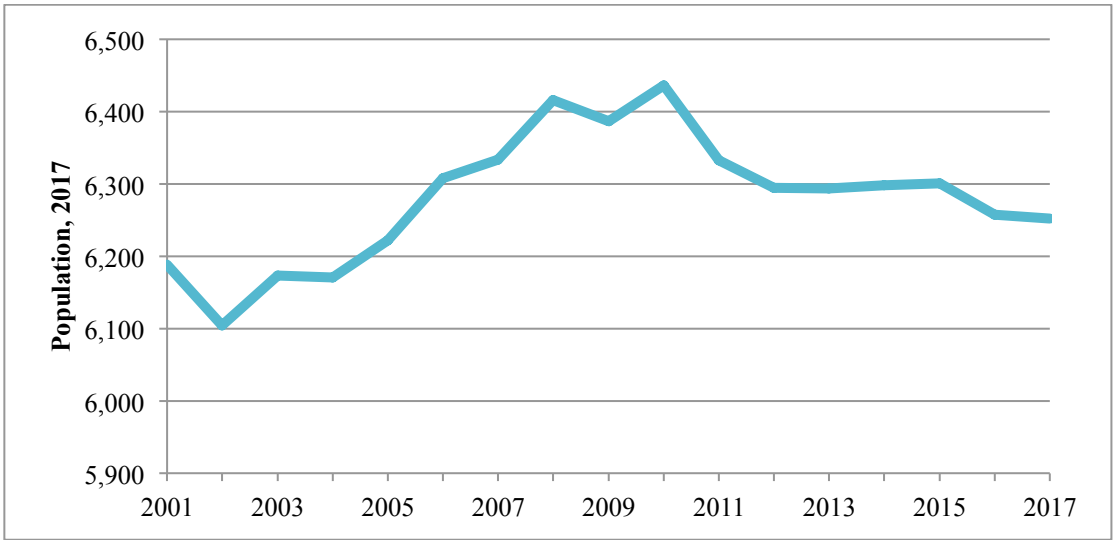
2.2 Population

8. Edge Analytics has undertaken a demographic analysis of the YDNP (see Demographic Evidence Report). Some key points drawn from this analysis are outlined below.

9. This shows that the total population of the Richmondshire Sub Area in 2017 was 6,253 people. This is around 11.6% of the total population in Richmondshire District and around 26.6% of the estimated total population of the whole YDNP.

10. Over the period 2001-2017, the population in the Richmondshire Sub Area grew by around 1%. It is notable however that a change in trend has occurred since 2008, a decline in population of around -2.5% being recorded since this time.

Figure A2.3: Total population, Richmondshire Sub Area, 2001-2017



Source: Based on Edge Analytics demographic work

11. In 2017, the Richmondshire Sub Area had the highest proportion of population aged 65 years or more (at 30.5%). This level has increased from around 21.7% in 2001.

2.3 Economic activity

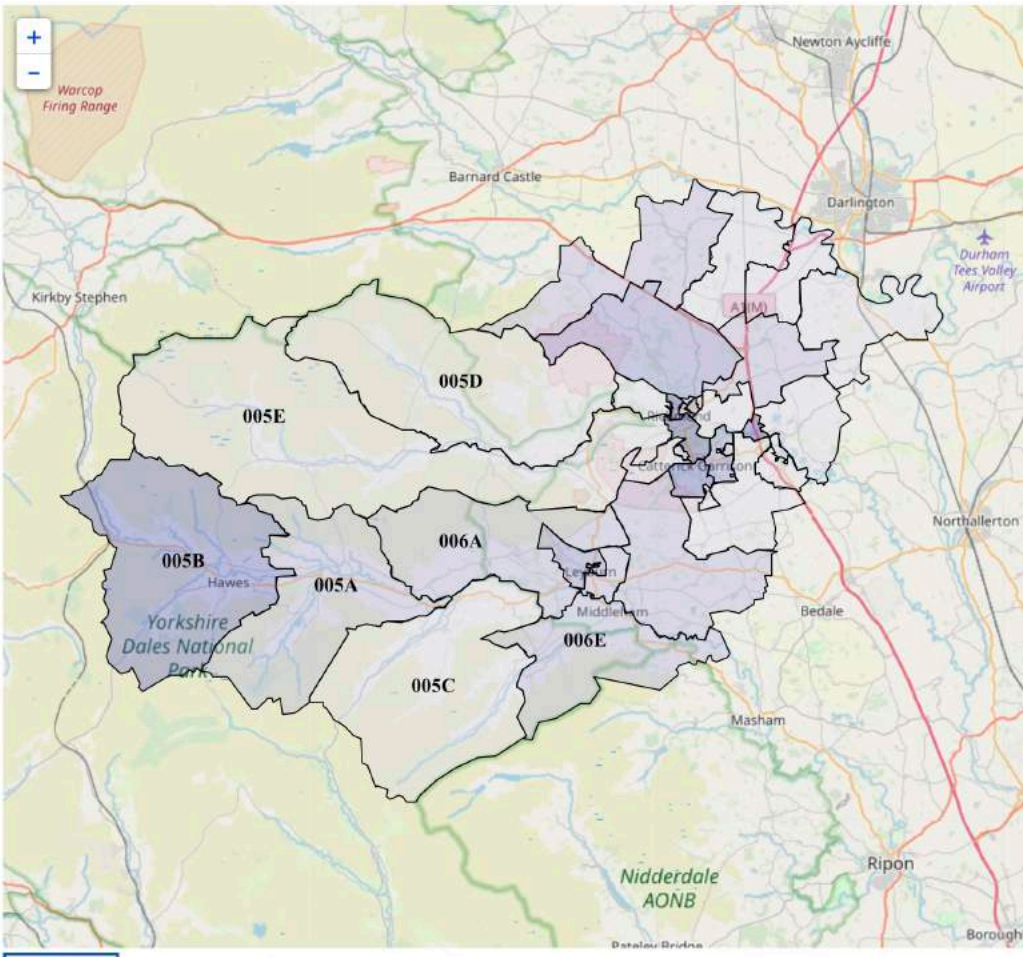
12. Data from the 2011 Census shows that this area of the YDNP had an economic activity rate of 82.3%. This is slightly lower than recorded for Richmondshire as a whole (83.1%). The economic activity rate is measured for the population aged 16-64.

2.4 Employment

Total employment

13. Examining the distribution of total employment across the whole of Richmondshire District in 2017 (the latest year available) indicates that several of the LSOAs within the YDNP are important in terms of employment. In particular, LSOA 005B (including Hawes) is significant.

Figure A2.4: Total employment across Richmondshire District, 2017



Source: ONS BRES data. Figures include PAYE employment

14. Examination of employment data for the Richmondshire Sub Area shows that total employment was around 2,912 jobs in 2017. The majority of employment (4 in 10 jobs) is in LSOA 005B (including Hawes). Around 2 in 10 jobs are located in LSOA 005A (including Askrigg, Bainbridge and Aysgarth).

15. Around 1 in 6 jobs in Richmondshire District are within the YDNP (total employment in the District in 2017 was 18,000 jobs).

Figure A2.5: Total employment in Richmondshire Sub Area, 2017

LSOA	Employment	as % of Richmondshire Sub Area
005A	600	20.6%
005B	1,250	42.9%
005C	250	8.6%
005D	265	9.1%
005E	286	9.8%
006A	88	3.0%
006E	173	5.9%
	2,912	**100.0%**
	Total Employment - Richmondshire District	**Richmondshire Sub Area as % of District**
	18,000	16.2%

Source: ONS BRES data. Figures include PAYE employment.

16. BRES data shows that there was a contraction in employment of 44 jobs (-1.8%) in the Richmondshire Sub Area in 2009-2015. Following this, there was an expansion of 406 jobs (+18.1%) in 2015-2017. Levels of employment in Richmondshire District as a whole were broadly unchanged over 2009-2015 but then grew in 2015-2017.

17. Over 2009-2017 (accepting discontinuity in BRES data), the employment level in the Richmondshire Sub Area expanded by 397 jobs (+15.8%) compared with growth of around 1,000 jobs (+5.3%) in Richmondshire District as a whole. The Richmondshire sub area therefore performed more strongly than Richmondshire District as a whole in terms of employment growth. There was considerable variation over the period however and most of the rise has occurred in 2015 to 2016.

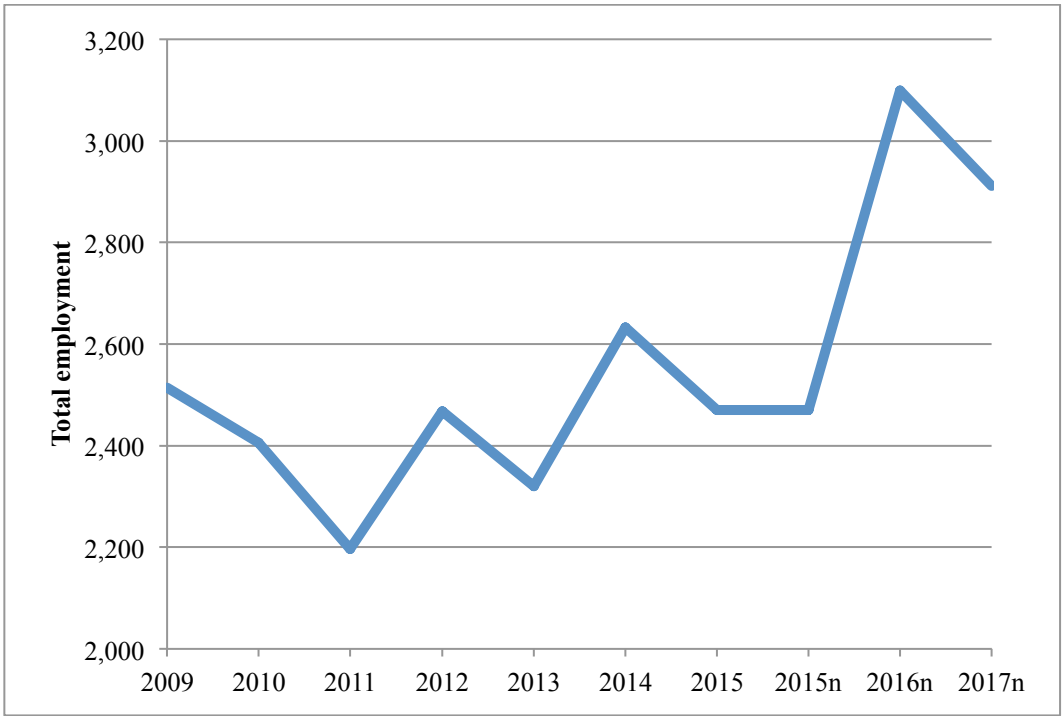
18. This performance masks significant differences across the Richmondshire Sub Area. The expansion in employment is concentrated in LSOA 005B (including Hawes). Smaller expansions are recorded in the LSOA 005C (including West Burton, West Witten & Carlton) and LSOA 006E (including Middleham, East Witton, Coverham, Melmerby and West Scrafton). In contrast, contractions occurred in LSOA 005D (including Reeth, Marrick & Marske) and LSOA 005E (including Gunnerside & Hudswell).

19. Primary research undertaken shows that a major employer (Wensleydale Creamery) opened facilities in Richmondshire Sub Area in 2015. The above growth rates are likely to be strongly influenced by this event. Removing this employer from the figures yields adjusted growth figures of:

    - +7.4% (2015-2017); and
    - +6.3% (2009-2017).

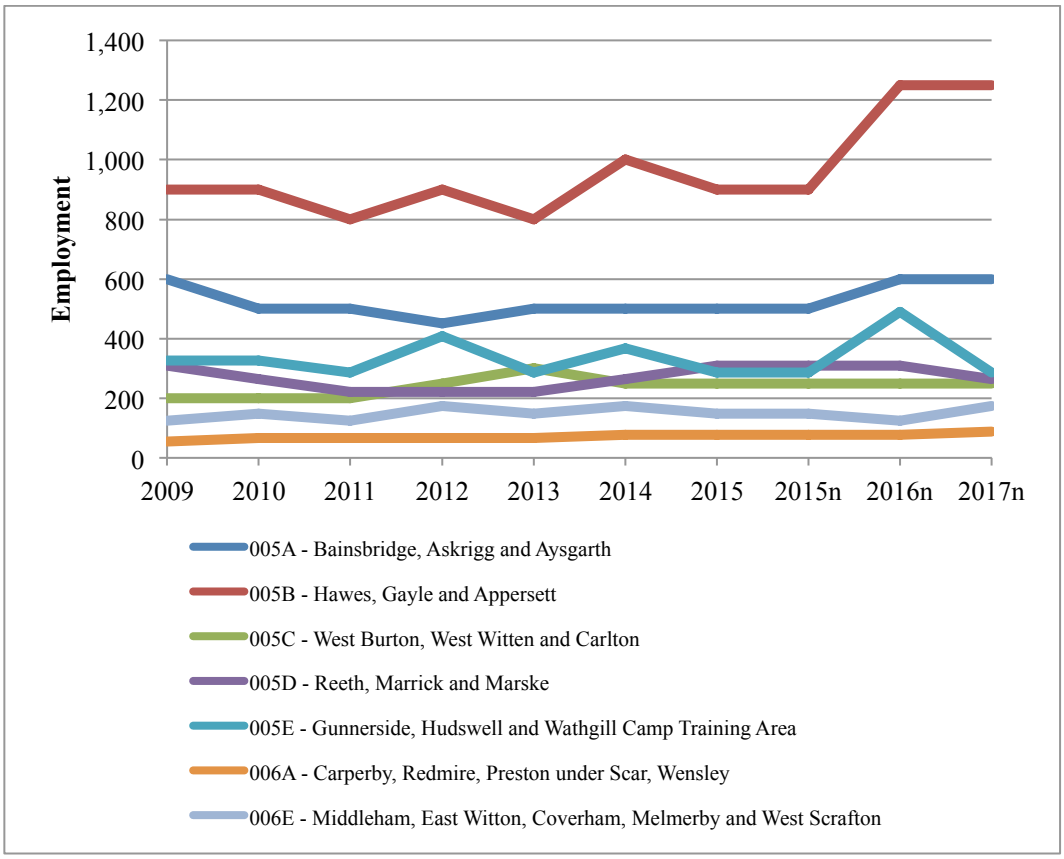
20. These figures are considered to be more representative of the economy excluding this one employer.

Figure A2.6: Total employment 2009-2017, Richmondshire Sub Area



Source: BRES data. Figures denoted 2015n, 2016 and 2017n include PAYE employment

Figure A2.7: Total employment 2009-2017, Richmondshire Sub Area



Source: BRES data. Figures denoted 2015n, 2016 and 2017n include PAYE employment

2.5 Industrial structure

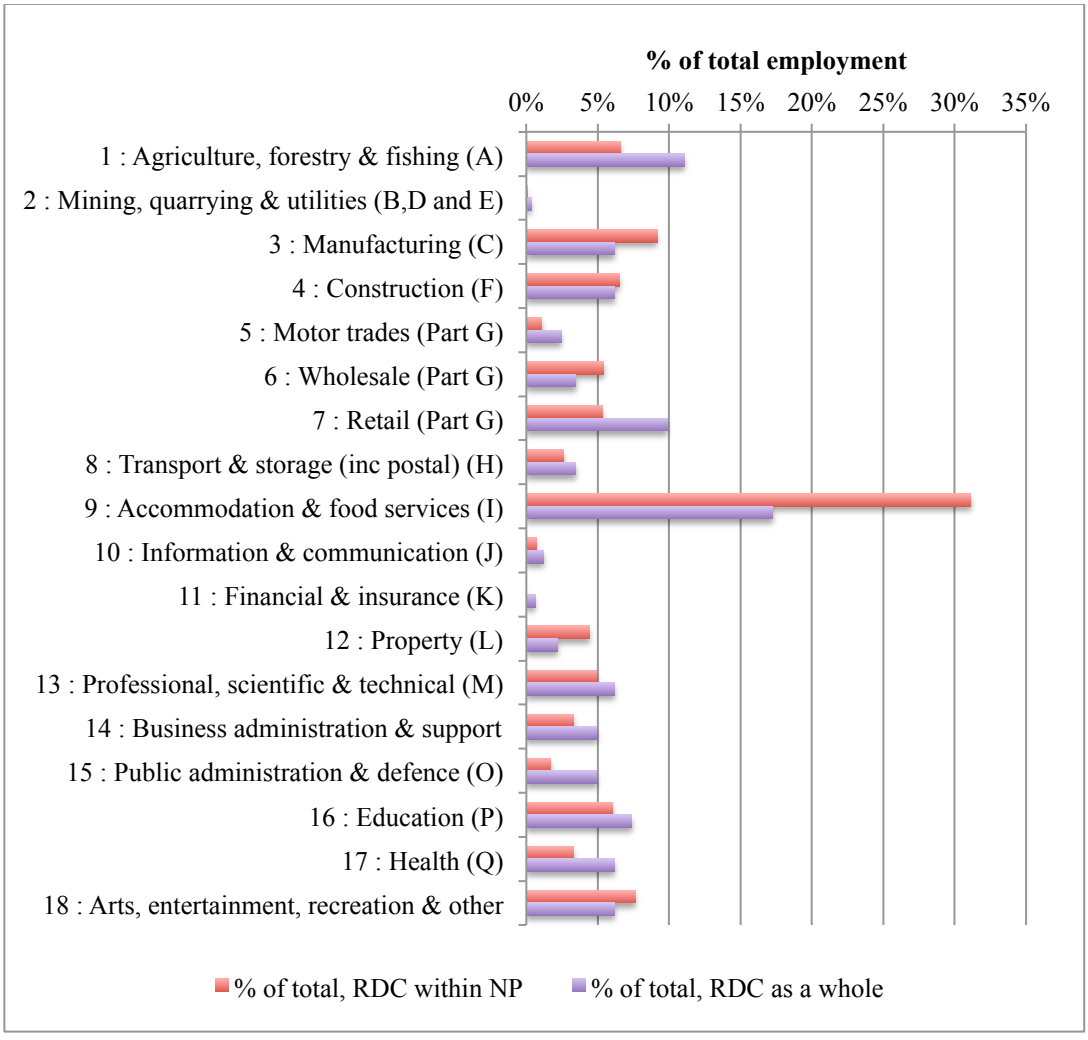
21. Examination of BRES data by industrial sector for 2017 (the latest available year) shows that there are key differences in the composition of the economy in the Richmondshire Sub Area and Richondshire District.

22. The three largest sectors in the Richmondshire Sub Area are:

- Accommodation & food services (31.1% of jobs);
- Manufacturing (9.2%); and
- Arts, entertainment, recreation & other services (7.6%).

23. Together, these three sectors account for almost 1 in 2 jobs. The Richmondshire Sub Area has a greater dependency on the Accommodation & food services and Manufacturing sectors than Richmondshire District.

Figure A2.8: % of total employment by industrial sector, 2017



Source: BRES data. Figures include PAYE employment

24. BRES data by industrial sector for the 2009-2017 period shows wide variation in performance across industrial sectors. Examining the three sectors that account for the largest proportion of total employment in 2017 shows the following performance:

- Accommodation & food services (+200 jobs, +30.2%);
- Manufacturing (-52 jobs, -17.1%); and
- Arts, entertainment, recreation & other services (+38 jobs, +21.8%).

25. Two of the three largest sectors therefore experienced employment growth over the period 2009-2017. The expansion in the Accommodation & food services sector is particularly strong and significant given that the sector accounts for around 1 in 3 jobs in the Richmondshire Sub Area in 2017. The decline in the manufacturing sector is also significant as it accounts for around 1 in 11 jobs.

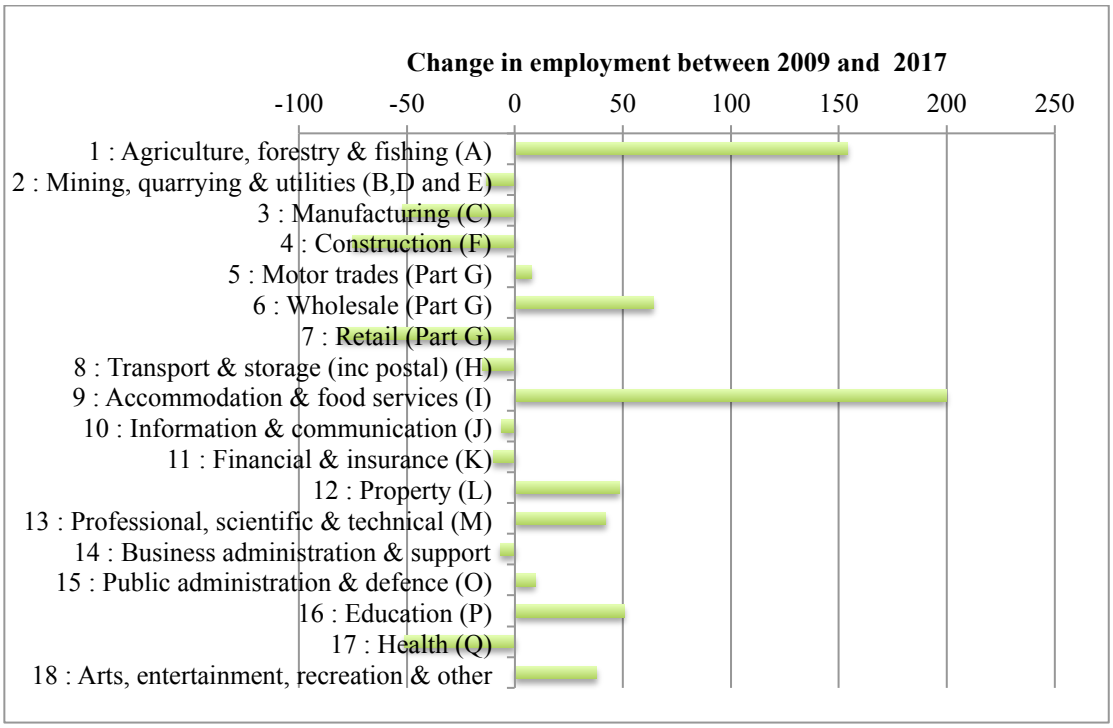
26. Other sectors with the largest absolute expansions in employment are:

- Agriculture (+154 jobs, +533.8%);
- Wholesale (+64 jobs, +74.7%);
- Property (+48 jobs, +65.6%); and
- Professional, scientific & technical (+42 jobs, +44.6%).

27. It should be noted that the above Agriculture figure comes from a low base and excludes Farm Agriculture. The sectors with the largest absolute contractions in employment are:

- Retail (-81 jobs, -35.4%);
- Construction (-75 jobs, -29.5%); and
- Health (-51 jobs, -36.0%).

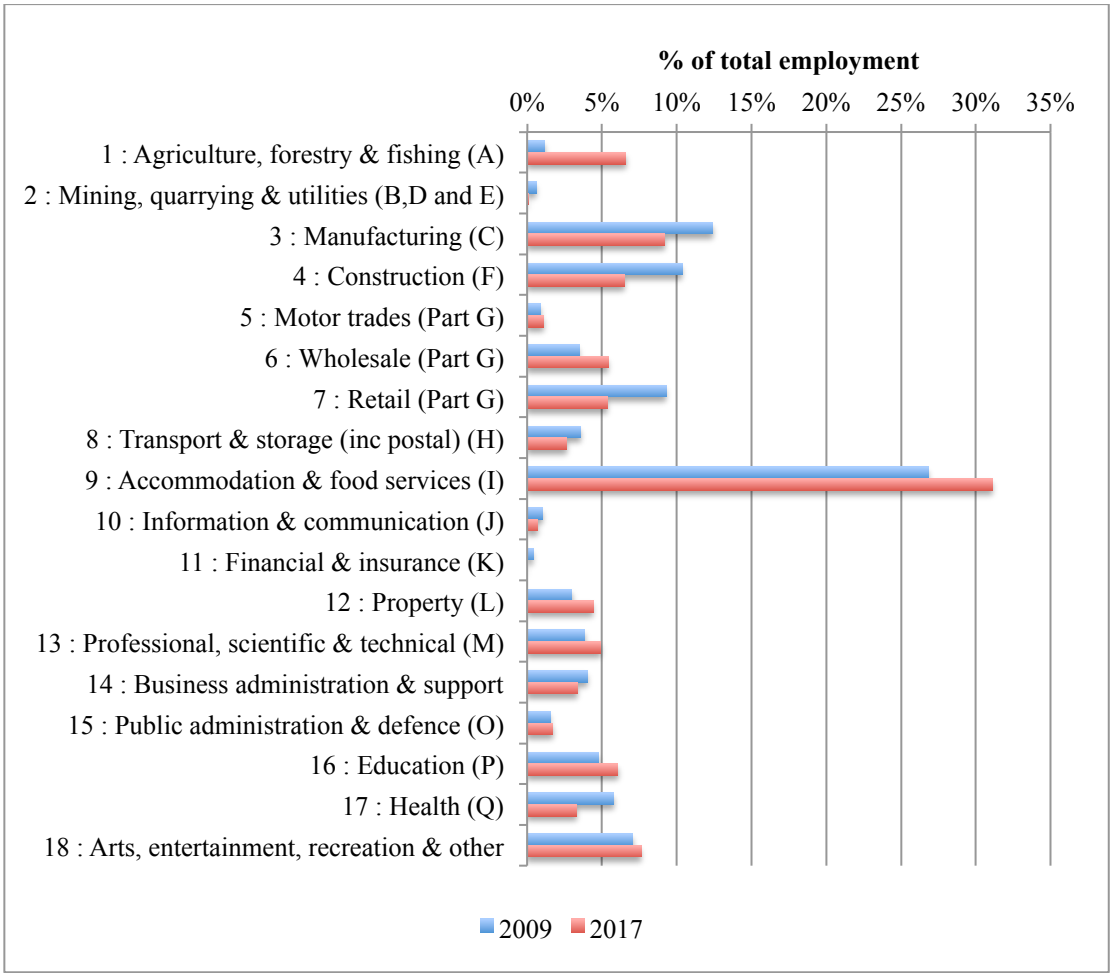
Figure A2.9: Employment by industrial sector, 2009-2017



Source: BRES data. Figures for 2017 include PAYE employment

28. The implication of this pattern of sectoral change for the % of total employment in the Richmondshire Sub Area accounted for by each industrial sector is shown in the following figure. In particular, the growth in importance of tourism related sectors is significant.

Figure A2.10: % of total employment by industrial sector, 2009-2017



Source: BRES data. Figures for 2017 include PAYE employment

Key employers

29. Key employers in the Richmondshire Sub Area include the Wensleydale Creamery (see box below) and YDNPA.

Wensleydale Creamery

Wensleydale Creamery in the town of Hawes has been hand-making cheese for more than 100 years.

Prior to the firm's current base established in 2015, a number of changes occurred in the firm's history.

In May 1992, Dairy Crest, a subsidiary of the Milk Marketing Board, closed the Hawes creamery with the loss of 59 jobs. Dairy Crest transferred production of Wensleydale cheese to Lancashire. Six months later, in November 1992, a management buyout took place, led by local businessman John Gibson and the management team. With the help of eleven members of the former workforce, cheese

making recommenced in Wensleydale.

Wensleydale Dairy Products sought to protect the name Yorkshire Wensleydale under an EU regulation; PGI status was awarded in 2013.

The business moved to its current location in Hawes in 2015 and still handcrafts the eponymous cheese with a staff of 230.

In 2017, the company made a £5 million investment in its dairy and cheese making facilities. Exports make up about 15% of the revenues and visits by tourists another 10%. In January 2018, the company appointed David Salkeld as its new Chairman, replacing Matthew Gribbin who was with the Creamery for ten years. Wensleydale Creamery has won many prestigious cheese awards, including Supreme Champion in 2018 for its new Yorkshire Cheddar at The Great Yorkshire Show's Cheese and Dairy Show.

The firm as recently invested £30,000 in its interactive Demonstration Room in a bid to position itself as the UK's premier cheese and food experience. The firm's facilities attract the order of 350,000 visitors each year, as well as contributing to food tourism in Yorkshire and enhancing the region's food reputation. The creamery sources milk from 45 local farms, contributing more than £13 million to the local economy.

Recently in 2019, the firm signed a deal to supply whey from its factory in the Yorkshire Dales to a biogas plant. It will then be broken down to produce gas in a process called anaerobic digestion. This prevents food waste being allowed to rot in landfill where it produces carbon-rich methane. The deal with Iona Capital, which owns the biogas plant in Leeming, North Yorkshire, will produce around 10,000 MWh of thermal power - enough energy to heat 800 homes.

Income

30. Income data is only available down to MSOA level so an approximation is used to the Richmondshire Sub Area; looking at MSOA005.

31. The average total annual income in this area in 2015/16 was £36,800. This was the lowest of the 6 MSOAs that make up Richmondshire District. The level was lower by a significant margin; the level in the YDNP being 89.5% of the level in the next lowest MSOA and only 79.0% of that in the MSOA with the highest income.

32. The average net income after housing costs as a % of net income before housing costs in the Richmondshire Sub Area MSOA was 90.3% in 2015/16. The comparable figure in MSOAs outside of the YDNP ranged from 88.3% to 95.8%. The impact of housing costs on net income is therefore relatively strong in the Richmondshire Sub Area compared with outside.

Business profile

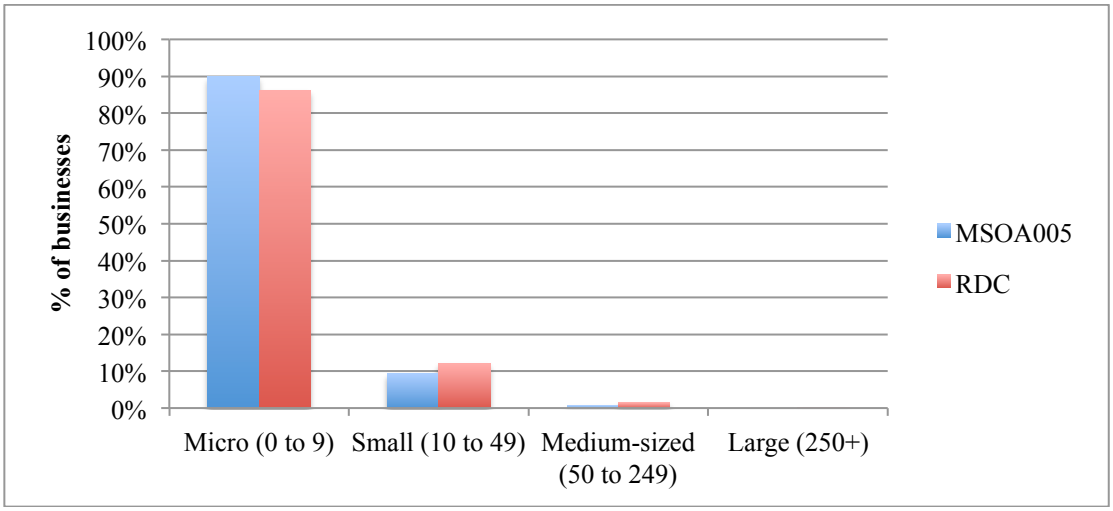
33. UK business count data from the ONS provides a picture of the shape of the business base. This data is only available down to MSOA level so an approximation is used to the Richmondshire Sub Area; looking at MSOA005.

34. There are around 690 businesses in the Richmondshire Sub Area (MSOA 005).

35. The majority of businesses in Richmondshire Sub Area (89.9%) are micro businesses with less than 10 employees. This is a similar level to Richmondshire

District. The main difference between the Richmondshire Sub Area and Richmondshire as a whole is in the larger firm categories. The proportion of businesses that are medium sized in the Richmondshire Sub Area is around half of that in Richmondshire (0.7% compared with 1.6%). There are also no large businesses of more than 250 staff in the Richmondshire Sub Area

Figure A2.11: Businesses by size (number of employees), 2018

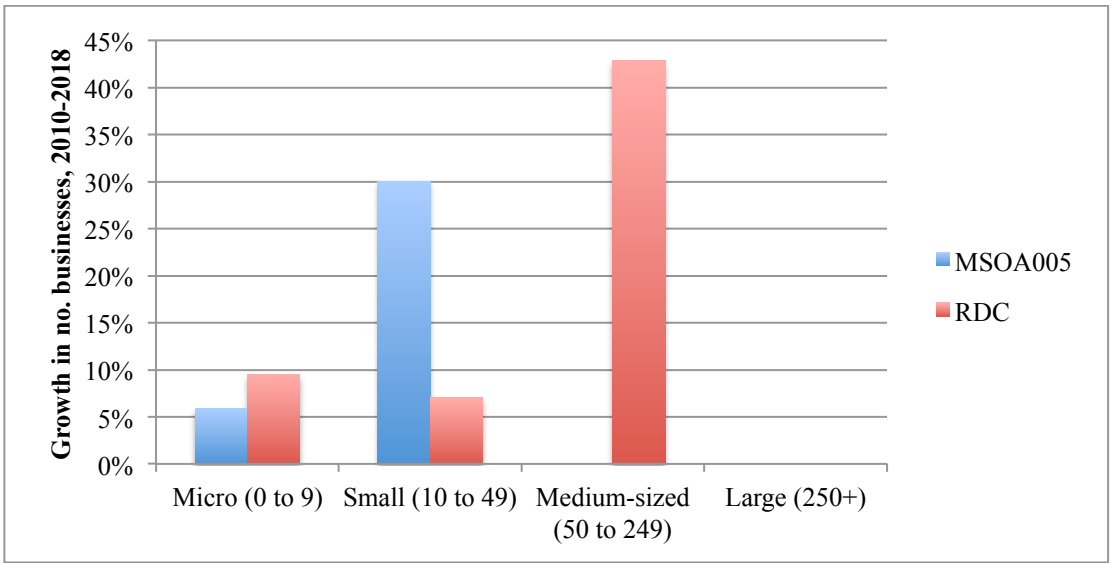


Source: ONS UK Business Counts, based on IDBR.

36. Over the period 2010 to 2018, the total business count in MSOA 005 increased by around 7%. This is a lower rate of growth than recorded for Richmondshire District as a whole (9.4%).

37. Examining trends by business size shows that growth in the Richmondshire Sub Area (MSOA 005) has been mostly in small businesses (10-49 employees). The number of these businesses grew by 30.0% over 2010-2018 compared with 7% in Richmondshire as whole. Notably, there was a lower level of growth in micro businesses within the Richmondshire Sub Area.

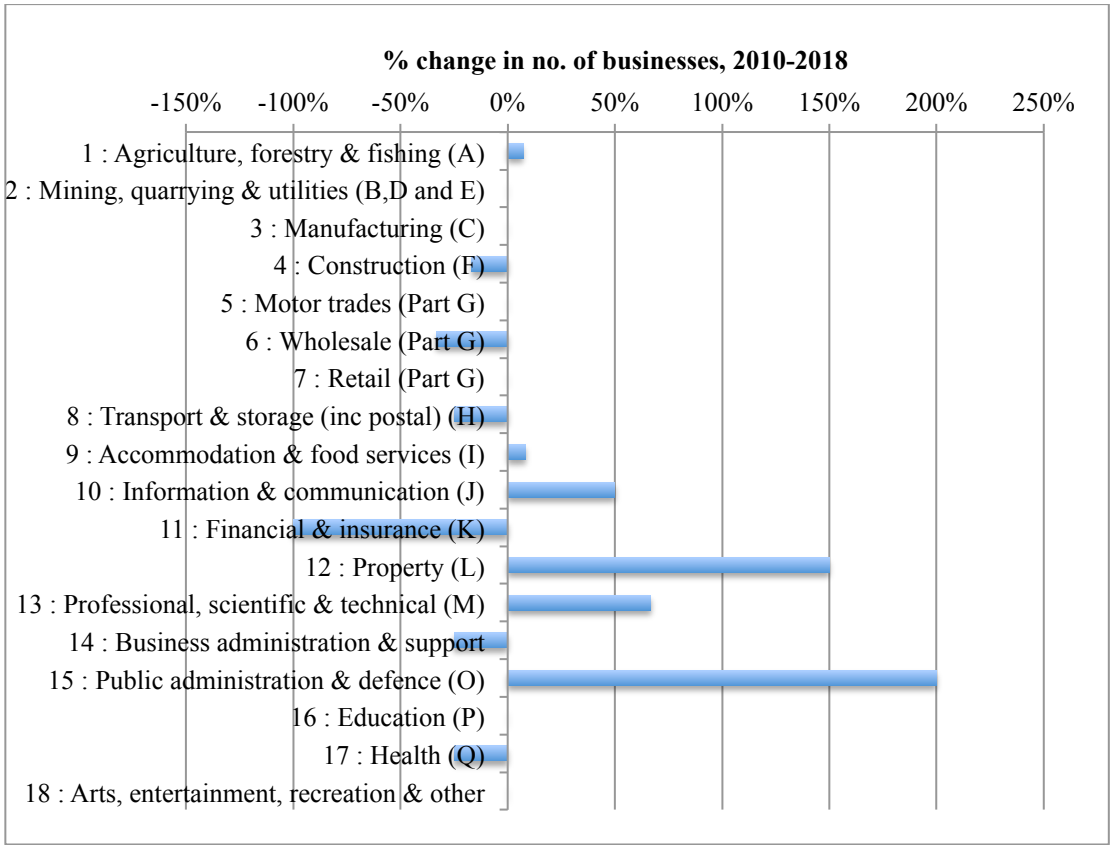
Figure A2.12: Growth in no. of businesses by size (employees), 2010-2018



Source: ONS UK Business Counts, based on IDBR.

38. Looking at the percentage change in the number of businesses by sector over 2010-2018, the Public admin, Property and Professional, scientific & technical sectors exhibited the greatest growth. The number of agricultural businesses increased by 7.1% over this period (from 280 to 300 businesses).

Figure A2.13: Growth in no. of businesses by industry, 2010-2018



Source: ONS UK Business Counts, based on IDBR.

2.6 Travel to work

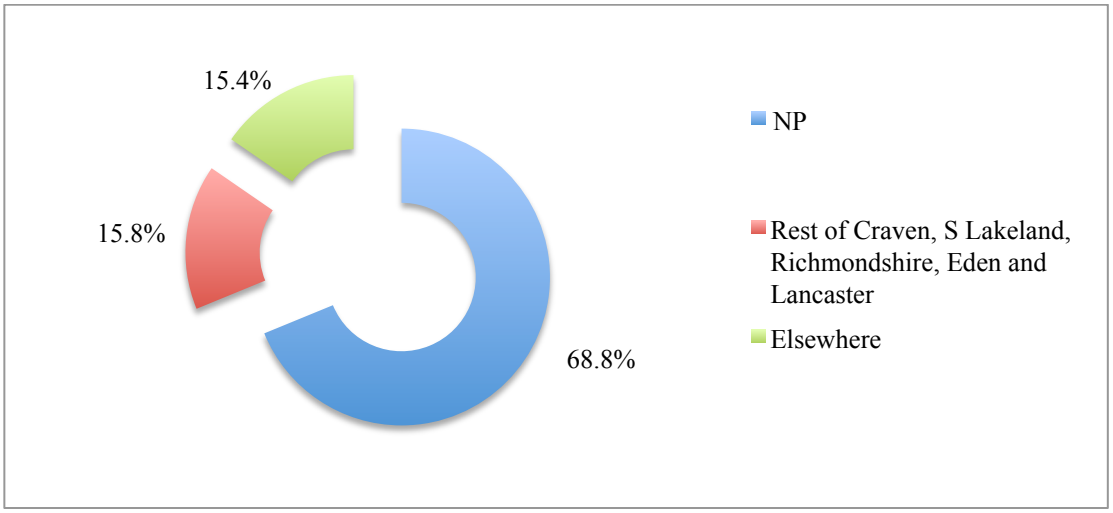
39. Origin-destination data published by the Office for National Statistics (ONS) provides data on the travel to work patterns of individuals[3]. This can be used to understand patterns across different parts of the Richmondshire Sub Area.

40. The Richmondshire Sub Area has a fairly high level of self-containment. Around 68.8% of those who live in the sub area also work within the YDNP. There is net out commuting with a ratio of resident workers to workplace-based employment of 1.03.

41. There are a number of important locations for employment outside the YDNP within Richmondshire. Richmond, Catterick Garrison and Leyburn are key employment locations. Access to the A1 also provides access to employment opportunities along the A1 corridor.

[3] 2011 Census.

Figure A2.14: Work locations for those who live in the Richmondshire Sub Area



Source: Census 2011

2.7 Local service provision

Education

42. In aggregate, primary school roll numbers in the Richmondshire Sub Area have decreased by -6.9% over the last 5 years (2014 – 2019).

43. There are significant differences in the trend across different schools. In particular, Arkengarthdale CoE Primary School has experienced a sharp decline; down over 80% taking its number of pupils in 2019 to just 6. The school closed in July 2019 as a consequence of low pupil numbers. Pupil numbers at West Burton CoE Primary also declined by almost 50%, taking its number of pupils in 2019 to 21. In contrast, Gunnerside Methodist Primary School experienced a substantial percentage growth in its pupil numbers.

44. There are no secondary schools or colleges in the Richmondshire Sub Area. These are located outside the YDNP, in Richmond, Catterick Garrison and Leyburn.

Figure A2.15: Primary school rolls, Richmondshire Sub Area, 2014-2019

School	Pupils on roll		Change, 2014-2019	
	2014	2019	No.	%
Arkengarthdale CofE Primary School	31	6	-25	-80.6%
Askrigg VC Primary School	32	37	+5	15.6%
Bainbridge CofE Primary and Nursery School	49	52	+3	6.1%
Gunnerside Methodist Primary School	7	19	+12	171.4%
Hawes Primary School	95	97	+2	2.1%
Reeth Community Primary School	53	53	0	0.0%
West Burton CofE Primary School	39	21	-18	-46.2%
Total	**306**	**285**	**-21**	**-6.9%**

Source: Drawing on Edge Analytics demographic analysis using DfE data

Health

45. In terms of primary care, GP services are provided at three sites in the Richmondshire Sub Area: Hawes, Aysgarth and Reeth. These perform well in terms of the average number of registered patients per GP compared with the average for England of 2,087 patients. Services provided through the Central Dales Practice are part of the Hambleton, Richmondshire and Whitby CCG and Heartbeat Alliance (a federation of 21 GP Practices across Hambleton, Richmondshire and Whitby).

46. Secondary care facilities are located some distance away outside of the YDNP. Hospitals with A&E departments include Darlington Memorial Hospital, Airedale General Hospital, Lancaster Royal Infirmary and Harrogate Royal Infirmary.

Figure A2.16: Primary care facilities, Richmondshire Sub Area

Primary care	GPs	Registered patients	Registered patients per GP
Central Dales Practice (2 sites – Hawes and Aysgarth)	3	4,216	1,405
Reeth Medical Centre	2	1,592	796

Source: NHS data

Transport

47. The A684 provides an important east-west road corridor in the YDNP, connecting its key centres in Aysgarth, Bainbridge and Hawes. It provides important onward connection to locations outside including Richmond (via) A6108), Leyburn and the A1(M). It also serves the area of the YDNP to the west that sits within South Lakeland.

48. Bus services within the YDNP run throughout the year linking the main towns, villages, and popular attractions, with additional services running during the summer months mainly on Sundays and Bank Holidays. These are covered in the main report looking at the YDNP as a whole.

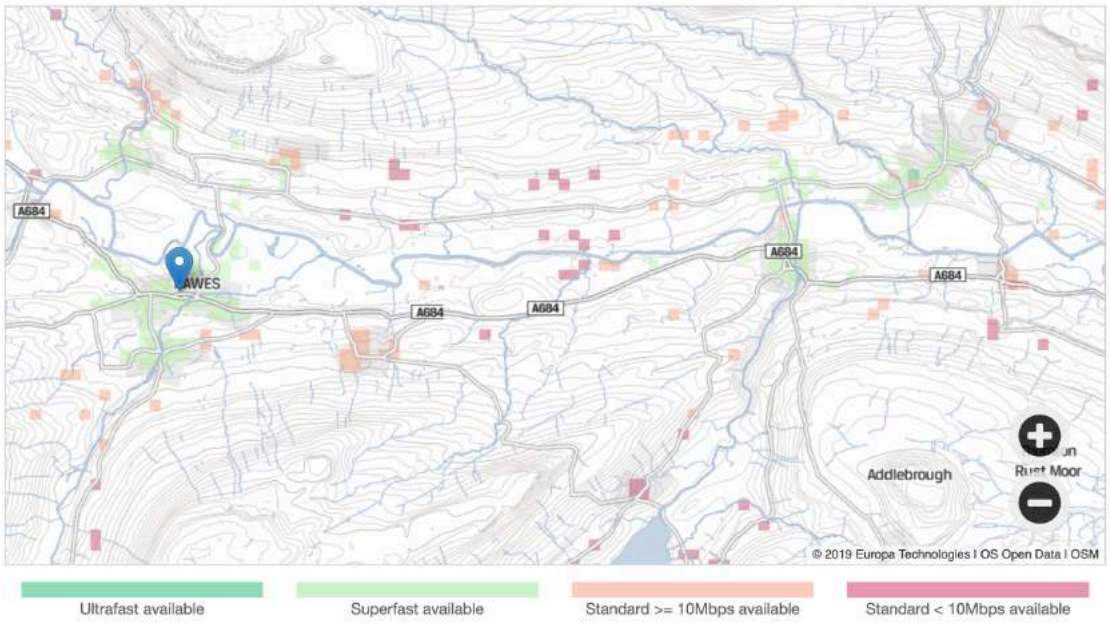
49. The Settle–Carlisle railway line runs through the Richmondshire Sub Area, with Garsdale Station being located just outside to the west and accessible from Hawes.

Communications

50. Levels of broadband coverage are variable within this area of the YDNP. The following figures show coverage along the A684 corridor including Hawes and Bainbridge as well as in Aysgarth. Whilst higher connectivity speeds are available in some of these areas, it is clear that speeds available vary considerably even over small areas. Other areas further from the main settlements generally have lower speeds available.

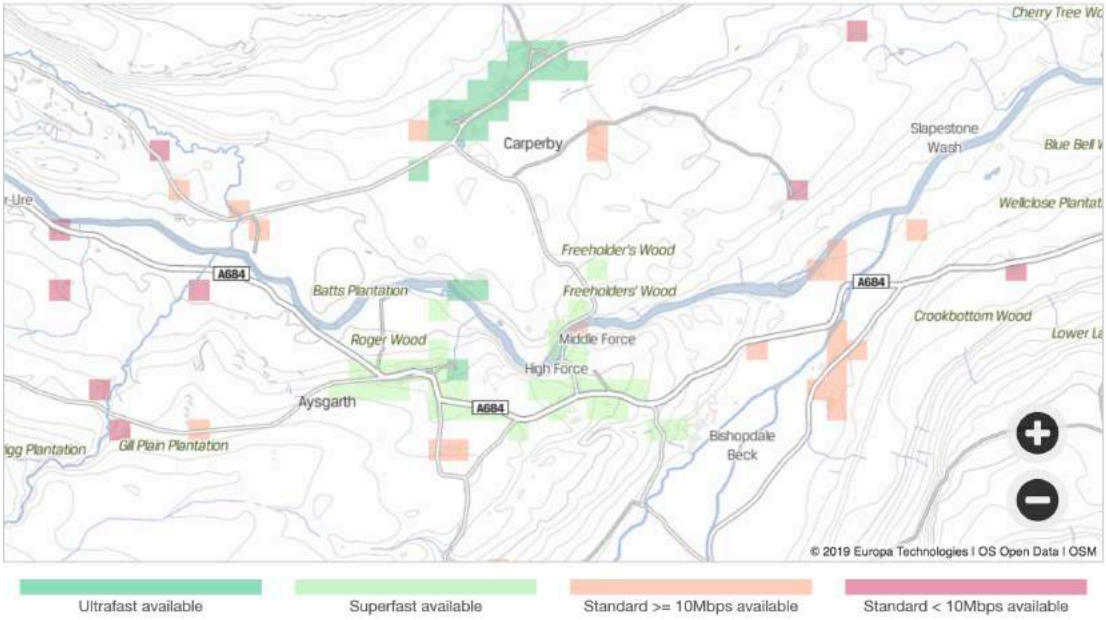
51. Broadband is covered in more detail in the main report looking at the YDNP as a whole.

Figure A2.17: Broadband connectivity, Hawes and Bainbridge A684 corridor



Source: Ofcom data

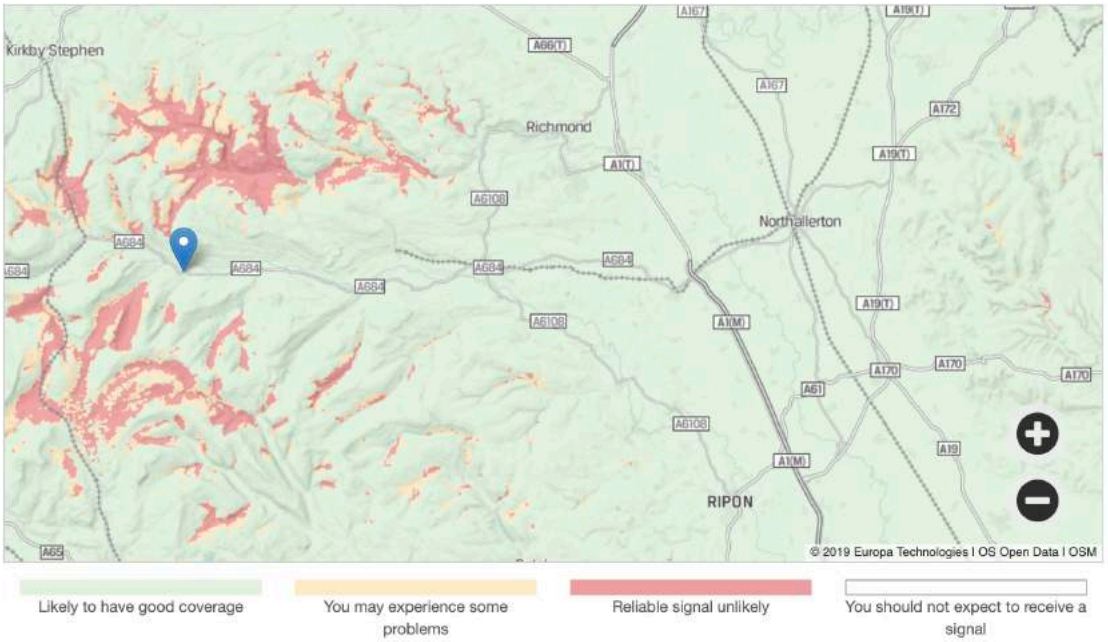
Figure A2.18: Broadband connectivity, Aysgarth A684 corridor



Source: Ofcom data

52. There are issues with mobile connectivity – both voice and data - in this area of the YDNP. Whilst coverage is generally good along the A684 corridor, outside of this there are large areas where a reliable signal is unlikely or problems may be experienced. This includes areas around Reeth and along the B6270 corridor.

Figure A2.19: Mobile connectivity in the Richmondshire Sub Area



Source: Ofcom data. Differs by provider. Map shown for Vodafone 4G voice call coverage (outside)

Other services

53. Trends in the banking sector have resulted in retreat from the provision of high street branches nationwide. This has also occurred in the YDNP and Hawes is facing the withdrawal of its last bank. Alternative models for service delivery may emerge. For example, the Newcastle Building Society is in discussions to launch a community branch for local people based in the Upper Wensleydale Community Office.

54. More broadly, the provision of local services has become increasing reliant on volunteers to retain services. For example in Hawes, the bus services, library, police station, petrol station, Post Office and Information Centre are run with the help of a team of 70 volunteers from the Upper Dales Community Office.

Key points

Population

- 11.6% of population of Richmondshire District are within the YDNP
- 26.6% of the total population of the whole YDNP are within Richmondshire
- A change in population trend has occurred since 2008, a decline in population of around -2.5% being recorded since this time
- The Richmondshire Sub Area had the highest proportion of population aged 65 years or more (at 30.5%)

Employment

- Around 1 in 6 jobs in Richmondshire District are within the YDNP
- There are 2,912 jobs within this part of the YDNP

- The majority of employment in the Richmondshire Sub Area is located in the Hawes area (4 in 10 jobs) and the Askrigg, Bainbridge and Aysgarth area (2 in 10 jobs)
- Total employment in the Richmondshire Sub Area expanded by 397 jobs (+15.8%) in 2009-2017
- Growth in employment was concentrated in the Hawes area and in contrast some areas experienced contractions in employment
- Primary research undertaken shows that a major employer (Wensleydale Creamery) opened their facilities in Richmondshire sub area in 2015. The above growth rates are likely to be strongly influenced by this event. Removing this employer from the figures yields adjusted growth figures of:
    - +7.4% (2015-2017); and
    - +6.3% (2009-2017).
- Almost 1 in 2 jobs in the Richmondshire Sub Area are accounted for by three sectors: (i) Accommodation & food services (ii) Manufacturing and (iii) Arts, entertainment, recreation & other services
- The Richmondshire Sub Area has greater dependency on the Accommodation & food services and Manufacturing sectors than Richmondshire District
- Two of the three largest sectors in the Richmondshire Sub Area experienced employment growth over the period 2009-2017
- The expansion in the Accommodation & food services sector is particularly strong and significant given that the sector accounts for around 1 in 3 jobs in the Richmondshire Sub Area in 2017
- The decline in the manufacturing sector is also significant as this accounts for around 1 in 11 jobs
- The growth in importance of tourism related sectors is significant
- Key employers include Wensleydale Creamery and the YDNPA
- The Wensleydale Creamery moved to its current location in Hawes in 2015 with a staff of 230. The firm is a significant local investor, making a £5million investment in 2017 and further amounts more recently to deliver its interactive visitor experience
- There are around 690 businesses in the Richmondshire Sub Area. The majority of businesses (89.9%) are micro businesses with less than 10 employees
- The proportion of businesses that are medium sized in the Richmondshire Sub Area is around half of that in Richmondshire District (0.7% compared with 1.6%)
- Over 2010 to 2018, the total business count in the Richmondshire Sub Area increased by around 7%. This is a lower rate of growth than recorded for Richmondshire District (9.4%)
- Growth in the number of businesses in the Richmondshire Sub Area (MSOA 005) has been mostly in small businesses (10-49 employees); the number of

these businesses grew by 30.0% over 2010-2018 compared with 7% in Richmondshire as whole. Notably, there was a lower level of growth in micro businesses within the Richmondshire Sub Area

- The Public admin, Property and Professional, scientific & technical sectors exhibited the greatest percentage growth in the number of businesses over 2010-2018

Travel to work

- The Richmondshire Sub Area has a fairly high level of self-containment. Around 68.8% of those who live in the sub-area also work within the YDNP

Local service provision

- In aggregate, primary school roll numbers in the Richmondshire Sub Area have decreased by -6.9% over the last 5 years (2014 – 2019)
- There are significant differences in the trend across different schools. In particular, Arkengarthdale CoE Primary School has experienced a sharp decline; down over 80% taking its number of pupils in 2019 to just 6. The school closed in July 2019 as a consequence of low pupil numbers. Pupil numbers at West Burton CoE Primary also declined by almost 50%, taking its number of pupils in 2019 to 21
- There are no secondary schools or colleges in the Richmondshire Sub Area. These are located outside the YDNP, in Richmond, Catterick Garrison and Leyburn
- GP services are provided at three sites in the Richmondshire Sub Area: Hawes, Aysgarth and Reeth. These perform well in terms of the average number of registered patients per GP
- Secondary care facilities are located some distance away outside of the YDNP. Hospitals with A&E departments include Darlington Memorial Hospital, Airedale General Hospital, Lancaster Royal Infirmary and Harrogate Royal Infirmary
- The A684 provides an important east-west road corridor in the Richmondshire Sub Area, connecting its key centres in Aysgarth, Bainbridge and Hawes. It provides important onward connection to locations outside including Richmond (via) A6108), Leyburn and the A1(M). It also serves the area of the YDNP to the west that sits within South Lakeland
- Bus services within the Richmondshire Sub Area run throughout the year linking the main towns, villages, and popular attractions, with additional services running during the summer months mainly on Sundays and Bank Holidays
- The Settle–Carlisle railway line runs through the Richmondshire Sub Area, with Garsdale Station being located just outside to the west and accessible from Hawes
- Levels of broadband coverage are variable within the Richmondshire Sub Area. Whilst higher connectivity speeds are available in some of areas, it is clear that speeds available vary considerably even over small areas. Other areas further from the main settlements generally have lower speeds available

- There are issues with mobile connectivity – both voice and data - in this area of the YDNP. Whilst coverage is generally good along the A684 corridor, outside of this there are large areas where a reliable signal is unlikely or problems may be experienced. This includes areas around Reeth and along the B6270 corridor
- Trends in the banking sector have resulted in retreat from the provision of high street branches nationwide. This has also occurred in the Richmondshire Sub Area and Hawes is facing the withdrawal of its last bank
- The provision of local services has become increasing reliant on volunteers to retain services. For example, in Hawes, the bus services, library, police station, petrol station, Post Office and Information Centre are run with the help of a team of 70 volunteers from the Upper Dales Community Office

3 Craven

3.1 Overview

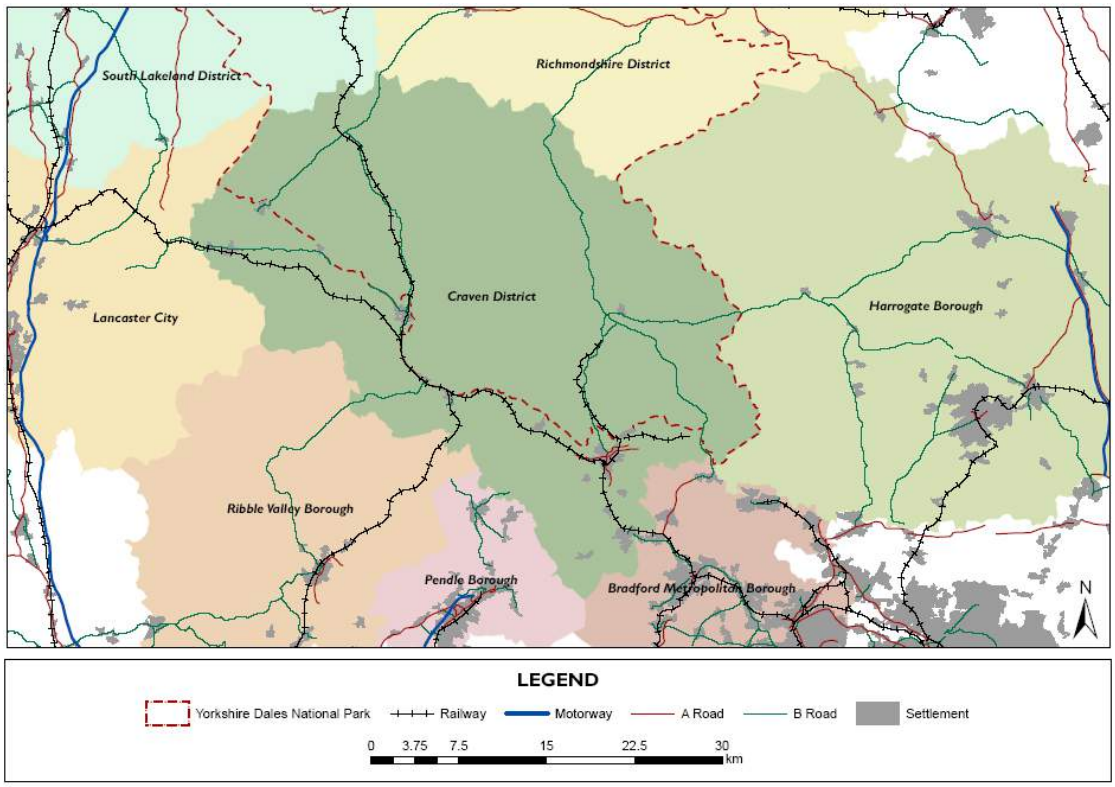
55. Craven District is located in North Yorkshire. The northern part of the District is situated within the YDNP. This accounts for a large proportion of the area of both the YDNP and Craven District.

56. The boundary of the YDNP in the Craven District generally follows the A65 to the north of Skipton and the A59 to the east of Skipton. At several locations the boundary of the YDNP bisects settlements e.g. Embsay, Clapham, creating a 'split' in planning control between the YDNP Authority and Craven District Council.

57. Craven has significant economic links with the extensive predominantly rural areas to the east and north of the District, including the YDNP. It also has important links to the Leeds-Bradford conurbation.

58. Key road connections in the District include the A59 (providing a link to the M6 to the west and to the A1(M) and the port of Hull to the east), the A629 (providing a link to the M606/M62 to the south-east) and the A65 (a trans-Pennine route linking to the M6 for Cumbria and the Lake District to the north-west and West Yorkshire (Leeds) and the M1 to the south east).

Figure A3.1: Craven District



Source: CDC.

59. A brief overview of Craven's **key settlements within the YDNP** is as follows:

- **Bolton Abbey** – The village of Bolton Abbey in the south of the YDNP is close to the A59 and has a public transport connection to Ilkley and

Grassington. It is the location of the Bolton Abbey Estate, Bolton Abbey and Bolton Abbey Steam Railway. It plays a significant role as a gateway to the YDNP. Lying on the boundary of the YDNP, Bolton Abbey is effectively a split settlement;

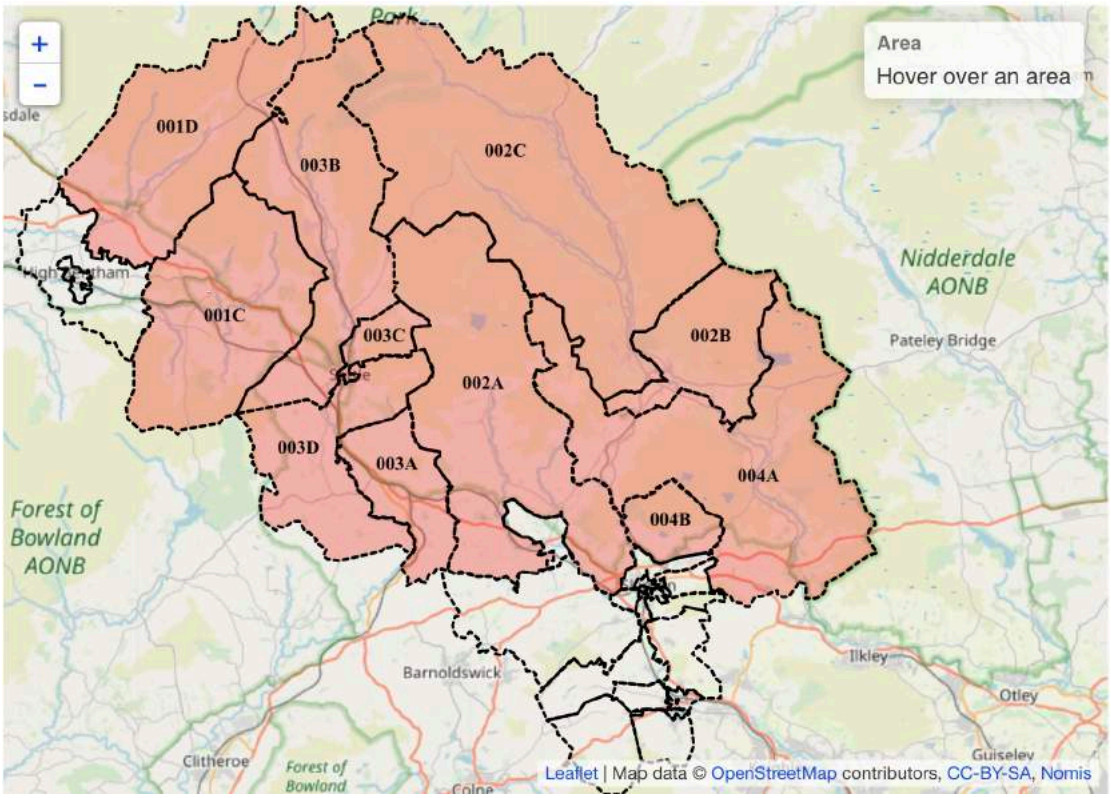
- **Grassington** – Grassington is the main settlement in upper Wharfedale. It is renowned for its pubs, cafes, shops and riverside walks;
- **Kettlewell** – Kettlewell is an attractive stone built village in Wharfedale and has pubs, cafes and many local walks. It lies 6 miles north of Grassington; and
- **Malham** – Malham is an attractive village with dramatic limestone scenery just a stone's throw from the village centre. A YDNP Visitor Centre is located here.

60. A brief overview of Craven's **key settlements <u>outside</u> of the YDNP** is as follows:

- **Skipton** - Skipton is the largest town in the District by a considerable margin and is located just south of the YDNP boundary. It contains the administrative functions of the District Council and is the base for a range of North Yorkshire County Council services. Skipton has the largest town centre, offers the widest range of employment opportunities, goods and services in the District and is well connected with the A road network and rail network;
- **Bentham** – Bentham is located to the west of the YDNP and has a good range of services, employment opportunities and connection to the A road network and rail network; and
- **Settle** – Settle is located to the south west of the YDNP very close to the boundary. It has a good range of services, employment opportunities and connection to the A road network and rail network. It is closer to the A65 than Bentham.

61. The analysis examines data for Craven within the YDNP at Lower Super Output Area (LSOA) level, as shown in the following map. In some cases a proportion of the LSOAs are applied to best fit the YDNP boundary. The area is referred to as the Craven Sub Area.

Figure A3.2: Craven LSOAs used to construct Craven Sub Area



001C – Austwick & Clapham

001D – Thorton in Lonsdale, Masongill & Ribblehead

002A – Thorlby, Winterburn, Airton, Kirkby Malham & Malham

002B – Grassington, Linton, Hebden & Burnsall

002C – Threshfield, Long Ashes YDNP, Conistone, Kilnsey, Kettlewell, Arncliffe, Buckden & Statbotton

003A – Long Preston

003B – Stainforth & Horton in Ribblesdale

003C - Langcliffe

003D - Mearbeck

004A – Bolton Abbey, Appletreewick, Burnsall, Cracoe & Rylstone

004B – Embsay (part) & Eastby (part)

Source: ONS

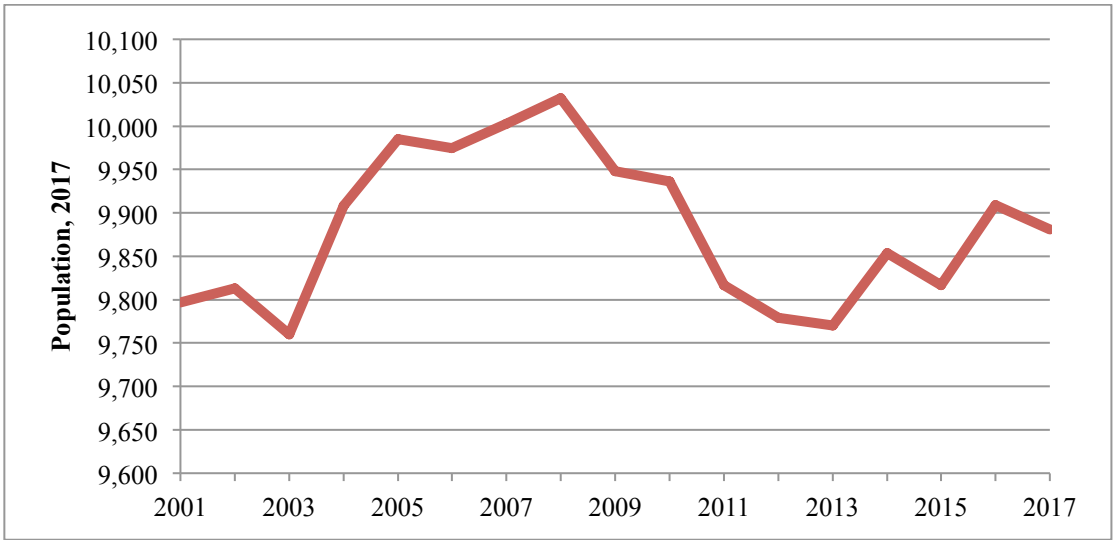
3.2 Population

62. Edge Analytics has undertaken a demographic analysis of the YDNP (see Demographic Evidence Report). Some key points drawn from this analysis are outlined below.

63. This shows that the total population of the Craven Sub Area in 2017 was 9,881 people. This is around 17.5% of the total population in Craven District and around 42.1% of the estimated total population of the whole YDNP. It is the largest area of the YDNP in terms of total population.

64. Over the period 2001-2017, the population in the Craven Sub Area grew by around 0.9%. It is notable however that a change in trend has occurred since 2008, a decline in population of around -1.5% being recorded since this time. Some growth in the population has occurred since 2013 however.

Figure A3.3: Total population, Craven Sub Area, 2001-2017



Source: Based on Edge Analytics demographic work

65. In 2017, the Craven Sub Area had the second highest proportion of population aged 65 years or more (at 30.8%). This level has increased from around 21.7% in 2001.

3.3 Economic activity

66. Data from the 2011 Census shows that the Craven Sub Area had an economic activity rate of 80.6%. This is slightly lower than recorded for Craven as a whole (81.9%). The economic activity rate is measured for the population aged 16-64.

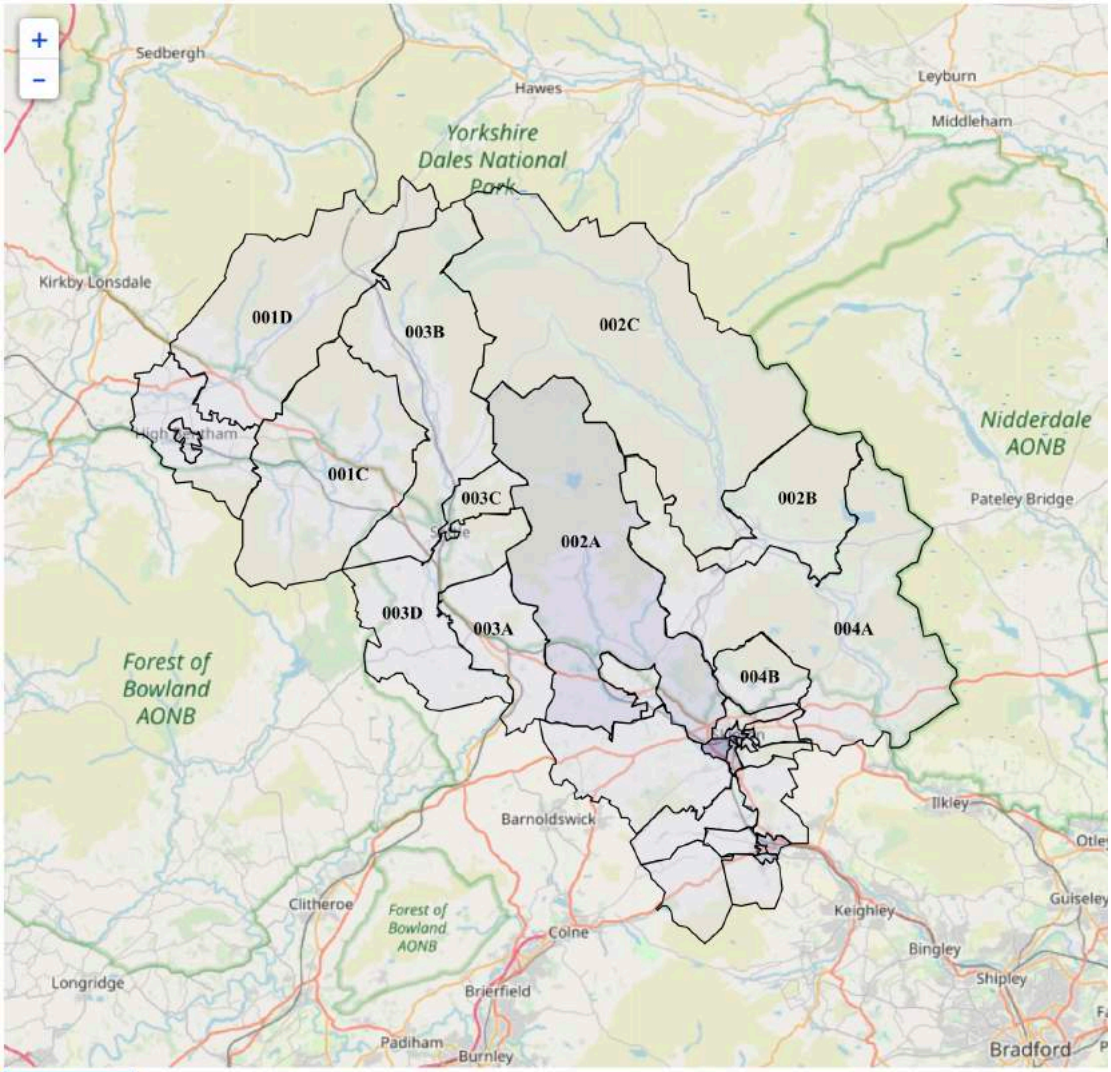
3.4 Employment

Total employment

67. The Business Register and Employment Survey (BRES) provides a measure of workplace based employment.

68. Examining the distribution of total employment across the whole of Craven District in 2017 (the latest year available) indicates that several of the LSOAs within the Craven Sub Area are important in terms of employment. In particular, LSOA 002A (including Thorlby, Winterburn, Airton, Kirkby Malham, and Malham within the YDNP) is a significant location. It is noted that some of LSOA 002A is outside of the YDNP boundary and includes Coniston Cold, the edge of Gargrave and edge of Skipton (the latter including Craven Cattle Marts, Computershare Loan Services and a small retail park including Travelodge).

Figure A3.4: Total employment across Craven District, 2017



About this data

Analysis
standard
Date
2017
Employment Status
Employment
Measure
Count
Area Type
2011 super output areas - lower layer
Industry
Total
Data
number

Legend

- 6,421 - 8,001
- 4,841 - 6,420
- 3,261 - 4,840
- 1,681 - 3,260
- 101 - 1,680

Source: ONS BRES data. Figures include PAYE employment

69. Examination of employment data for the Craven Sub Area shows that total employment was around 4,594 jobs in 2017.

70. The majority of employment (2 in 10 jobs) is in LSOA 002A (including Thorlby, Winterburn, Airton, Kirkby Malham and Malham area). Around 2 in 10 jobs are

located in LSOA 004A (including Bolton Abbey, Appletreewick, Burnsall, Cracoe and Rylstone area).

71. Around 1 in 7 jobs in Craven District are within the Craven Sub Area (total employment in the District in 2017 was 32,000 jobs).

Figure A3.5: Total employment in Craven Sub Area, 2017

LSOA	Employment	as % of Craven Sub Area
001C	170	3.7%
001D	128	2.8%
002A	1,077	23.4%
002B	600	13.1%
002C	700	15.2%
003A	74	1.6%
003B	418	9.1%
003C	206	4.5%
003D	27	0.6%
004A	981	21.4%
004B	212	4.6%
	4,594	**100%**
	Total Employment – Craven District	**Craven Sub Area as % of District**
	32,000	14.4%

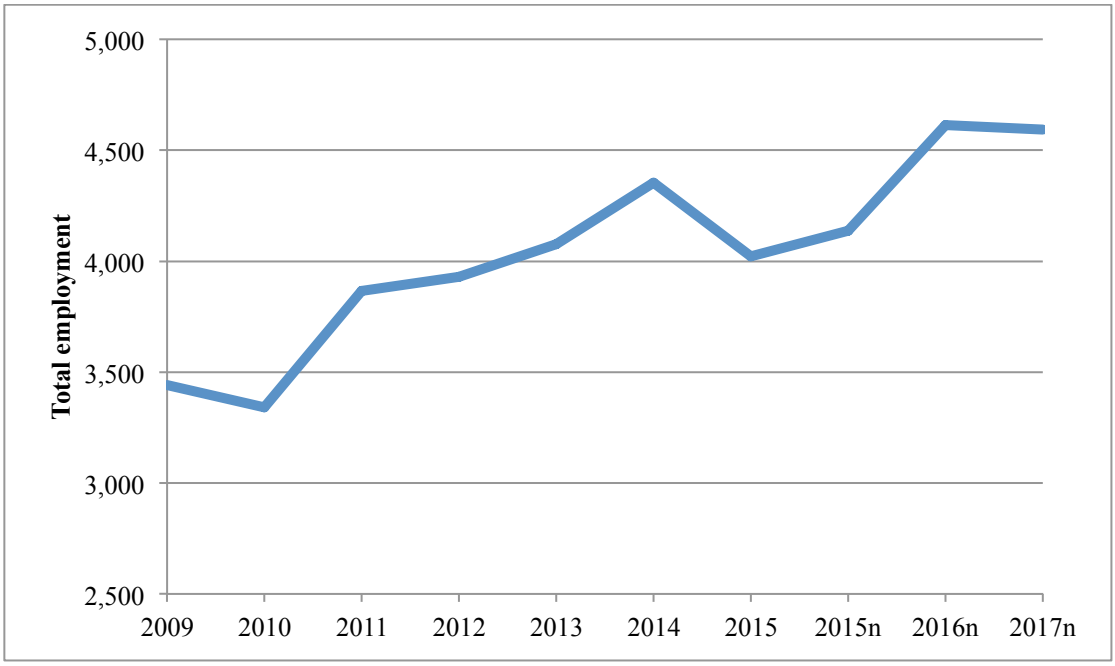
Source: ONS BRES data. Figures include PAYE employment

72. BRES data shows that there was an expansion in employment of 580 jobs (+16.9%) in the Craven Sub Area in 2009-2015. Following this, there was an expansion of 457 jobs (+11.0%) in 2015-2017. Levels of employment in Craven District as a whole also expanded over both periods. The expansion in the Craven Sub Area was at a far greater rate than the District as a whole.

73. Over 2009-2017 (accepting discontinuity in BRES data), the employment level in the Craven Sub Area expanded by 1,151 jobs (+33.4%) compared with growth of around 2,000 jobs (+6.3%) in Craven District as a whole. Adjusting for the BRES discontinuity (PAYE jobs) yields a revised figure of 1,037 jobs (+30.1%).

74. The Craven Sub Area therefore performed more strongly than Craven District as a whole in terms of employment growth. There was considerable variation over the period however.

Figure A3.6: Total employment 2009-2017, Craven Sub Area



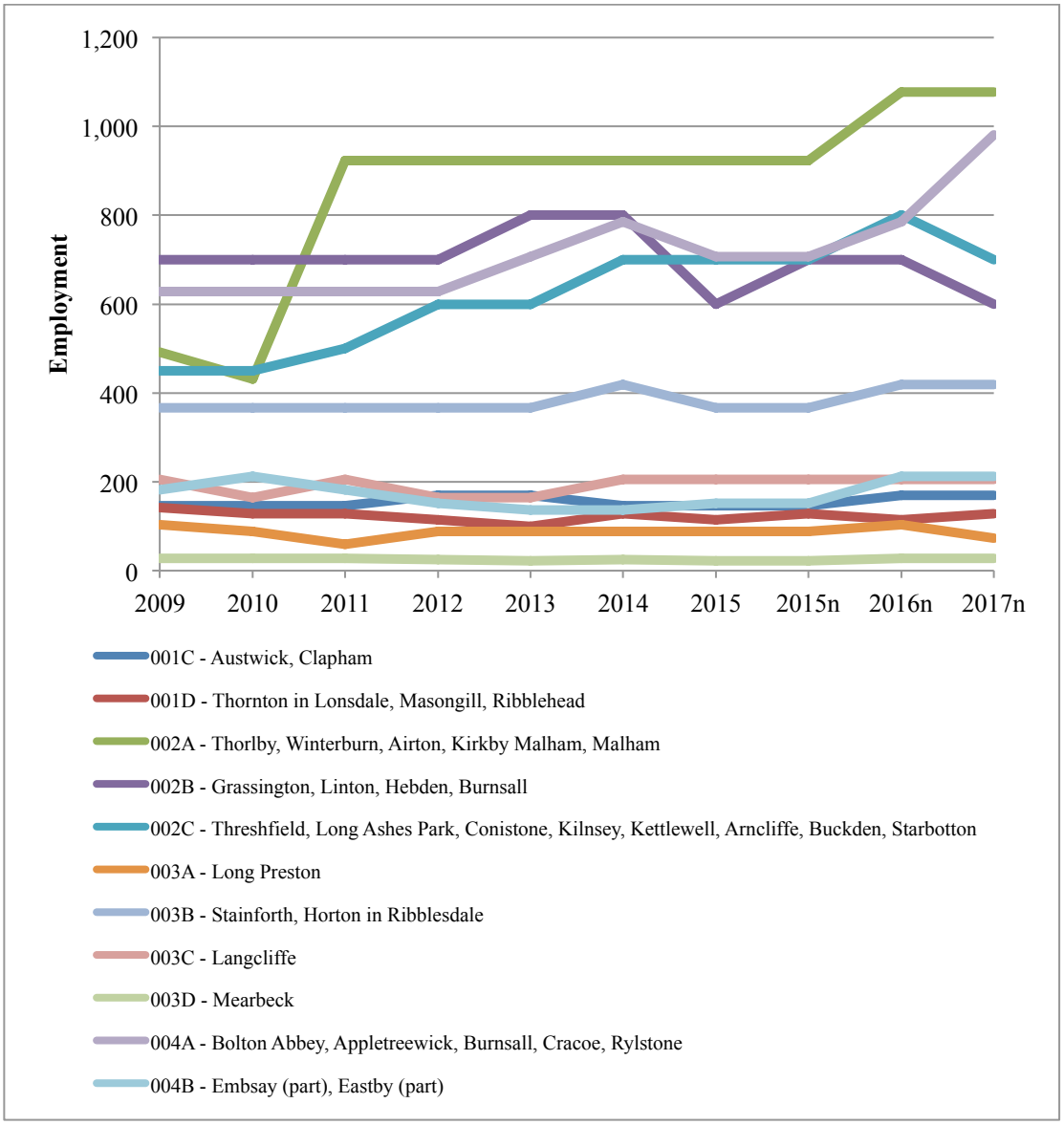
Source: BRES data. Figures denoted 2015n, 2016 and 2017n include PAYE employment

75. This performance masks significant differences across the Craven Sub Area. The expansion in employment is concentrated in LSOA 002A (including Thorlby, Winterburn, Airton, Kirkby Malham and Malham) and LSOA 004A (including Bolton Abbey, Appletreewick, Burnsall, Cracoe and Rylstone).

76. In contrast, contractions in employment are concentrated in LSOA 002B (including Grassington, Linton, Hebden and Burnsall) and LSOA 003A (including Long Preston).

77. It is noted that some of the LSOAs used to construct the Craven Sub Area include significant areas of employment outside the YDNP. As a consequence, the figures for the Craven Sub Area may be influenced by growth outside of the YDNP. In particular, LSOA 002A – the location of much of the employment growth – includes employment areas around the edge of Skipton. Accordingly, some caution is required and the above figures may overestimate employment growth in the Craven Sub Area. If LSOA 002A were excluded from the analysis (which would also exclude a large section of the YDNP), the growth in 2009-2017 would approximately halve to 452 jobs (+15.3%).

Figure A3.7: Total employment 2009-2017, Craven Sub Area



Source: BRES data. Figures denoted 2015n, 2016 and 2017n include PAYE employment

3.5 Industrial structure

78. Examination of BRES data by industrial sector for 2017 (the latest available year) shows that there are key differences in the composition of the economy in the Craven Sub Area and Craven District.

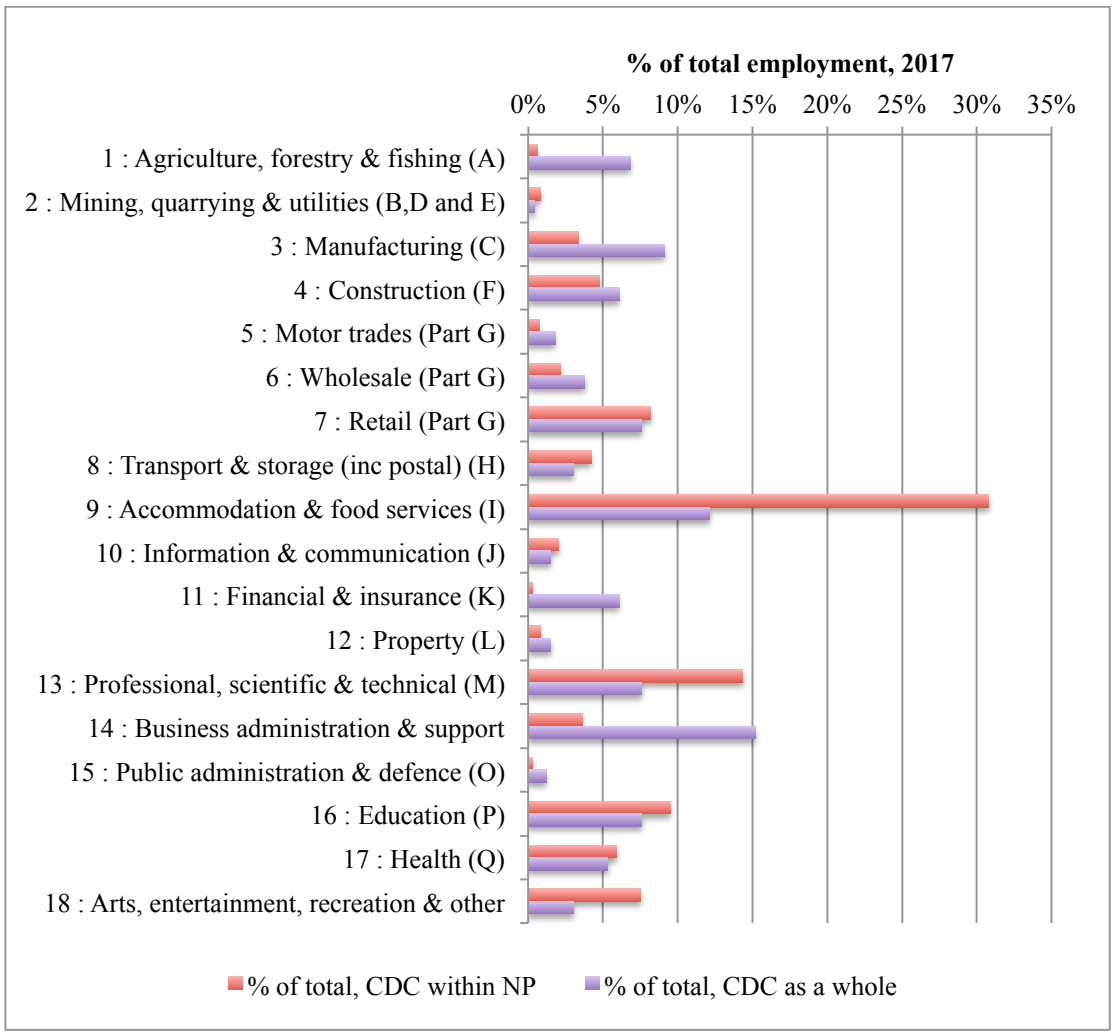
79. The three largest sectors in the Craven Sub Area are:

- Accommodation & food services (30.8% of jobs);
- Professional, scientific & technical (14.4%); and
- Education (9.5%).

80. Together, these three sectors account for over 1 in 2 jobs within the Craven Sub Area. The Craven Sub Area has a far greater dependency on the Accommodation

& food services and Professional, scientific & technical sectors than Craven District. It has also less dependency on the manufacturing sector.

Figure A3.8: % of total employment by industrial sector, 2017



Source: BRES data. Figures for 2017 include PAYE employment

81. BRES data by industrial sector for the 2009-2017 period shows wide variation in performance across industrial sectors. Examining the three sectors that account for the largest proportion of total employment in 2017 shows the following performance:

- Accommodation & food services (+549 jobs, +67.8%);
- Professional, scientific & technical (+418 jobs, +194.3%); and
- Education (-54 jobs, -11.4%).

82. Two of the three largest sectors therefore experienced employment growth over the period 2009-2017. The expansion in the Accommodation & food services sector is particularly strong and significant given that the sector accounts for around 1 in 3 jobs in the Craven Sub Area in 2017. The decline in the education sector is also significant as this accounts for around 1 in 10 jobs.

83. Sectors with the largest absolute expansions in employment are:

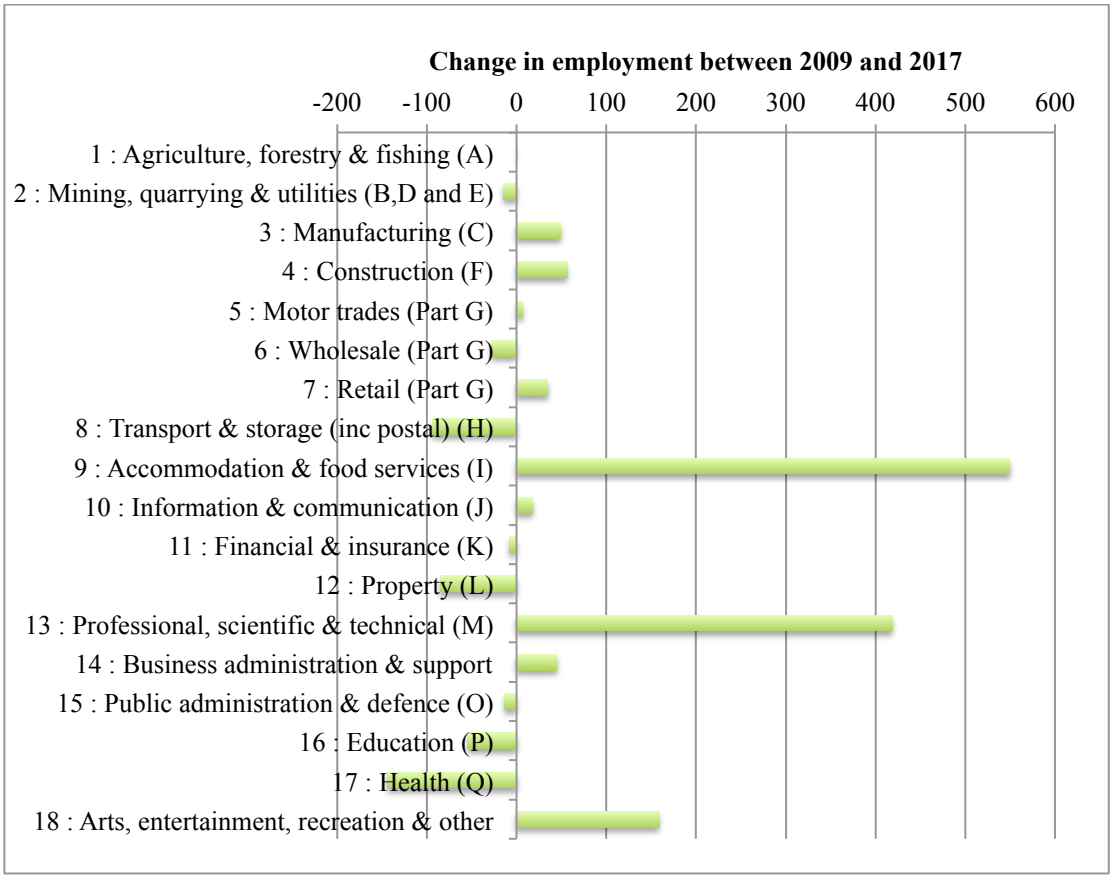
- Arts, entertainment & recreation (+159 jobs, +92.5%);
- Business admin & support services (+45 jobs, +39.3%); and
- Manufacturing (+49 jobs, +49.9%).

84. It should be noted that the above data excludes Farm Agriculture.

85. Sectors with the largest absolute contractions in employment are:

- Health (-144 jobs, -35.5%);
- Transport & storage (-94 jobs, -33.5%); and
- Property (-85 jobs, -69.6%).

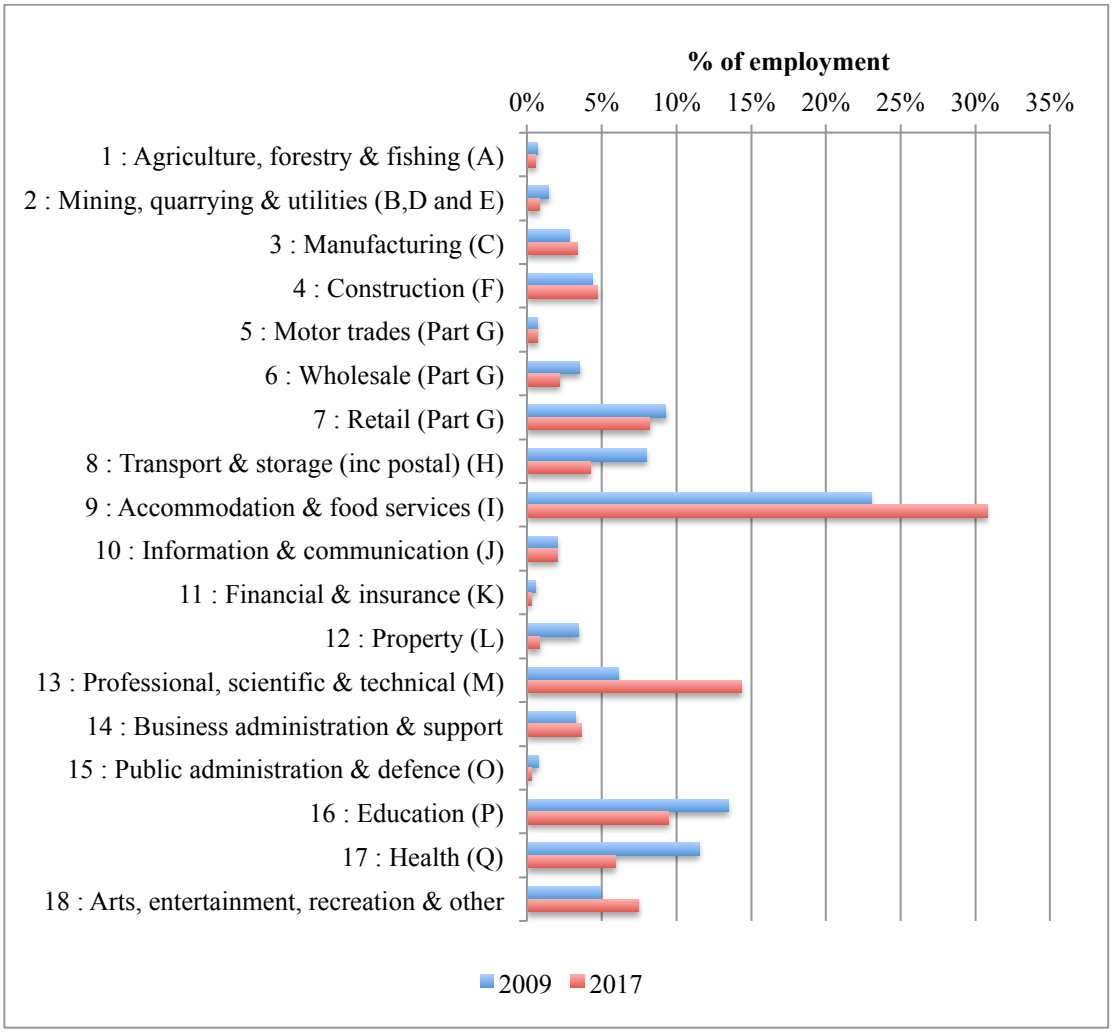
Figure A3.9: Employment by industrial sector, Craven Sub Area, 2009-2017



Source: BRES data. Figures for 2017 include PAYE employment

86. The implication of this pattern of sectoral change for the % of total employment in the Craven Sub Area accounted for by each industrial sector is shown in the following figure. In particular, the growth in importance of the professional and tourism related sectors is significant.

Figure A3.10: % of employment by industry, Craven Sub Area 2009-2017



Source: BRES data. Figures for 2017 include PAYE employment

Key employers

87. The Bolton Abbey Estate (see box below) is a key employer in the Craven Sub Area.

Bolton Abbey Estate

The Bolton Abbey Estate covers a large geographic area of some 28,000 acres. It includes areas not just within the YDNP but also interests in Grassington, Keithly, Harrogate and Craven.

The Bolton Abbey Estate encompasses 8 miles (13 km) of river, 84 farms, 84 buildings of architectural interest, and four Grade I listed buildings. It is currently home to 27 businesses from tearooms to bookshops.

The Estate includes extensive grouse moors, including Barden Moor on the west side of Wharfedale and Barden Fell on the east side of the dale. There is also a pheasant shoot. Apart from people employed within these businesses, the Estate employs about 120 staff to work on the upkeep of the Estate.

Much of the Estate is open to the public. A charge is made for car parking. The

estate includes Bolton Abbey Hall, originally the gatehouse of the priory, which was converted into a house by the Cavendish family. The hall is a Grade II* listed building.

The estate attracts around 450,000 visitors per annum.

It supports substantial employment:

- **Employment (direct)** – around 220 staff (approx. 180 FTE). These staff reside in Ilkley, Skipton and outskirts of Leeds and are primarily drawn from the SE and SW of the YDNP. It is estimated that 10-15% of staff reside within the YDNP. Employment is fairly stable overall, although increased use of contractors for some functions. Direct staff include professional/estate management roles and tourism/hospitality roles. Professional/estate management accounts for around 40 FTE roles with the remainder of the 180 in tourism/hospitality;
- **Employment (indirect)** – the Estate also acts as a landlord and there is significant employment in tenant businesses. There are around 75 tenanted businesses. These range from garages, tarmac coating plants, wedding venues to cafes and American Diners. The majority is tourism based. It is estimated these businesses employ the order of 500 staff.

Its geographical extent means that it is a cross boundary economic stakeholder.

Income

88. This data is only available down to MSOA level so an approximation is used to the Craven Sub Area; looking at MSOAs 001, 002 and 003. It should be noted that these cover a wider area than just the Craven Sub Area.

89. The average total annual income across these 3 MSOAs in 2015/16 was £39,533. This sits at a middle level in comparison with other MSOAs in Craven District. The level in the Craven Sub Area is 87.3% of that in the MSOA with the highest income.

90. Notably, there is significant variation in the 3 MSOAs within the Craven Sub Area. MSOA 003 which sits in the most central area (along the B6479, covering Settle, Stainforth and up through Horton in Ribblesdale) has a significantly lower average income level (£36,700) compared to the other 2 MSOAs within the Craven Sub Area. This could reflect this area having less accessibility to locations outside of the YDNP.

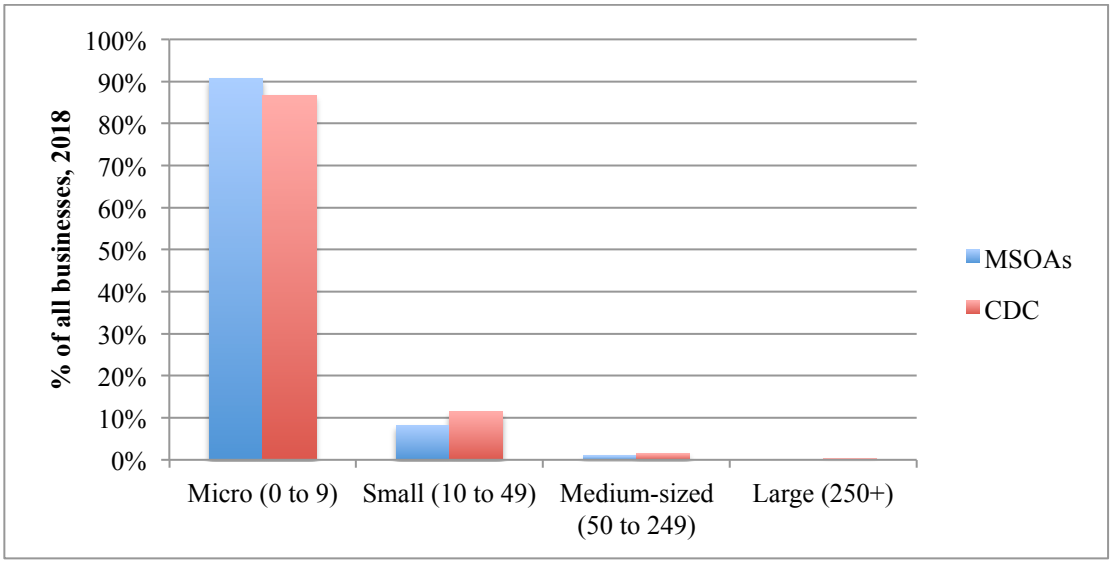
91. The average net income after housing costs as a % of net income before housing costs in the YDNP was 94.2% in 2015/16. The comparable figure in MSOAs outside of the YDNP ranged from 90.2% to 96.4%. The impact of housing costs on net income is therefore relatively weaker in the YDNP than many locations outside.

Business profile

92. UK business count data from the ONS provides a picture of the shape of the business base. This data is only available down to MSOA level so an approximation is used to the Craven Sub Area; looking at MSOAs 001, 002 and 003. It should be noted that these cover a wider area than just the Craven Sub Area.

93. There are around 1,995 businesses in the Craven Sub Area (measured by above MSOAs). The majority of businesses in Craven Sub Area (90.7%) are micro businesses with less than 10 employees. This is a slightly greater proportion than Craven District. There are no large businesses of more than 250 staff in the Craven Sub Area.

Figure A3.11: Businesses by size (number of employees), 2018

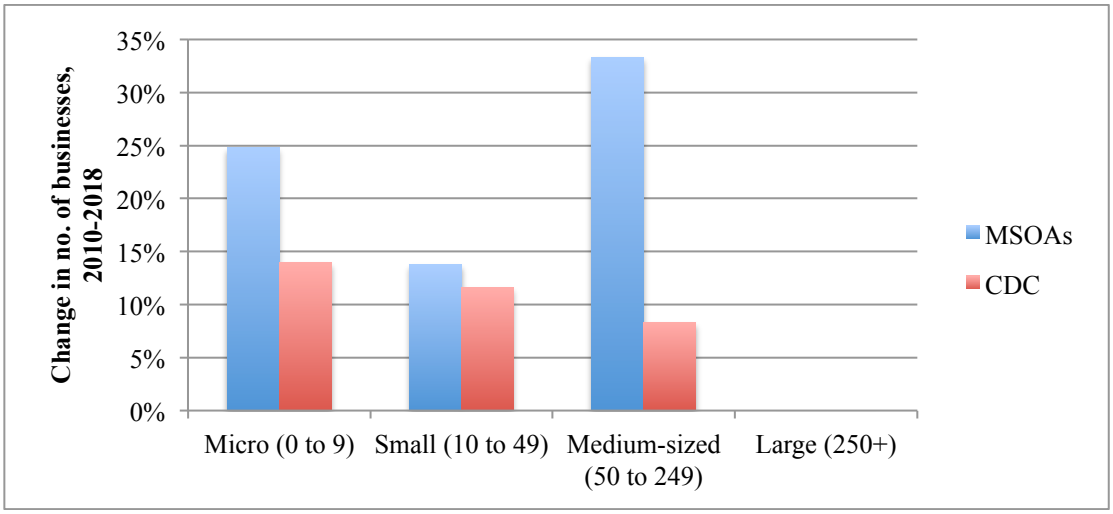


Source: ONS UK Business Counts, based on IDBR.

94. Over the period 2010 to 2018, the total business count in the Craven Sub Area increased by around 24.3%. This is a higher rate of growth than recorded for Craven District (13.4%).

95. Examining trends by business size shows that growth in the Craven Sub Area (MSOAs) has been mostly in medium-sized businesses (10-49 employees); the number of these businesses grew by 33.3% over 2010-2018 compared with 8.3% in Craven District. There was also a higher level of growth in micro businesses within the Craven Sub Area.

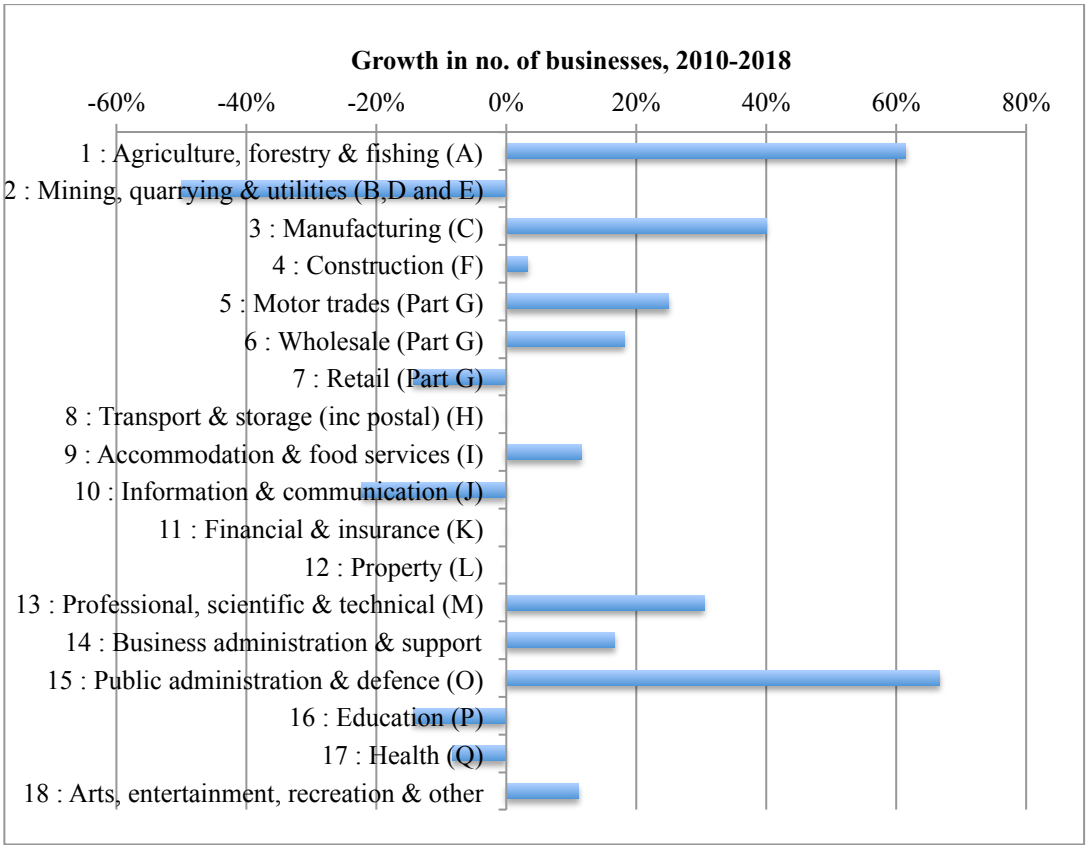
Figure A3.12: Growth in no. of businesses by size (employees), 2010-2018



Source: ONS UK Business Counts, based on IDBR.

96. Looking at the percentage change in the number of businesses by sector over 2010-2018, the Public admin, Agriculture and Manufacturing sectors exhibited the greatest growth. The number of agricultural businesses increased by 61.5% over this period (from 480 to 775 businesses).

Figure A3.13: Growth in no. of businesses by industry, 2010-2018



Source: ONS UK Business Counts, based on IDBR.

3.6 Travel to work

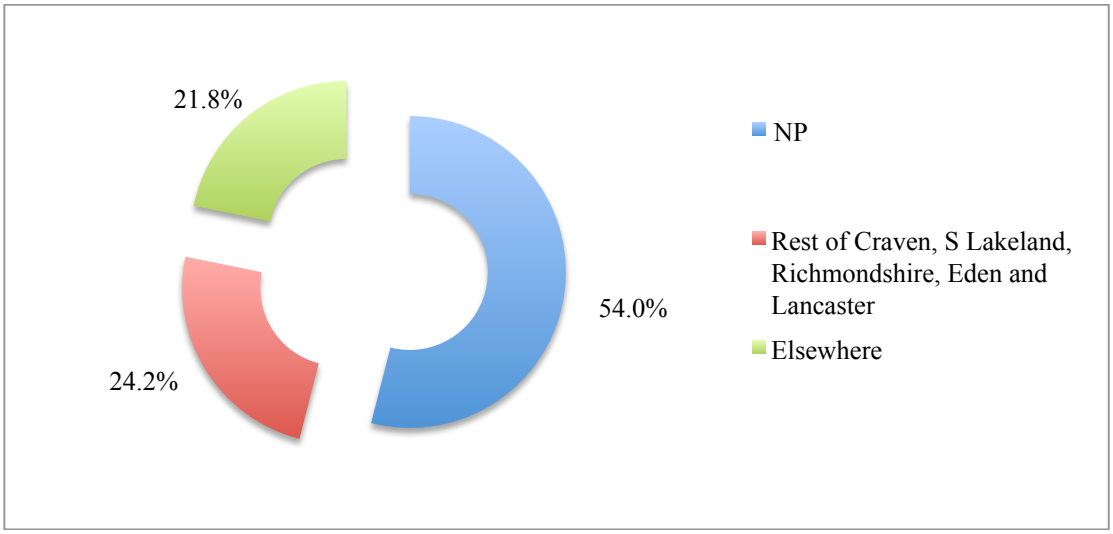
97. Origin-destination data published by the Office for National Statistics (ONS) provides data on the travel to work patterns of individuals[4]. This can be used to understand patterns across different areas of the YDNP.

98. The Craven Sub Area has a fairly low level of self-containment. Around 54.0% of those who live in the sub-area also work within the YDNP. There is net out commuting with a ratio of resident workers to workplace-based employment of 1.15.

99. There are a number of important locations for employment just outside the YDNP within Craven, including Skipton, Settle and Ingleton.

[4] 2011 Census.

Figure A3.14: Work locations for those who live in the Craven Sub Area



Source: Census 2011

3.7 Local service provision

Education

100. In aggregate, primary school roll numbers in the Craven Sub Area have increased by +5.1% over the last 5 years (2014 – 2019).

101. There are significant differences in the trend across different schools. Pupil roll numbers grew at 6 of the 10 primary schools. The largest growth (of almost 50%) was at The Boyle and Petyt Primary School. Declines were concentrated around the Grassington area with Burnsall VA Primary School experiencing the largest percentage decrease in pupil numbers (-29.4%).

Figure A3.15: Primary school roll numbers in the Craven Sub Area, 2014-2019

School	Pupils on roll		Change, 2014-2019	
	2014	2019	No.	%
Austwick CofE VA Primary School	53	58	5	9.4%
Burnsall VA Primary School	34	24	-10	-29.4%
Cracoe and Rylstone VC CofE Primary School	46	39	-7	-15.2%
Embsay CofE VC Primary School	208	209	1	0.5%
Grassington CofE VC Primary School	62	59	-3	-4.8%
Kettlewell Primary School	26	30	4	15.4%
Kirkby in Malhamdale United VA Primary School	44	51	7	15.9%
Long Preston Endowed VA Primary School	56	69	13	23.2%
The Boyle and Petyt Primary School	59	86	27	45.8%
Threshfield School	62	58	-4	-6.5%
Total	**650**	**683**	**33**	**5.1%**

Source: Drawing on Edge Analytics demographic analysis using DfE data

102. In terms of mainstream secondary provision, numbers at Upper Wharfedale School were unchanged over the period (at 296 pupils). In terms of independent schools, the Wharfedale Montessori School saw an increase of over 118% (from 22 to 48 pupils).

103. Further secondary provision plus college provision is located outside the YDNP, in Settle and Skipton.

Health

104. In terms of primary care, GP services are provided in Grassington and at three sites just outside the YDNP boundary (Settle, Hellifield and Ingleton). These perform well in terms of the average number of registered patients per GP compared with the average for England of 2,087 patients. Services provided through the Townhead Surgery are part of the Wharfedale, Airedale and Craven Association (WACA) which is a federation of eight independent, GP practices covering a population of 72,000 patients in North Yorkshire.

105. Secondary care facilities are located some distance away outside of the YDNP. Hospitals with A&E departments include Airedale General Hospital, Lancaster Royal Infirmary and Harrogate Royal Infirmary.

Figure A3.16: Primary care facilities in the Craven Sub Area

Primary care	GPs	Registered patients	Registered patients per GP
Grassington Medical Centre (figures relate to practice which includes Ilkley Moor outside the YDNP)	14 (4 in YDNP)	17,911	1,279
Townhead Surgery and Hellifield Surgery (sites just outside the YDNP, at Settle and Hellifield)	9	9,576	1,064
Ingleton Surgery (just outside the YDNP)	6	7,124	1,187

Source: NHS data

Transport

106. Several B-roads provide key routes across the Craven Sub Area, to settlements just outside and to the wider A-road network. These include the B6255 (connecting Ingleton outside the YDNP to Hawes via Ribblehead), the B6479 (running from Ribblehead down toward Settle), the B6265 serving Skipton and providing onward access to the A65 to the south and A61 and A1(M) to the east, and the B6160 (running north-south from Bolton Abbey and providing connection to A59).

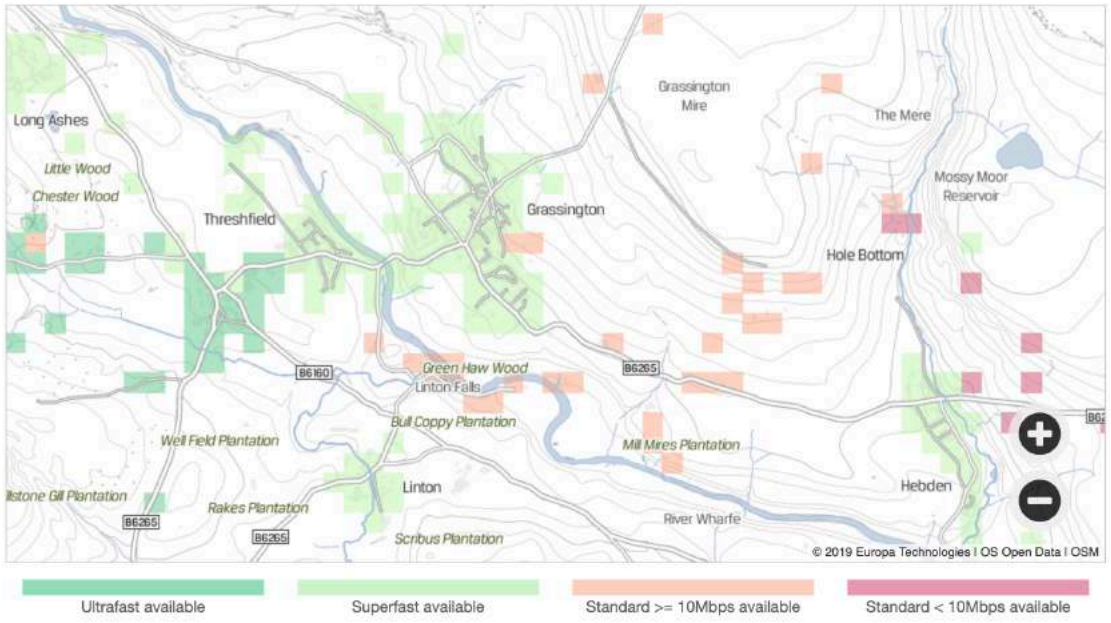
107. Bus services within the Craven Sub Area run throughout the year linking the main towns, villages, and popular attractions, with additional services running during the summer months mainly on Sundays and Bank Holidays. These are covered in the main report looking at the YDNP as a whole.

108. The Settle–Carlisle railway line runs up from Settle just outside the YDNP boundary northward through Ribblehead, including several stops.

Communications

109. Levels of broadband coverage are variable within the Craven Sub Area. The following figures show coverage in the areas around Grassington and Malham. Whilst higher connectivity speeds are available in some of these areas, it is clear that speeds available vary considerably even over small areas. Other areas further from the main settlements generally have lower speeds available. Broadband is covered in more detail in the main report looking at the YDNP as a whole.

Figure A3.17: Broadband connectivity, Grassington area



Source: Ofcom data

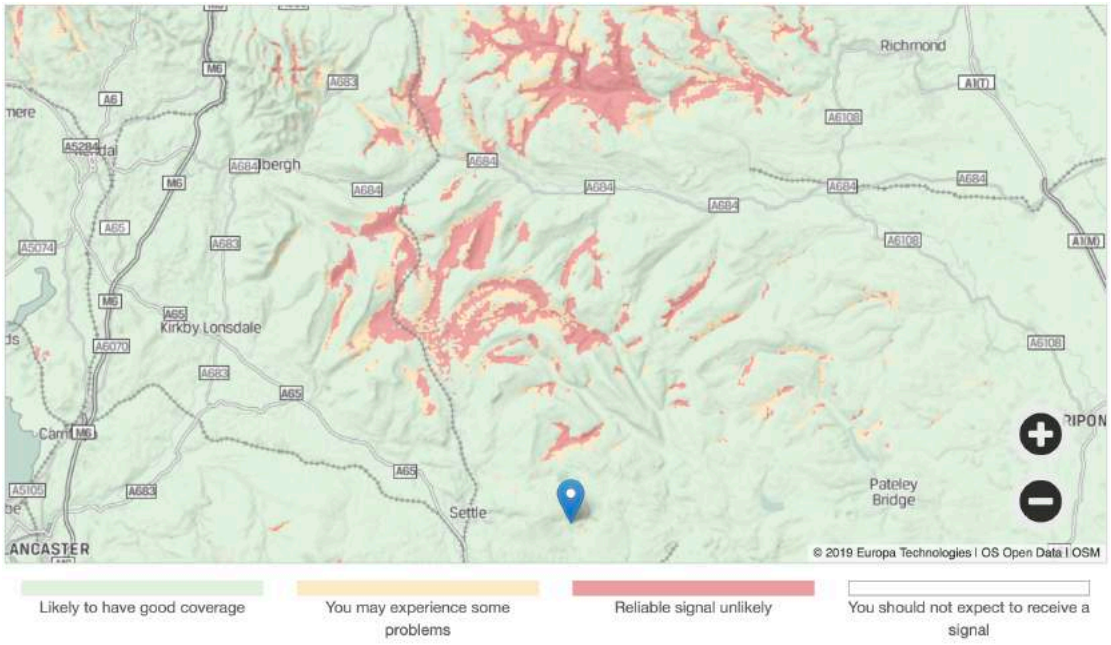
Figure A3.18: Broadband connectivity, Malham area

Source: Ofcom data

110. There are issues with mobile connectivity – both voice and data - in the Craven Sub Area. Whilst coverage is generally good in main areas, outside of this

there are large areas where a reliable signal is unlikely or problems may be experienced. This includes areas around the B-road corridors (e.g. at Ribbleshead).

Figure A3.19: Mobile connectivity in the Craven Sub Area



Source: Ofcom data. Differs by provider. Map shown for Vodafone 4G voice call coverage (outside)

Key points

Population

- 17.5% of population of Craven District are within the YDNP
- 42.1% of the total population of the whole YDNP are within Craven
- A decline in population of around -1.5% has occurred since 2008, some growth has occurred since 2013 however
- The Craven Sub Area has the second highest proportion of population aged 60 years or more (at over 39%)

Employment

- Around 1 in 7 jobs in Craven District are within the YDNP
- There are 4,594 jobs within the Craven Sub Area
- The majority of employment in the Craven Sub Area is located in the Thorlby, Winterburn, Airton, Kirkby Malham and Malham area (around 2 in 10 jobs) and the Bolton Abbey, Appletreewick, Burnsall, Cracoe and Rylstone area (2 in 10 jobs)
- Total employment expanded by 1,151 jobs (+33.4%) in 2009-2017, adjusted figure 30.1%

- The figures for the Craven Sub Area may be influenced by growth outside of the YDNP. In particular, LSOA 002A – the location of much of the employment growth – includes employment areas around the edge of Skipton. Accordingly, some caution is required and the above figures of employment change may overestimate employment growth in the Craven sub area of the YDNP. If LSOA 002A were excluded from the analysis (which would also exclude a large section of the YDNP), the growth in 2009-2017 would approximately halve to 452 jobs (+15.3%)
- The growth in employment was concentrated in LSOA 002A (including Thorlby, Winterburn, Airton, Kirkby Malham and Malham)
- Around 1 in 2 jobs in the Craven Sub Area are accounted for by three sectors: (i) Accommodation & food services (ii) Professional, scientific & technical and (iii) Education
- This Craven Sub Area has greater dependency on the Accommodation & food services and Professional, scientific & technical sectors than Craven District
- It has less dependency on the Manufacturing sector than Craven District
- Two of the three largest sectors in the YDNP experienced employment growth over the period 2009-2017
- The expansion in the Accommodation & food services sector is particularly strong and significant given that the sector accounts for around 1 in 3 jobs in the Craven Sub Area in 2017
- The decline in the Health sector is significant although this accounts for a relatively small proportion of employment in this area of the YDNP
- Key employers include the Bolton Abbey Estate and its tenant businesses. The Estate attracts around 450,000 visitors per annum. It supports substantial employment (approximately 220 staff directly and 500 staff indirectly) and is a cross boundary economic stakeholder
- There are around 1,995 businesses in the Craven Sub Area. The majority of businesses (90.7%) are micro businesses with less than 10 employees. This is a slightly greater proportion than Craven District. There are no large businesses of more than 250 staff in the Craven Sub Area
- Over the period 2010 to 2018, the total business count in the Craven Sub Area increased by around 24.3%. This is a higher rate of growth than recorded for Craven District (13.4%)
- Growth in the Craven Sub Area has been mostly in medium-sized businesses (10-49 employees)
- The Public admin, Agriculture and Manufacturing sectors exhibited the greatest growth in numbers as a proportion of total businesses in 2010 to 2018

Travel to work

- The Craven Sub Area has a fairly low level of self-containment. Around 54.0% of those who live in the sub area also work within the YDNP
- There is net out commuting with a ratio of resident workers to workplace-based employment of 1.15

Local service provision

- In aggregate, primary school roll numbers in the Craven Sub Area have increased by +5.1% over the last 5 years (2014 – 2019)
- There are significant differences in the trend across different schools. Pupil roll numbers grew at 6 of the 10 primary schools. The largest growth (of almost 50%) was at The Boyle and Petyt Primary School. Declines were concentrated around the Grassington area with Burnsall VA Primary School experiencing the largest percentage decrease in pupil numbers (-29.4%).
- In terms of mainstream secondary provision, numbers at Upper Wharfedale School were unchanged over the period (at 296 pupils). In terms of independent schools, the Wharfedale Montessori School saw an increase of over 118% (from 22 to 48 pupils)
- Further secondary provision plus college provision is located outside the YDNP, in Settle and Skipton
- GP services are provided at Grassington and at three sites just outside the YDNP boundary (in Settle, Hellifield and Ingleton). These perform well in terms of the average number of registered patients per GP compared with the average for England
- Secondary care facilities are located some distance away outside of the YDNP. Hospitals with A&E departments include Airedale General Hospital, Lancaster Royal Infirmary and Harrogate Royal Infirmary
- Several B-roads provide key routes across the Craven Sub Area, to settlements just outside and to the wider A-road network
- Bus services within the Craven Sub Area run throughout the year linking the main towns, villages, and popular attractions, with additional services running during the summer months mainly on Sundays and Bank Holidays
- The Settle–Carlisle railway line runs up from Settle just outside the YDNP boundary northward through Ribblehead, including several stops
- Levels of broadband coverage are variable within the Craven Sub Area. Whilst higher connectivity speeds are available in some of the areas around Grassington and Malham, it is clear that speeds available vary considerably even over small areas. Other areas further from the main settlements generally have lower speeds available
- There are issues with mobile connectivity – both voice and data - in the Craven Sub Area. Whilst coverage is generally good in main areas, outside of this there are large areas where a reliable signal is unlikely or problems may be experienced. This includes areas around the B-road corridors (e.g. at Ribbleshead)

4 Eden

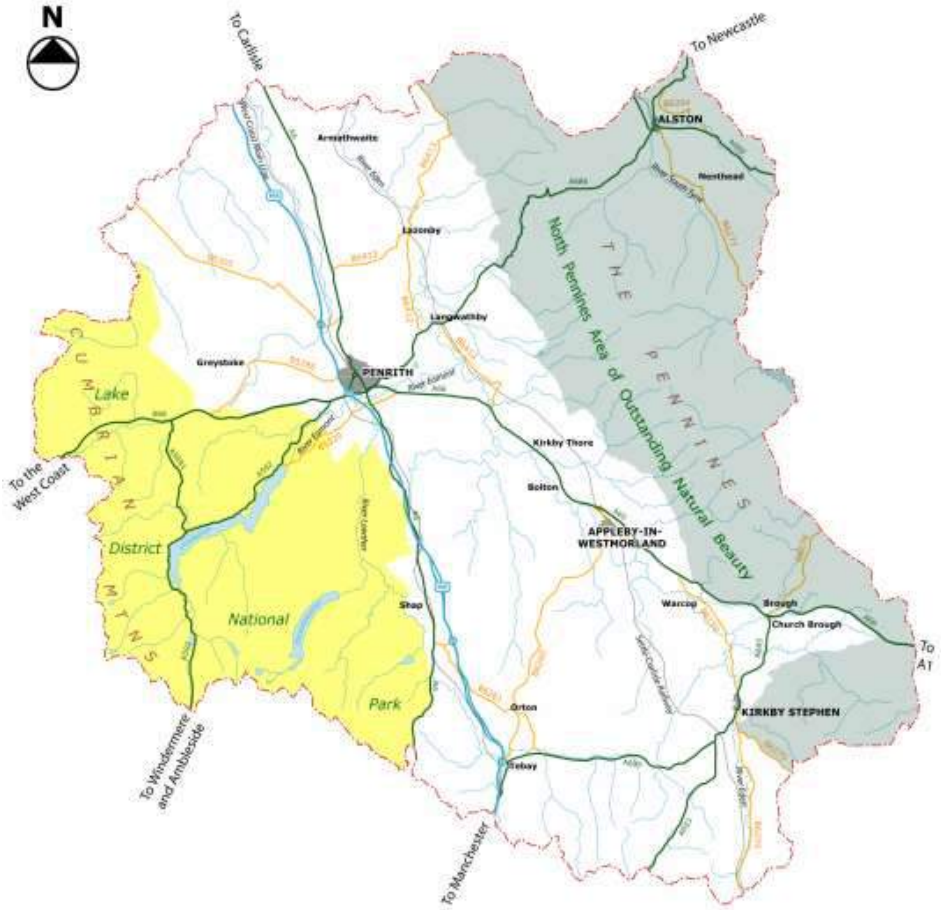
4.1 Overview

111. Eden District is located in eastern Cumbria. Following the expansion of the YDNP boundary in 2016, the southern part of the Eden District became part of the YDNP.

112. Eden lies has an area of 2,156 km2, making it the largest non-metropolitan area in England and Wales. In 2011, the population of Eden was 52,564, meaning it has the lowest population density of any English district. A high proportion of the population is scattered throughout small villages across a wide rural area, with more than half the population (29,361 or 55.8%) living outside the four main towns of Penrith, Alston, Appleby and Kirkby Stephen.

113. The boundary of the YDNP in the Eden District broadly runs just west of Kirkby Stephen, northwards toward Appleby in Westmorland and south just to the east of the M6. Key road connections in the District include the M6 and A6 which run north-south and A66 which runs east-west.

Figure A4.1: Eden District



Source: EDC.

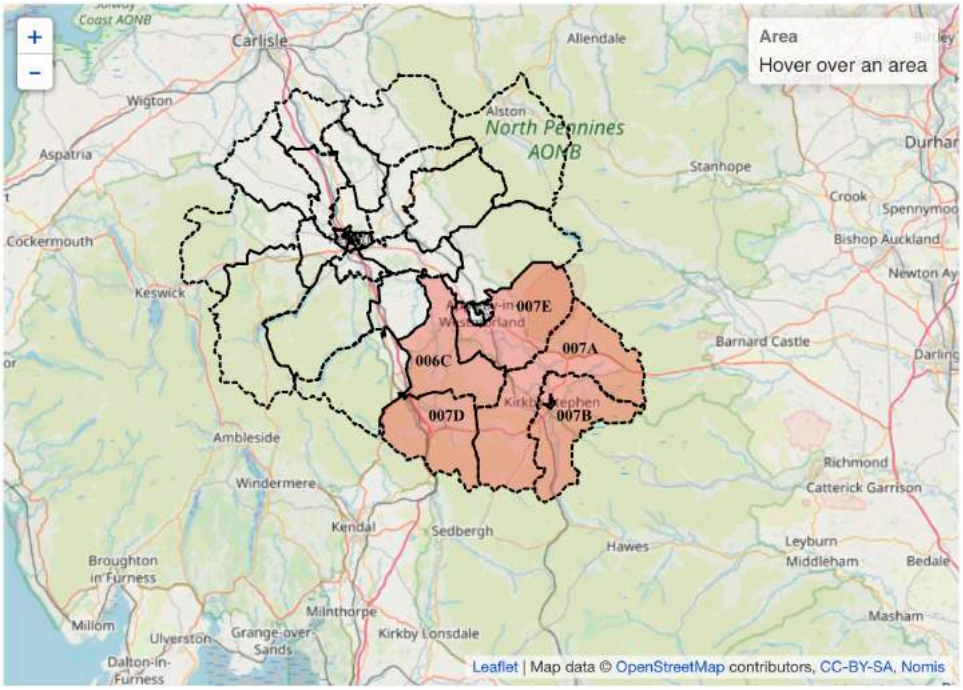
114. There are no large settlements in Eden that sit within the YDNP. Smaller settlements within the YDNP include Ravenstonedale, Crosby Garrett, Great Asby, Crosby Ravensworth and Orton.

115. A brief overview of Eden's **key settlements <u>outside</u> of the YDNP** is as follows:

- **Kirkby Stephen** – Kirkby Stephen is located just outside of the YDNP boundary and on the A685. The town is a centre for outdoor recreation, benefiting from close proximity to the YDNP. It is also an important centre for the local farming community and has a well-attended agricultural mart. The town provides a range of retail, health and education services. Along with Appleby and Alston (below), the Kirkby Stephen acts as a vital 'service hub' to the wider rural hinterland;
- **Appleby** – Appleby lies between Kirkby Stephen and Penrith. The town has a station on the Settle-Carlisle line and the A66 provides access to Penrith, the M6 and A1 at Scotch Corner;
- **Alston** – Alston lies in the far north of the District, furthest from the YDNP. The town lies within the North Pennines Area of Outstanding Natural Beauty. The town is remote but connected to Penrith via the A686; and
- **Penrith** – Penrith is the largest town in the District and benefits from major transport connections (including the M6 and A66). The town has a strong local food economy.

116. The analysis examines data for the Eden Sub Area at Lower Super Output Area (LSOA) level, as shown in the following map. In some cases a proportion of the LSOAs are applied to best fit the YDNP boundary.

Figure A4.2: Eden LSOAs used to construct Eden Sub Area



006C – Maulds Meaburn, Crosby Ravensworth & Great Asby

007A – Brough, Church Brough, Brough Sowerby, Great Musgrave, Soulby, Crosby Garrett, Waitby, Newbiggin on Lune & Ravenstonedale

007B – Nateby

007D – Orton

007E – no main settlement in the YDNP

Source: ONS

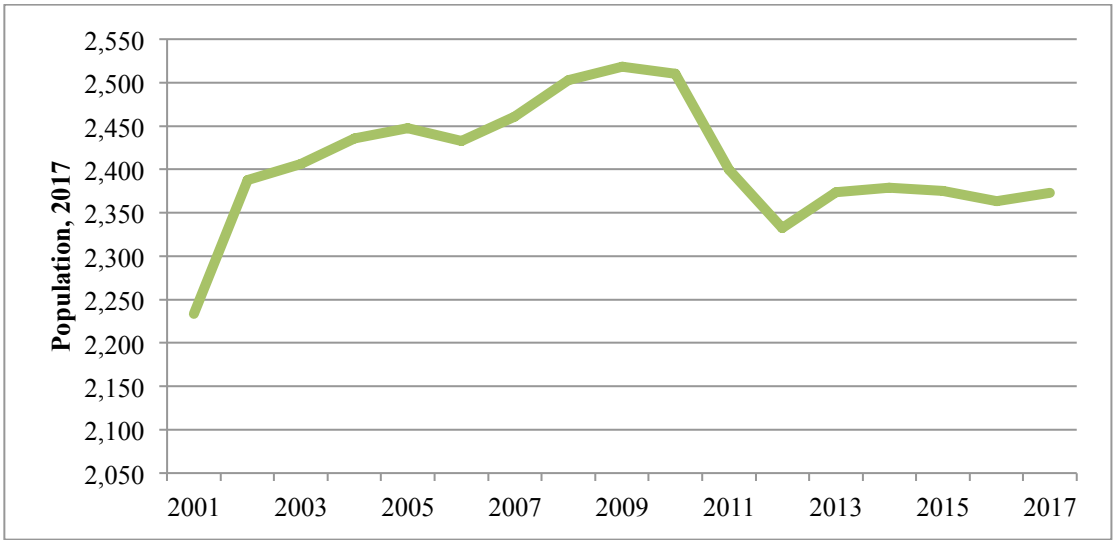
4.2 Population

117. Edge Analytics has undertaken a demographic analysis of the YDNP (see Demographic Evidence Report). Some key points drawn from this analysis are outlined below.

118. This shows that the total population of the Eden Sub Area in 2017 was 2,373 people. This is around 4.5% of the total population in Eden District and around 10.1% of the estimated total population of the whole YDNP.

119. Over the period 2001-2017, the population in the Eden Sub Area grew by around 6.3%. It is notable however that a change in trend has occurred since 2009, a decline in population of around -5.7% being recorded since this time. This is driven by a sharp decline in 2009-2012 with some low level of growth recorded since 2012.

Figure A4.3: Total population, Eden Sub Area, 2001-2017



Source: Based on Edge Analytics demographic work

120. In 2017, 27.3% of the population in the Eden Sub Area were aged 65 years or more. Whilst this is not the highest of the YDNP's sub areas, this element of the population has grown by the second greatest amount as a proportion of total population in the Eden Sub Area (from 16.3% in 2001).

4.3 Economic activity

121. Data from the 2011 Census shows that the Eden Sub Area had an economic activity rate of 82.9%. This is slightly lower than recorded for Eden District (83.1%). The economic activity rate is measured for the population aged 16-64.

4.4 Employment

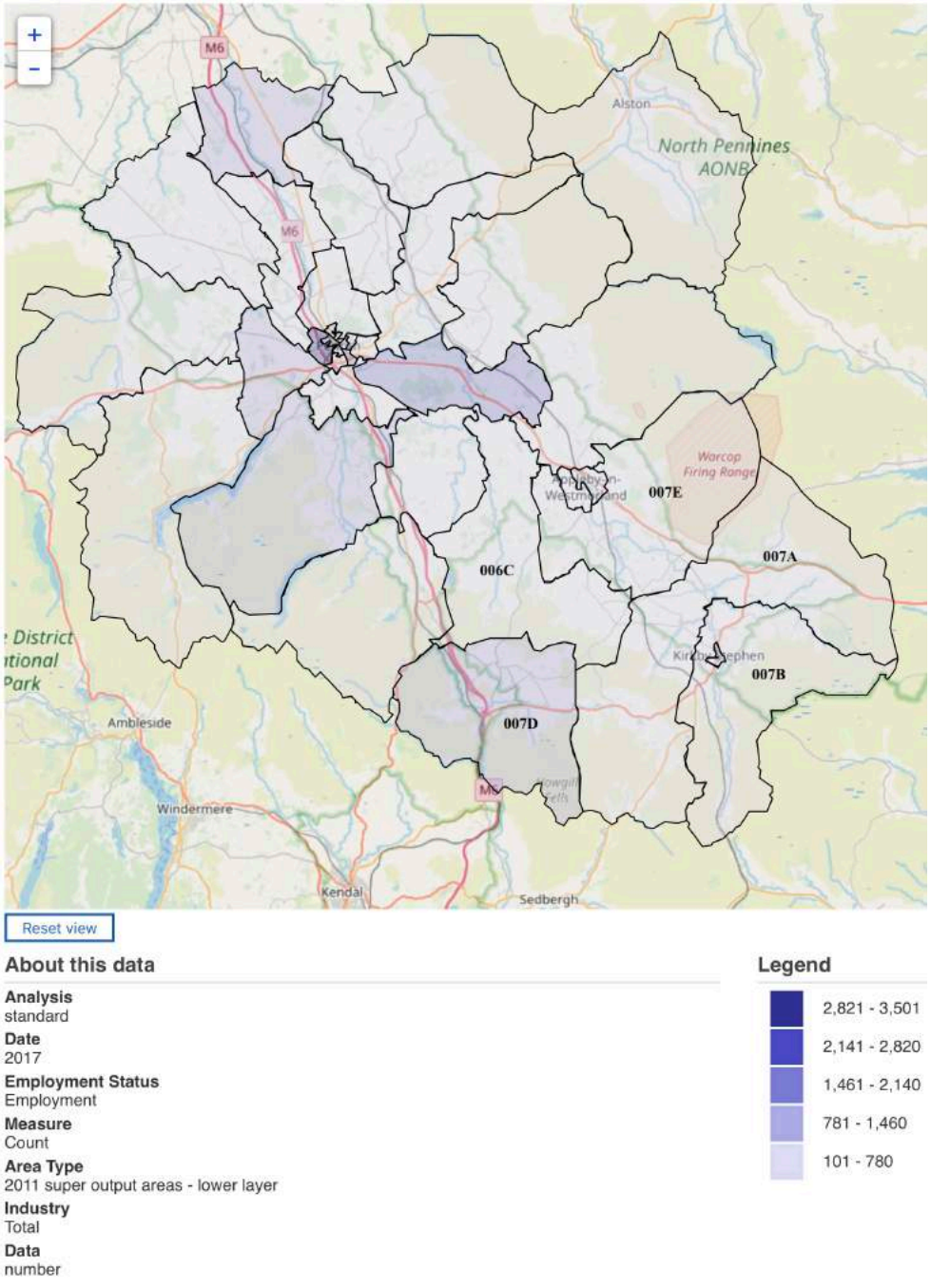
Total employment

122. The Business Register and Employment Survey (BRES) provides a measure of workplace based employment.

123. It should be noted that figures for LSOAs (and therefore the YDNP) do not include Farm Agriculture. Farm Agriculture is included in district level figures however.

124. Examining the distribution of total employment across the whole of Eden District in 2017 (the latest year available) indicates that several of the LSOAs within the Eden Sub Area are important in terms of employment. In particular, LSOA 007D (including Orton) is a significant location. It is noted that some of LSOA 007D is outside of the YDNP boundary and includes Tebay and Greenholme.

Figure A4.4: Total employment across Eden District, 2017



Source: ONS BRES data. Figures include PAYE employment, LSOAs within the YDNP labelled.

125. Examination of employment data for the Eden Sub Area shows that total employment was around 730 jobs in 2017. The majority of employment (1 in 2 jobs) is in LSOA 007D (including Orton). Around 1 in 4 jobs are located in LSOA 007A (including Brough, Church Brough, Brough Sowerby, Great Musgrave, Soulby, Crosby Garrett, Waitby, Newbiggin on Lune and Ravenstonedale). Around 1 in 34 jobs in Eden District are within the Eden Sub Area (total employment in the District in 2017 was 25,000 jobs).

Figure A4.5: Total employment in Eden Sub Area, 2017

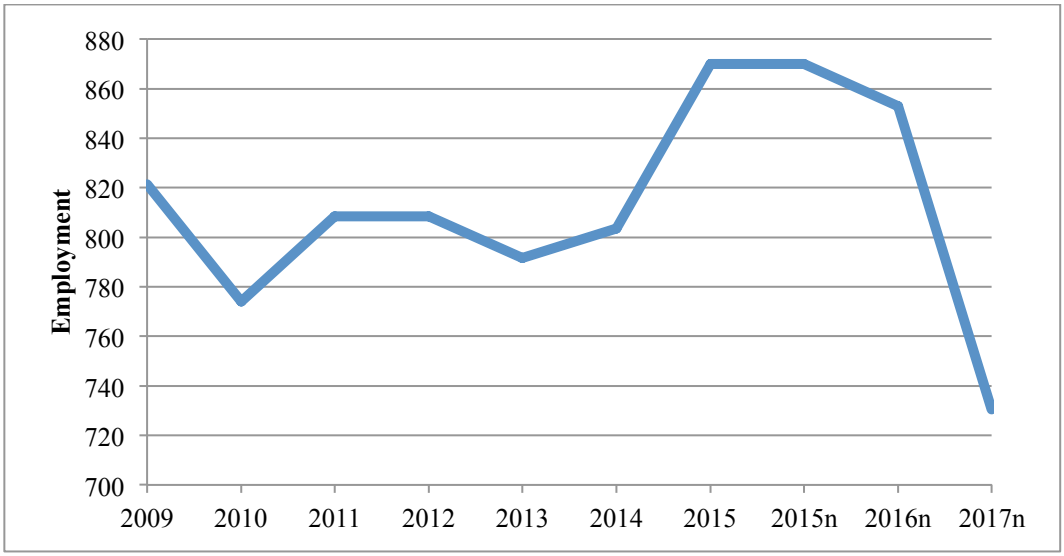
LSOA	Employment	as % of Eden Sub Area
006C	122	16.7%
007A	172	23.5%
007B	66	9.0%
007D	358	49.0%
007E	13	1.8%
	730	**100%**
	Employment – Eden District	**Eden Sub Area as % of District**
	25,000	2.9%

Source: ONS BRES data. Figures include PAYE employment

126. BRES data shows that there was an expansion in employment of 49 jobs (+5.9%) in the Eden Sub Area in 2009-2015. Following this, there was a contraction of 140 jobs (-16.0%) in 2015-2017. Employment in Eden District as a whole was broadly unchanged in both periods (although fluctuating year to year).

127. Over 2009-2017 (accepting discontinuity in BRES data), the employment level in the Eden Sub Area contracted by 91 jobs (-11.1%) compared with growth of around 1,000 jobs (+3.6%) in Eden District as a whole. The Eden Sub Area therefore performed more weakly than Eden District.

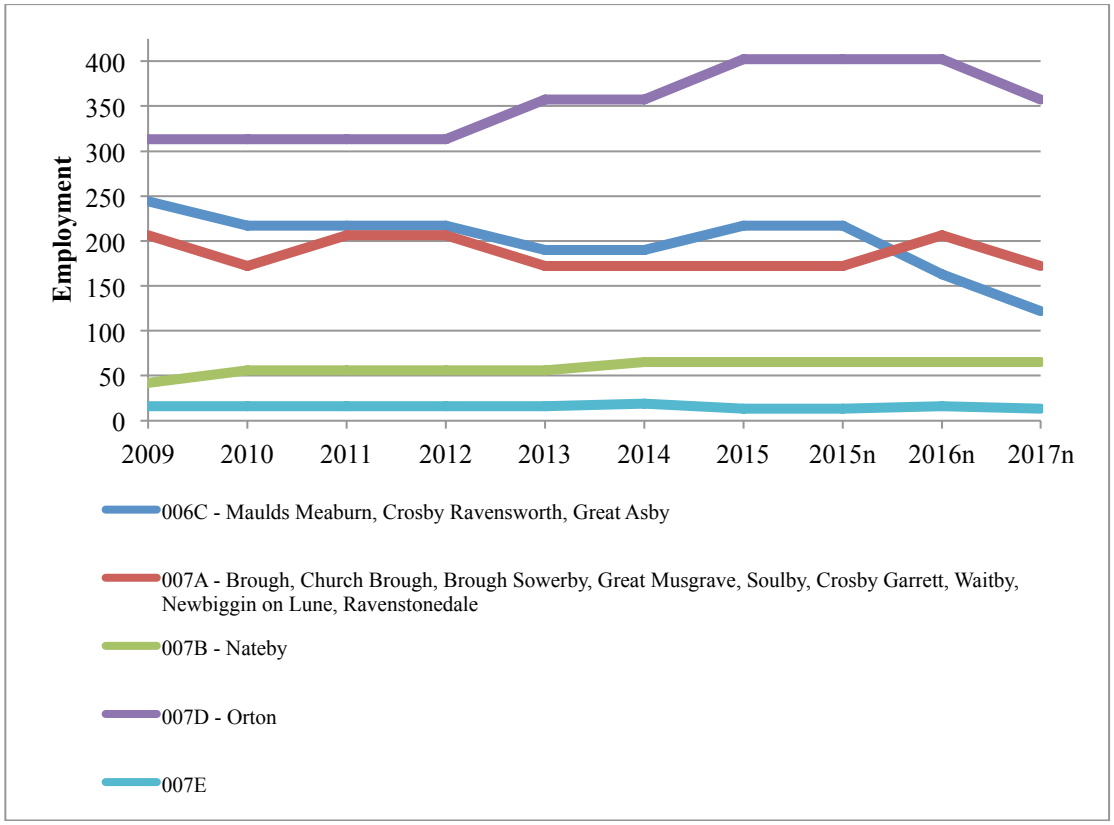
Figure A4.6: Total employment 2009-2017, Eden Sub Area



Source: BRES data. Figures denoted 2015n, 2016 and 2017n include PAYE employment

128. This performance masks significant differences across the Eden Sub Area. The contraction in employment is concentrated in LSOA 006C (including Maulds Meaburn, Crosby Ravensowrth and Great Asby). In contrast, growth in employment was concentrated in LSOA 007D (including Orton).

Figure A4.7: Total employment 2009-2017, Eden Sub Area



Source: BRES data. Figures exclude PAYE employment

4.5 Industrial structure

129. Examination of BRES data by industrial sector for 2017 (the latest available year) shows that there are key differences in the composition of the economy in the Eden Sub Area and Eden District.

130. It should be noted that figures for LSOAs (and therefore the YDNP) do not include Farm Agriculture. Farm Agriculture is included in district level figures.

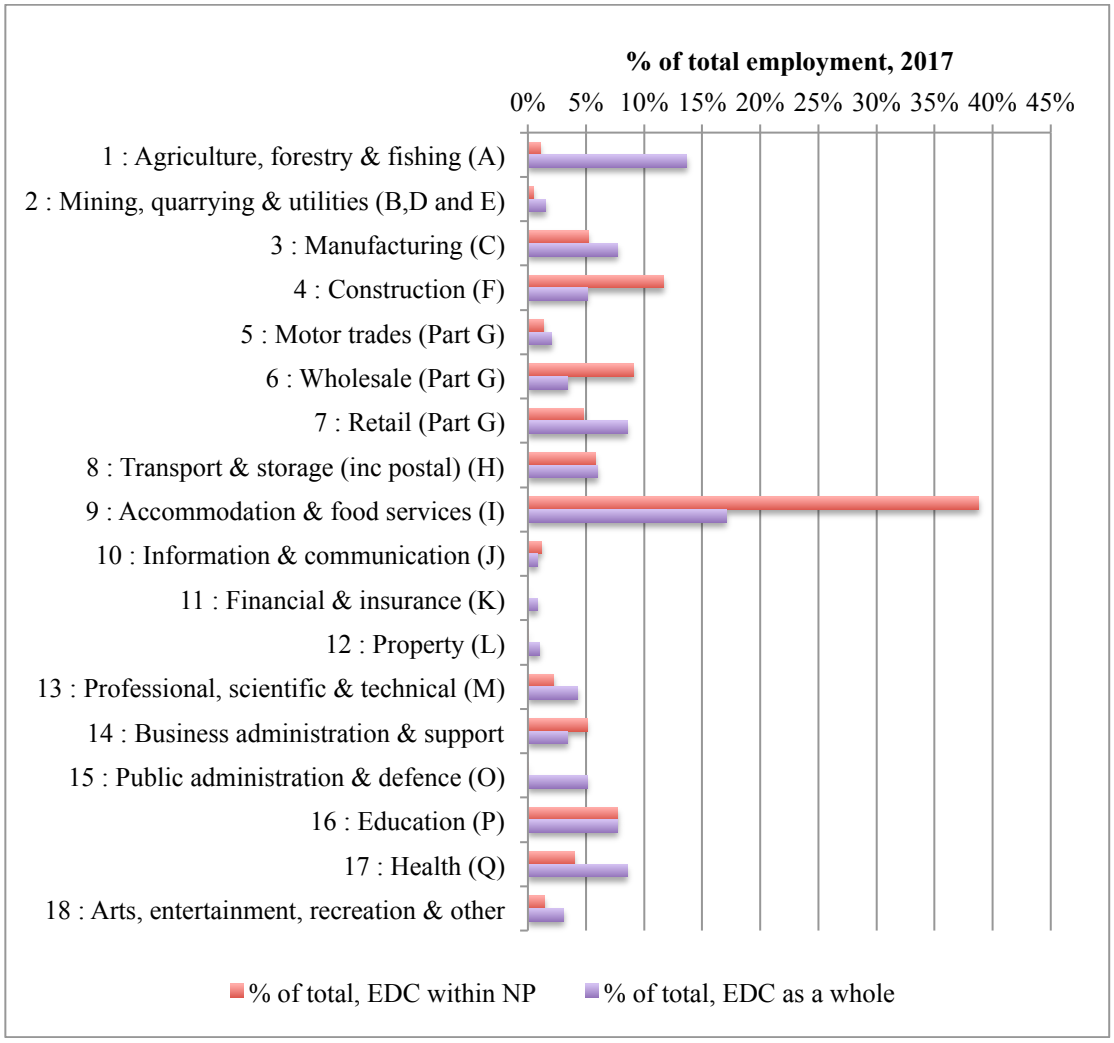
131. The three largest sectors in the Eden Sub Area are:

- Accommodation & food services (38.8% of jobs);
- Construction (11.7%); and
- Wholesale (9.1%).

132. Together, these three sectors account for around 6 in 10 jobs within the Eden Sub Area. The Eden Sub Area has a greater dependency on the Accommodation & food services, Construction and Wholesale sectors than Eden District. It also has less dependency on the manufacturing sector.

133.

Figure A4.8: % of total employment by industrial sector, 2017



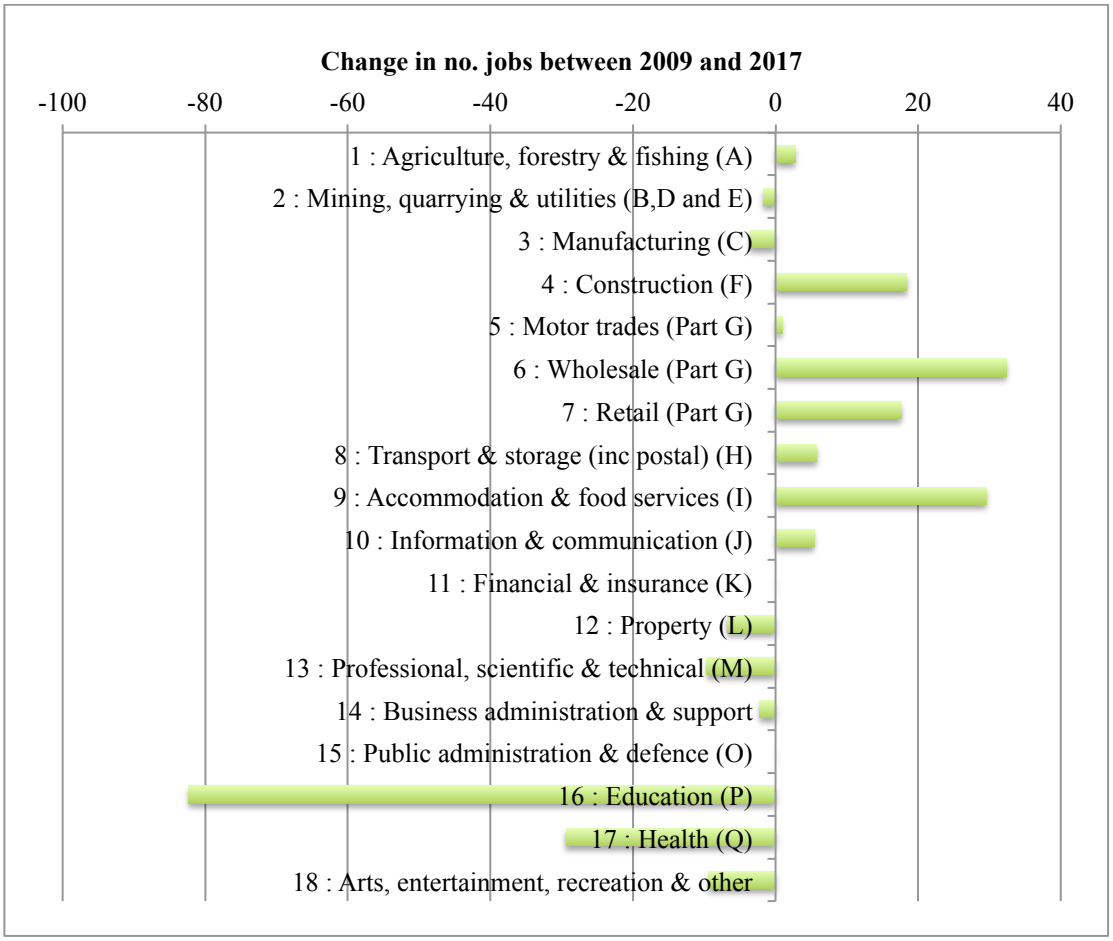
Source: BRES data. Figures include PAYE employment. District figures include Farm Agriculture

134. BRES data by industrial sector for the 2009-2017 period shows wide variation in performance across industrial sectors. Examining the three sectors that account for the largest proportion of total employment in 2017 shows the following performance:

- Construction (+18 jobs);
- Wholesale (+32 jobs); and
- Accommodation & food services (+30 jobs).

135. There were significant falls in employment in the Education (-82 jobs) and Health (-29 jobs) sectors. Other sectors experiencing contractions included the Professional, scientific & technical sector (-10 jobs) and Property sector (-7 jobs).

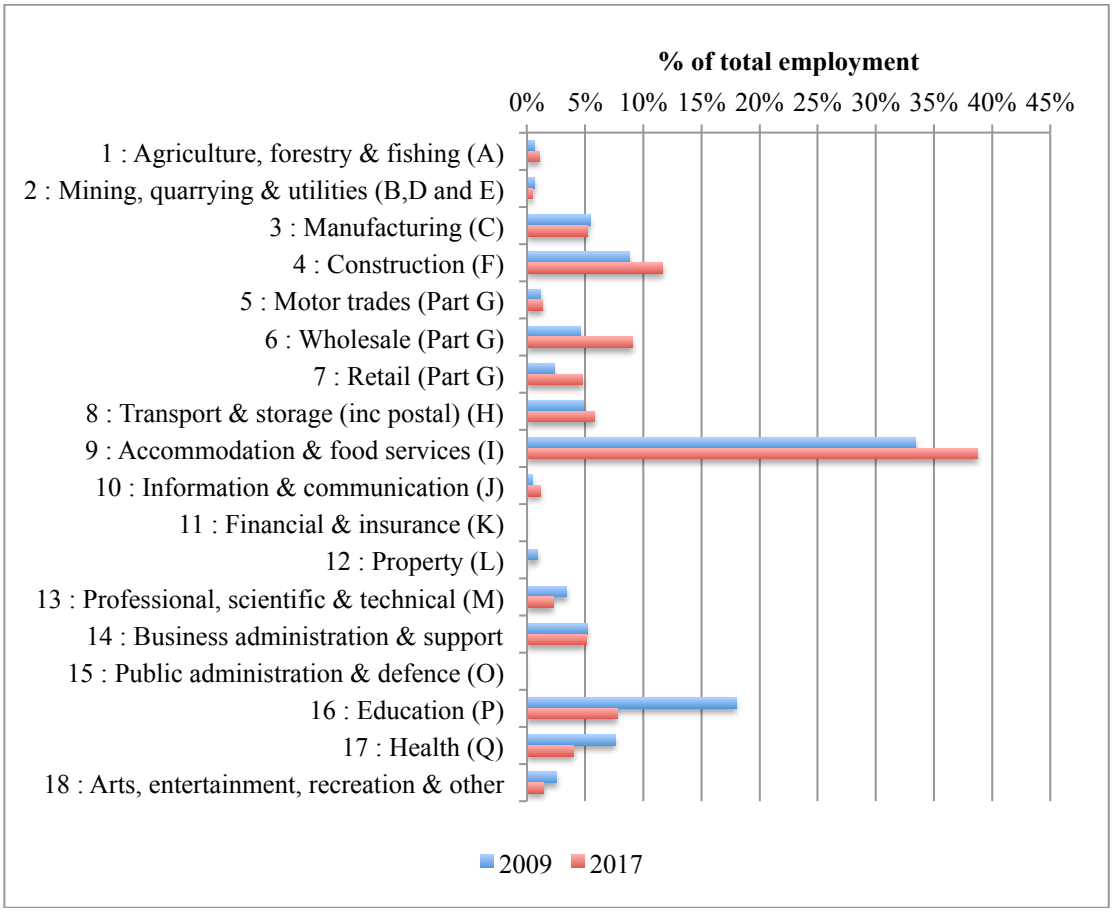
Figure A4.9: Change in employment by industry, Eden Sub Area 2009-2017



Source: BRES data. Figures for 2017 include PAYE employment

136. The implication of this pattern of sectoral change for the % of total employment in the Eden Sub Area accounted for by each industrial sector is shown in the following figure. In particular, the decline in importance of the Education sector is particularly marked.

Figure A4.10: % of total employment by industry, Eden Sub Area, 2009-2017



Source: BRES data. Figures for 2017 include PAYE employment

Income

137. Income data is only available down to MSOA level so an approximation is used to the Eden Sub Area; looking at MSOA 007. It should be noted that this MSOA covers a wider area than just the Eden sub area.

138. The average total annual income in this area in 2015/16 was £37,800. This sits at a middle level in comparison with other MSOAs in Eden District. The level in the Eden Sub Area is 90.0% of that in the MSOA with the highest income.

139. The average net income after housing costs as a % of net income before housing costs in the Eden Sub Area was 93.2% in 2015/16. The comparable figure in MSOAs outside of the YDNP ranged from 89.2% to 95.2%.

Business profile

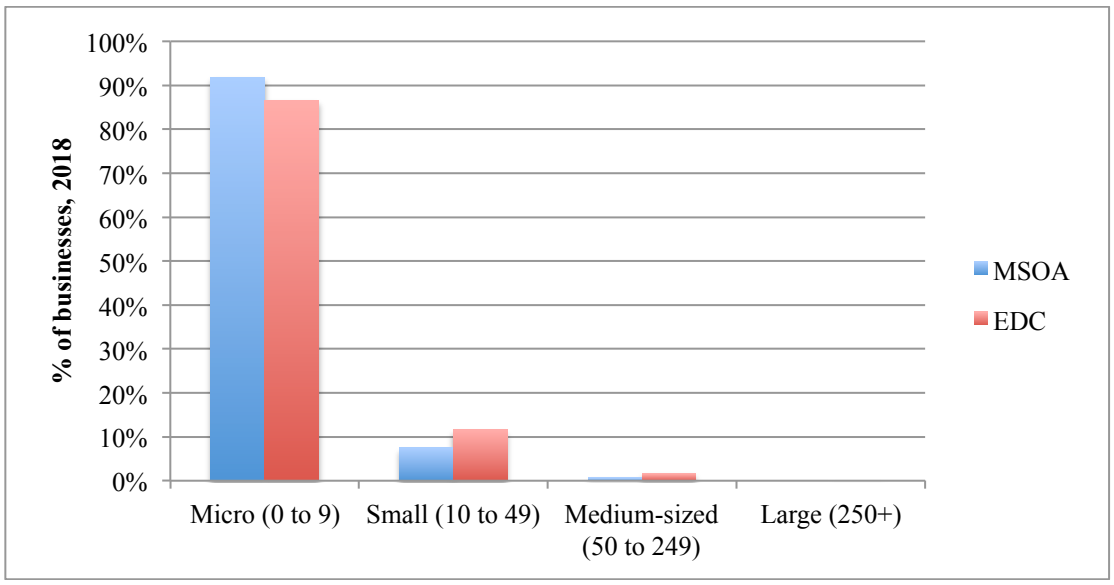
140. UK business count data from the ONS provides a picture of the shape of the business base. This data is only available down to MSOA level so an approximation is used to the Eden sub area; looking at MSOA 007. It should be noted that this MSOA covers a wider area than just the Eden sub area.

141. There are around 735 businesses in the YDNP (measured by above MSOA 007).

142. The majority of businesses in the Eden Sub Area (91.8%) are micro businesses with less than 10 employees. This is a slightly greater proportion than Eden

District. There are no large businesses of more than 250 staff in the Eden Sub Area.

Figure A4.11: Businesses by size (number of employees), 2018

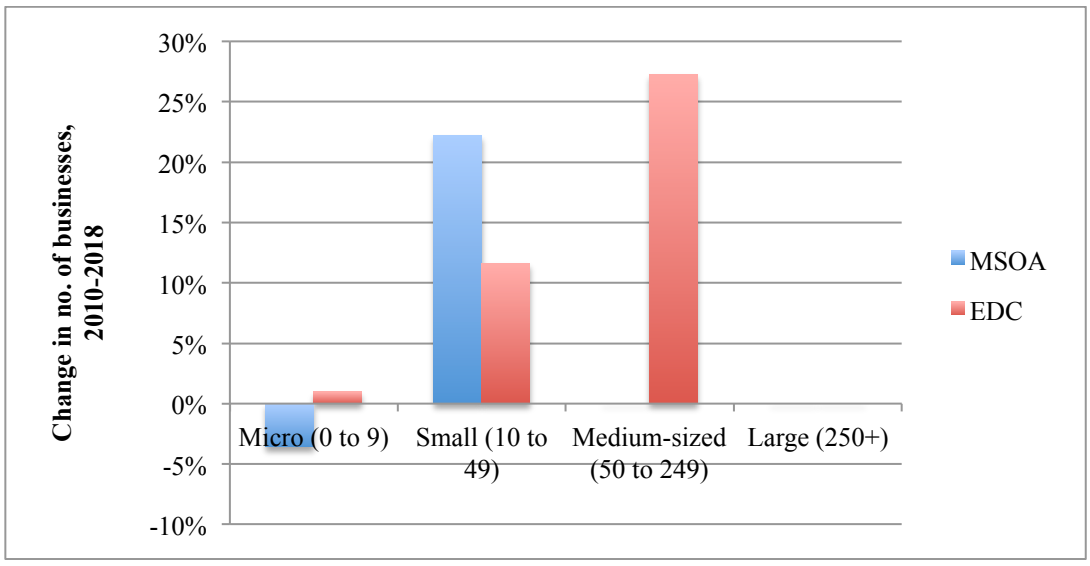


Source: ONS UK Business Counts, based on IDBR

143. Over the period 2010 to 2018, the total business count in the Eden Sub Area decreased by around 2.0%. This contrasts with growth for Eden District of 2.5%.

144. Examining trends by business size shows that growth in the Eden Sub Area (MSOA) has been mostly in small businesses (10-49 employees); the number of these businesses grew by 22.2% over 2010-2018 compared with 11.6% in Eden District. There was a fall in the number of micro businesses within the Eden Sub Area.

Figure A4.12: Growth in no. of businesses by size (employees), 2010-2018



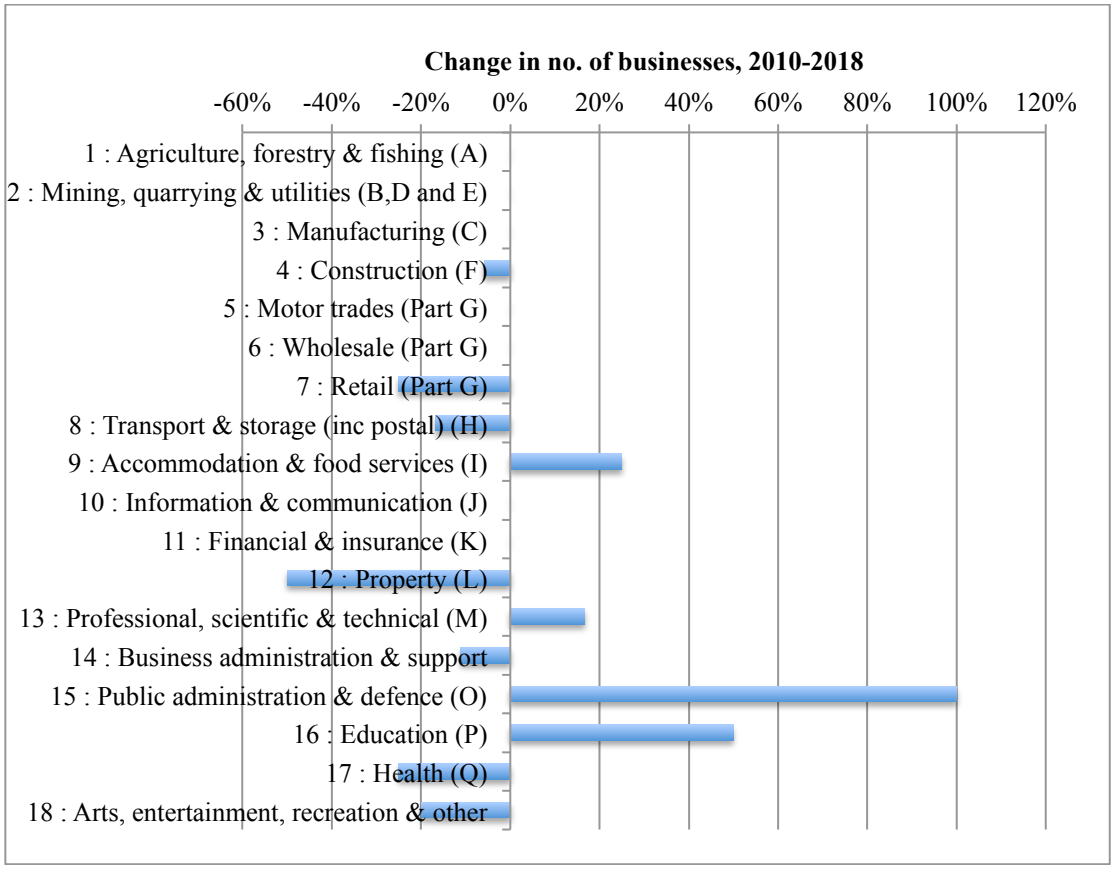
Source: ONS UK Business Counts, based on IDBR.

145. Looking at the percentage change in the number of businesses by sector over 2010-2018, the Public admin, Education and Accommodation & food service sectors exhibited the greatest growth.

146. It is also notable that there were decreases in the number of businesses in several sectors, including Property, Retail, Health and Arts & entertainment.

147. The number of agricultural businesses remained stable over this period - at 335 businesses.

Figure A4.13: Growth in no. of businesses by industry, 2010-2018



Source: ONS UK Business Counts, based on IDBR

4.6 Travel to work

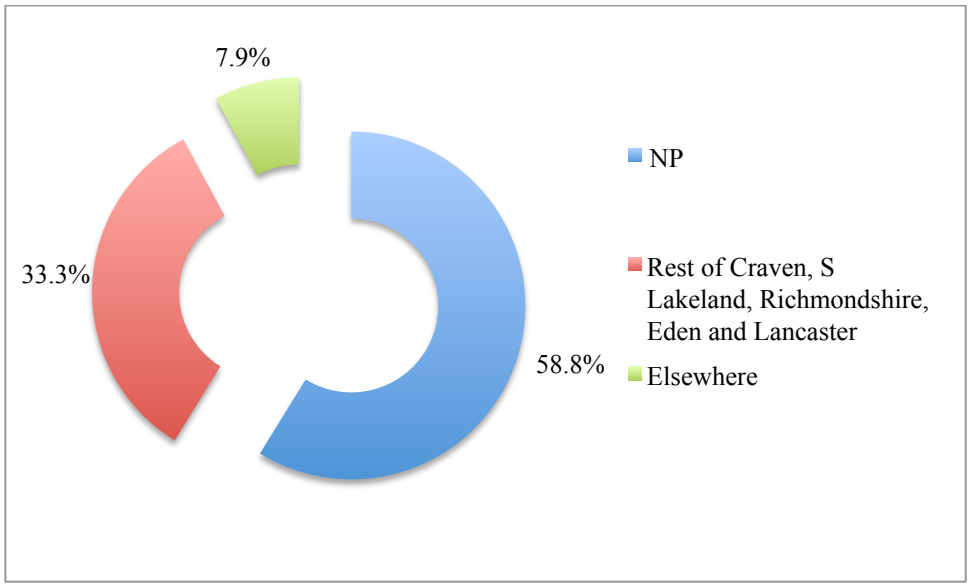
148. Origin-destination data published by the Office for National Statistics (ONS) provides data on the travel to work patterns of individuals[5]. This can be used to understand patterns across different areas of the YDNP.

149. The Eden Sub Area has a fairly low level of self-containment. Around 58.8% of those who live in the sub area also work within the YDNP. There is net out commuting with a ratio of resident workers to workplace-based employment of 1.03.

[5] 2011 Census.

150. There are a number of important employment locations outside the YDNP, including Kirkby Stephen just outside as well as locations further afield via the A66 including Penrith.

Figure A4.14: Work locations for those who live in the Eden Sub Area



Source: Census 2011

4.7 Local service provision

Education

151. In aggregate, primary school roll numbers in the Eden Sub Area have decreased by -2.4% over the last 5 years (2014 – 2019).

152. Pupil roll numbers decreased in 2 of the 3 primary schools. The largest percentage decrease (-14.3%) was in Asby Endowed School.

Figure A4.15: School roll numbers, Eden Sub Area, 2014-2019

School	Pupils on roll		Change, 2014-2019	
	2014	2019	No.	%
Asby Endowed School	21	18	-3	-14.3%
Crosby Ravensworth CofE School	38	34	-4	-10.5%
Orton CofE School	68	72	4	5.9%
Total	**127**	**124**	**-3**	**-2.4%**

Source: Drawing on Edge Analytics demographic analysis using DfE data

153. There are no mainstream secondary provision or independent schools in the Eden Sub Area. It is noted however that there further schools (including secondary) just outside the YDNP in Kirkby Stephen and in Appleby.

Health

154. In terms of primary care, GP services are provided at Orton inside the YDNP and sites outside in Kirkby Stephen, Tebay and Shap. These perform well in

terms of the average number of registered patients per GP compared with the average for England of 2,087 patients.

155. Secondary care facilities are located some distance away outside of the YDNP. Hospitals with A&E departments include Darlington Memorial Hospital, Lancaster Royal Infirmary, Cumberland Infirmary and Furness General Hospital.

Figure A4.16: Primary care facilities, Eden Sub Area

Primary care	GPs	Registered patients	Registered patients per GP
Shap Medical Practice, 2 sites at Orton (within YDNP) and Snap (outside YDNP)	3	3,048	1,016
Upper Eden Medical Practice, 2 sites at Kirkby Stephen and Tebay (outside YDNP)	7	6,659	951

Source: NHS data

Transport

156. The A685 provides a key east-west route across the Eden Sub Area, providing access to Kirkby Stephen and A66 to the east and Tebay and the M6 to the west.

157. There is a programme to dual the whole length of the A66[6]. This should make connections to Penrith and the A1M easier for residents and the YDNP more accessible.

158. Bus services within the Eden Sub Area run throughout the year linking the main towns, villages, and popular attractions, with additional services running during the summer months mainly on Sundays and Bank Holidays. These are covered in the main report looking at the YDNP as a whole.

159. The Settle–Carlisle railway line has a station at Kirkby Stephen just outside the YDNP boundary.

Communications

160. Levels of broadband coverage are variable within the Eden Sub Area. The following figure shows coverage in the Ravenstonedale A685 corridor. Whilst higher connectivity speeds are available in some of these areas, it is clear that speeds available vary considerably even over small areas. Other areas further from the main settlements generally have lower speeds available.

161. Broadband is covered in more detail in the main report looking at the YDNP as a whole.

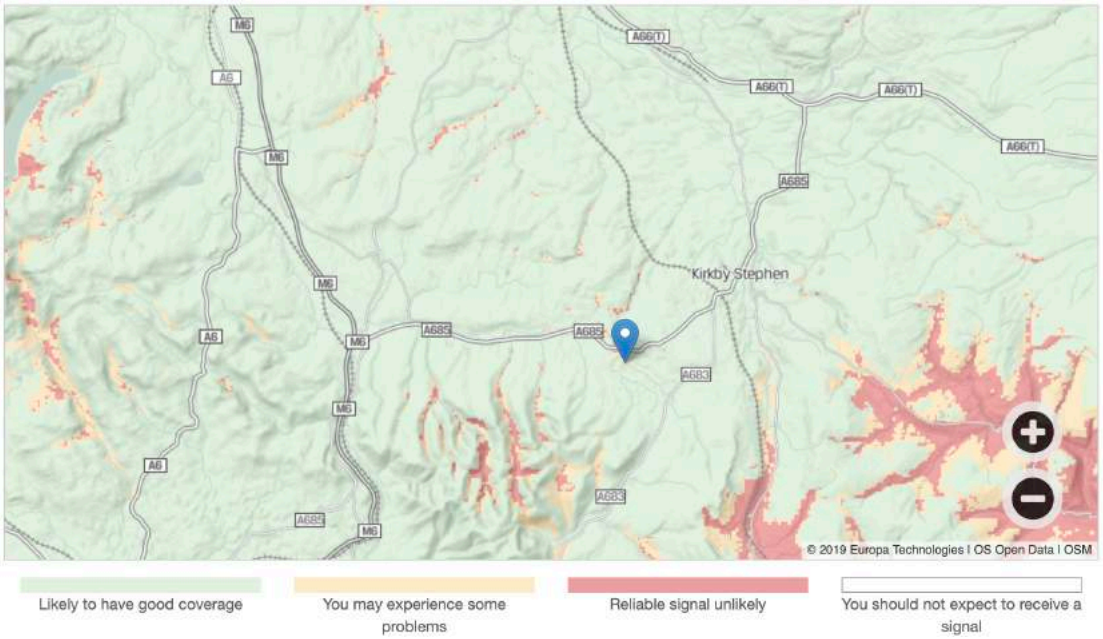
[6] https://highwaysengland.co.uk/projects/a66-northern-trans-pennine/

Figure A4.17: Broadband connectivity, Ravenstonedale A685 corridor

Source: Ofcom data

162. There are issues with mobile connectivity – both voice and data - in this area of the YDNP. Whilst coverage is generally good in main areas, outside of this there are large areas where a reliable signal is unlikely or problems may be experienced. This includes areas both north and south of the A685 corridor.

Figure A4.18: Mobile connectivity in the Eden Sub Area



Source: Ofcom data. Differs by provider. Map shown for Vodafone 4G voice call coverage (outside)

Other services

163. The Black Swan Pub in Ravenstonedale provides an important role for the village and was recently awarded Best Inn in the Great British Pub awards. There

is a post office in Orton. High street banking is available in Kirkby Stephen just outside the YDNP.

Key points

Population

- 4.5% of the population of Eden District are within the YDNP
- 10.1% of the total population of the whole YDNP are within Eden
- A growth in population of around 6.3% has occurred over 2001-2017. A change in trend has occurred since 2009 however, a decline in population of around -5.7% being recorded since this time. Some growth has occurred since 2013 however
- Around 27.3% of the population of the Eden Sub Area is aged 65+. This element of the population has grown by the second greatest amount as a proportion of total population in this sub area of the YDNP (from 16.3% in 2001)

Employment

- Around 1 in 34 jobs in Eden District are within the YDNP
- There are 730 jobs within the Eden Sub Area
- The majority of employment in the Eden Sub Area – 1 in 2 jobs - is located in the LSOA 007D area (including Orton)
- Total employment in the Eden Sub Area expanded by 49 jobs (+5.9%) in 2009-2015, then contracted by 140 jobs (-16.0%) in 2015-2017
- Over 2009-2017 (accepting BRES discontinuity), the employment level in the Eden Sub Area contracted by 91 jobs (-11.1%) compared with growth of 1,000 jobs (+3.6%) in Eden District
- Around 6 in 10 jobs in the Eden Sub Area are accounted for by three sectors: (i) Accommodation & food services (ii) Construction and (iii) Wholesale
- The Eden Sub Area has greater dependency on these three sectors than Eden District
- All three largest sectors in the Eden Sub Area experienced employment growth over the period 2009-2017
- The decline in the Education and Health sectors is marked
- There are around 735 businesses in the Eden Sub Area. The majority of businesses (91.8%) are micro businesses with less than 10 employees. This is a slightly greater proportion than Eden District. There are no large businesses of more than 250 staff in the Eden Sub Area
- Over the period 2010 to 2018, the total business count in the Eden Sub Area decreased by around 2.0%. This contrasts with growth for Eden District
- Growth in the Eden Sub Area has been mostly in small businesses (10-49 employees); the number of these businesses grew by 22.2% over 2010-2018 compared with 11.6% in Eden District. There was a fall in the number of

micro businesses within the Eden Sub Area

- Looking at the percentage change in the number of businesses by sector over 2010-2018, the Public admin, Education and Accommodation & food service sectors exhibited the greatest growth
- There were decreases in the number of businesses in several sectors, including Property, Retail, Health and Arts & entertainment

Travel to work

- The Eden Sub Area has a fairly low level of self-containment. Around 58.8% of those who live in the sub-area also work within the YDNP

Local service provision

- In aggregate, primary school roll numbers in the Eden Sub Area have decreased by -2.4% over the last 5 years (2014 – 2019).Pupil roll numbers decreased in 2 of the 3 primary schools. The largest percentage decrease (-14.3%) was in Asby Endowed School
- There are no mainstream secondary provision or independent schools in the Eden Sub Area. It is noted however that there further schools (including secondary) just outside the YDNP in Kirkby Stephen and in Appleby
- GP services are provided at Orton inside the YDNP and sites outside in Kirkby Stephen, Tebay and Shap. These perform well in terms of the average number of registered patients per GP compared with the average for England
- Secondary care facilities are located some distance away outside of the YDNP. Hospitals with A&E departments include Darlington Memorial Hospital, Lancaster Royal Infirmary, Cumberland Infirmary and Furness General Hospital
- The A685 provides a key east-west route across the Eden Sub Area, providing access to Kirkby Stephen and A66 to the east and Tebay and the M6 to the west. There is a programme to dual the whole length of the A66. This should make connections to Penrith and the A1M easier for residents and make the YDNP more accessible
- Bus services within the Eden Sub Area run throughout the year linking the main towns, villages, and popular attractions, with additional services running during the summer months mainly on Sundays and Bank Holidays. The Settle–Carlisle railway line has a station at Kirkby Stephen just outside the YDNP boundary
- Levels of broadband coverage are variable within this area of the YDNP. Whilst higher connectivity speeds are available in some of the areas around the Ravenstonedale A685 corridor, the speeds available vary considerably even over small areas. Other areas further from the main settlements generally have lower speeds available
- There are issues with mobile connectivity – both voice and data - in this area of the YDNP. Whilst coverage is generally good in main areas, outside of this there are large areas where a reliable signal is unlikely or problems may be experienced. This includes areas both north and south of the A685 corridor

5 South Lakeland

5.1 Overview

164. South Lakeland District lies in the southernmost part of Cumbria between the districts of Lancaster, Craven and Richmondshire to the south and east, and the Cumbrian Districts of Eden, Barrow-in- Furness, Copeland and Allerdale to the north, south west and west. Following the expansion of the YDNP boundary in 2016, a larger section of the District became part of the YDNP. The expanded area includes Killington and Barbon.

165. The east of the District – Kendal and the rural areas – in particular benefits from good accessibility to main national transport links. The M6 and the West Coast mainline railway cross the eastern part of the District, providing access to cities in the north west such as Preston, Manchester and Liverpool, as well as the key transport hub of Manchester Airport and places further afield such as Scotland and the south of England.

166. The boundary of the YDNP in South Lakeland District broadly runs from Kirkby Lonsdale northwards until intersection with the M6 south of Tebay.

Figure A5.1: South Lakeland District

Source: SLDC.

167. A brief overview of South Lakeland's **key settlements inside the YDNP** is as follows:

- **Sedbergh** – Sedbergh is one of Britain's leading 'Book towns' and is also the location of Sedbergh School, a leading independent school and major employer. It is located a short distance inside the YDNP on the A684 which

provides accessibility to other locations in the YDNP (including Hawes) and the M6 outside the YDNP to the west; and

- **Dent** – Dent is a village located further into the YDNP than Sedbergh. It is a popular tourist destination and also has access to the Settle-Carlisle railway via a station about 4 miles from the village.

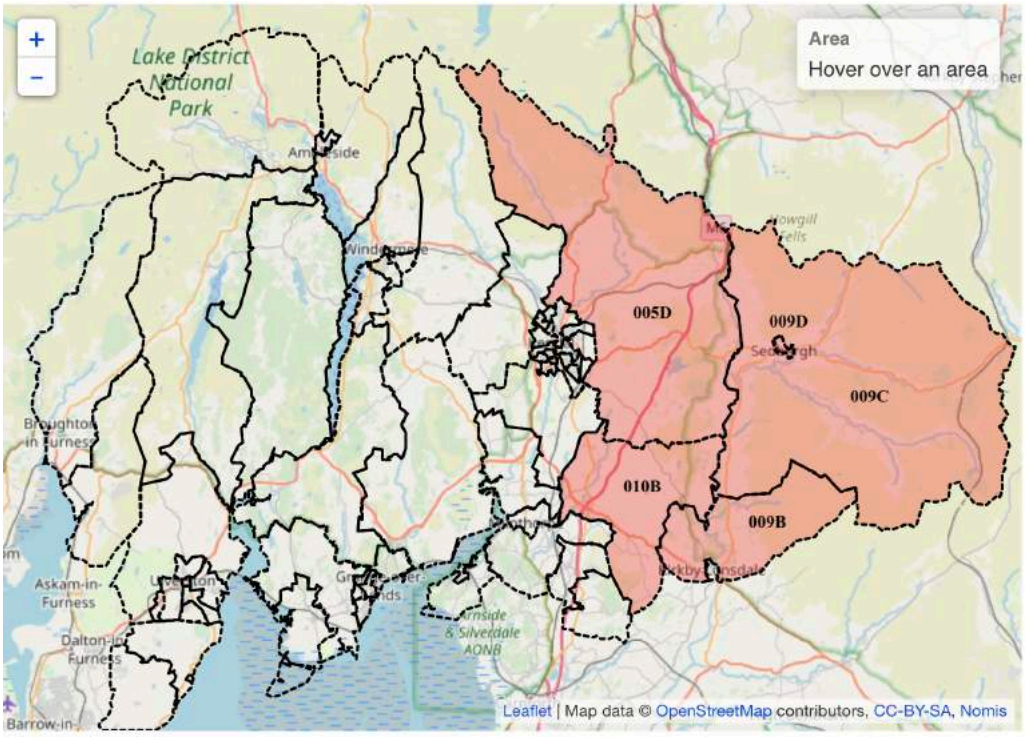
168. A brief overview of South Lakeland's **key settlements <u>outside</u> of the YDNP** (and in the eastern part of the District) is as follows:

- **Kirkby Lonsdale** – Kirkby Lonsdale is a town situated along the north side of the A65 some thirteen miles southeast of Kendal and close to the Forest of Bowland AONB and the YDNP. Whilst smaller than Kendal, Kirkby Lonsdale has a robust employment and service role serving a clear rural hinterland due to its more isolated location; and

- **Kendal** – Kendal is the largest settlement within South Lakeland. It is a key service centre on the edge of the Lake District National Park with good strategic road and rail links to the M6 and the West Coast mainline railway. Kendal is the main market and shopping centre for a large area of South Cumbria.

169. The analysis examines data for South Lakeland within the YDNP at Lower Super Output Area (LSOA) level, as shown in the following map. In some cases a proportion of the LSOAs are applied to best fit the YDNP boundary. The area is referred to as the South Lakeland Sub Area.

Figure A5.2: South Lakeland LSOAs used for South Lakeland Sub Area



005D – Killington

009D – Sedbergh

009B – Casterton and Barbon

010B – Mansergh

009C – Sedbergh (part), Middleton, Gawthrop & Dent

Source: ONS

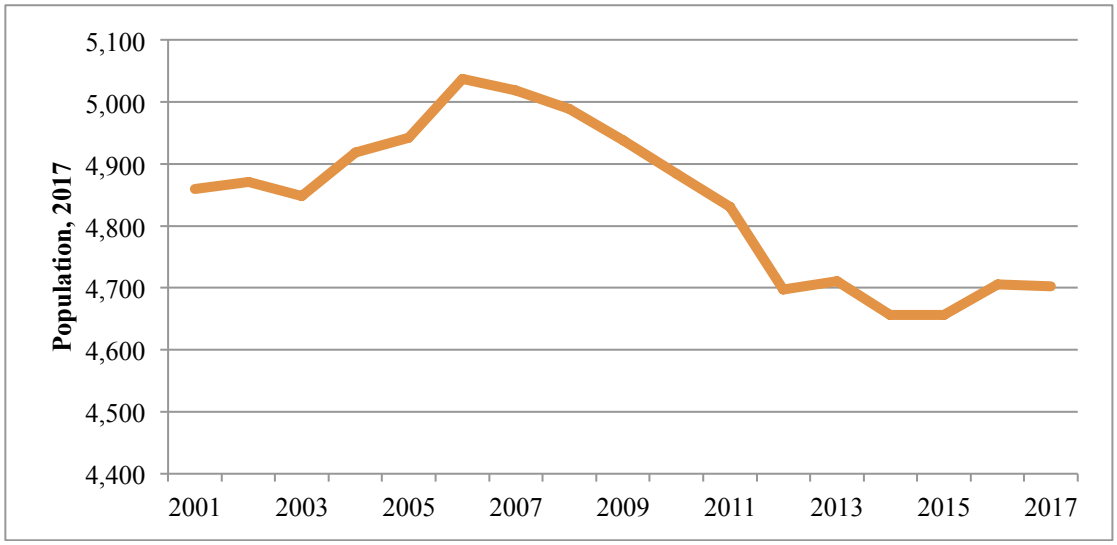
5.2 Population

170. Edge Analytics has undertaken a demographic analysis of the YDNP (see Demographic Evidence Report). Some key points drawn from this analysis are outlined below.

171. This shows that the total population of the South Lakeland Sub Area in 2017 was 4,703 people. This is around 4.5% of the total population in South Lakeland District and around 20% of the estimated total population of the whole YDNP.

172. Over the period 2001-2017, the population in the South Lakeland Sub Area decreased by around -3.2%. A fairly steady decline has occurred since 2006 (-6.6%) although levels has stabilised since 2012.

Figure A5.3: Total population, South Lakeland Sub Area, 2001-2017



Source: Based on Edge Analytics demographic work

173. In 2017, 27.4% of the population in the South Lakeland Sub Area were aged 65 years or more (up from 18.9% in 2001).

5.3 Economic activity

174. Data from the 2011 Census shows that the South Lakeland Sub Area had an economic activity rate of 78.4%. This is lower than recorded for South Lakeland District (81.1%). The economic activity rate is measured for the population aged 16-64.

5.4 Employment

Total employment

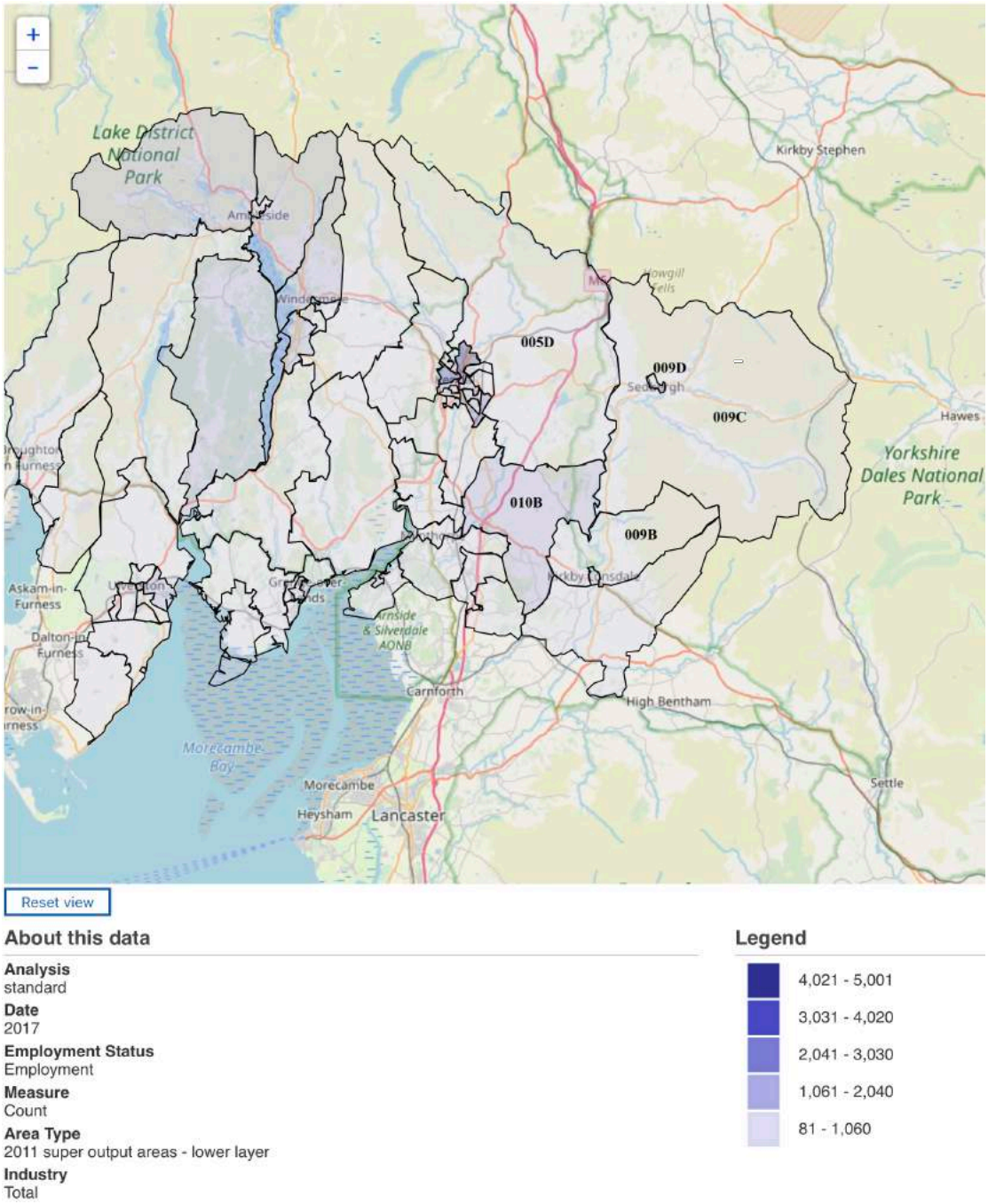
175. The Business Register and Employment Survey (BRES) provides a measure of workplace based employment.

176. It should be noted that figures for LSOAs (and therefore the YDNP) do not include Farm Agriculture. Farm Agriculture is included in district level figures.

177. Examining the distribution of total employment across the whole of South Lakeland District in 2017 (the latest year available) indicates that some of the

LSOAs within the South Lakeland Sub Area are important in terms of employment. In particular, LSOA 010B is a significant location. Only a small proportion of LSOA 010B is within the YDNP however; the area within in the YDNP includes Mansergh while locations outside the YDNP include Hutton Roof, Lupton, Preston Patrick, Crooklands, Endmoor and Gatebeck. Outside of the YDNP, the Kendal area is a key employment location.

Figure A5.4: Total employment across South Lakeland District, 2017



Source: ONS BRES data. Figures include PAYE employment, LSOAs within the YDNP labelled

178. Examination of employment data for the South Lakeland Sub Area shows that total employment was around 1,815 jobs in 2017.

179. The majority of employment (1 in 2 jobs) is in LSOA 009C (including part of Sedbergh, Middleton, Gawthrop and Dent). Around 1 in 5 jobs are located in LSOA 009D (including Sedbergh).

180. Around 1 in 29 jobs in South Lakeland District are within the South Lakeland Sub Area (total employment in the District in 2017 was 52,000 jobs).

Figure A5.5: Total employment in South Lakeland Sub Area, 2017

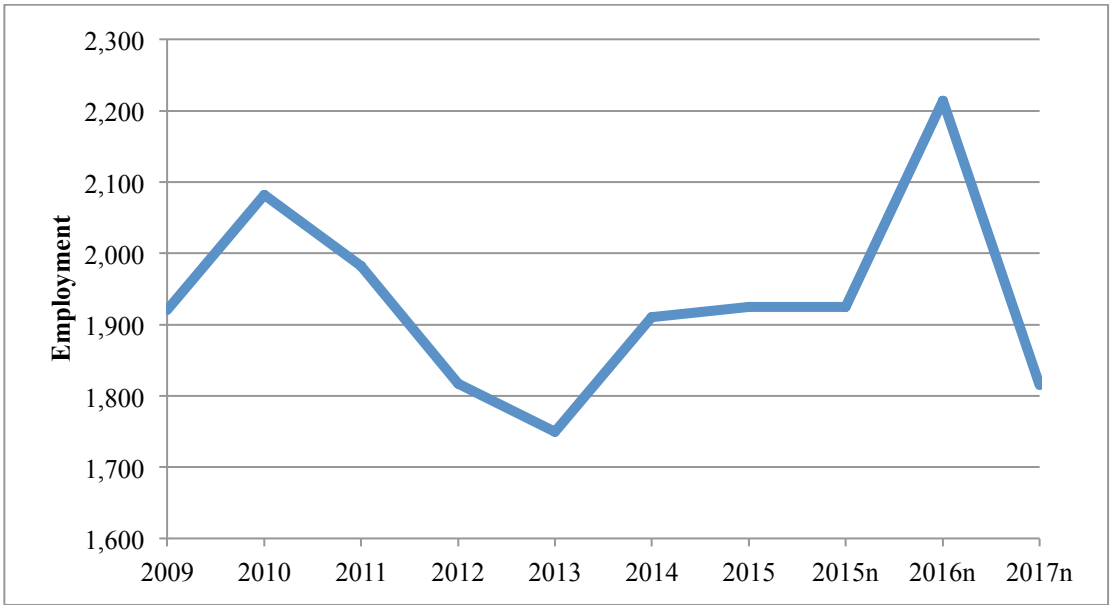
LSOA	Employment	as % of YDNP South Lakeland Sub Area
005D	77	4.2%
009B	345	19.0%
009C	900	49.6%
009D	400	22.0%
010B	94	5.2
	1,815	**100%**
	Employment – South Lakeland District	**South Lakeland Sub Area as % of District**
	52,000	2.9%

Source: ONS BRES data. Figures include PAYE employment

181. BRES data shows that employment in the South Lakeland Sub Area in 2015 was almost unchanged from the level in 2009. Following this, there was a contraction of 109 jobs (-5.7%) in 2015-2017. Levels of employment in South Lakeland District expanded in 2009-2015 but contracted in 2015-2017. The contraction in employment within the South Lakeland Sub Area in 2015-2017 was around 3 times the rate experienced in South Lakeland District.

182. Over 2009-2017 (accepting discontinuity in BRES data), the employment level in the South Lakeland Sub Area contracted by 105 jobs (-5.5%) compared with growth of around 2,000 jobs (+3.8%) in South Lakeland District. The South Lakeland Sub Area therefore performed far more weakly than South Lakeland District.

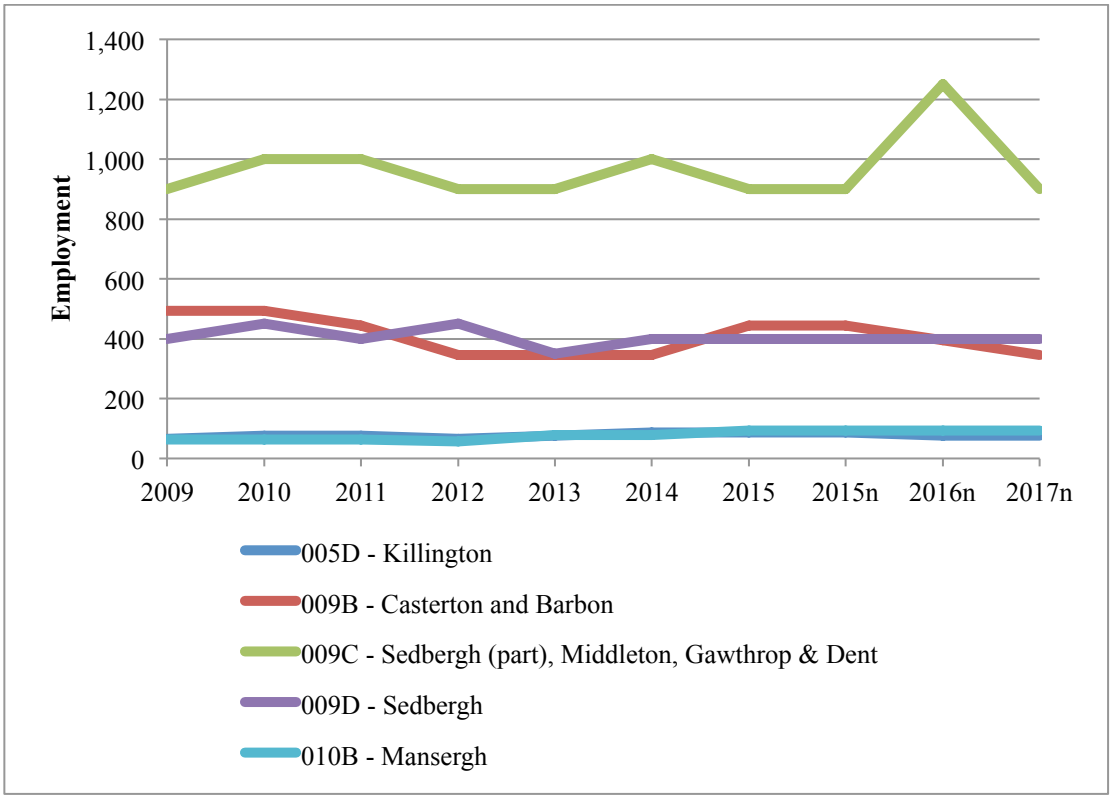
Figure A5.6: Total employment 2009-2017, South Lakeland Sub Area



Source: BRES data. Figures denoted 2015n, 2016 and 2017n include PAYE employment

183. This performance masks significant differences across the South Lakeland Sub Area. The contraction in employment in 2009-2017 is concentrated in LSOA 009B (including Casterton and Barbon). Levels were broadly unchanged in 2017 over 2009 in LSOA 009C and LSOA 009D that cover the area around Sedbergh.

Figure A5.7: Total employment 2009-2017, South Lakeland Sub Area



Source: BRES data. Figures exclude PAYE employment

5.5 Industrial structure

184. Examination of BRES data by industrial sector for 2017 (the latest available year) shows that there are key differences in the composition of the economy in the South Lakeland Sub Area and South Lakeland District.

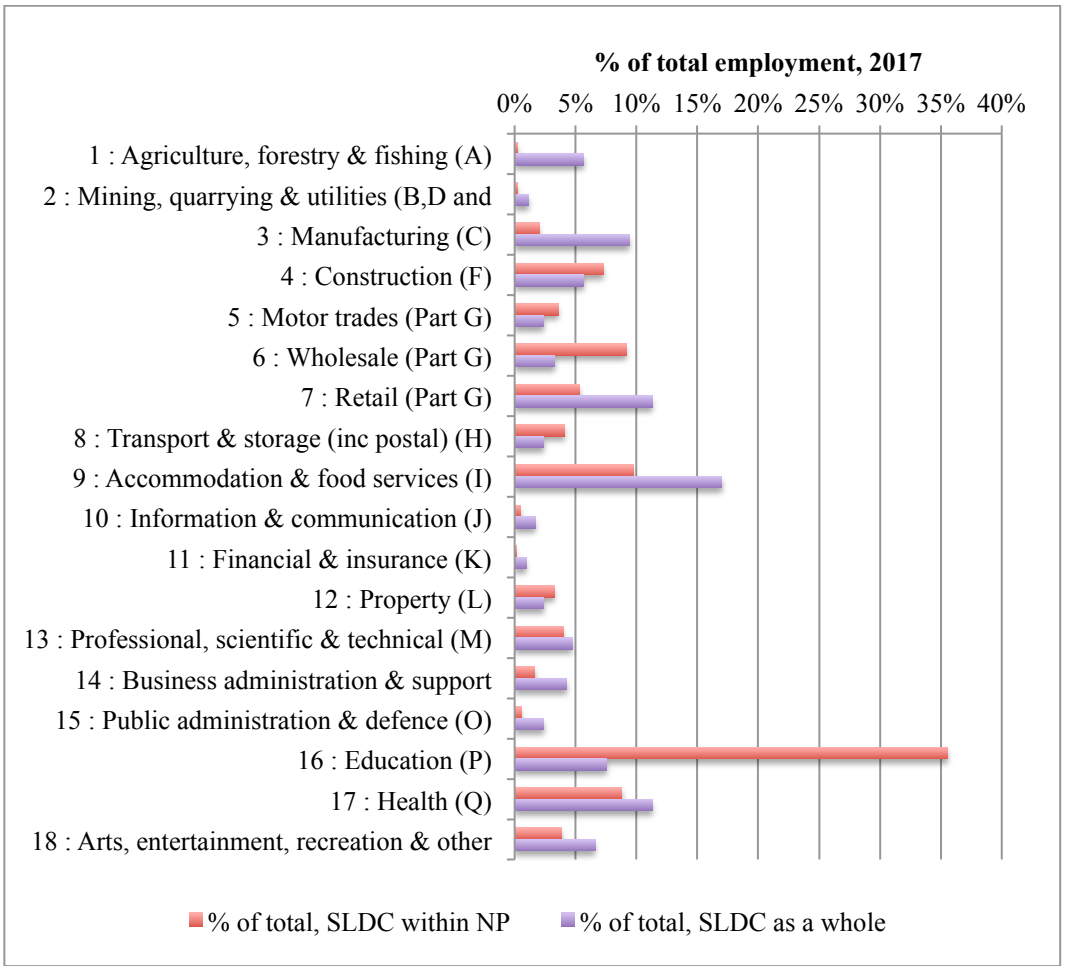
185. It should be noted that figures for LSOAs (and therefore the YDNP) do not include Farm Agriculture. Farm Agriculture is included in district level figures however.

186. The three largest sectors in the South Lakeland Sub Area are:

- Education (35.5% of jobs);
- Accommodation & food services (9.7%); and
- Wholesale (9.2%).

187. Together, these three sectors account for around 1 in 2 jobs within the South Lakeland Sub Area. The South Lakeland Sub Area has a greater dependency on the Education and Wholesale sectors than South Lakeland District. In particular, the Education sector is very important (Sedbergh School). The South Lakeland Sub Area also has less reliance on the manufacturing sector compared to South Lakeland District and other areas of the YDNP.

Figure A5.8: % of total employment by industrial sector, 2017



Source: BRES data. Figures include PAYE employment. District figures include Farm Agriculture

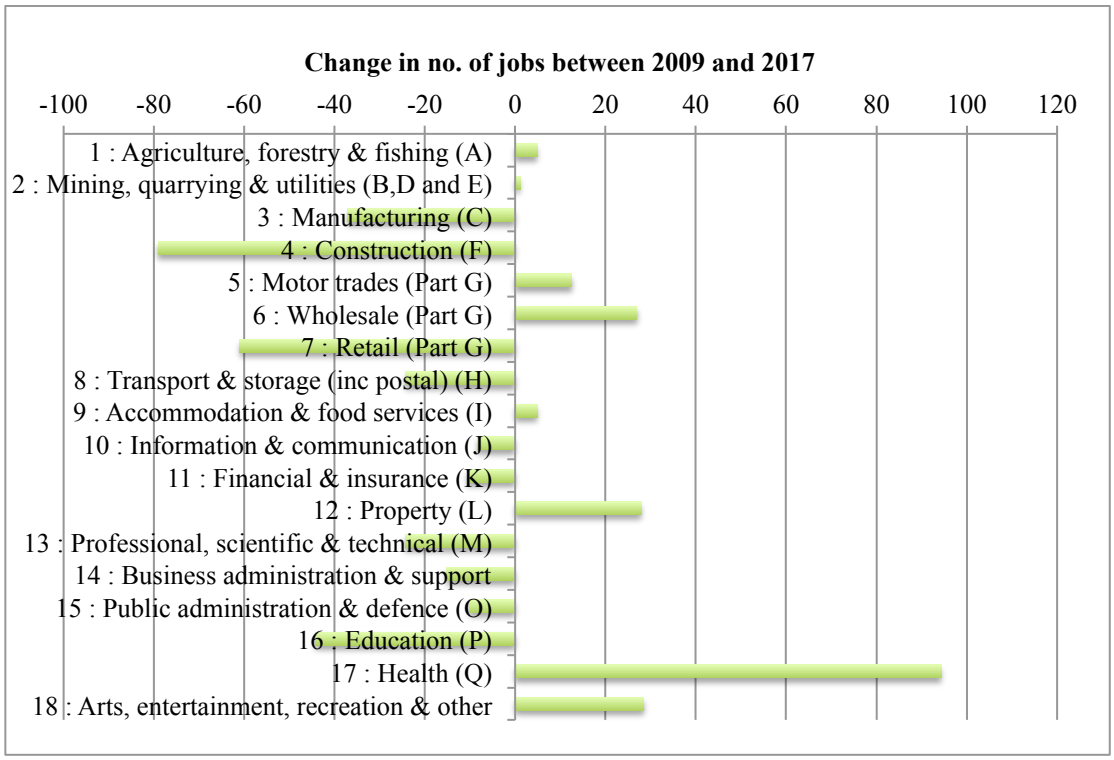
188. BRES data by industrial sector for the 2009-2017 period shows wide variation in performance across industrial sectors. Examining the three sectors that account for the largest proportion of total employment in 2017 shows the following performance:

- Education (-44 jobs);
- Accommodation & food services (+5 jobs); and
- Wholesale (+27 jobs).

189. The contraction in employment in the Education sector is significant given it accounts for a large proportion of total employment.

190. The largest contractions in employment in absolute terms were in the Construction (-79 jobs) and Retail sectors (-61 jobs). The largest expansion was in the Health sector (+94 jobs).

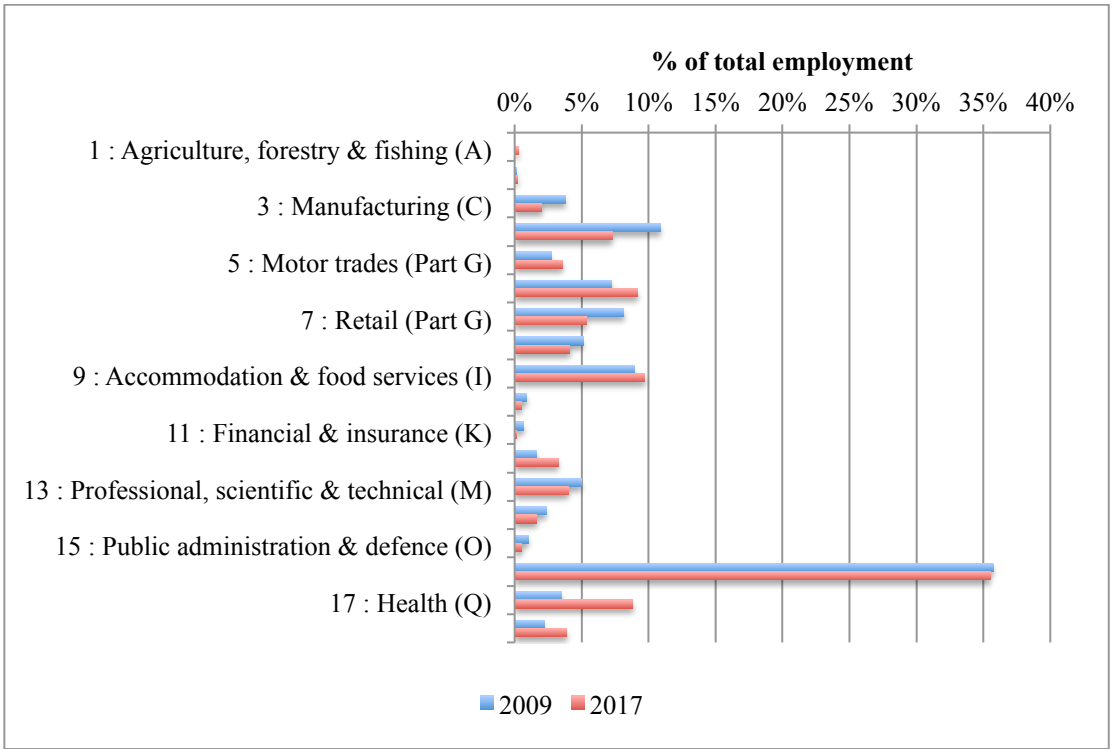
Figure A5.9: Change in employment by sector, South Lakeland SA 2009-2017



Source: BRES data. Figures for 2017 include PAYE employment

191. The implication of this pattern of sectoral change for the % of total employment in the South Lakeland Sub Area accounted for by each industrial sector is shown below.

Figure A5.10: % of employment by industry, South Lakeland SA, 2009-2017



Source: BRES data. Figures for 2017 include PAYE employment

Key employers

192. Key employers in the South Lakeland Sub Area include Sedbergh School (see box).

Sedbergh School

Sedbergh School is a co-educational independent boarding school in the town of Sedbergh in Cumbria, in North West England. It comprises a junior school for children aged 4 to 13 and the main school. It was established in 1525.

In 2010, Sedbergh School had 408 pupils, there were 83 pupils in Sedbergh Junior School and the programme of summer sports courses was in its infancy. In September this year, Sedbergh School will have 550 pupils, Casterton Sedbergh Prep School will start its sixth year with 190 pupils and in China, Rong Qiao Sedbergh School will welcome its first pupils. 1,000 children will participate in sports, arts and language courses at Sedbergh during the holidays.

The School operates as a trading business and creates direct benefits from its operation. Furthermore, indirect benefits are created through the supply chain, as well as induced benefits from the spending of staff living locally. A Social and Economic Impact Assessment of Sedbergh School was completed by ERS in 2018. The key findings of this work were as follows:

- **Direct Impacts** - During the 2017/18 academic year, Sedbergh employed a total of 463 staff and expressed as full-time equivalents there were 307 FTE jobs. The majority of staff live close to both schools, with 199 FTEs in the LA6/LA10 postcode area and 238 FTE living in 50 mile radius. Total income at the School after accounting for concessions, amounted to £15.7 million in

2017/18. Total supplier expenditure was equal to £5.5 million, therefore direct GVA resulting from the main operations of the school was £10.2 million.

- **Indirect Impacts** - As much as 35.6% of purchases were made within LA6/LA10 postcodes, 51.9% of purchases are within a 50-mile radius and 48.1% are made to more distant suppliers. At a local level in LA6/LA10 postcodes, purchases are supporting a further 14.4 FTE jobs and contributing an additional £0.7 million GVA. Across the wider 50-mile radius, estimated indirect benefits are 21.0 FTEs and £1.0million GVA.
- **Induced Impacts** - At a local level in LA6/LA10 postcodes, induced impacts are supporting 35.1 FTE jobs and contributing an additional £1.0 million GVA. Across the wider 50-mile radius, estimated induced benefits are 42.5 FTEs and £1.2million GVA.
- **Net Economic Impacts for operations** - Drawing together the operational impacts for Sedbergh School, covering school activity, as well as trading companies delivering summer school activities yields **a total impact of 248.5 FTE jobs and £11.9m GVA at the Sedbergh level and 301.2 FTE jobs and £12.4m GVA across a 50-mile radius**.

The School was also the prime initiator in enabling the refurbishment and reopening of the Black Bull Hotel (Sedbergh), which is now operated by a company connected to the School. The net economic impacts of the Black Bull are estimated as £500,000 GVA and 27 FTEs for Sedbergh (LA6/LA10) and £190,000 GVA and 7 FTEs for the 50-mile radius.

In addition to the operation of the School itself, there are also further benefits in terms of the extent to which the school attracts visitors, who in turn spend in the local economy during their visit. This includes school events attracting parents and visiting sports teams, as well as those attending summer schools and the pupils themselves.

Income

193. Income data is only available down to MSOA level so an approximation is used to the South Lakeland Sub Area; looking at MSOA 009. It should be noted that a small section of the South Lakeland Sub Area sits outside of this MSOA.

194. The average total annual income in this area in 2015/16 was £38,700. This sits at a middle level in comparison with other MSOAs in South Lakeland District. The level in the South Lakeland Sub Area is 85.2% of that in the MSOA with the highest income.

195. The average net income after housing costs as a % of net income before housing costs in the South Lakeland Sub Area was 96.1% in 2015/16. The comparable figure in MSOAs outside of the YDNP ranged from 86.6% to 98.1%. The impact of housing costs on net income is therefore relatively less in the YDNP compared with outside.

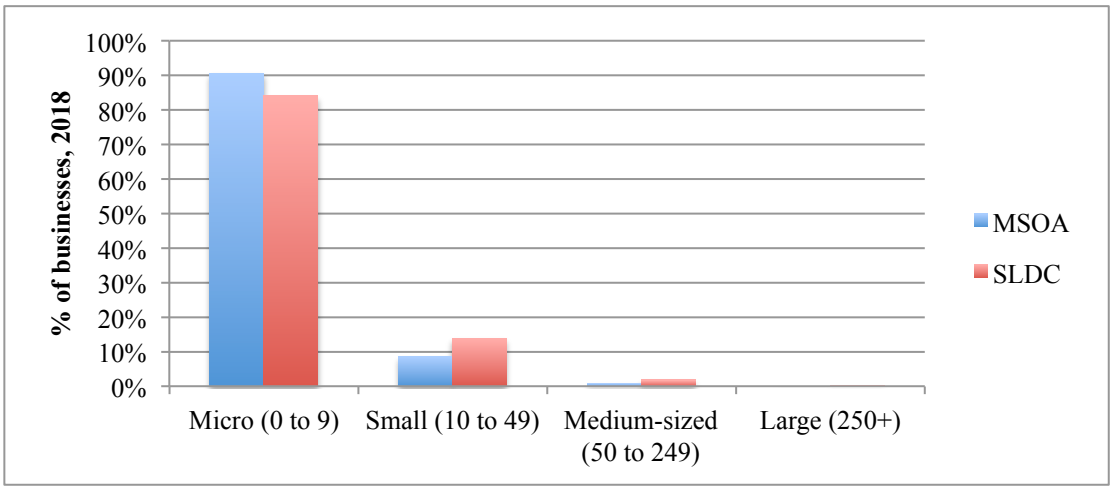
Business profile

196. UK business count data from the ONS provides a picture of the shape of the business base. This data is only available down to MSOA level so an approximation is used to the South Lakeland Sub Area; looking at MSOA 009. It should be noted that a small section of the South Lakeland Sub Area sits outside of this MSOA.

197. There are around 580 businesses in the South Lakeland Sub Area (measured by above MSOA 009).

198. The majority of businesses in South Lakeland Sub Area (90.6%) are micro businesses with less than 10 employees. This is a slightly greater proportion than South Lakeland District. There are no large businesses of more than 250 staff in the South Lakeland Sub Area.

Figure A5.11: Businesses by size (number of employees), 2018

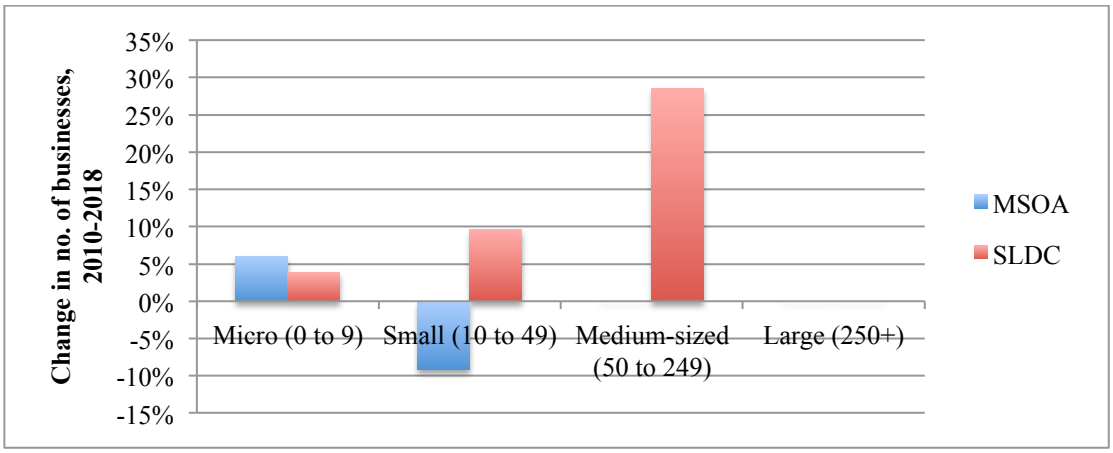


Source: ONS UK Business Counts, based on IDBR

199. Over the period 2010 to 2018, the total business count in the South Lakeland Sub Area increased by around 4.5%. This is fairly in line with growth for South Lakeland District of 5.0%.

200. Examining trends by business size shows that growth in the South Lakeland Sub Area (MSOA) has been mostly in micro businesses (0-9 employees); the number of these businesses grew by 6.0% over 2010-2018 compared with 3.9% in South Lakeland District. There was a fall in the number of small businesses within the South Lakeland Sub Area however.

Figure A5.12: Growth in no. of businesses by size (employees), 2010-2018



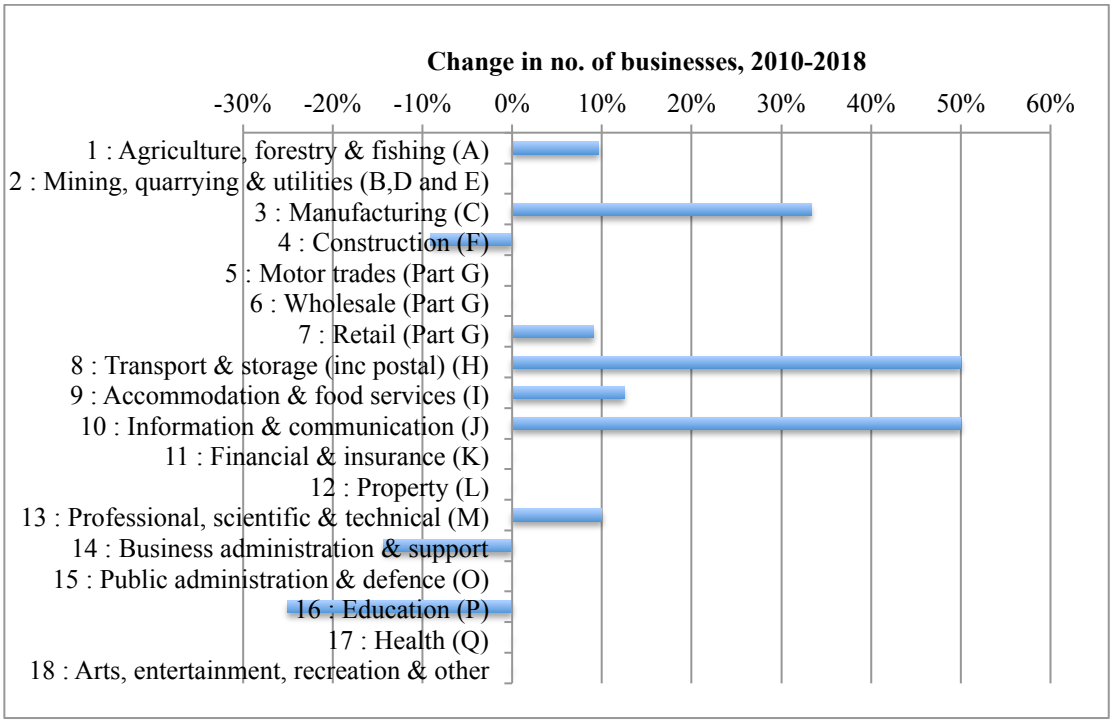
Source: ONS UK Business Counts, based on IDBR.

201. Looking at the percentage change in the number of businesses by sector over 2010-2018, the Transport & storage, Information & communication and

Manufacturing sectors exhibited the greatest growth. There were decreases in the number of businesses in several sectors, including Education, Business administration and Construction.

202. The number of agricultural businesses grew by 9.7% (from 155 to 170).

Figure A5.13: Growth in no. of businesses by industry, 2010-2018



Source: ONS UK Business Counts, based on IDBR.

5.6 Travel to work

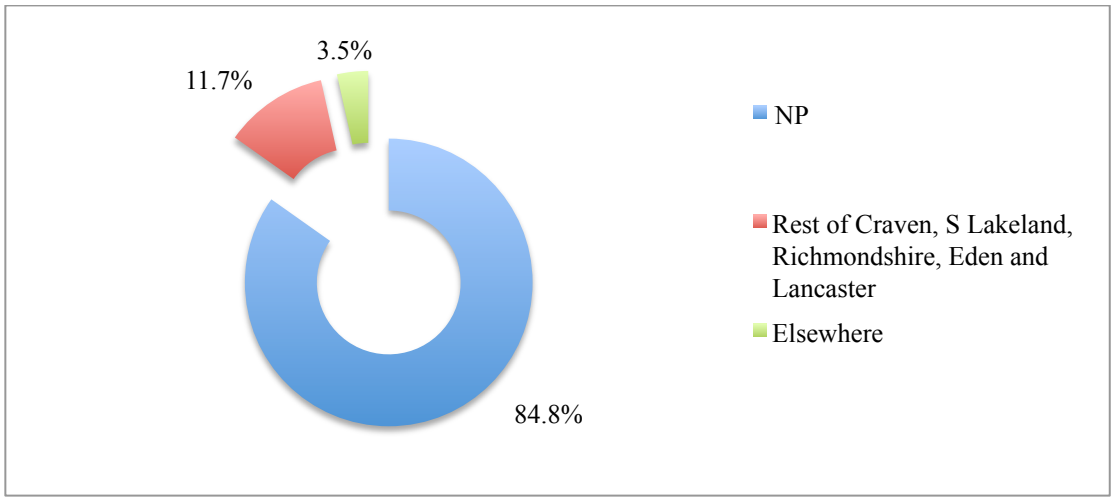
203. Origin-destination data published by the Office for National Statistics (ONS) provides data on the travel to work patterns of individuals[7]. This can be used to understand patterns across different areas of the YDNP.

204. The South Lakeland Sub Area has a high level of self-containment. Around 66.7% of those who live in the sub-area also work within the YDNP. There is net out commuting with a ratio of resident workers to workplace-based employment of 1.07.

205. There are a number of important employment locations outside the YDNP, including Kirkby Lonsdale just outside as well as locations further afield including Kendal and locations via the M6.

[7] 2011 Census.

Figure A5.14: Work locations for those who live in the South Lakeland Sub Area



Source: Census 2011

5.7 Local service provision

206. In aggregate, primary school roll numbers in the South Lakeland Sub Area have decreased by -8.7% over the last 5 years (2014 – 2019). The largest percentage decrease (-21.1%) was in Dent CofE VA Primary School.

207. Secondary school numbers grew by 20.1%. Independent school numbers increased by 18.5%.

Figure A5.15: School roll numbers, South Lakeland Sub Area, 2014-2019

School	Pupils on roll		Change, 2014-2019	
	2014	2019	No.	%
Primary				
Dent CofE VA Primary School	38	30	-8	-21.1%
Sedbergh Primary School	170	160	-10	-5.9%
	208	**190**	**-18**	**-8.7%**
Secondary				
Settlebeck School	164	197	33	20.1%
Independent				
Casterton, Sedbergh Preparatory School	164	198	34	20.7%
Sedbergh School	480	547	67	14.0%
Underley Garden School	31	55	24	77.4%
	675	**800**	**125**	**18.5%**

Source: Drawing on Edge Analytics demographic analysis using DfE data

208. There are further schools just outside the YDNP in Kirkby Lonsdale and Kendal.

Health

209. In terms of primary care, GP services are provided in Sedbergh and Dent. These perform well in terms of the average number of registered patients per GP compared with the average for England of 2,087 patients. There is also a practice just outside the YDNP in Kirkby Lonsdale (Lunesdale Surgery).

210. Secondary care facilities are located some distance away outside of the YDNP. Hospitals with A&E departments include Lancaster Royal Infirmary and Furness General Hospital.

Figure A5.16: Primary care facilities, South Lakeland Sub Area

Primary care	GPs	Registered patients	Registered patients per GP
Sedbergh Medical Practice, 2 sites at Sedbergh and Dent	5	4,294	859

Source: NHS dat

Transport

211. The A684 provides a key east-west route across the South Lakeland Sub Area, providing access to Hawes to the east and the M6 to the west. The A683 provides a key north-south route, providing access to Kirkby Stephen to the north and Kirkby Lonsdale to the south.

212. Bus services within the South Lakeland Sub Area run throughout the year linking the main towns, villages, and popular attractions, with additional services running during the summer months mainly on Sundays and Bank Holidays. These are covered in the main report looking at the YDNP as a whole.

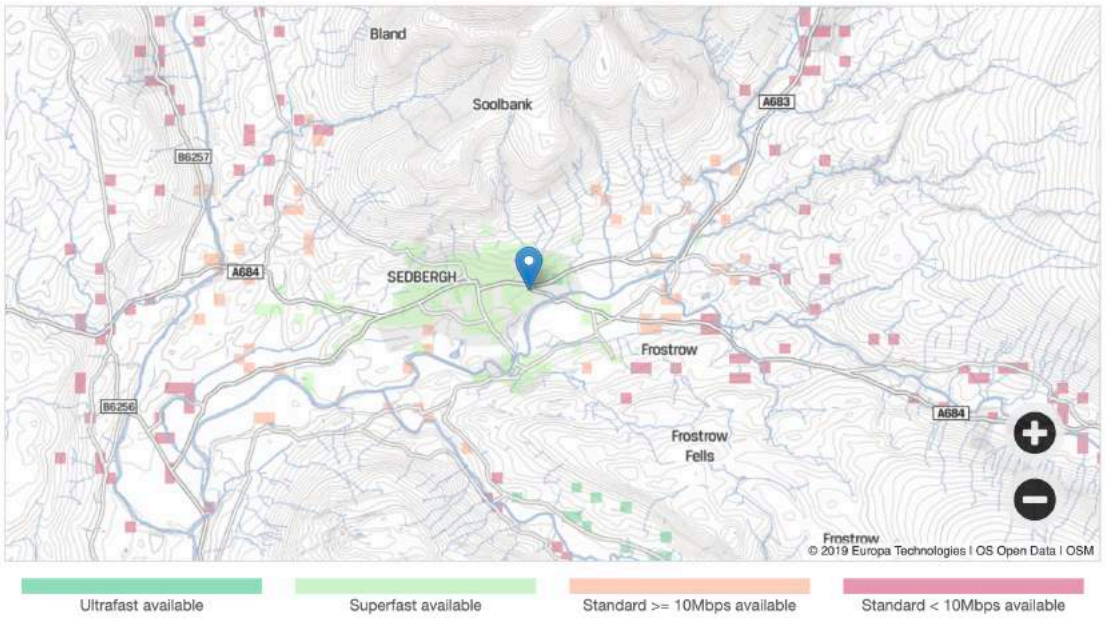
213. The Settle–Carlisle railway line has a station at Dent.

Communications

214. Levels of broadband coverage are variable within this area of the YDNP. The following figures show coverage in the Sedbergh and Dent areas. Whilst higher connectivity speeds are available in Sedbergh, it is clear that speeds available vary considerably outside of this, even along the main A roads. The corridor through Dent shows good coverage, with ultrafast connection being available.

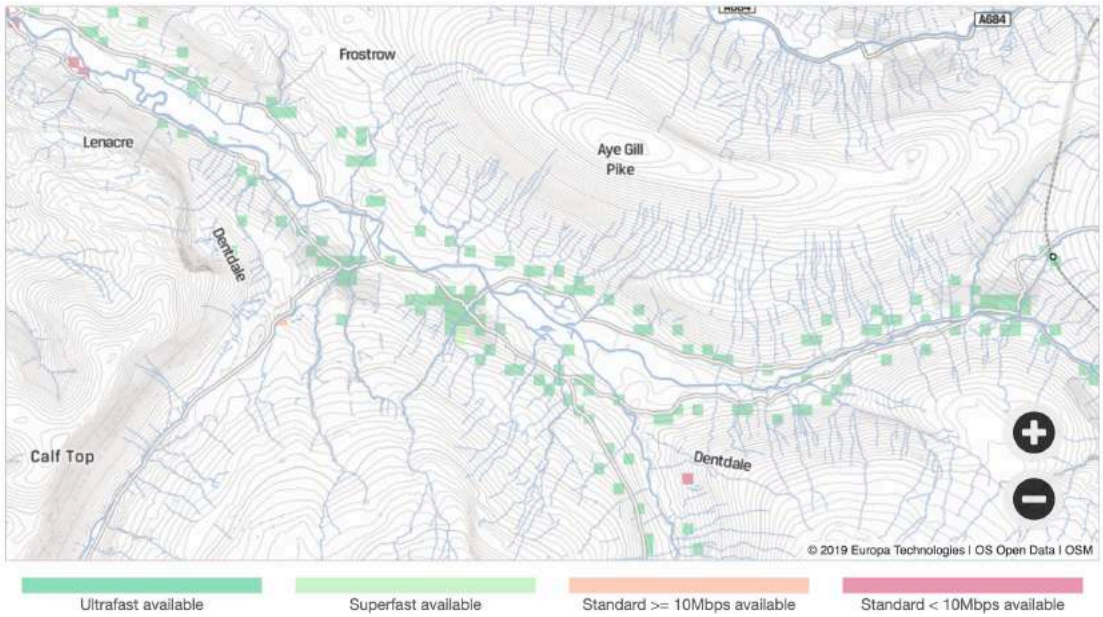
215. Other areas further from the main settlements generally have lower speeds available. Broadband is covered in more detail in the main report looking at the YDNP as a whole.

Figure A5.17: Broadband connectivity, Sedbergh area



Source: Ofcom data

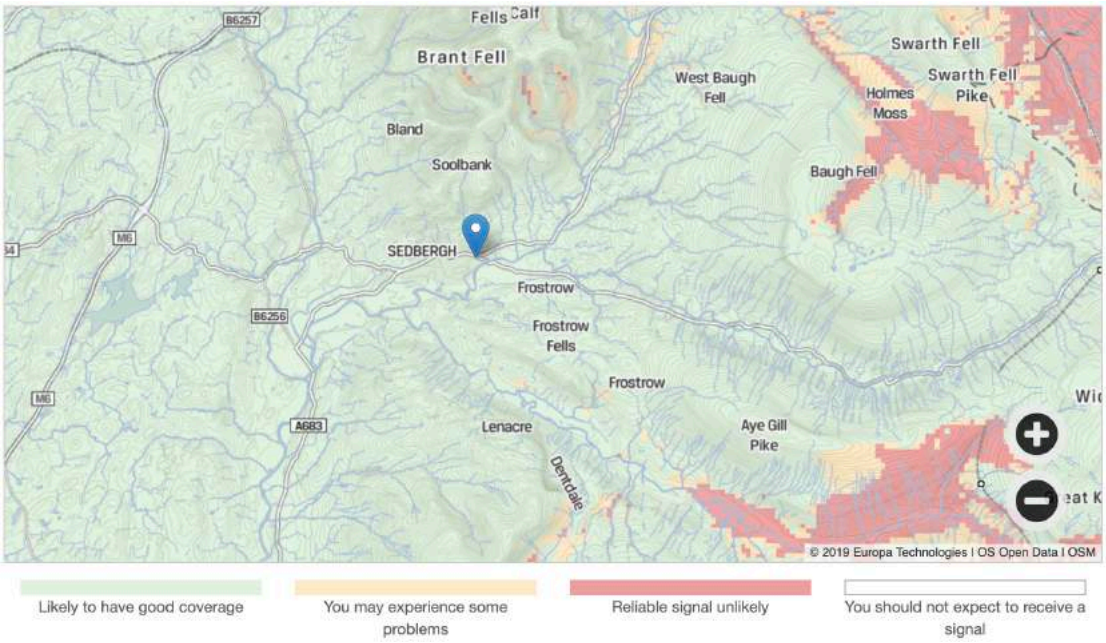
Figure A5.18: Broadband connectivity, Dent area



Source: Ofcom data

216. There are fewer issues with mobile connectivity in this area of the YDNP than others – both voice and data. Coverage is generally good in most areas, with just small areas such as south of Dentdale having poorer coverage.

Figure A5.19: Mobile connectivity in the South Lakeland Sub Area



Source: Ofcom data. Differs by provider. Map shown for Vodafone 4G voice call coverage (outside)

Other services

217. The Black Bull Pub in Sedbergh provides an important role for the village and was recently featured in the National Geographic Traveller Big Sleep Awards. There is a post office in Sedbergh. High street banking is available in Kirkby Lonsdale just outside the YDNP.

Key points

Population

- 4.5% of the population of South Lakeland District are within the YDNP
- 20% of the total population of the whole YDNP are within South Lakeland
- A decline in population of around -3.2% has occurred over 2001-2017. A fairly steady decline has occurred since 2006 (-6.6%) although levels have stabilised since 2012
- Around 27.4% of the population in the South Lakeland Sub Area were aged 65 years or more (up from 18.9% in 2001)

Employment

- Around 1 in 29 jobs in South Lakeland District are within the YDNP
- There are 1,815 jobs within the South Lakeland Sub Area
- The majority of employment in the South Lakeland Sub Area (1 in 2 jobs) is in LSOA 009C (including part of Sedbergh, Middleton, Gawthrop and Dent). Around 1 in 5 jobs are located in LSOA 009D (including Sedbergh)
- Over 2009-2017 (accepting discontinuity in BRES data), the employment level in the South Lakeland Sub Area contracted by 105 jobs (-5.5%)

compared with growth of around 2,000 jobs (+3.8%) in South Lakeland District

- The contraction in employment in 2009-2017 is concentrated in LSOA 009B (including Casterton and Barbon). Levels were broadly unchanged in 2017 over 2009 in LSOA 009C and LSOA 009D which cover around Sedbergh
- Around 1 in 2 jobs in the South Lakeland Sub Area are accounted for by three sectors: (i) Education (ii) Accommodation & food services and (iii) Wholesale
- The South Lakeland Sub Area has a greater dependency on the Education and Wholesale sectors than South Lakeland District
- In particular, the Education sector is very important
- The South Lakeland Sub Area also has less reliance on the manufacturing sector compared to South Lakeland District and other areas of the YDNP
- Two of the three largest sectors in the South Lakeland Sub Area experienced employment growth over the period 2009-2017. The largest sector, Education, experienced a contraction however
- The largest contractions in employment in absolute terms were in the Construction and Retail sectors. The largest expansion was in the Health sector
- Sedbergh School is a major employer with a recent economic impact study estimating a total impact of 248.5 FTE jobs and £11.9m GVA at the Sedbergh level and 301.2 FTE jobs and £12.4m GVA across a 50-mile radius (excluding additional visitor impacts)
- There are around 580 businesses in the South Lakeland Sub Area. The majority of businesses (90.6%) are micro businesses with less than 10 employees. This is a slightly greater proportion than South Lakeland District. There are no large businesses of more than 250 staff in the South Lakeland Sub Area
- Over the period 2010 to 2018, the total business count in the South Lakeland Sub Area increased by around 4.5%. This is fairly in line with growth for South Lakeland District of 5.0%
- Examining trends by business size shows that growth in the South Lakeland Sub Area (MSOA) has been mostly in micro businesses (0-9 employees); the number of these businesses grew by 6.0% over 2010-2018 compared with 3.9% in South Lakeland District. There was a fall in the number of small businesses within the YDNP however
- Looking at the percentage change in the number of businesses by sector over 2010-2018, the Transport & storage, Information & communication and Manufacturing sectors exhibited the greatest growth
- There were decreases in the number of businesses in several sectors, including Education, Business administration and Construction

Travel to work

- The South Lakeland Sub Area has a high level of self-containment. Around 84.8% of those who live in the sub-area also work within the YDNP

Local service provision

- In aggregate, primary school roll numbers in the South Lakeland Sub Area have decreased by -8.7% over the last 5 years (2014 – 2019). The largest percentage decrease (-21.1%) was in Dent CofE VA Primary School
- Secondary school numbers grew by 20.1%. Independent school numbers increased by 18.5%. It is noted that there further schools just outside the YDNP in Kirkby Lonsdale and Kendal
- GP services are provided in Sedbergh and Dent. These perform well in terms of the average number of registered patients per GP compared with the average for England. There is also a practice just outside the YDNP in Kirkby Lonsdale (Lunesdale Surgery)
- Secondary care facilities are located some distance away outside of the YDNP. Hospitals with A&E departments include Lancaster Royal Infirmary and Furness General Hospital
- The A684 provides a key east-west route across the South Lakeland Sub Area, providing access to Hawes to the east and the M6 to the west. The A683 provides a key north-south route, providing access to Kirkby Stephen to the north and Kirkby Lonsdale to the south
- Bus services within the South Lakeland Sub Area run throughout the year linking the main towns, villages, and popular attractions, with additional services running during the summer months mainly on Sundays and Bank Holidays
- The Settle–Carlisle railway line has a station at Dent
- Levels of broadband coverage are variable within this area of the YDNP. Whilst higher connectivity speeds are available in Sedbergh, it is clear that speeds available vary considerably outside of this, even along the main A roads. The corridor through Dent shows good coverage, with ultrafast connection being available. Other areas further from the main settlements generally have lower speeds available
- There are fewer issues with mobile connectivity in this area of the YDNP than others – both voice and data. Coverage is generally good in most areas, with just small areas such as south of Dentdale having poorer coverage

6 Lancaster

218. The part of the YDNP that sits within Lancaster is very small. Consequently, the extent of analysis possible using ONS spatial geographies in highly constrained (this part of the YDNP accounts for only small proportion of one LSOA, LSOA 002D). For this reason, the analysis presented is limited to high-level population and employment figures plus school roll data.

219. The demographic analysis undertaken by Edge Analytics indicates that the total population of the YDNP within Lancaster in 2017 was 278 people. This is around 0.2% of the total population in Lancaster District and around 1.2% of the estimated total population of the whole YDNP.

220. BRES employment data for that part of LSOA 002D within the YDNP shows that total employment in the YDNP was around 71 jobs in 2017. Only a small proportion of LSOA 002D is within the YDNP boundary, including Leck and Ireby. Outside the YDNP, this LSOA includes Whittington, Tunstall, Wennington, Cowan Bridge. Around 1 in 821 jobs in Lancaster District are within the YDNP (total employment in the District in 2017 was 58,000 jobs).

221. There is a primary school located in Clapham, just outside the YDNP boundary. Its roll numbers have decreased by -24.3% over the last 5 years (2014 – 2019).

Figure A6.1: School roll numbers, Lancaster Sub Area, 2014-2019

School	Pupils on roll		Change, 2014-2019	
	2014	2019	No.	%
Primary				
Clapham CoE Primary School	37	28	-9	-24.3%

Source: Drawing on Edge Analytics demographic analysis using DfE data