

Evidence Base Document

Employment Land Study Update 2014



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1. Introduction

- 1.1 Rochford District Council (RDC) are in the process of preparing a new Local Plan for the District that will set the high level spatial strategy for the period to 2031. The preparation of the Local Plan is guided by the National Planning Policy Framework (NPPF) and the National Planning Practice Guidance (NPPG).
- 1.2 Both documents advocate that an evidence based approach to employment land allocation and protection is taken and that the land portfolio should offer sufficient capacity to accommodate expected future demand requirements both in quantitative and qualitative terms.
- 1.3 The 'future requirements' for employment land should be established through an objective assessment of need that, as far as possible, seeks to align population growth with economic development.
- 1.4 The NPPF identifies a need to identify a portfolio of sites within a local authority area that have a reasonable prospect of being delivered, and that allocations should not simply be 'rolled over' from one plan period to the next (NPPF Paragraph 22). The NPPG is clear that in identifying land for economic development it should be demonstrated that it is "suitable, available and achievable.....over the plan period". The NPPG recommends that site assessments are undertaken at regular intervals to ensure the land portfolio continues to provide the most appropriate match for economic growth.
- 1.5 RDC have commissioned GVA to prepare an assessment of the current employment land within the District alongside interpreting the scale and nature of future demand and requirements. Ultimately this Study is tasked with making recommendations as to the land portfolio's future suitability for accommodating economic growth.
- 1.6 The assessment has been undertaken based on GVA's objective view of land and economic growth potential and RDC's knowledge of recent employment growth and property development trends.

Study Objectives

- 1.7 The client, Rochford District Council, issued in early 2014 to undertake a review of its employment land to inform and update existing and future planning policy (Local Plan) documents. This study will be a core part of the Council's planning policy evidence base and will:
- Provide a comprehensive and robust evidence base to underpin and inform employment land provision in the period to 2031
 - Assess the amount and type of employment land that is required in the District to assist in maintaining the economic health of the area and in supporting the creation of job opportunities for its residents.
 - Review the supply of employment land and premises in the District
 - Establish the qualitative and quantitative demands for employment land and premises
 - Focus analysis and recommendations on B1, B2 and B8 uses and establish the appropriate land and premises to accommodate these uses.
- 1.8 The study is not intended to be an update of the 2008 RDC Employment Land Study completed by GVA. Whilst it provides a useful starting point for understanding the local area it was prepared prior to the publication of the NPPF and NPPG, the adoption of the RDC Local Development Framework Core Strategy and Allocations DPDs, and publication of the 2011 Census. As such it is necessary to 'start over' to ensure the analysis and recommendations for the future reflect this updated context.

Overview of Approach & Data Sources

- 1.9 The Employment Land Study has been undertaken by completing a number of 'inter-linked' stages which have sought to understand the economic potential of the District as driven by socio-economic conditions, future economic drivers, the stock of existing land, the local market trends and the wider issues affecting the suitability of land for its current occupiers.
- 1.10 The first stage has been to prepare a robust, focussed baseline position which sets the context for the Study and ensures recommendations are tied to an understanding of the strengths, weaknesses, opportunities and threats for the local economy.

- 1.11 This analysis has included establishing socio-economic and commercial property market conditions; it also considers the aims and aspirations of neighbouring authorities to understand where complementarities and competition may exist. From this baseline a working definition of the functional economic and market area has been established.
- 1.12 The detailed approach to employment land forecasting is set out. A bespoke set of sensitivities were prepared to test the implications of alternative delivery scenarios of employment growth based on the East of England Forecasting Model (EEFM) scenarios, with additional sensitivities to understand the specific opportunity presented by the presence of London Southend Airport.
- 1.13 A key task was to identify the actual 'stock' of employment sites within the District. Since the last comprehensive assessment of employment land (2008) much has changed within the District, with a number of sites deallocated, new stock delivered and new land allocated.
- 1.14 Finally, the demand and supply analysis has been drawn together to provide an assessment of the future suitability of employment land both in terms of scale and nature. This provides recommendations on site specific issues as well as wider considerations and impacts for the future use of employment sites, particularly where non-B Class employment generating uses may compete with B Class activities.
- 1.15 To inform the study a range of data sources have been drawn upon and combined to ensure recommendations are based on robust and up to date information, key data sources include:
- Socio-economic information (from ONS);
 - Employment forecasts produced by Cambridge Econometrics;
 - Property transactions data (from Egi, CoStar);
 - Planning activity information (provided by RDC); and
 - Information from agents and RDC's economic development team.

1.16 Each step in the assessment process is set out in the Report, which is structured as follows:

- **Section 2 – High level policy review:**
- **Section 3– Socio-economic baseline review;**
- **Section 4 – Commercial Property Market Review;**
- **Section 5 – Review of Existing Employment Land;**
- **Section 6 – Employment Growth and Demand;**
- **Section 7 – The Market Balance.**

2. Policy Context

2.1 The following documents are considered:

- [National Planning Policy Framework](#);
- [National Planning Practice Guidance](#);
- [Rochford District Local Development Framework](#)
 - [Core Strategy](#)
 - [Allocation Plan](#)

2.2 It is also important to consider the aspirations of neighbouring authorities; these are reviewed at the end of the section.

National Planning Policy Framework

2.3 The National Planning Policy Framework (NPPF) has placed economic growth at the heart of its definition of sustainable development.

2.4 The main economic development and business requirements of the NPPF that are relevant to the Employment Land Study are set out in paragraphs 20, 21, 22 and 160. They can be summarised as:

- Planning proactively to meet the development needs of business and support an economy fit for the 21st Century;
- Setting out a clear economic vision and strategy for the area which positively and proactively encourages sustainable growth;
- Include the whole economy and up-to-date market demand/supply intelligence and evidence as the basis for the strategy;
- Include neighbouring areas outside the District through the Duty to Co-operate. Economic issues straddle and affect adjacent districts/boroughs and need to include other authorities and relevant LEP(s);
- Engage with the business community to understand their changing needs and identify / address barriers to investment;

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- Identify strategic sites for local and inward investment to match the strategy and meet anticipated needs in plan period;
 - Consider the role of land for economic development purposes and review land availability for economic purposes as well as its ability to meet other functions; and
 - Ensure that there is an emphasis on the viability of plans which must be deliverable.
- 2.5 Paragraph 22 of the NPPF provides a key driver for considering the Employment Sites in more detail, identifying a requirement for Local Authorities to “avoid long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose”. This Study therefore seeks to establish a robust market-orientated approach to the employment land provision in Rochford that ensures those sites that remain protected and allocated through policy will meet the needs of businesses and growth sectors now and in the future and, hence, be best placed to come forward during the plan period.
- 2.6 The importance of identifying strategic sites for inward investment is identified clearly in the NPPF at paragraph 21 which recognises the role that such sites play in supporting economic growth, business retention and securing new investment.
- 2.7 The NPPF is concerned with far more than simply the supply of property, land and sites to support economic growth. It envisages that local authorities will address the whole economy in a positive and proactive manner that encourages economic prosperity as part of sustainable development. The emphasis of the NPPF is therefore focused on creating and securing jobs through growth in existing businesses as well as providing the foundations for new inward investment.
- 2.8 The NPPF provides the basis for local authorities to address existing and forecast deficiencies in the quantity or quality of commercial property and employment land stock. There is a need to focus on supporting the economic sectors that are capable of sustainable growth and to identify how barriers to economic growth will be resolved including the quality of labour force, access to skills and education/training, accessibility to markets and the quality and choice of housing.
- 2.9 The NPPF emphasises the importance of deliverability in many parts of the Guidance. With respect to economic growth, there is a need for local authorities to establish and
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support the infrastructure (social, communication and transport) necessary to foster economic growth and identify how this will be delivered.

National Planning Practice Guidance

- 2.10 The National Planning Practice Guidance (NPPG) demonstrates particular relevance to this Study in its Assessment of Housing and Economic Development Needs Guidance. It focuses specifically on the methodological aspects of understanding current economic markets and analysing employment land requirements.
- 2.11 When analysing employment land, it advocates the categorisation of land in different sub-areas and market segments and consideration of the balance between quantitative and qualitative employment land supply and demand. Forecasting should take into account future need within different market segments and economic sectors, and identify any gaps in local employment land provision. It is noted that “national economic trends may not automatically translate to particular areas with a distinct employment base”.
- 2.12 In relation to the derivation of employment land requirement, the guidance identifies the following four key relationships to be calculated;
- Standard Industrial Classification sectors to use classes;
 - Standard Industrial Classification sectors to type of property;
 - Employment to floorspace (employment density); and
 - Floorspace to site area (plot ratio based on industry proxies).

Rochford District Local Development Framework

- 2.13 The Rochford District Council Local Development Framework is comprised of two key adopted development plans, The Core Strategy (adopted in 2011) and the Site Allocations Plan (adopted in February 2014).

Core Strategy

- 2.14 The Core Strategy was adopted in December 2011. The Plan sets out the vision, objectives and strategic policies that will shape the growth and development of the District.

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- 2.15 The Employment Land Study Update Final Report (2009) includes Employment Floorspace Requirements for Rochford District between 2006-2021. The plan identifies a number of specific allocated employment sites (with associated housing targets).
- 2.16 The Core Strategy identifies the capacity and distribution of employment floorspace over a period less than fifteen years from its adoption in February 2014 requiring a review as recognised by the District (Employment Land Study Update 2009 covers Employment Floorspace requirements until 2026). It details the findings of the previous Employment Land Study, and Policy ED1 (Employment Growth) discusses the approach towards supporting economic development in certain areas (including the enhancement of London Southend Airport, which is focussed on specifically within Policy ED2).
- 2.17 Within the Core Strategy there are a number of identified existing employment locations which it is indicated the Council will protect from alternative uses, and certain sites where land will be re-allocated for alternative uses. Policy ED3 focusses specifically on the District's existing employment land. Existing employment land (Policy ED3) and future employment allocations (Policy ED4) information within the Core Strategy is based on the previous Employment Land Study analysis. Existing sites to be protected as identified in the Allocations Plan are outlined below.

The Allocations Plan

- 2.18 The Rochford District Council Allocations Plan was formally adopted by the Council in February 2014. The Plan allocates specific sites and sets out detailed policies, including residential, employment, education and open space uses, in line with the Council's Core Strategy.

Existing Employment Land Allocations

- 2.19 The majority of the District's existing employment land, as set out in Policy ED3 of the Core Strategy, will be protected from uses that would undermine their role as employment generators. Existing sites to be protected as identified in the Allocations Plan are outlined below:
- 2.20 Policy EEL1 – Existing Employment Land around Rochford:
- Swaines Industrial Estate

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- Purdeys Industrial Estate
 - Riverside Industrial Estate
 - Rochford Business Park
- 2.21 Policy EEL2 – Existing Employment Land around Rayleigh
- Imperial Park Industrial Estate
 - Brook Road Industrial Estate
- 2.22 Policy EEL3 – Existing Employment Land on Wallasea Island
- Baltic Wharf
 - Essex Marina
- 2.23 The northern section of Aviation Way Industrial Estate is also identified for protection through the planning process. However, this area falls within the boundary of the London Southend Airport and Environs Joint Area Action Plan; and consequently will be allocated through that document.

New Employment Land Allocations

- 2.24 New employment land allocations on land previously designated as Green Belt are identified in the LDF Allocation Plan. This is to compensate for the reallocation of four existing employment sites for alternative uses and to accommodate additional employment uses.
- 2.25 The Core Strategy (Policy ED4) identifies that new employment land should be allocated to the west of Rayleigh (Allocations Plan Policy NEL1), to the south of Great Wakering (Allocations Plan Policy NEL2) and to the north of London Southend Airport (Allocations Plan Policy NEL3). These are carried forward into the Allocations Plan, with further detail provided on the development issues and opportunities for each site.
- 2.26 The extent of land allocated for employment to the north of London Southend Airport will be determined through the London Southend Airport and Environs Joint Area Action Plan.

3. Socio-Economic Baseline

- 3.1 Within this section we consider the current economic context, providing a brief overview of the key socio-economic strengths of the District. Understanding this context provides vital direction for the future. Increasingly economic growth is refocusing on building from the strengths of the local economy both in terms of indigenous business growth and attracting like-minded new activities to the area.
- 3.2 This section reviews the latest data available from 2011 Census and the latest available data to provide an accurate portrait of the skill, occupations and activity rates of people living in the District. Essex County, South East LEP and the East region have been used as sub-regional and regional comparators while England is used as a country-wide comparator to Rochford District.

Population and Labour Market Profile

- 3.3 In 2011, Rochford had a population of 83,287 residents, a rise of 6.1% from 2001. Although in line with Essex this is much lower rate of population increase than the country (7.9%) and region (East of England 8.5%).

Table 1 - Resident population age structure

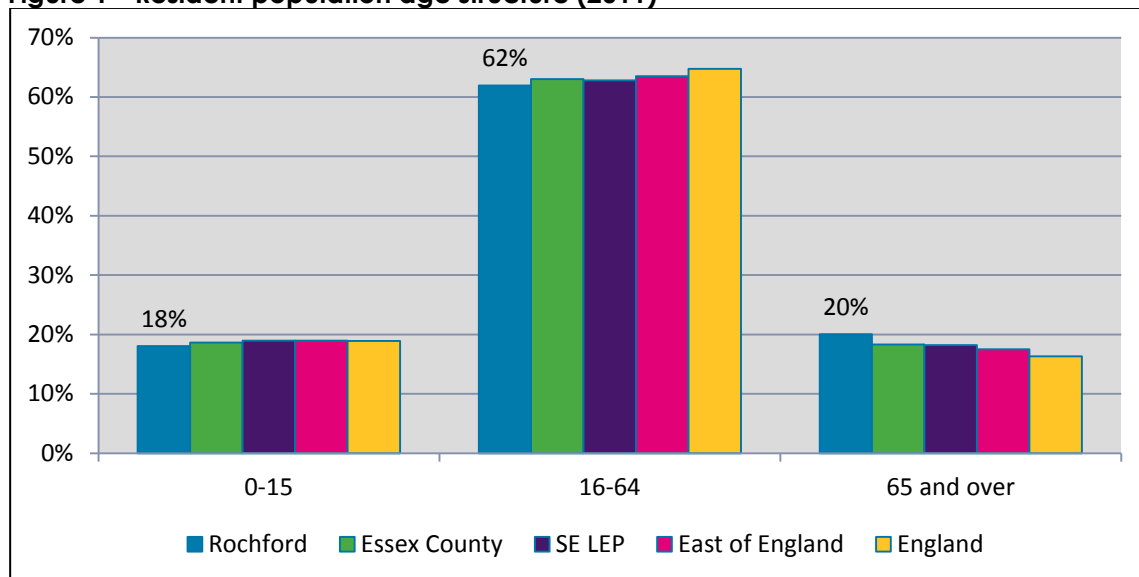
	2001	2011	Rate of change 2011-2001
Rochford	78,483	83,287	6.1%
Essex	1,310,836	1,393,587	6.3%
East of England	5,388,140	5,846,965	8.5%
England	49,138,831	53,012,456	7.9%

Source: Census 2011

- 3.4 The Census 2011 shows that Rochford has a relatively high proportion of residents within older age bands. It has approximately 18% of its resident population falling below the age of 16, which is lowest among benchmarks; and a significantly high proportion of people aged 65 and above, at 20%, the highest among all benchmarks as shown in Figure 1.
- 3.5 Rochford has the lowest proportion of working age population (aged 16-65) compared to the other comparators. It also has the lowest rate of increase of working

age population proportion since 2001, at 4.7%. This is significantly lower when compared to the country (9.2%) and the East of England (8.6%).

Figure 1 - Resident population age structure (2011)



Source: Census 2011

- 3.6 Age structure also has an impact on economic activity of an area. The level of economic activity, often referred to as the available workforce, can be regarded as a measure of economic participation and is a quotient of workforce to working age population. Table 2 shows the economic activity rate of Rochford and the wider area.
- 3.7 There are currently 39,503 people in employment in Rochford (which is 47% of the total population of the District); of the employed population 23% are full time employees, 59% are part time and 17% are self-employed.
- 3.8 Rochford's economic activity is more or less in line with the regional economic activity. It has an economic activity rate of 70.8%, similar to that of SE LEP, 70.8%, and the East of England, 71.6%. This is marginally higher than the country's average of 69.9%.
- 3.9 Rochford has proportionately the highest population in employment at 65.4% and the lowest proportion of unemployed, at 3%, among all comparators. This is significantly higher than the national average of 62.1% and 4.4% respectively.

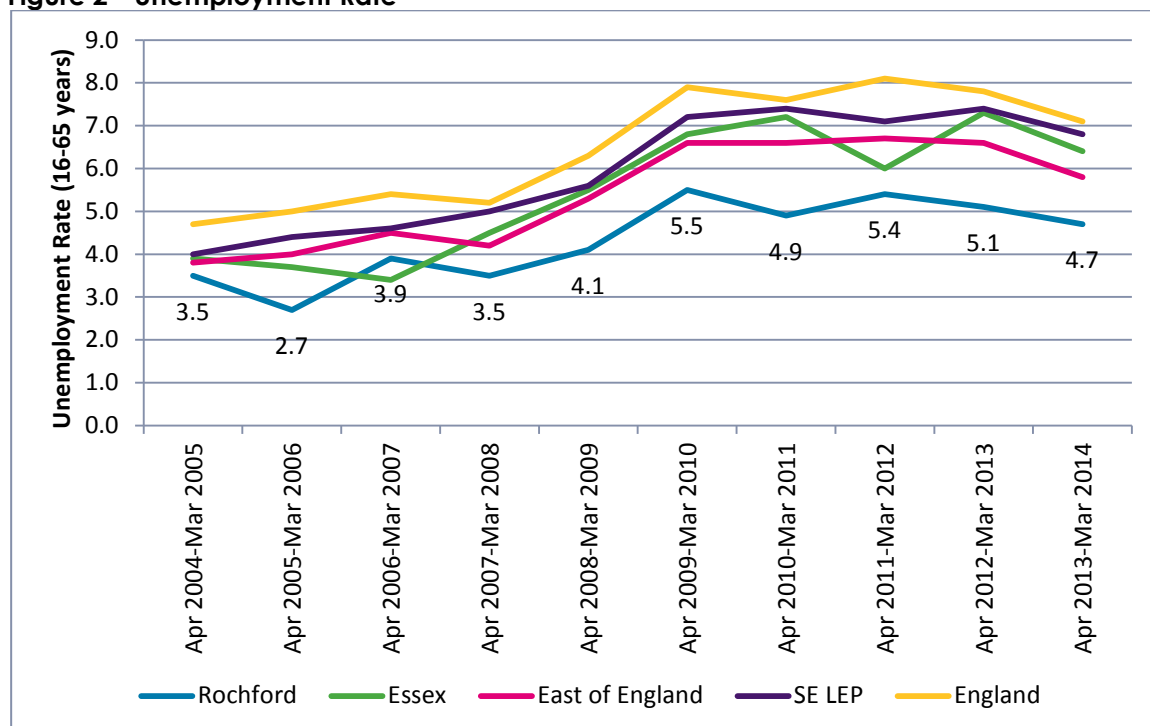
Table 2 - Economic activity % (2011)

	Rochford (%)	Essex County (%)	SE LEP (%)	East of England (%)	England (%)
Economically active	70.8	71.1	70.4	71.6	69.9
Economically active: In employment	65.4	64.6	63.4	64.8	62.1
Economically active: Unemployed	3.0	3.8	4.0	3.8	4.4
Economically active: Full-time student	2.4	2.7	2.9	3.0	3.4
Economically Inactive	29.2	28.9	29.6	28.4	30.1

Source: Census 2011

3.10 Unemployment levels in Rochford have remained consistently low compared to all benchmark areas as shown in Figure 2. In 2004/2005 the unemployment rate in Rochford was 3.5 compared to 3.8 in the East of England and 4.7 in England. During the recession period it peaked to 5.5 in 2009/2010, but remained lower than benchmarks. Since 2010 the unemployment rates in Rochford have steadily increased, reaching a level of 4.7 in 2013/ 2014, but it has failed to recover to pre-recession levels.

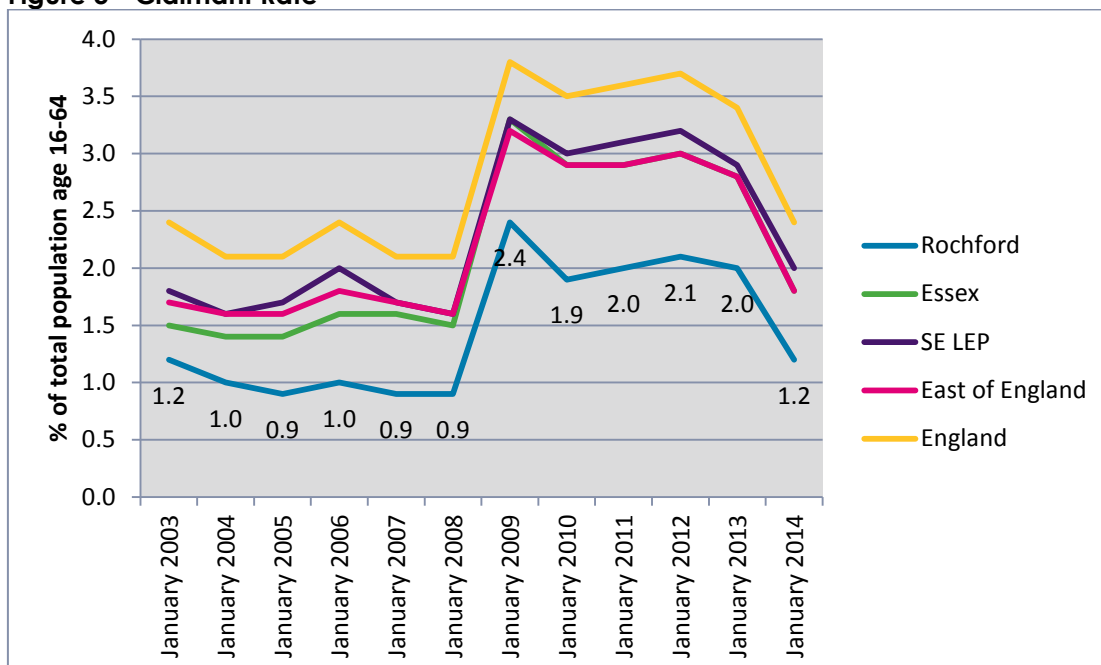
Figure 2 - Unemployment Rate



Source: NOMIS

3.11 Figure 3 shows the percentage of working age population claiming out-of-work benefits providing an indicator for unemployment in Rochford and comparator areas from January 2003 to January 2014. The claimant count rate in Rochford resonates with the unemployment rates shown in Figure 2. Rochford's claimant count trends are towards the lower side of the spectrum compared to the wider area. There is a clear impact of recession of 2008 on its economy, after which the claimant rates peaked to 2.4 between 2009/2010, the same time as the unemployment rate was at its peak. However, it lowered to 1.2 in Jan 2014, which is the first time it came close to pre-recession rate. Overall, the claimant rates in Rochford have been significantly and consistently lower than the comparators areas.

Figure 3 - Claimant Rate



Source: NOMIS

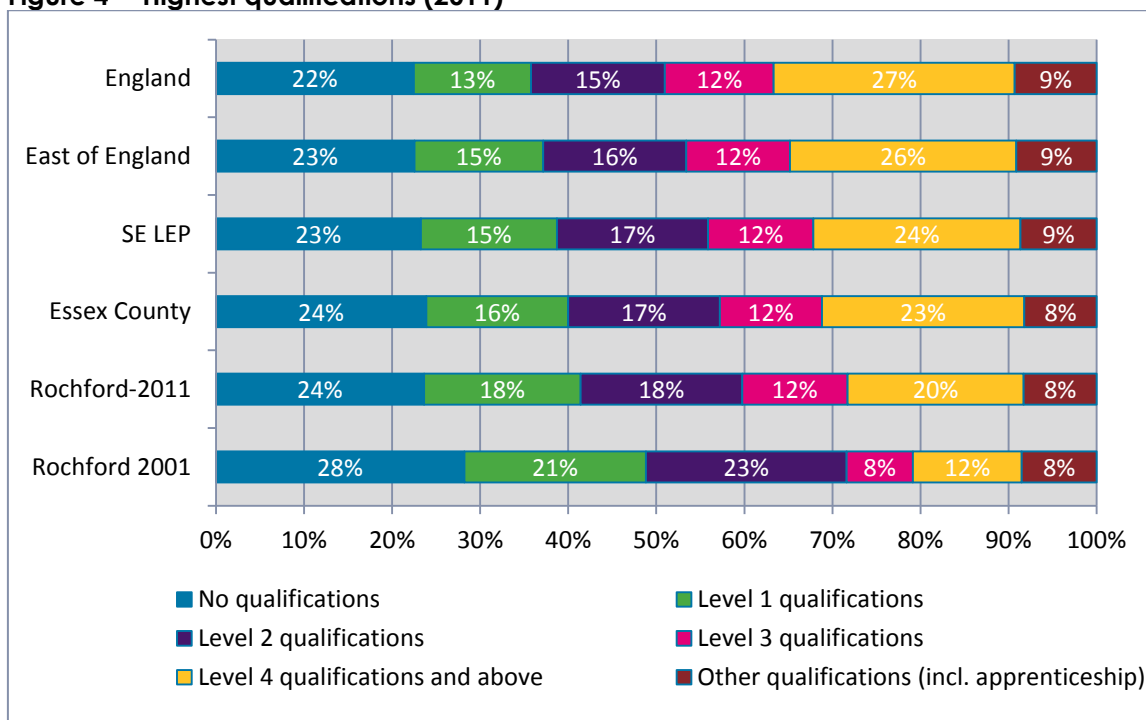
3.12 The skills profile of the District will be critical in attracting and supporting future economic growth, with businesses seeking locations with an available pool of suitably skilled labour. Figure 4 shows the skill profile comparison for Rochford in 2001 and 2011 and the comparison with benchmark areas in 2011.

3.13 There has been an improvement in the qualifications level in Rochford residents between 2001 and 2011 particularly in level 4 qualifications which has gone up from 12% in 2001 to 20% in 2011. There has also been a decline in the proportion of

unqualified residents in Rochford, which has gone down from 28% in 2001 to 24% in 2011.

3.14 In comparison to the wider area, Rochford's qualification levels are more or less in line with the region. It has a marginally higher proportion of unqualified population 24% (same as Essex). Although the level 4 qualification achievement has improved in the District in the last decade, it is still lowest among the benchmark areas at 20% compared to the national average of 27%.

Figure 4 - Highest qualifications (2011)



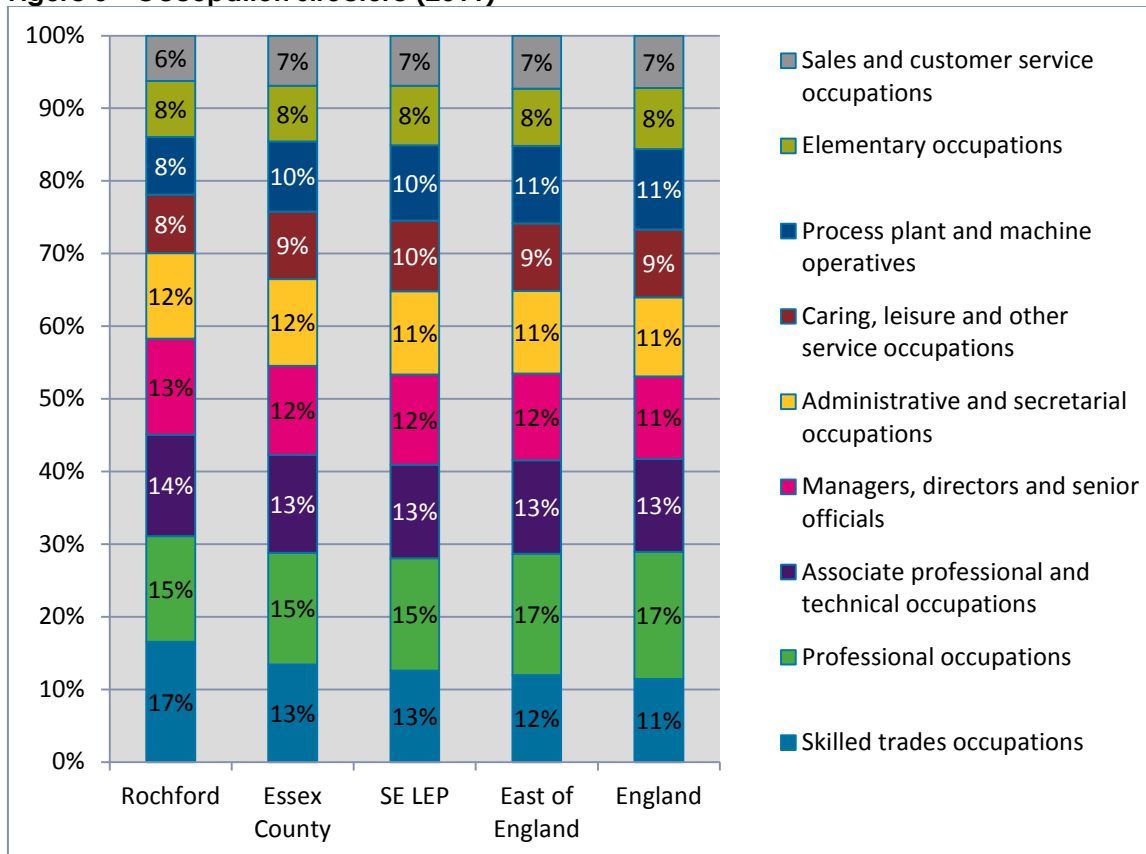
Source: Census 2011

3.15 The qualification levels are reflective of the occupational engagement of the population in a place. The occupational structure relates to the jobs people do and is always changing. Rochford's occupational structure for 2013 (Figure 5) shows that there is a marginally lower proportion of employees engaged in elementary and process occupations, c. 16% of the total employed population, compared to 18% for Essex, and 19% for the East of England and England.

3.16 Most of the workforce is engaged in higher level occupations; with the highest proportion engaged in skilled trade occupations (17%), significantly higher than regional averages in Essex and SE LEP (13%), East of England (12%) and England (11%).

Almost 42% are those employed are within technical, professional and management occupations, which is in line with regional and national proportions.

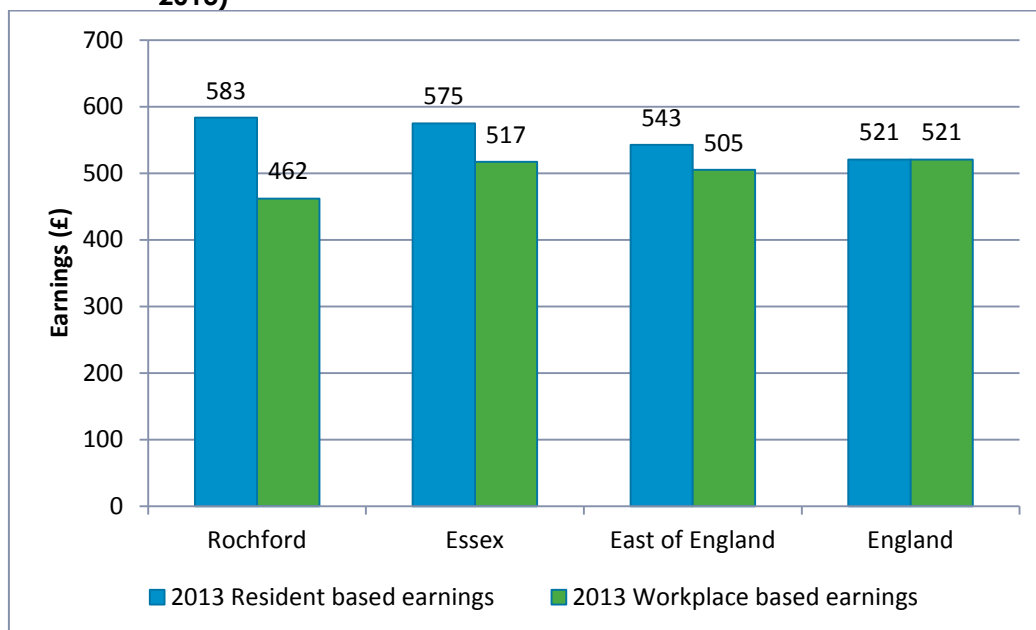
Figure 5 - Occupation structure (2011)



Source: Census 2011

3.17 Figure 6 shows the comparison of workplace and residence based earnings in Rochford and benchmark areas. In 2013 Rochford had the highest residence based weekly earnings (£583) compared to Essex (£575), the East of England (£543) and England (£521). Conversely, the workplace based earnings were lowest in Rochford (£462) compared to Essex, East, and England-£517, £505 and £520 respectively. This indicated that those who travel to work in Rochford District earn less than residents of the District who may be employed elsewhere.

Figure 6 -- Residence and Household based Earnings (Median Gross Weekly Pay-2013)



Source: NOMIS

- 3.18 Table 3 provides a list of industries by broad sectors and the proportion of employment in each of these industries in the year 2011. It shows that relatively, Rochford has a strong presence of the Finance and Insurance sector (12%) compared to the regional and national proportion - all below 7%. Rochford also has a relatively strong presence of construction activities (10.5%) above the national average of 7.7%.
- 3.19 Within Rochford the key employment industries related to Public admin, education and health (25.3%). Almost as strong as the Finance and Insurance industry is the Retail industry (14.2%), Professional and Private Services and Finance and Insurance both 12%, Construction (10%) and Manufacturing (8%).
- 3.20 There are low to moderate levels (between 3% to 5%) of employment engagement in Transport and Storage, Accommodation and Leisure Services, IT and Communications, and Other Sectors.

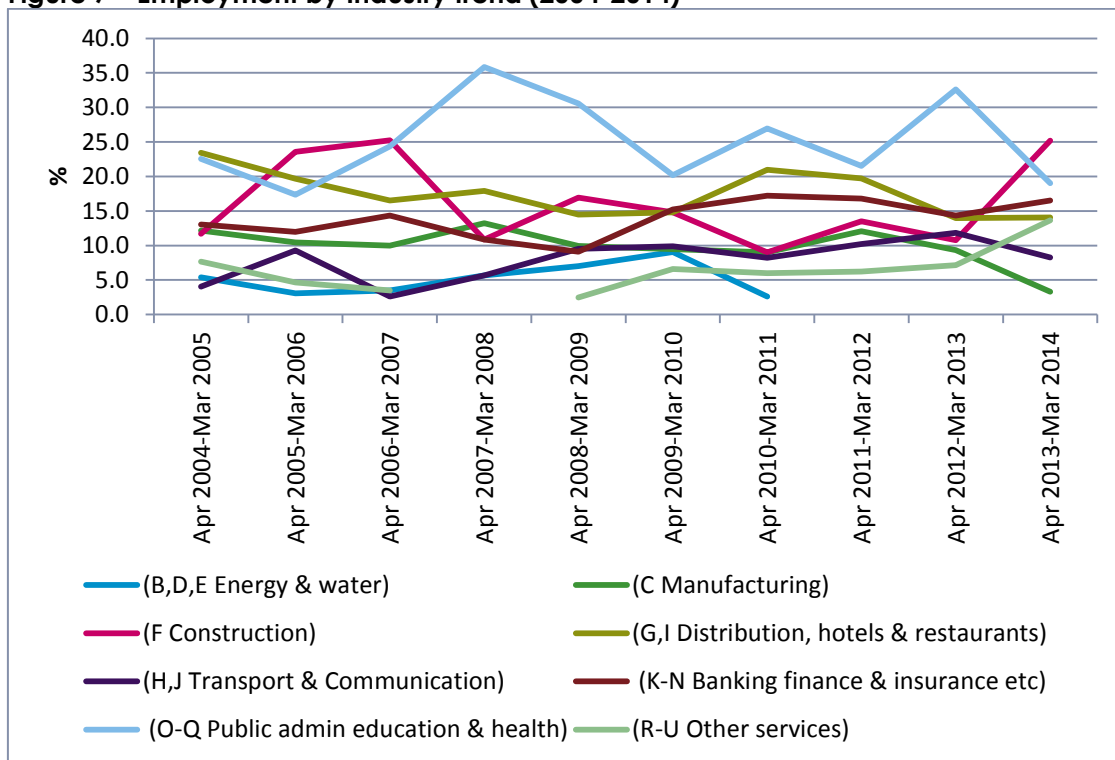
Table 3 - Employment by industry-2011 (%)

	Rochford	Essex County	SE LEP	East of England	England
(O-Q Public admin education & health)	25.3	26.6	28.0	27.0	28.2
(K-N Banking finance & insurance etc)	24.2	13.7	12.4	11.3	10.8
(G,I Distribution, hotels & restaurants)	17.5	20.0	20.9	21.1	21.5
(C Manufacturing)	14.9	14.3	13.3	15.5	15.6
(F Construction)	10.5	10.0	9.8	8.6	7.7
(H,J Transport & Communication)	7.9	8.8	8.6	9.2	9.1
(R-U Other services)	4.6	4.7	4.8	5.0	5.0
(B,D,E Energy & water)	1.1	1.2	1.3	1.2	1.4
A. Agriculture and Fishing	0.5	0.7	0.8	1.1	0.5

Source: Census 2011

- 3.21 The following graph presents a trend based analysis of the industries from April 2005 to March 2014 for Rochford. Notably, the Construction sector has seen the most growth in Rochford in this period (13.5%) followed by Other Service categories (6%). The most declining sectors have been Distribution, Hotels and Restaurants (-9.4%), followed by Manufacturing (-8.9%) and Public Admin (-3.5%). The Finance and Insurance industry has grown at a moderate rate of 3.5%.
- 3.22 Clearly, all sectors suffered a slow growth during the recession in 2008, but the industries that showed the most decline were Distribution, hotels and restaurant (-9%), followed by Banking and Finance (-4%) in 2008-2009. Of these the former continued to decline post-recession while the latter has recovered back to pre-recession levels.

Figure 7 – Employment by Industry trend (2004-2014)



Source: NOMIS

- 3.23 Rochford has 29,000 available jobs in the District, giving it a job density of 0.56 jobs/person (ONS, 2011). This indicates a lack of job availability in the District which is further backed by a high out-commuting flow of workers demonstrated in Table 4.
- 3.24 Rochford is mainly an exporter of workers. Around 10,416 people commute into Rochford from other local authorities in the UK and 24,441 residents of Rochford commute to other local authorities to work. This results in a population decrease of 14,025 working population in Rochford to other authorities. Rochford loses most of its working population to Southend on Sea (3,508), followed by Westminster in London (2932) and Basildon (1882).

Table 4 - Employment Commuting Patterns-2011

	Outflow	Inflow	Balance
Rochford	24441	10416	-14025
Southend-on-Sea	8,466	4,958	-3508
Basildon	3201	1327	-1882
Westminster, London	2,936	4	-2932
Castle Point	1,479	1,554	75
Chelmsford	1,404	658	-746
Tower Hamlets	951	23	-928
Thurrock	769	297	-472
Brentwood	533	145	-388
Havering	521	208	-313
Barking and Dagenham	331	46	-285

Source: NOMIS

- 3.25 In terms of methods of travel to work of those working within the District, most travel by car. Rochford has a high rate of dependency on car based commuting to work, with 72.2% of the work commute being done by car against 59% in England in 2011. Rochford has a very low proportion of cyclists going to work (1%) compared to the national average of 3%. It has 9.5% of people walking to work which is almost the same as the national average of 10%.

Economic Performance

- 3.26 Table 5 examines the Gross Value Added (GVA) and average annual % of growth in the UK, Essex, East of England, and Rochford from 1999 to 2013. Rochford's average annual % of growth has been in line with national (1.7%) and regional trends (East of England -1.9%), but has performed notably below the Essex County which has shown a growth rate of 3%.

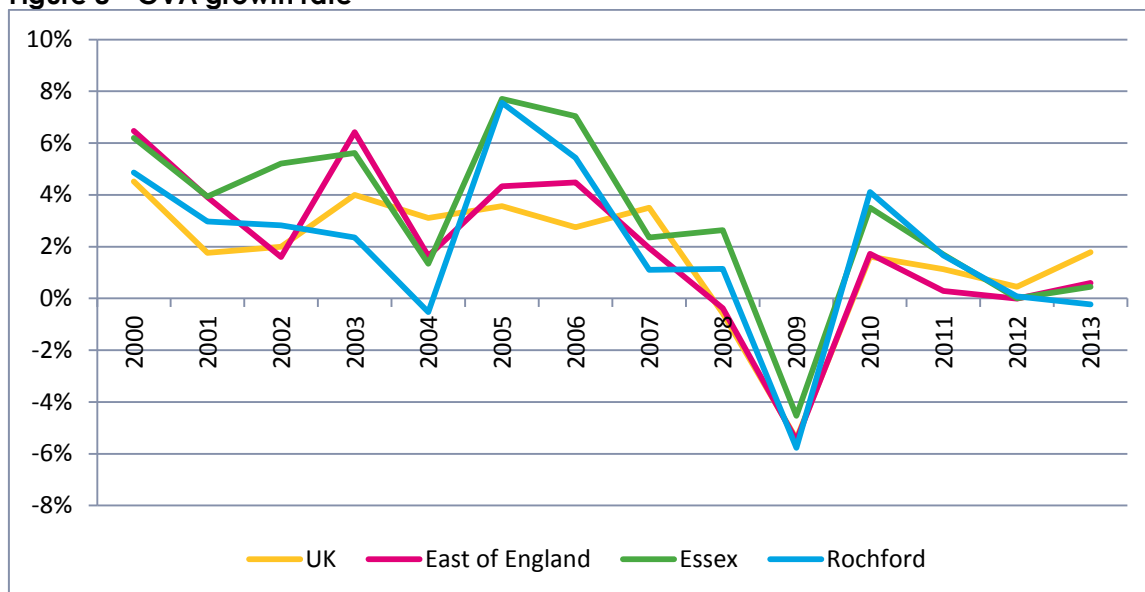
Table 5 – Total Output- GVA (£ million) and Average Annual Growth (%)

	1999	2003	2007	2009	2011	2013	Ave annual % growth (1999-2013)
UK	1085000	1224000	1390000	1307000	1343000	1373000	1.70%
East of England	86665	103663	117084	110244	112474	113135	1.90%
Essex	20430	25056	29966	29363	30909	31051	3.00%
Rochford	720	818	933	889	941	939	1.90%

Source: Experian

3.27 Figure 8 shows GVA growth in Rochford and comparator areas. Between 2004 and 2005, Rochford's economy peaked at 8% (same as Essex), which is the highest rate it has reached in a decade. However, the recession has impacted the growth rates in the District and the wider region, and between 2008 and 2009 Rochford's economy declined the most by -5.8% compared to -4.5% in Essex and -5% in the UK. Although, post-recession there has been some recovery of growth rates in Rochford, it has not been able to bounce back to pre-recession levels.

Figure 8 – GVA growth rate



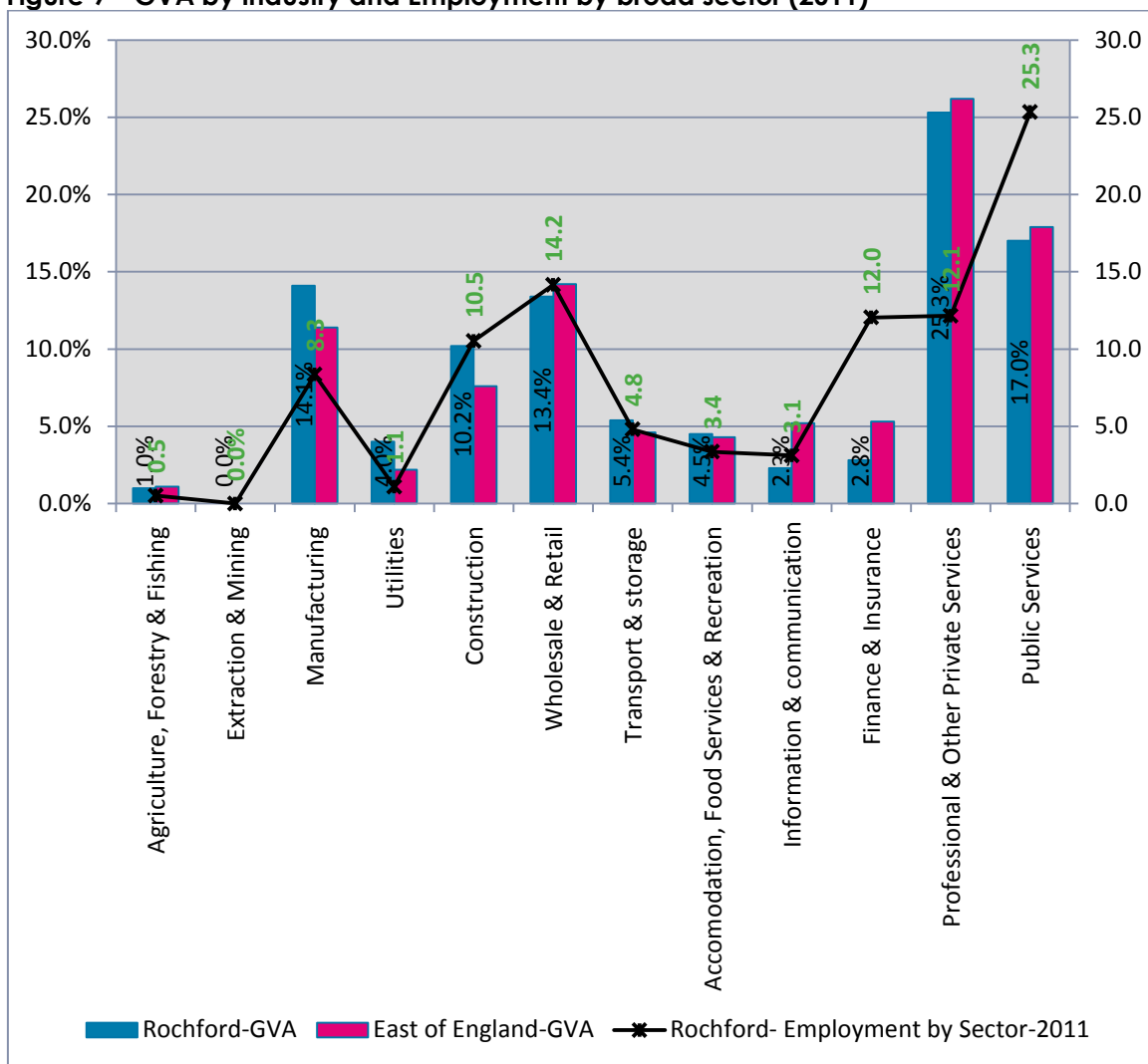
Source: Experian

3.28 Figure 9 compares GVA contribution by broad sector in Rochford, East of England and the UK in 2011. It shows that Professional and Private Services is a key economic driver with a GVA output of 25.3%, and is less resource intensive as it has an

employment engagement of only 12.1%. On the other hand, Public Services, which has the second highest GVA output of 17%, has employment engagement of almost a quarter of the employees in Rochford. The other moderate GVA contributors are Manufacturing 14.1%, which is relatively less resource intensive at 8.3%, and Wholesale and Retail (14.2%) and Construction (10.5%), which have almost similar employment engagement.

3.29 Relatively, the GVA output of Rochford is more or less in line with the East of England. It has a relatively higher output in Manufacturing (14%) against the East (11%). In the rest of the sectors, Rochford has slightly less GVA contribution compared to the East, but more or less aligns with it.

Figure 9 – GVA by industry and Employment by broad sector (2011)



Source: Experian and NOMIS

Business Demography

- 3.30 The following set of figures and table reviews business size, enterprises and growth rates to provide a context of business demography in Rochford.
- 3.31 Table 6 and Table 7 show the business size and sector breakdown in Rochford in 2014. It has 87.1% of Micro-business with a maximum 9 employees. Small businesses with an employee count between 10 and 49 are second in line with a 10.9% proportion of business units, followed by Medium size businesses (50-249 employees) with only 1.8% and very few large businesses (250+ employees) at 0.1%.

Table 6 - Business Units by Size, Rochford-2014

Unit Size	(%)
Micro (0 to 9)	87.1
Small (10 to 49)	10.9
Medium-sized (50 to 249)	1.8
Large (250+)	0.1
Total	100
Micro (breakdown)	(%)
Micro A (0-4)	86.8
Micro B (5-9)	13.2
Total	100

Source: NOMIS

- 3.32 About 97% of these business units are private sector while only 3% are public sector. Table 7 shows further proportional breakdown of these business units according to the sectors. It shows that construction (17%) and professional and technical services (15%) by far have the maximum share of business units by proportion. This is followed by manufacturing; retail, business admin, arts and other services and IT have a moderate share between 5 and 10%.

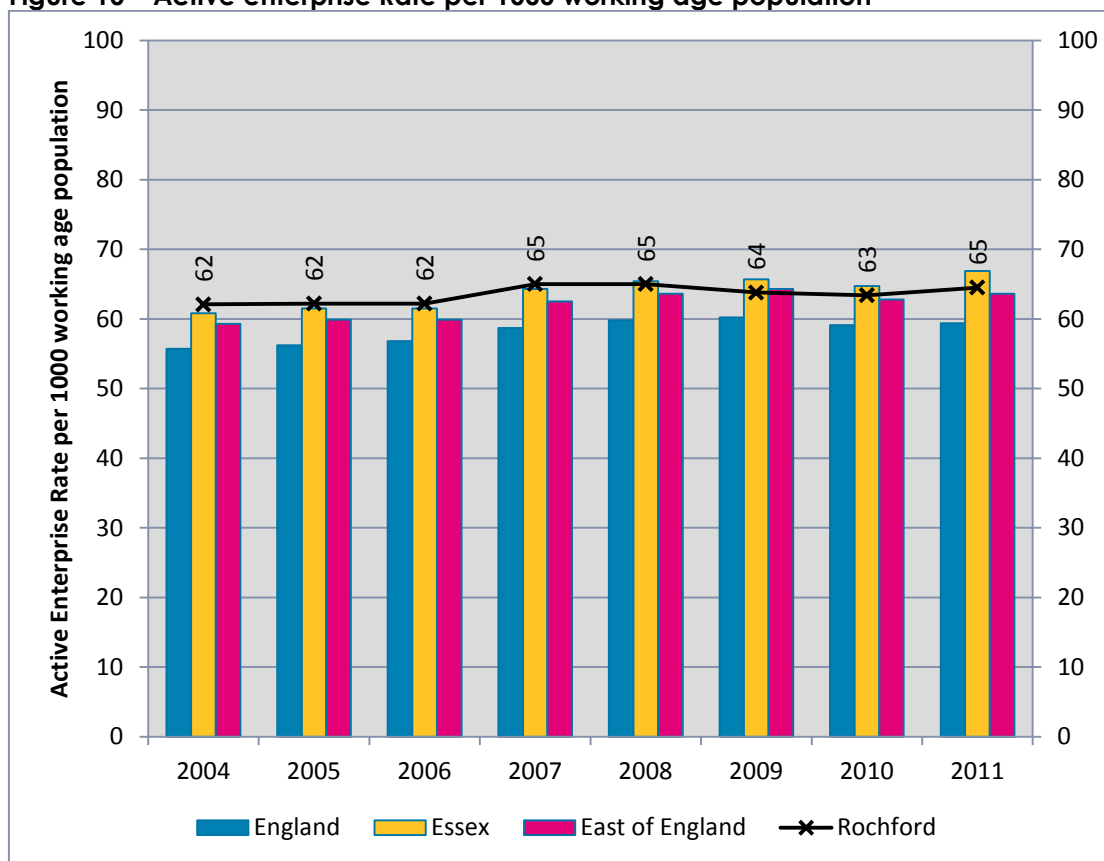
Table 7 - Business Units split by Sector, Rochford-2014

Sector	(%)
1 : Agriculture, forestry & fishing (A)	2.2
2 : Mining, quarrying & utilities (B,D and E)	0.6
3 : Manufacturing (C)	7.0
4 : Construction (F)	18.6
5 : Motor trades (Part G)	3.4
6 : Wholesale (Part G)	4.2
7 : Retail (Part G)	9.1
8 : Transport & storage (inc postal) (H)	4.0
9 : Accommodation & food services (I)	4.8
10 : Information & communication (J)	5.5
11 : Financial & insurance (K)	1.8
12 : Property (L)	3.1
13 : Professional, scientific & technical (M)	15.1
14 : Business administration & support services (N)	6.6
15 : Public administration & defence (O)	0.9
16 : Education (P)	1.9
17 : Health (Q)	4.2
18 : Arts, entertainment, recreation & other services (R,S,T and U)	6.9
Column Total	100

Source: NOMIS

- 3.33 Figure 10 shows the active enterprise rate per 1000 working age population in order to understand the business enterprise trend in the District. Overall, Rochford's rate is in line with Essex, and is better than the East region and national average. In terms of trend over the years, its rate in 2004 was 62, followed by a strong incline of 65 in 2007 and 2008, after which it suffered a decline during the economic downturn having a rate of 63.8. In 2011, it had an active enterprise rate of 64.5 compared to 59.4 as the national average and 63.6 in the East.

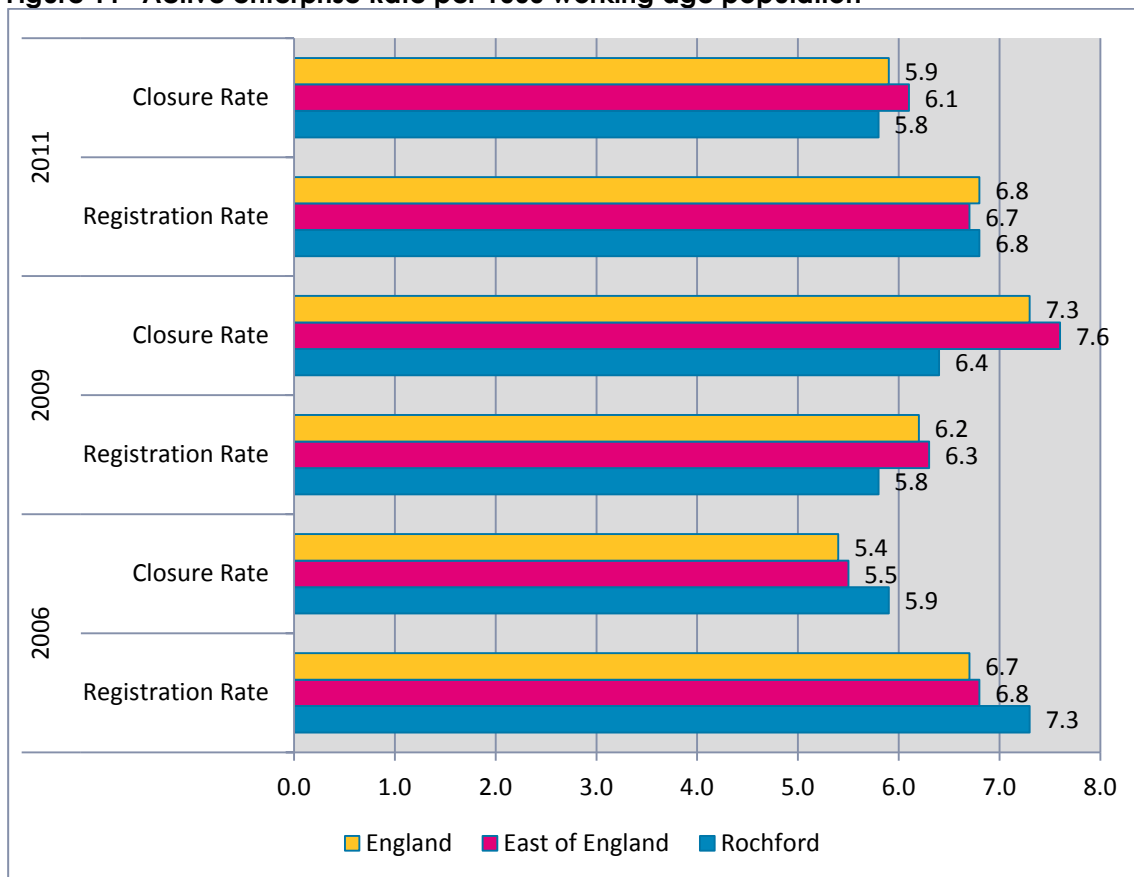
Figure 10 – Active enterprise Rate per 1000 working age population



Source: Essex Insight

- 3.34 In terms of registration and closure rates of these businesses in Rochford, Rochford has performed slightly better than compared with national and regional (East of England) averages. Figure 11 shows pre-recession (2006), recession (2009) and post-recession (2011) rates in the three areas.
- 3.35 It shows that in 2006, Rochford's business registration and closure rates were in line with regional and national average, however in 2009, it has shown better resilience compared to the region and England. The difference between registration and closure has been half in Rochford than what it has been in the wider region. While in 2011, Rochford has shown a strong registration rate of 6.8 and a smaller closure rate of 5.8 compared to the regional and national averages.

Figure 11– Active enterprise Rate per 1000 working age population



Source: Essex Insight

3.36 Table 8 shows the survival rates of new businesses starting in the District, indicating that Rochford's business survival rate is more in line with Essex and the national average. Only 51.3% of businesses started in Rochford in 2007 survived beyond 5 years, compared to 52.1% in Essex and 51.9% in England. During the recession period of 2008 it has shown a strong three year survival rate for businesses that started in 2008 at 63.9 than Essex (58.8) and the national average (57.9).

Table 8 – Survival Rates

	Year of Birth	Percentage - 1 Year per cent	Percentage - 2 Year per cent	Percentage - 3 Year per cent	Percentage - 4 Year per cent
England	2006	96.50	80.70	66.20	53.00
	2007	95.40	81.30	62.90	51.90
	2008	92.10	73.90	57.90	-
	2009	90.90	73.90	-	-
	2010	86.80	-	-	-
Essex	2006	95.90	80.80	65.50	53.20
	2007	95.10	80.60	63.20	52.10
	2008	92.30	74.20	58.80	-
	2009	93.00	77.50	-	-
	2010	88.90	-	-	-
Rochford	2006	94.70	81.30	68.00	56.00
	2007	93.60	79.50	61.50	51.30
	2008	94.40	81.90	63.90	
	2009	95.00	81.70	-	-
	2010	90.90	-	-	-

Source: Essex Insight

Summary

- 3.37 Rochford is a relatively slow growing District in the UK by population, with a population increase of 6.1%, lower than the national average. It has a high proportion of older residents compared to all benchmarks. It has an economic activity of 70.8% which is in line with the regional and national context. Out of these about 65.4% of the economically active population is in employment, which is the highest among all benchmarks. About 47% of its total population is in employment. This is reflected in unemployment rates in Rochford, which have remained consistently low in the past decade compared to the wider context. This also attributes to low claimant rates in Rochford.
- 3.38 In terms of qualifications, the proportion without any qualifications is more or less in line with national averages. However, Rochford lags behind substantially in Level 4 qualifications as it has a significantly low population with Level 4 qualification (20%) compared with the national average of 27%. The proportion of working people who are in elementary occupations in Rochford is very low by national standards. It also

has a low proportion engaged in lower skilled occupations and a high proportion engaged in skilled occupations compared to national standards. An average proportion is engaged in Level 4 managerial occupations compared to the national average. About a quarter of Rochford's population is engaged in public admin, educational, health, banking, finance and insurance sectors. Construction is also a growing sector within the District and it has shown the maximum growth of 13.5% in the past decade. It currently holds a moderate proportion of 10% of the employment share in Rochford.

- 3.39 Rochford has low job density levels of 0.56 jobs/ person (2011) indicating a lack of job availability in the District which is further backed by a high out-commuting flow. It has a containment rate of only 42% which makes it mainly an exporter of workers. It also has a high dependency on car based commute with c.72% work commute by car. Rochford's residence based earnings are higher than workplace based earnings indicating that those who travel to work in Rochford District earn less than residents of the District who may be employed elsewhere.
- 3.40 The economic performance in Rochford measured in terms of GVA growth has been on average in line with England, but notably below Essex. One of its main economic drivers is Professional and Private Services with a quarter of its GVA output, followed by public sector at 10%. While the previous is less resource intensive with employment engagement of only 12%, the latter has a high employment engagement of 25%.
- 3.41 Rochford has a strong private sector with 97% of the total business units belonging to the private sector. It has performed better in terms of active enterprises in the District with a rate above the national average and in line with Essex. In terms of new business registrations and closure, it has shown better resilience during the recession of 2008 compared to the region and England. It had a stronger three year survival rate for businesses that started in 2008 at 63.9, than Essex (58.8) and the national average (57.9).

Strengths/ Opportunities	Weakness/ Threats
<ul style="list-style-type: none"> • High employment among economically active population • Low unemployment rate and claimant counts. • Low level of population with low qualifications • High residence based earning • Strong Finance and Insurance sector • Better survival rates. • Business enterprise performed better during the recession. • Strong private sector. 	<ul style="list-style-type: none"> • Aging population • Low job density • Less qualified population with Level 4 qualification • Low levels engaged in managerial occupations. • Low knowledge economy sector • Low job density • High out-commuting for work and low containment rate. • High dependency on car based commute for work.

4. Commercial Property Market Review

- 4.1 The economic growth forecasts and historic sector performance provide the underpinnings of future space demand. However, property markets follow their own trends, with successful developments tending to be replicated on other sites as demand is proven.
- 4.2 To understand how the property market itself may influence future provision we consider market performance in terms of deals completed (space take up) between July 2009 and July 2014 and advertised space (vacancies).
- 4.3 The CoStar¹ database seeks to record actual market activity (i.e. the 'turnover' of occupiers and premises) as such the majority of lease renegotiations and extensions are not included. It should be noted that the CoStar database relies on the participation of agents to maintain its accuracy; as such a number of smaller deals may not be captured. However, it provides a consistent and robust record of the predominant market trends from which the market can be understood.
- 4.4 The previous Employment Land Study identified that the commercial market was concentrated primarily within the two major urban settlements of Rayleigh and Rochford. It recognised that the District was not a major office location; however demand for offices was strongest in the west of the District around Rayleigh. The key driver in the Rochford area was the airport and the range of manufacturing and other supply chain businesses it attracted.
- 4.5 Outside of these core areas demand for commercial property was underpinned by locally orientated service businesses.
- 4.6 In preparing this updated Study we have reviewed the commercial property market again, identifying where, if at all, these historic trends are changing.

¹ CoStar Focus is a nation-wide property database that records deals and vacant premises within the commercial property market. The database relies on support from local agents to complete data records. It provides a robust and consistent measure of both current and historic market performance. It should be noted that whilst CoStar take every effort to ensure accuracy and coverage it does not capture all activity but does provide a significant and robust sample from which conclusions can be drawn.

The Rochford District Office Market

- 4.7 Within this section we review the office market within the District. At the headline level it would appear the office market has continued to operate at a modest scale within the focus of demand for smaller units, with a total of 59 units transacted in the 5 year period between August 2009 and July 2014.

Table 9 - Office Deals, Rochford July 2009-July 2014

	2009	2010	2011	2012	2013	2014	Total
<185 sqm	3	8	11	10	10	4	46
185 - 464 sqm	0	4	4	2	2	0	12
465 - 1,849 sqm	0	1	0	0	0	0	1
1,850 sqm +	0	0	0	0	0	0	0
Total	3	13	15	12	12	4	59

Source: CoStar, Focus, GVA, 2014.

- 4.8 Over the period demand has remained relatively consistent, although the first part of 2014 shows a potential drop in demand, with only 4 deals completed in the first 6 months of the year.
- 4.9 No deals above 465sqm have been completed since 2010, with no large deals completed at all in the last five and a half years underlining the small business orientation of the local market.
- 4.10 In total 7,317 sqm of space has been transacted, with half of this within the smallest sizeband.

Table 10 - Office Floorspace Take Up, Rochford July 2009-July 2014

	Total Deals	Total Take Up (sqm)	Average Size (sqm)	Unit	Av. Days on Market
<185 sqm	46	3,793		83	318
185 - 465 sqm	12	2,855		238	491
465 - 1,849 sqm	1	669		669	Not known
1,850 sqm +	0	0		0	0
Total	59	7,317		124	361

Source: CoStar, Focus, GVA, 2014

- 4.11 The average deal size was less than 150sqm, which would suggest the average business occupying space within the District was small, most likely around 10 employees (based on average occupier densities). This again reinforces the nature of the market as one orientated towards local businesses.

- 4.12 Geographically Rayleigh remains the dominant location for office activity, with almost 45% of deals occurring within the town.

Table 11 - Location of Office Activity

	No. of Deals	Total Size (sqm)	Average Achieved Rent (£/sqm)
Hockley	12	1,573	89
Rayleigh	26	2,474	102
Rochford	13	1,985	115
Southend Airport	8	1,285	138
Total	59	7,317	109

Source: CoStar, Focus, GVA, 2014

- 4.13 However, despite having 45% of the deals, these represented a third of total floorspace transacted suggesting that whilst more active, the Rayleigh market focuses on smaller 'product'. This is reinforced when average deal sizes are considered, which show larger average lettings in Rochford and the environs of the airport.
- 4.14 Rents also tend to be stronger close to the airport, reflecting the newer stock which has been delivered in the area (particularly at Aviation Way) and also the 'higher profile' it offers businesses.
- 4.15 Turning to availability in July 2014 there were 46 office units being advertised through the CoStar Focus database, totalling 5,336sqm of available space.

Table 12 - Office Floorspace Availability

	No. of Units	Total Floorspace	Av. Days on the Market
<185 sqm	36	2,516	560
185 - 465 sqm	9	2,355	610
465 - 1,850 sqm	1	465	238
1,850 + sqm	0	0	0
Total	46	5,336	562

Source: CoStar, Focus, GVA, 2014

- 4.16 The majority of this space was available within small units of less than 185sqm, with no availability of very large 1,850sqm units. The pattern of availability matches closely the pattern of demand with space available for small businesses. The existing

available units have been on the market for in excess of a year and a half, considerably longer than the long term historic letting period of 361 days.

- 4.17 Geographically availability of office space is focussed in unit and floorspace terms at Rayleigh, where 38% of total units available in the District are located representing 44% of floorspace.

Table 13 - Location of Office Availability

	No. of Units	Total Size (sqm)
Hockley	9	1,526
Rayleigh	18	2,671
Rochford	11	1,275
Southend Airport	9	597
Total	47	6,069

Source: CoStar, Focus, GVA, 2014

- 4.18 Given the scale and focus of demand in the area close to Southend Airport it could be considered there is a lack of supply in this area, particularly given that these tend to be very small units compared to the average deal size.

The Rochford District Industrial Market

- 4.19 Within this section we review the industrial market within the District. At the headline level it would appear the industrial market has continued to operate at a relatively consistent level over the 5 year period between August 2009 and July 2014, with 49 deals completed in total

Table 14 - Industrial Deals, Rochford July 2009-July 2014

	2009	2010	2011	2012	2013	2014	Total
<185 sqm	2	6	5	2	2	1	18
185 - 464 sqm	4	2	3	2	5		16
465 - 1,849 sqm	1	2	3	7	1		14
1,850 sqm +				1			1
Total	7	10	11	12	8	1	49

Source: CoStar, Focus, GVA, 2014.

- 4.20 Demand across three of the four sizebands has been consistent over the period, suggesting the market is relatively balanced across small and medium size bands, reflecting the local and sub-regional orientated nature of the majority of businesses and the fact that Rochford is not seen as a major distribution location in particular.

- 4.21 Only one deal was completed in the largest size band where c.2,000sqm of space was taken up by Wayland Games within the Hockley Trading Estate for mail order distribution purposes.
- 4.22 In total 20,884 sqm of space has been transacted, with half of this within the larger sizebands. This contrasts with office demand which focussed on much smaller units, however the business size (in terms of employees) is likely to be relatively similar.

Table 15 - Industrial Floorspace Take Up, Rochford July 2009-July 2014

	Total Deals	Total Take Up (sqm)	Average Size (sqm)	Unit	Av. Days on Market
<185 sqm	18	2,140		119	405
185 - 465 sqm	16	4,701		294	298
465 - 1,849 sqm	14	12,005		856	458
1,850 sqm +	1	2,038		2,038	289
Total	49	20,884		426	382

Source: CoStar, Focus, GVA, 2014

- 4.23 The average deal size was less than 426sqm, still lying within the smaller sizeband range, highlighting the distorting effect that the smaller number of larger deals have on total floorspace figures. Again this would reflect the local market being dominated by smaller businesses. Whilst there are a number of larger employers in the industrial sector these tend to be well settled in the District, hence their property demands have been met prior to this analysis.
- 4.24 Recent trends suggest that the District has not attracted new, larger, occupiers in any great number, which could, in part, reflect the scale and nature of stock or development land available.
- 4.25 Geographically Rochford dominates the industrial market with 40% of all deals occurring within the town and a third of all floorspace take up. It has also achieved the highest average rents within the District at £78/sqm

Table 16 - Location of Industrial Activity

	No. of Deals	Total Size (sqm)	Average Achieved Rent (£/sqm)
Hockley	8	7,392	37
Rayleigh	10	1,877	47
Rochford	20	6,815	78
Southend Airport	11	4,800	51
Total	49	20,884	59

Source: CoStar, Focus, GVA, 2014

- 4.26 The area close to the airport has also performed strongly with the second highest number of deals and achieved rents. Hockley also has experienced high levels of demand in terms of floorspace, although this has somewhat been distorted by one large (in the local context) deal.
- 4.27 Rayleigh is the smallest of the industrial markets, with a much smaller amount of take up and also smaller average deal sizes, suggesting a greater focus on small businesses.
- 4.28 Turning to availability in July 2014 there were 37 industrial units being advertised through the CoStar Focus database, totalling 23,441sqm of available space.

Table 17 - Industrial Floorspace Availability

	No. of Units	Total Floorspace	Av. Days on the Market
<185 sqm	10	794	486
185 - 465 sqm	10	3,109	394
465 - 1,850 sqm	15	13,031	736
1,850 + sqm	2	6,507	766
Total	37	23,441	578

Source: CoStar, Focus, GVA, 2014

- 4.29 The majority of this space was available within medium sized units, with over half the floorspace in units between 465 and 1,850sqm. Only two large units are currently on the market, and have been for in excess of two years, suggesting weaker demand for these units.
- 4.30 Geographically availability of industrial space is focussed in unit and floorspace terms at Rochford, with almost half the floorspace and number of units lying within the town.

This is a reflection of the relative scale of the Purdey's Estate, where 13 of all units available within the District are located.

Table 18 - Location of Office Availability

	No. of Units	Total Size (sqm)
Hockley	7	4,257
Rayleigh	6	5,375
Rochford	19	11,298
Southend Airport	5	2,511
Total	37	23,441

Source: CoStar, Focus, GVA, 2014

- 4.31 Currently there are no new or refurbished units on the market within the District highlighting a potential lack of choice for occupiers. Given the potential strengths and drivers of industrial activity and the age of existing stock, this is likely to be a critical consideration in the future.

Property Market Conclusions

- 4.32 Generally, the property market analysis has shown that the District's market is of a relatively modest scale across all property types with a particular orientation towards smaller scale businesses.
- 4.33 Importantly, whilst the previous Employment Land Study highlighted the importance of the A127 and Rayleigh in market terms (particularly for office activity) it can be seen by recent data that the area close to London Southend Airport has become an important part of the market, beginning to balance activity across the District.
- 4.34 There are also key differences in the type of demand. For office in particular whilst Rayleigh remains the dominant centre in terms number of deals and total floorspace the average deal is smaller here than at the airport. This suggests that different land and property requirements will arrive at each place.
- 4.35 In allocating and protecting employment land across the District it is these finer grain trends that will be important, ensuring that the land and property mix aligns with the overall market demand.

5. Review of Employment Land Provision

- 5.1 This section provides a summary of the key findings and observations from the employment site surveys undertaken, covering the entire portfolio of existing employment locations within the District. This analysis is based on on-site survey of the key characteristics of each employment site, with the survey forms and site assessment matrix both included as appendices to this Report.
- 5.2 The first step in reviewing the portfolio of existing employment land has been to establish a list of sites that currently accommodate B class employment activity. These have been identified in partnership with the Council, considering: existing employment sites and allocated future development opportunities identified within the Allocations Plan; and other 'speculative' proposals that have been identified by third parties through the Allocations Plan Call for Sites exercise.
- 5.3 In line with the NPPG, site surveys and analysis in this study have focussed on sites that are greater than 0.25ha in scale. The following sites were identified within the District, see Table 19.

Table 19 - Identified Employment Sites

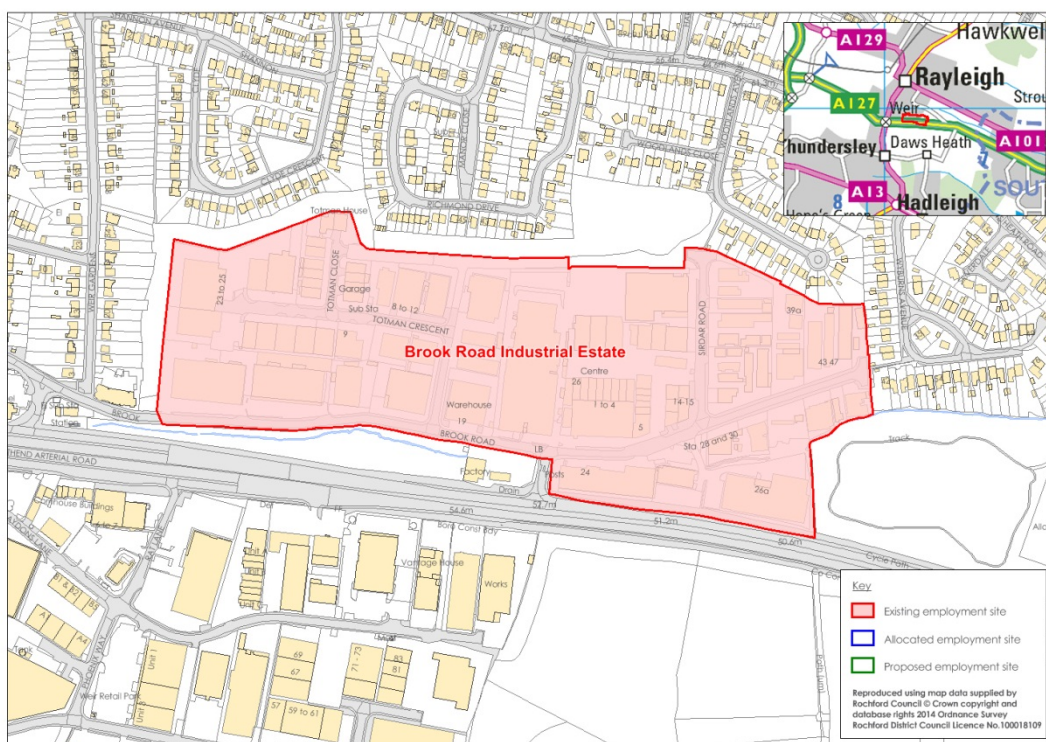
Site Name	Site Type	Site Area
Aviation Way Industrial Estate	Existing	25.27
Baltic Wharf	Existing	16.11
Essex Marina	Existing	4.03
Brook Road Industrial Estate	Existing	13.15
Imperial Park Industrial Estate	Existing	2.35
Locks Hill, Rochford	Existing	0.82
Riverside Industrial Estate	Existing	0.34
Rochford Business Park	Existing	11.63
Swaines Industrial Estate	Existing	0.46
Purdey's Industrial Estate	Existing	37.38
Land West of A1245, Rayleigh (Michelins Farm)	Allocated	8.77
Land South of Great Wakering	Allocated	3.19
Eldon Way, Hockley	Allocated	1.24
Land North of Southend Airport	Allocated	27.07
Land West of Purdey's Industrial Estate	Proposed	15.82

- 5.4 These sites are distributed across the District; however the key clusters reflect the major urban areas of Rochford and Rayleigh, as shown in Figure 12.

- 5.5 This site review process is vital in understanding how existing provision meets businesses needs and where there are opportunities to either improve the offer within sites or intensify levels of provision activity through redevelopment. It updates the information collected by GVA for the District's previous ELS in 2008.
- 5.6 This process identified the character, condition and functionality of each identified employment site in their current form, reflecting on the strengths and weaknesses of the site as an employment location. It also considered the potential role of each site in accommodating future economic activity and growth, either through current stock redevelopment or expansion.
- 5.7 In the remainder of this section we summarise our analysis of each existing allocated employment site within the District, followed by a review of potential additional land and sites that has been either allocated or identified for potential future B class use.

Existing Sites

Brook Road Industrial Estate



Site Description:

- 5.8 The Brook Road Industrial Estate is located in the western cluster of employment sites within the District, north of the Southend Arterial Road (A127). The estate is a large employment area which provides a variety of typologies of space for predominantly B2/B8 uses. In the main, the area is occupied by regional and local scale businesses.
- 5.9 Generally the stock is purpose built and of average quality, although this does vary significantly within the estate, this largely reflects the nature of the occupier and the level of refurbishment activity, for example the Supreme Ironcraft Unit (Unit 26) is of lower quality than the Monitor Audio units at the southern boundary of the site.
- 5.10 The majority of occupation is for B class uses, however approximately 10-15% of uses are for leisure, including the go-karting and gym uses at the western entrance to the site. There are also a few vacant units within the estate, many of which are in poor stock condition.

-
- 5.11 The estate has no major challenges to its access, although there could potentially be difficulties for HGVs. Many units within the estate have some parking provision and there is also on-street parking, which does not cause obstruction to internal circulation.

Strengths:

- 5.12 Brook Road Industrial Estate is largely well-occupied; there are some vacancies a number of which can be reoccupied without significant investment or refurbishment. The scale and nature of the occupiers suggests that the proximity and access to the A127 has an influence on location decisions.
- 5.13 Despite providing dated stock, much of which was surveyed to be built between 1940 and 1969, the majority of the stock is in relatively good condition, this reflects investment and maintenance undertaken by existing occupiers.
- 5.14 Economic activity within the site is mixed however there is a strong focus on engineering, smaller scale manufacturing and the automotive industry within the site. Larger scale employers include Albon Plc and Monitor Audio, although there are a large number of smaller occupiers, particularly for vehicle repairs.

Weaknesses:

- 5.15 The major weaknesses within the Estate are the quality of the environment. At the time of the survey there were considerable issues with the quality of road surfacing, areas of on road storage and fly tipping, and clusters of dilapidated buildings.
- 5.16 The major weaknesses in terms of the stock lie along the north-south axis of Totman Crescent and the small 'courtyard' of older industrial stock to the west of Sirdar Road, whilst these represent a relatively low proportion of the overall stock quantity the clustering increases the impact it has on overall impressions of the site.
- 5.17 The dilution of the B class character within the site is also a potential challenge for the future, driven by the cluster of leisure uses within prominent buildings at the site entrance. Not only does this reduce the capacity for B Class activity but also reduces the impression the site gives as a 'successful' business location, particularly where these uses do not serve or support the B class activity.

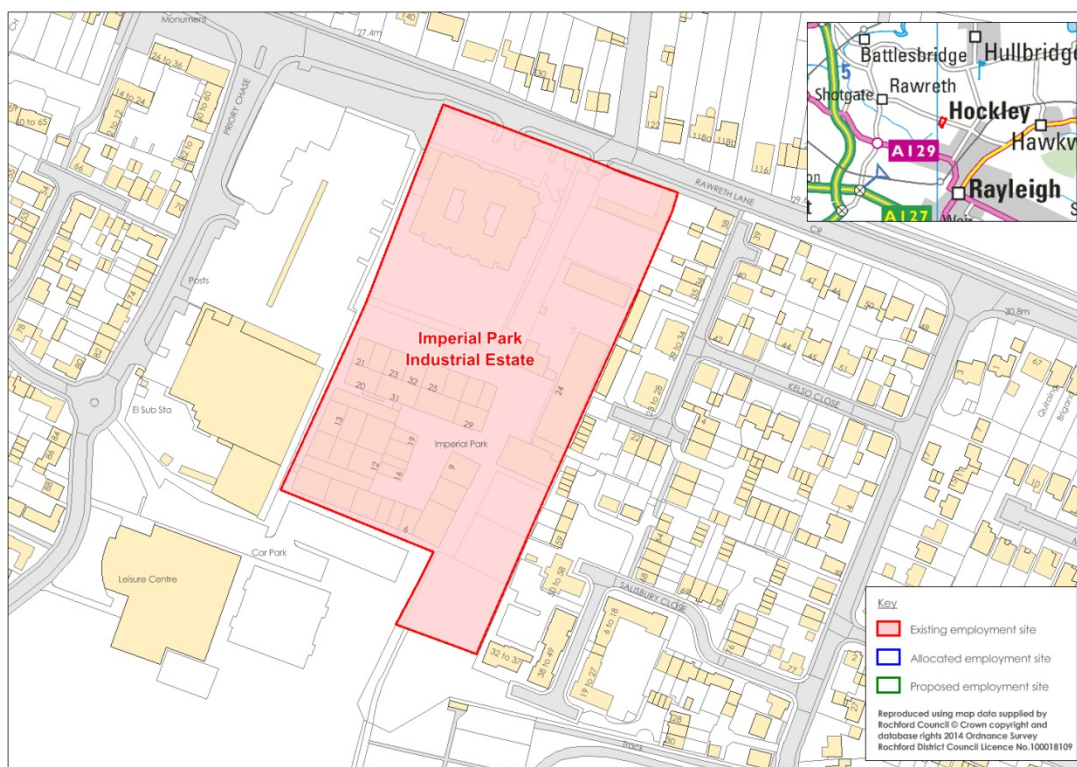
- 5.18 The site is used reasonably intensely and there is a lack of significant opportunity for redevelopment or intensification on the estate to increase employment numbers, this is exacerbated by the growing leisure presence.

Conclusions and recommendations

- 5.19 Brook Road Industrial Estate is considered to fulfil its purpose as an employment site focussed towards engineering and manufacturing uses within the District. Based on the site's strengths it should continue to be protected as an active employment site.
- 5.20 The Council should seek to encourage highways investment into the estate to improve the poor road condition which is currently one of the estate's main weaknesses. Such investment would improve the environment for current business occupiers as well as helping to attract new occupiers to fill the currently vacant units and prevent further leisure use intensification. If these steps towards highways improvement are not taken it could undermine the B class employment function of the estate and further negatively impact on current occupiers.
- 5.21 Future refurbishment or re-provision of poorer quality stock should be supported to ensure the site continues to meet business needs. However, it is unlikely that significant additional capacity can be delivered to accommodate a large share of future employment growth.



Imperial Park Industrial Estate



Site Description:

- 5.22 The Imperial Estate is a small light industrial and storage location to the north of Rayleigh, accessed via Rawreth Lane. The site is well occupied, with no obvious vacant units. There are some small vacant parcels of land that could be developed to provide new floorspace within the estate.
- 5.23 Buildings tend to be from the latter part of the twentieth century and are of mixed condition. To the south of the site a considerable portion of land is used for storage of goods in shipping containers, overtime there may be potential to better utilise this part of the site for employment generating uses.
- 5.24 Activities tend to be 'locally' serving, such as vehicle repairs and household storage, however it is noticeable that there is some incursion of quasi-retail uses, including a bridal shop, two takeaway/delivery units and a tyre centre. The site also accommodates a small office used by an independent financial advisory business.

Strengths:

- 5.25 The site is easily accessed from Rawreth Lane which in turn provides a direct connection to the A1245, as such it provides a good location for businesses seeking to serve clients in the surrounding area and (potentially) more widely across South Essex.
- 5.26 The site also benefits from local amenities in the form of a major supermarket, which also enables users of the site to access public transport.
- 5.27 As noted above there are opportunities to deliver new space on vacant or under-utilised land as required. These are likely to be modest scale units in keeping with the nature of the existing estate. At the time of the site survey there was evidence of ongoing refurbishment of some units.

Weaknesses:

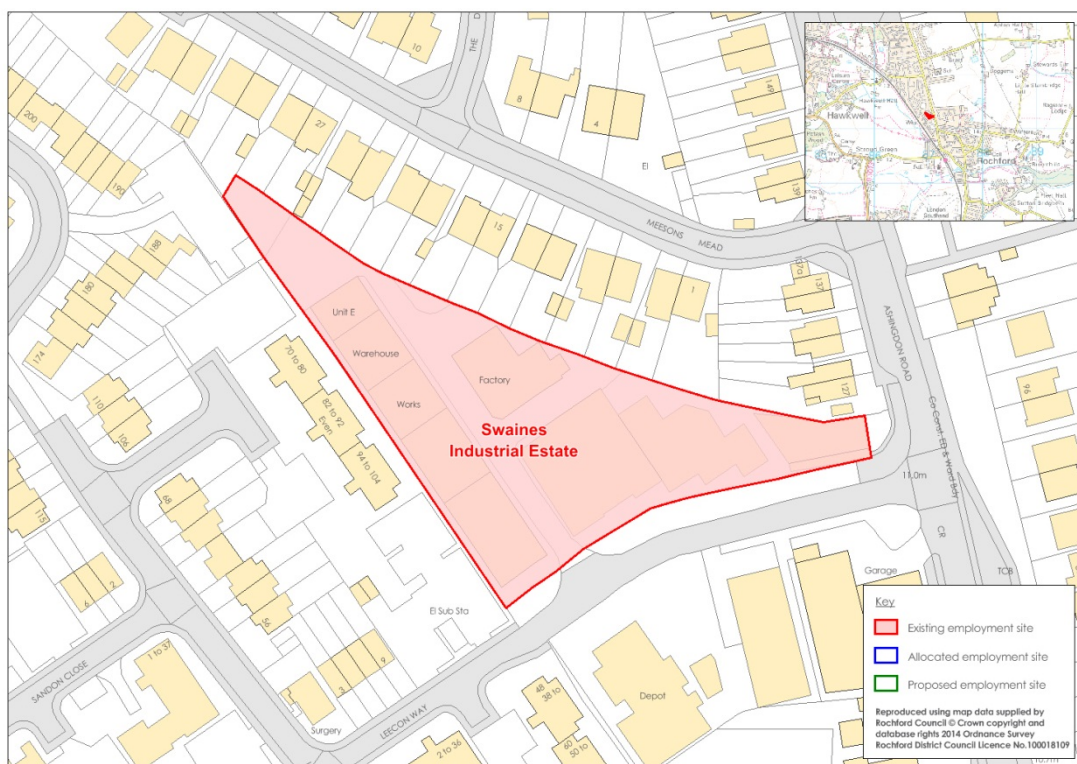
- 5.28 Internal access and movement within the site was limited and would be unlikely to allow for HGV access, however given the scale and nature of the activities this is not a major limiting factor on the appropriateness of the site.
- 5.29 The quality of the built stock is mixed, with some units having been refurbished whilst others show signs of disrepair that may affect their attractiveness. Whilst the entrance and buildings fronting the entrance road are generally of good quality and appearance the units to the right (accommodating Jet Wheel Tyres, Ashley Doors etc.) are of poorer quality and impact on the overall impression of the site.
- 5.30 The accessibility of the site has attracted some non-B class occupiers, with a bridal shop occupying a prominent building at the main 'internal' entrance. There are also two hot food takeaway delivery businesses located within the estate, occupying small light industrial units. These appear to focus on delivery rather than customer visits and therefore are likely to have limited impact on the site. However, they do reduce the B class employment capacity of the site overall.

Conclusions:

- 5.31 Generally the site and properties are fit for purpose and provide a suitable location for predominantly locally orientated 'service' activities. Over the plan period there are likely to be opportunities to improve the quality of the estate through redevelopment of existing stock and, potentially, new development on vacant sites.



Swaines Industrial Estate



Site Description:

- 5.32 Located to the north of Rochford on Leecon Way, the Swaines Industrial Estate is a small employment site in a predominantly residential area. The stock tends to be small, older units with occupiers focussed on servicing local needs.
- 5.33 The stock is of mixed quality and nature, predominantly comprising units constructed in the mid-twentieth century, albeit with some having undergone refurbishment to raise the quality and appearance of the stock.
- 5.34 Occupiers are predominantly a mixture of small engineering, car repair and trade counter businesses, with those 'customer facing' activities dominating the frontage with Ashingdon Road.

Strengths:

- 5.35 The site is well located to serve the needs of local residents, lying at the centre of a significant residential community. It is also relatively well served by public transport with a number of bus routes passing close to the site on Ashingdon Road.
- 5.36 The provision of smaller units is also a key strength, providing a floorspace type and size that is appropriate for smaller businesses. Whilst there is other space of this type within the District it tends to be within larger estates.

Weaknesses:

- 5.37 Strategic accessibility is an issue for the site, lying a significant distance from the major trunk road network. Access is via residential streets which will impact HGV movements and also, on the day of survey, did suffer from peak time congestion at key junctions. However, given the nature of the businesses within the estate these are unlikely to have major impacts on the business activity.

Conclusions:

- 5.38 The site is unlikely to change significantly, however appears to provide a local servicing role and is compatible with its surrounding context. The site should continue to be considered as a B class employment site.



Locks Hill Rochford



Site Description:

- 5.39 The Locks Hill area of Rochford is the District's most significant cluster of office floorspace. Located to the south of Rochford town centre, it provides good access to both the amenities of the retail core and the station.
- 5.40 Accommodation is provided in a mix of buildings, including a converted 'maltings' style property which has had a significant, more modern, extension alongside a standalone block at the front of the site that was constructed towards the end of the twentieth century.
- 5.41 Occupancy is underpinned by Rochford Housing, who occupy the majority of the 'maltings' building and its extension. The standalone unit appears to contain multiple occupiers.

Strengths:

- 5.42 Generally the quality of the office stock is good, with the 'maltings' conversion and its extension providing a high quality offer to the market. The site has good quality public realm, with landscaping around a good level of parking provision specifically for occupiers.
- 5.43 The site is well located with respect to the town centre and also has a strong prominence to the main road. As a result of its location on the edge of the town centre it is well served by public transport.

Weaknesses:

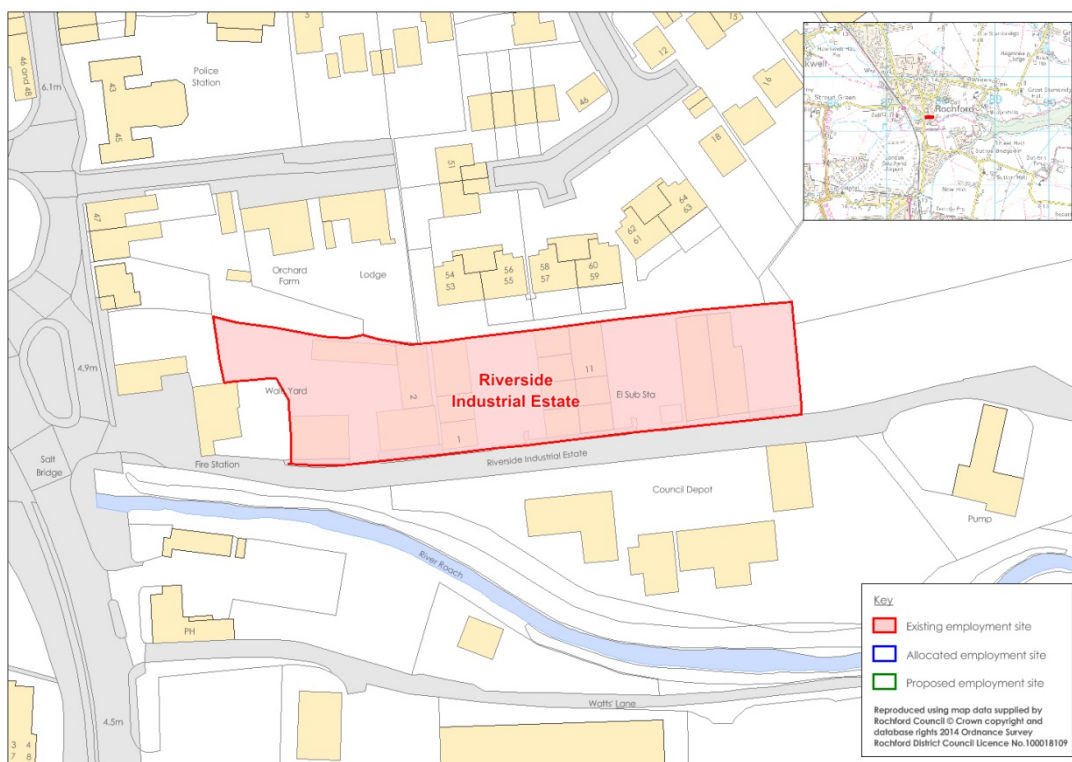
- 5.44 The key weakness of the site is the prominence of the lower quality appearance of the building at the gateway to the site. Whilst it is not of very poor quality it does not provide a strong image when compared to the rest of the offer.
- 5.45 Whilst located within the town centre there is a weaker relationship between core offer and the site, reducing its visibility to occupiers. This is a relatively minor issue and one the town centre AAP is likely to address as part of wider improvements to the town.

Conclusion:

- 5.46 Overall the site provides a good office offer compatible with its location on the edge of the town centre. The stock had relatively low vacancy levels indicating it continues to meet local needs. The site should remain allocated for employment uses with the upgrading of the 'gateway' building and connections to the town centre considered over the plan period.



Riverside Industrial Estate



Site Description:

- 5.47 The Riverside Industrial Estate lies to the south of Rochford town centre, opposite the Locks Hill area. It provides small, good quality employment floorspace accessed from the main road passing the south of the town.
- 5.48 There are two different 'character areas' within the site. To the front lies a small development of predominantly office stock (Wallis Yard) and to the rear are small light industrial units organised around courtyards which feed onto South Street. The front of the site (outside of the employment land boundary) is occupied by a fire station.
- 5.49 Outside of the employment land designation lays the RDC Depot (to the south of South Street), areas of storage and a coach/bus depot, both uses which are compatible with the character of the Riverside Estate.
- 5.50 There are a wide range of occupiers within the site including small engineering companies, car repairs, construction and printers.

Strengths:

- 5.51 The units provided within the estate are relatively modern and of good quality. The Wallis Yard office development appears to be a reasonably new addition to the estate.
- 5.52 The size of units clearly meets a need within the local area. The site is well occupied with few identified vacant units during the site visit or commercial data analysis. The size of units and nature of occupiers suggests that the site is well organised and placed to service local resident and business needs.
- 5.53 The site is relatively well located to access the town centre and also benefits from good public transport provision.

Weaknesses:

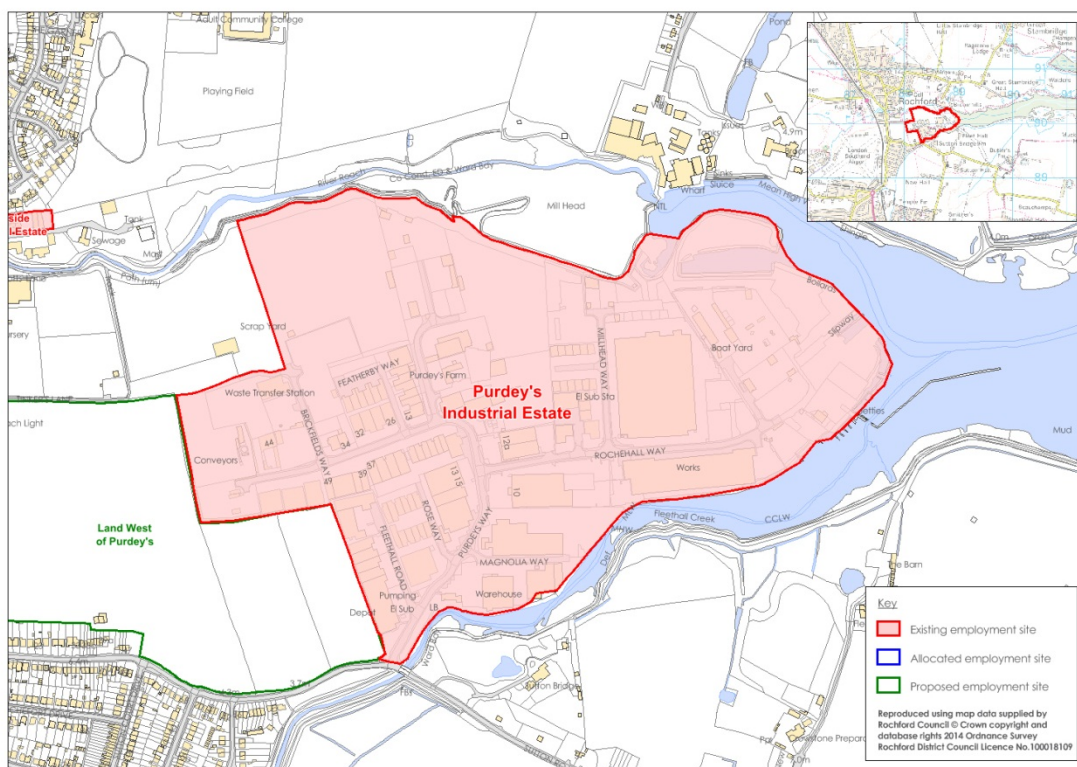
- 5.54 The major weakness for the site is access, which is via a narrow entrance to the south of the fire station; this provides essentially a single carriage way in/out of the site with relatively poor visibility.
- 5.55 The site is clearly accessible for larger vehicles given the presence of the depot and bus storage however the access point and the internal road layout do create some conflicts.

Conclusions:

- 5.56 Overall, the site is of good quality and provides a number of local service activities for Rochford (for example car repairs). Whilst there is no potential for the site to increase its employment role due to wider constraints on access and available land it acts as an important local resource and also complements the Council depot. As such the site should be retained as a locally orientated employment site.



Purdeys Industrial Estate



Site Description:

- 5.57 Purdeys is the largest single existing site in the District and accommodates a wide range of B and non-B class employment generating uses. The stock is of mixed type, age and quality with a number of newer units delivered alongside a number of older, poorer quality units.
- 5.58 The entrance to the site is from a relatively small scale highway to the south of Rochford. The units either front the main estate road (Purdeys Way) or lie on cul-de-sacs which feeds onto this road. The Estate has a number of different 'character areas' which offer a different type and scale of offer.
- 5.59 The entrance to the estate is dominated by non-B class employment uses including large retail warehousing and leisure uses. This area also accommodates some of the larger B class units, although the largest of these is currently vacant. Smaller units within the estate are provided in two locations, along Rose Way and Millhead Way (where there has been new units delivered). Albon are a major occupier and have

two large units on Rochehall Way, which then leads to a large area of open storage to the east, closest to the river/marina.

- 5.60 To the north (Brickfields Way, Welton Way) there is significant waste processing and scrap metal activity including car breakers and a number of salvage yards. This area is much less organised with limited built stock. It is also an area with poorer quality public realm and roads.

Strengths:

- 5.61 The key strength of the site is its scale, providing space for larger occupiers which would not be accommodated within the District's other employment sites. It also allows a diverse range of activities to be undertaken within obvious conflicts.
- 5.62 The site accommodates a number of the District's largest employers and activities. Albon occupy two large plots along Rochehall Way. This includes a relatively new building to the south of the road which combines a significant office component with a new industrial/warehouse space. Their site opposite is older but remains in good condition.
- 5.63 There has been a significant development of new, smaller light industrial units to the west of Millhead Way. These provide smaller light industrial spaces and appear well occupied by a range of business types, albeit some with a quasi-retail use (such as a guitar retailer). The scale, nature and occupancy of these units suggests that there is a demand for good quality space in the area.
- 5.64 Generally the stock is in good condition and the area is well maintained. Older stock tends to be in good repair and sits alongside new, high quality office/industrial spaces. Whilst there is limited landscaping across the site (reflecting its major uses as an industrial estate not a business park) the communal areas are generally in good condition and free from fly tipping, creating a good impression for occupiers.
- 5.65 Whilst there are a number of non-B class activities these do not have a major impact on the character or impression of the site given its scale. Each has significant parking and there appear to be few conflicts between B and non-B class trading. The site provides good circulation, servicing and parking for each unit.

Weaknesses:

- 5.66 Whilst the overall quality of the site is appropriate for the activities within it there are areas where either stock or the public realm is weaker, these tend to lie to the west of Purdey's Way and to the north of the site generally. These areas tend to be linked with lower value and waste-orientated activity.
- 5.67 Stock quality is notably older along Rose Way and Fleethall Road, however many units appear to be well maintained. Given the nature of the stock it is likely that it will require redevelopment over the duration of the plan period to meet business needs.
- 5.68 The environment and public realm is poor to the north of Purdey's Way, particularly along Brickfields Way and Welton Way although it does not affect the activity of the businesses, which are largely linked to waste processing and scrap metal. Some conflicts were noted in this area between large waste vehicles and other road users, particularly where Brickfields and Welton join Purdey's Way.
- 5.69 Whilst access and movement within the site is not generally an issue there appears to be some challenges to the strategic access arrangements at the junction of Sutton Rd-Southend Rd. This is a relatively minor road and mini-roundabout which, on the day of survey, appeared to be a challenge to larger vehicles and cause some congestion issues. Clearly the site functions adequately with the current arrangement, however access could limit its future potential.
- 5.70 The presence of major non-B class activity at the entrance to the site (specialist clothing retail, a roller disco and soft play centre) dominate first impressions. Whilst the uses do not appear to create issues for business operation they do impact on the capacity of the site to accommodate future B class activity and, given they tend to achieve higher rents, continue to 'squeeze' B class uses out of other prominent sites within the estate.

Conclusions:

- 5.71 Overall the Purdey's Estate is a good B class employment area, with a generally appropriate environment, a good range of stock and important occupiers for the local economy. Potential exists to make better use of land within the site, particularly through consolidation of scrap & waste transfer uses which make inefficient use of land. There is also potential to deliver new stock on some of the open storage yards

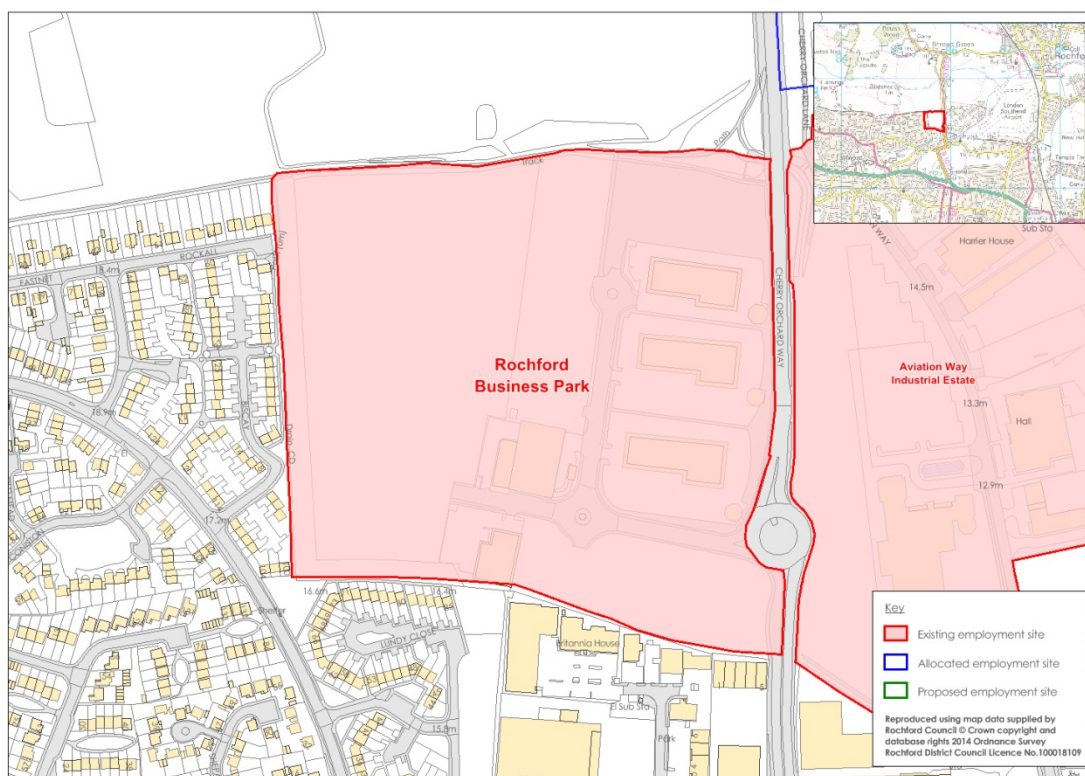
and by redeveloping older stock along Purdeys Way to intensify the utilisation of land. Development within the site previously has demonstrated there is likely to be demand for this type of space.

5.72 However, it is likely that this capacity for additional development will need to be balanced with the limitations of access via the Sutton Rd-Southend Rd junction, which is likely to have limited capacity for additional traffic (particularly HGVs).

5.73 As such, the site should be retained and protected for B class uses, with the encroachment of non-B class activity carefully monitored to ensure it doesn't negatively impact operating conditions. Opportunities to deliver new, high quality space within the estate should be supported.



Rochford Business Park



Site Description:

- 5.74 Rochford Business Park lies to the south east of Southend airport at the northern edge of the Southend on Sea urban area. It occupies a high profile location on a major approach road to the airport on Cherry Orchard Way. The site represents an opportunity to develop new B class employment floorspace within cleared and potentially serviced sites. However, a number of non-B class (employment generating uses have been permitted within the site which, if delivered, would limit the capacity to accommodate B class uses within the site.
- 5.75 At present the site is dominated by non-B class employment generating uses with a cluster of new, high quality main car dealerships located along the main road frontage. Vacant sites lie to the rear of these activities.
- 5.76 Whilst outside of the District the site adjoins some higher quality employment floorspace to the south, which provides significant office stock. To the east lies the

Aviation Way Industrial Estate, which is separated from this site by Cherry Orchard Way and some open space.

Strengths:

- 5.77 The opportunity for new development to come forward on undeveloped land with strong strategic access and visibility are the main strengths for the site. It's location and separation from existing industrial estates but proximity to high quality office-led provision at the northern end of Comet Way suggest a different form of development can be achieved here than on the majority of other existing sites.
- 5.78 High quality road infrastructure is already in place, providing significant capacity and easy access to/from the main road. Its proximity (and accessibility) to the airport also provides an opportunity to secure future occupier demand.

Weaknesses:

- 5.79 This site's employment development potential is impacted by the planning consent on the front half of Rochford Business Park for 7 car dealerships, petrol filling station and valeting centre (application ref 05/00536/REM) where 4 of these car dealerships remain outstanding. It is also impacted by a recent application approved on appeal (ref 12/00619) for development of a drive through restaurant with offices above, on a small part of the site.
- 5.80 The image and perception of the area is already dominated by the car dealerships which occupy the road frontage. Whilst compatible with B class activities, these current uses and the further permitted developments identified, will erode the opportunity to deliver high quality B class space and may restrict attractiveness to some occupiers.

Conclusions:

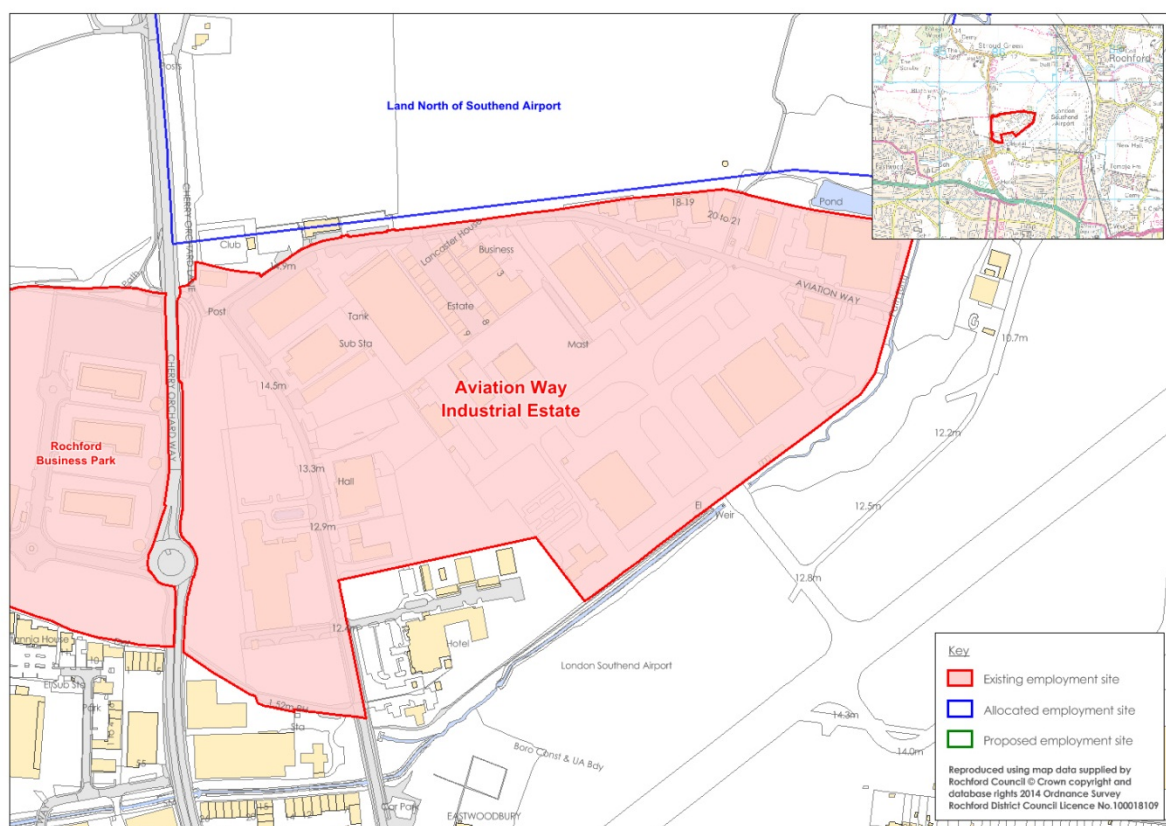
- 5.81 The site presents a key opportunity within the District to deliver new, high quality employment space in close proximity to the areas major economic driver. It would appear to offer a good opportunity to accommodate businesses that would wish to be in close proximity to the airport but do not require space 'on-airport'. Future uses could include office based activity and higher quality industrial/warehouse development given the quality of the road access. However, the presence of non B class employment uses currently on site, and permitted to be developed, would limit

the capacity to accommodate B class uses within the site a number of non-B class (employment generating uses have been permitted within the site which, if delivered, would limit the capacity to accommodate B class uses within the site, as well as potentially reducing occupier interest in the site for B class employment uses.

- 5.82 The site should be retained for employment uses, and the delivery of high quality space that broadens the existing portfolio supported. However, should the existing planning permission be delivered it will limit the capacity of the site to accommodate B class activity.



Aviation Way Industrial Estate



Site Description:

- 5.83 The Aviation Way Estate is one of the largest within the District and accommodates a broad range of activities and property types. Activity ranges from small, locally orientated service businesses to large national and international manufacturing.
- 5.84 The site lies to the immediate north of the London Southend Airport runway and has attracted a cluster of airport related maintenance, repair and overhaul (MRO) businesses. These include InFlight, who provide a range of aircraft repair and refit services, whose site benefits from direct access to the airport operational area. Also within the site are Ipeco, a leading manufacturer of seating, galley equipment, power management and materials for the aircraft industry.
- 5.85 Stock within the site is mixed, a number of units have been recently refurbished or are new and provide a high quality offer. There is a cluster of higher quality buildings,

including newer office stock to the east of the site, including Lancaster House, Cohav House and 18-19 Aviation Way (occupied by printers EC2i).

- 5.86 Industrial stock is itself varied. Large production units occupied by Ipeco, Inflite and Air Livery, are of mixed quality with some of Ipeco's units appearing dated and of lower quality.
- 5.87 Smaller units are provided in 'courtyard' developments accessed from Aviation Way. The Lancaster Business Park provides relatively new small and medium sized light industrial units which appear to be high quality. The Robert Leonard Industrial Park provides older, smaller units, which predominantly accommodate a number of car repair and engineering businesses.

Strengths:

- 5.88 It is clear that the major strength of the site is its proximity and access to the airport, enabling a number of businesses direct access to their market and client base. For Inflite this includes the benefit of a link to the runway which enables aircraft to be serviced off-site.
- 5.89 Strategic access to the site is good, with relatively direct links to Nestuda Way and onwards to the major road network; internal circulation is also generally good, albeit with some minor conflicts with on-street parking on Aviation Way.
- 5.90 The range and quality of stock is also generally a strength, with the site accommodating some of best quality office space within the District in particular. This has established a broad range of business sectors including marketing, ICT and professional services alongside manufacturing activity.

Weaknesses:

- 5.91 The site is developed at a relatively low density. In part this is necessary to provide aviation businesses the necessary space to accommodate aircraft. However there are sites within the estate that would appear under-utilised and could therefore make a more significant contribution to the District economy.
- 5.92 There are areas of weaker stock which, whilst still meeting occupier needs, do undermine the overall quality and appearance of the site. Weaker buildings tend to

be those that are used by the larger occupiers for production or hangar space, they are therefore large and relatively prominent.

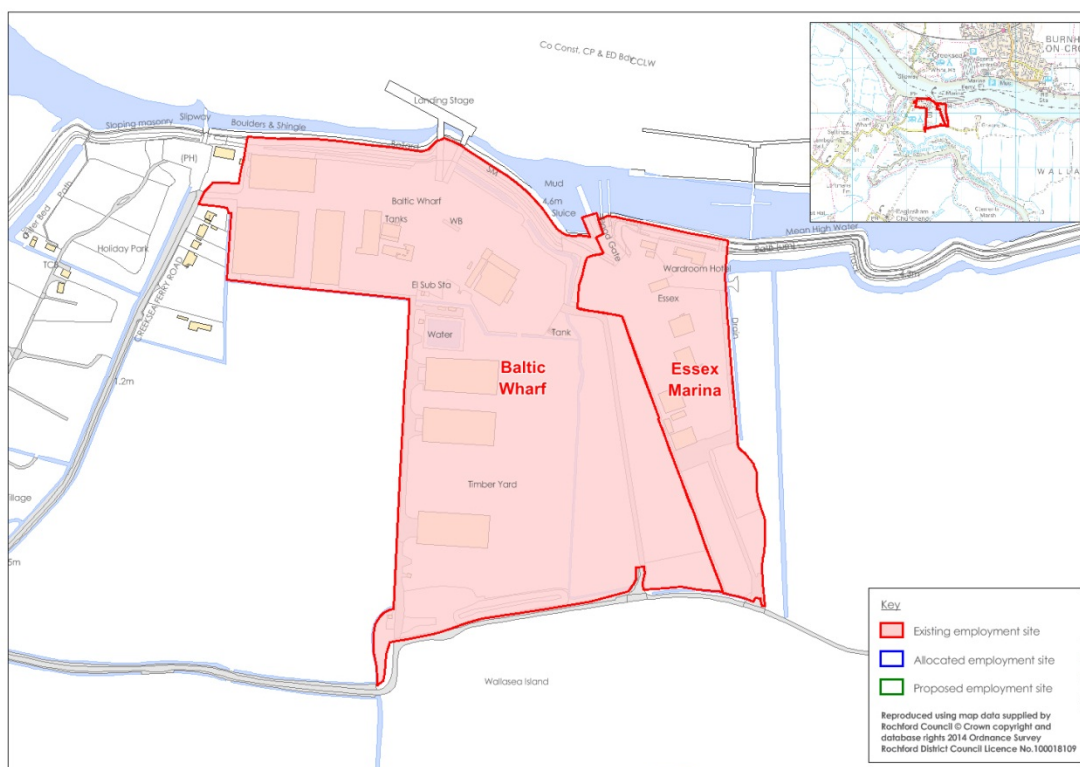
- 5.93 Whilst the presence of Ipeco within the site is major strength the dispersed nature of the business is a risk. With such a high profile single occupier being 'pepper potted' across the Site there is a risk that any withdrawal or consolidation by the occupier could create significant vacancy but not allow a comprehensive redevelopment opportunity. Ipeco have previously explored options for relocating to land north of Aviation Way and a dialogue should be maintained to ensure best use is made of their existing sites if vacated.

Conclusions:

- 5.94 The Aviation Way Estate is a key economic hub for the District and wider sub-regional economy; it plays an important role in accommodating uses that support the operation of the airport, a major driver for the South Essex economy. As such it should continue to be protected as a B class employment site.
- 5.95 The special link the site has with the airport should continue to be recognised and supported, ensuring aviation related businesses are retained and future sites promoted to expand the cluster.



Baltic Wharf and Essex Marina



Site Description:

- 5.96 These separate but adjoining sites lie at the north eastern tip of the District on the Blackwater Estuary and are accessed via small 'country lanes' rather than trunk roads. The surrounding area is open countryside/marshland with a major RSPB sanctuary lying further east and a caravan park to the west.
- 5.97 Baltic Wharf is a relatively remote small 'port' specialising in the importation of wood and timber, mainly from the Baltic States and Scandinavia. The site also contains a sawmill and timber treatment facility. Much of the landside area is dedicated to the storage of timber.
- 5.98 Essex Marina adjoins Baltic Wharf and is used for pleasure craft storage, maintenance and sales. The Marina has a small number of repair and maintenance operations, with the majority of the area used for boat storage.

Strengths:

- 5.99 The core business driver in this location is access to the Blackwater Estuary, which enables both the importing of timber to Baltic Wharf and access to pleasure craft for Essex Marina. As such, whilst these sites are remote from the core areas of activity within the District they are ideally placed to service their market.
- 5.100 Generally the sites are well used with no vacancies or empty buildings observed or identified through the review of the property market. There is potential for intensification of activity in physical capacity terms, however it is unlikely that the location would attract demand beyond the current scale and nature,

Weaknesses:

- 5.101 Overall the Baltic Wharf site is of poor quality with buildings appearing to be in a poor state of repair and the 'public realm' around the perimeter poorly maintained and suffering from significant fly-tipping. Essex Marina is significantly higher quality, with a good quality entrance, public realm and road. However, it is unlikely that, given the nature of activity at Baltic Wharf, the quality of environment is a particular issue.
- 5.102 Access to the sites is also weak, with long and indirect routes to the main road network via minor roads. These roads are not ideal for major HGV activity, which is likely to be important to occupiers of both sites.

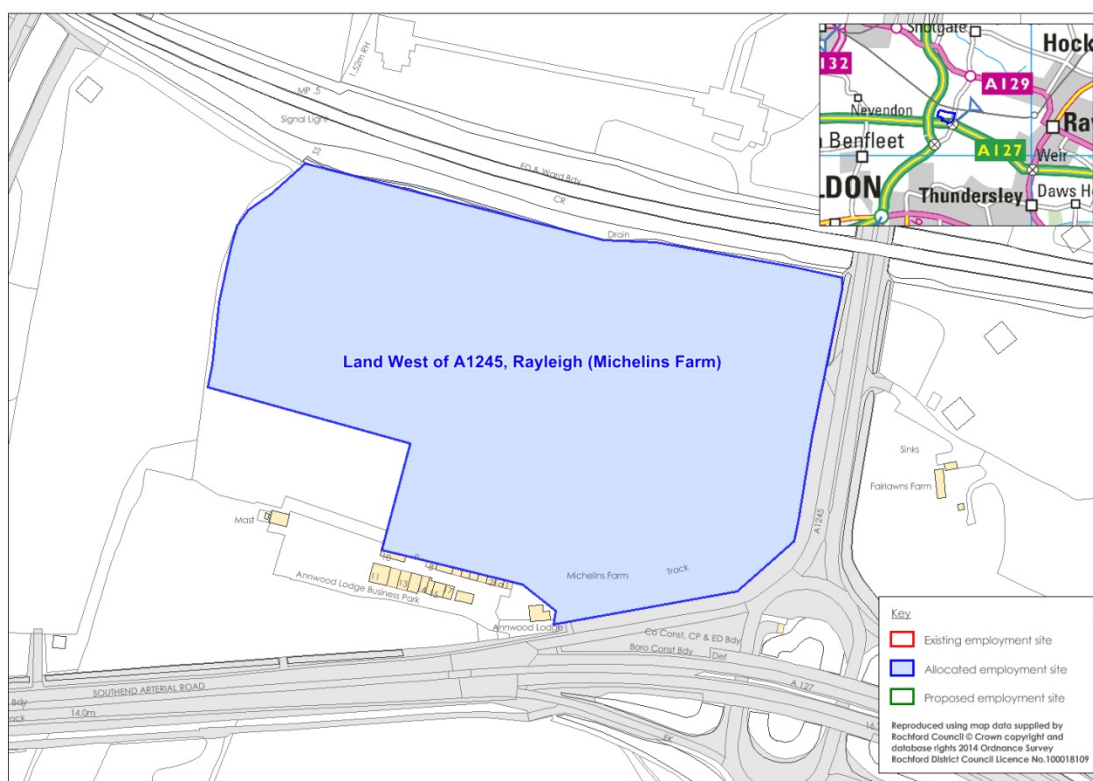
Conclusions

- 5.103 Whilst the sites do not present the 'strongest' employment offer and future growth opportunities are limited, they are appropriate in scale, location and nature for the activities they accommodate. They are important both to the local economy and also more widely given the boat servicing and timber import. As such the sites should be retained and protected as key locations for existing uses and activities.



Potential New Sites and Land

Land West of A1245, Rayleigh



Site Description:

5.104 The site is currently greenfield land that lies to the west of the urban area of Rayleigh, at the junction of the A127 and the A1245. It is bounded by the train line to the north, the A127 to the south, the A1245 to the east and open space to the west. The site has been allocated in the adopted Allocations Plan for future use by a range of employment generating activity including displaced activity from the de-allocated Rawreth Industrial Estate and new, high quality office and industrial development.

Strengths:

5.105 The key strength of the site is its location, which provides both direct access to the trunk road network (via potential new access points to the A1245 and A127 slip road) and also visibility from the key route into and through the District. As a 'new' development the site can establish a high quality strategic character which will

differentiate it from the existing portfolio of sites, providing greater location choice within the District.

- 5.106 As noted in previous Employment Land Studies, the site lies in the strongest location within the District for office floorspace demand and also where the supply is relatively weak. As such the site would benefit from the most favourable conditions to support development.

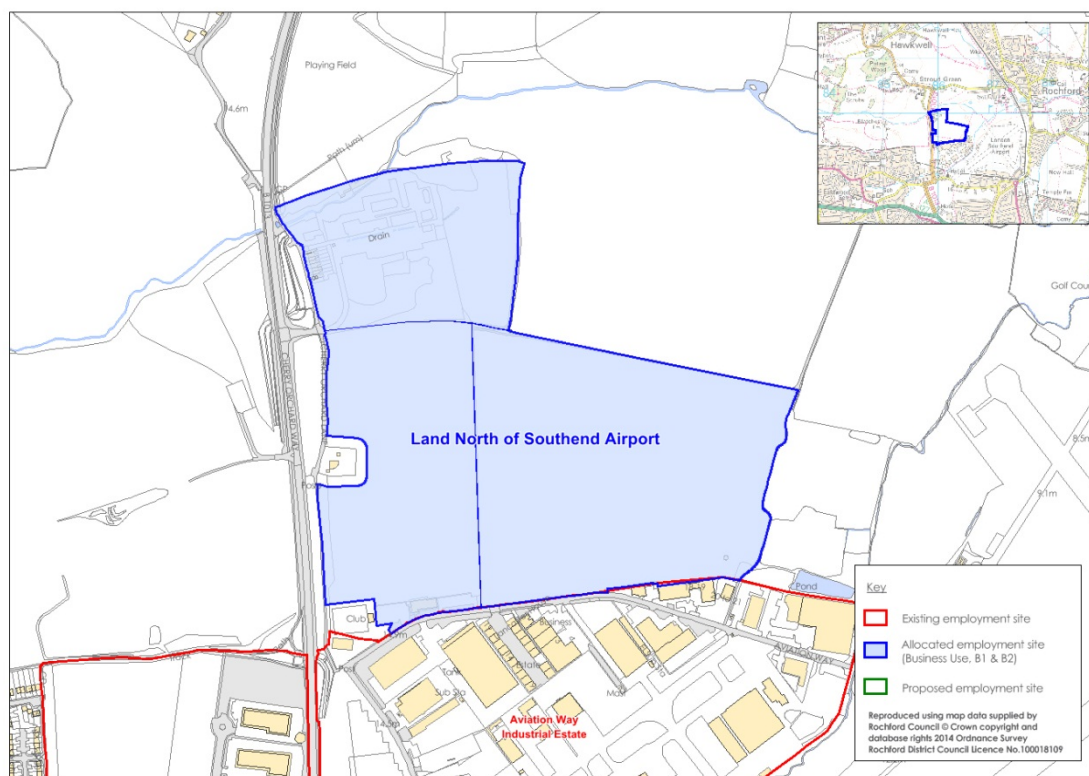
Weaknesses:

- 5.107 As a greenfield development opportunity the key issues for delivery of the site are the upfront requirements for site preparation, including clearance, access and servicing provision. The site also has some level changes, although these are not likely to significantly affect any future development.
- 5.108 Whilst well connected to the trunk road network, the site is not directly served by public transport and is not in close proximity to wider amenity provision.

Conclusion:

- 5.109 The Land West of the A1245 provides an attractive and appropriate location for the delivery of new employment space over the plan period. It is located within the strongest commercial market sub-area and provides an accessible and visible development opportunity. Future development should seek to create an offer that is not likely to be achievable within the portfolio of existing sites, in particular providing modern office and industrial space in a high quality environment. It also provides some capacity to offset the impact of redeveloping Rawreth Industrial Estate for non-B class uses.

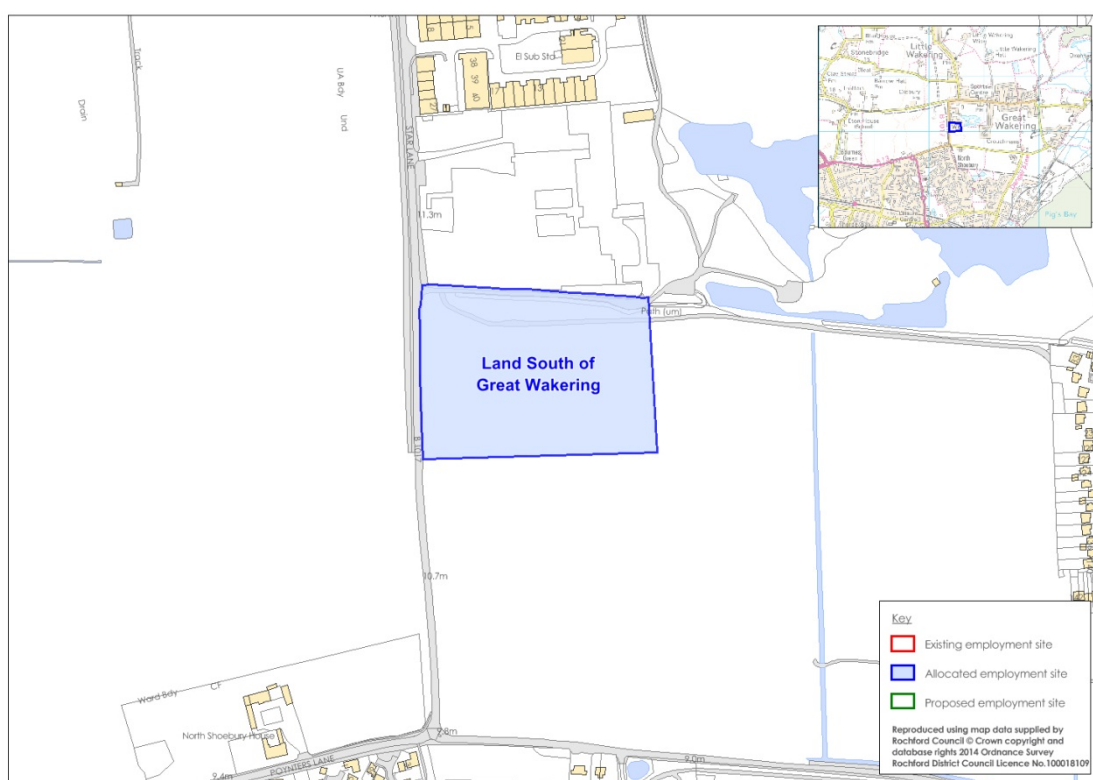
North of London Southend Airport



- 5.110 Through the London Southend Airport and Environs Joint Area Action Plan, land has been allocated to the north of Aviation Way to provide a high quality business park with capacity to accommodate additional aviation related businesses, expanding the cluster of activities already present within the Aviation Way Estate, and other high value businesses which could benefit from locating near the airport.
- 5.111 Previously, interest had been expressed in the site by Ipeco, who were seeking to consolidate and expand operations currently within the Aviation Way Estate. Whilst macro-economic trends have stalled this proposal it does demonstrate the strength of the site in terms of providing a location for airport related activity.
- 5.112 The site benefits from the same strong road connections as the existing Aviation Way Estate, and these could be potentially improved if development delivered to Cherry Orchard Way.

- 5.113 Development here would enable new, good quality bespoke space to be delivered in a location which has demonstrated success in attracting business activity. It would enable the current offer in the area to be broadened and support the existing estate.
- 5.114 Over the plan period the land would provide a competitive offer to attract businesses from the aviation sector, its supply chain and also others seeking good quality, accessible space.

South of Great Waking

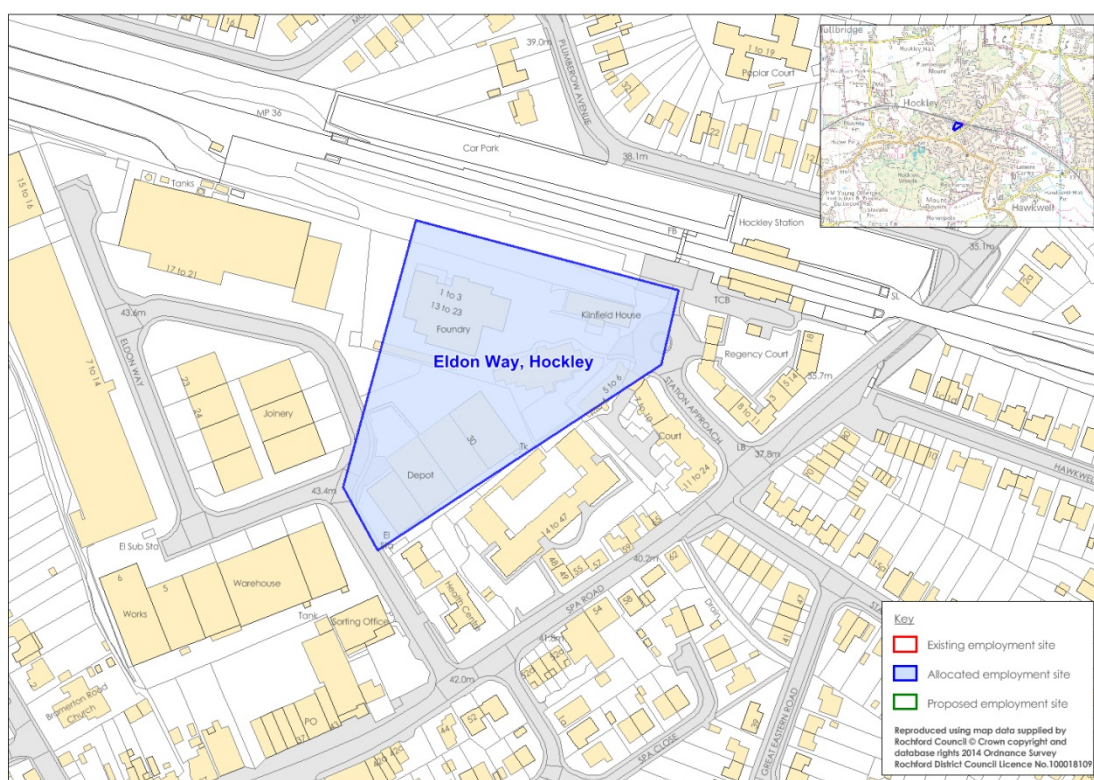


- 5.115 The existing Star Lane industrial area and the former Stambridge Mills site were both 'de-allocated' from employment use within the Local Plan Core Strategy with a new site identified further south on Star Lane for future employment development. The former sites are proposed, over the plan period, to be redeveloped for residential use.
- 5.116 The allocated site is greenfield with no existing access to the road network; however it lies close to the junction of Star Lane and Poynters Lane, which provides access to the strategic road network.

5.117 The site is relatively remote from the area's main economic hubs and has weaker road access than other sites; as such it is unlikely to be a location for strategic economic growth.

5.118 However, it is well connected to the local area and will be an important location for accommodating more localised needs, particularly when the existing estate is redeveloped. Given the lack of other employment provision in this part of the District, its connections to Great Wakering and the surrounding area, it is likely to form a reasonable, small scale employment location.

Eldon Way Hockley



5.119 Eldon Way is identified within the Hockley Area Action Plan as an area of significant change and redevelopment. It is currently occupied by a dated industrial estate which suffers from significant vacancies and accommodates a high number of non-B class 'leisure' uses.

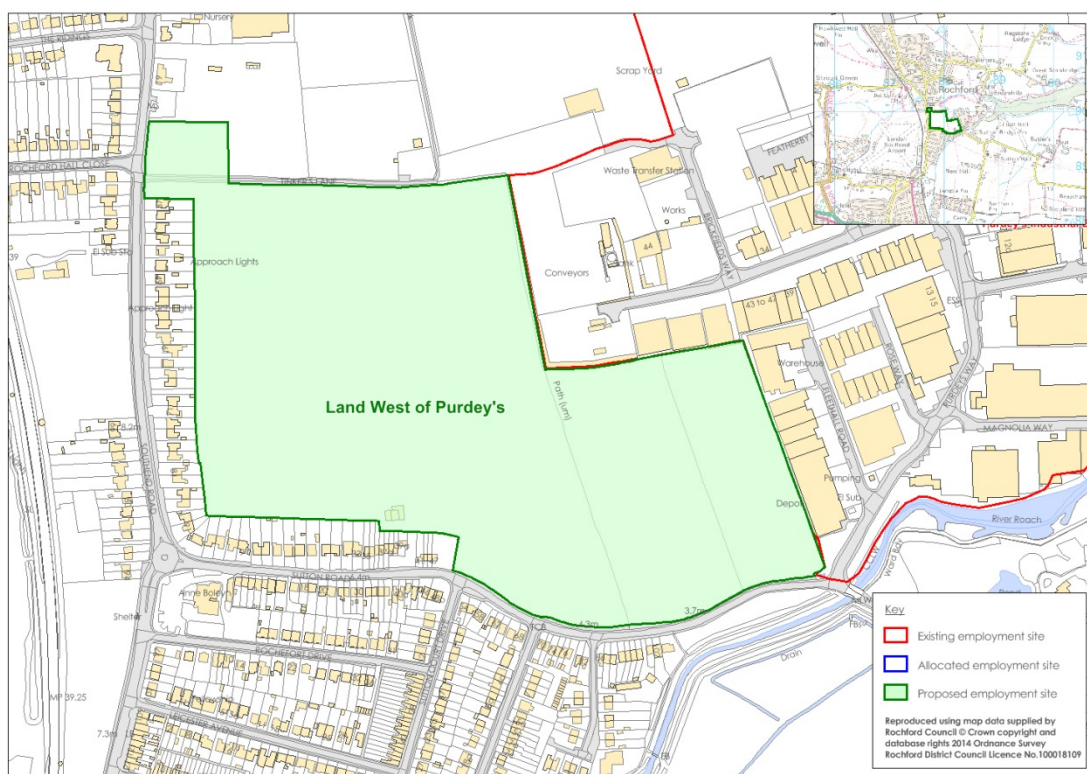
5.120 The AAP vision identifies the potential to better utilise the land asset, enhance its role within the town centre and make better use of the connections to the rail station. A

mixed use redevelopment is envisaged that would see the consolidation of employment uses to the east of the area.

- 5.121 The current stock is clearly not meeting business needs and is poorly located within the District. The consolidation and introduction of new activity could have considerable benefits for the town. Given the connections to the station and the town centre it is likely Eldon Way will provide an attractive location for a range of small and start-up businesses, particularly those that are run by local residents or serve the local catchment.
- 5.122 Demand is likely to be small scale both in terms of total quantum but also in terms of the types of units required. The mixed use development approach would support a change in offer to provide smaller workshops and office spaces, ensuring a wide range of local needs could be met in an area with little existing, fit for purpose provision.

Potential Additional Employment Land

Land West of Purdey's Industrial Estate



5.123 The potential for employment development on land immediately to the west of the existing Purdey's Industrial Estate have been considered by the Council. The land is not currently allocated but has been raised as a future opportunity for B Class development by a third party through the Core Strategy/Allocations Plan Call For Sites process. Given the scale and location of the site, and in line with the NPPG, it has been included within the assessment to ensure a comprehensive understanding of the District's potential land supply is achieved. By considering this proposed site alongside those that are already active or allocated sites allows consistent and comparable conclusions to be drawn, as directed by the NPPG.

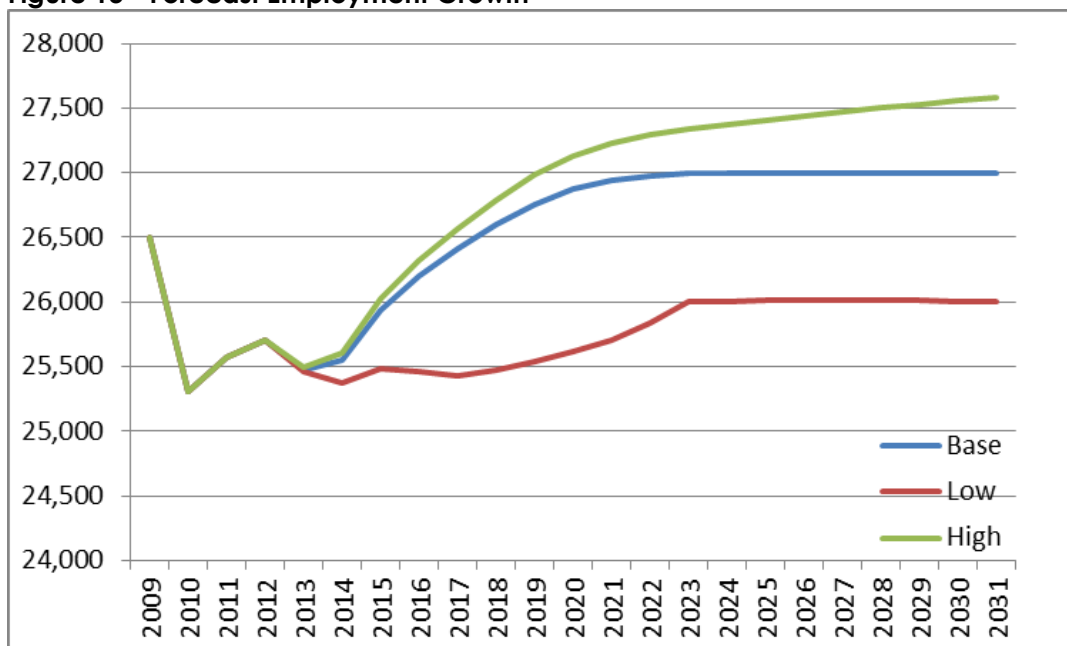
5.124 This would use a greenfield site that lies north of Sutton Road, south of Tinker's Lane, and west of the existing estate. The site is not currently allocated within the Core Strategy for employment, and is designated as green belt.

- 5.125 In economic terms this would appear a suitable location given its relationship to the existing Purdey's Estate, however it's allocation should only be considered if (through this study) an additional land requirement is identified or the assessment considers it to be more suitable, available and achievable than the existing allocations
- 5.126 The site could form a new extension to the existing estate, providing additional capacity to deliver new, high quality floorspace close to existing economic activity. Any development here should seek to broaden the portfolio of employment floorspace, complementing the predominantly large scale units within Purdey's with smaller, high quality light industrial units. It should be ensured that it is not used to extend the local employment generating open storage or waste/scrap processing activities.
- 5.127 Similar to the existing estate the potential and attractiveness of this additional land will be limited by the poor access to the site via the Sutton Rd-Southend Rd junction. With a significant increase in traffic a new access solution will be required, which will be challenged by the nature of development around the existing junction. As such, even if the site is allocated on the back of 'economic need', it may not truly be deliverable and therefore not an appropriate site in NPPF/NPPG terms. . In addition, gaining approval for employment development would be significantly impeded by the land's green belt designation.

6. Employment Growth and Demand

- 6.1 In understanding the range and portfolio of future employment land and floorspace need it is important to understand the potential nature of employment growth within the District over the plan period, to ensure sufficient provision is made and protected within the District's employment sites.
- 6.2 This section sets out the forecast scenarios used within this Study to understand the 'reasonable alternatives' for potential future growth. The forecast is based on the employment growth projections provided by East of England Forecasting Model (EEFM) published in 2013; these provide a consistent base for forecasting employment growth across the East of England region.
- 6.3 Three EEFM scenarios are tested alongside an additional 'sensitivity test' that considers the impact of enhanced employment growth driven by the airport on each of the EEFM scenarios.
- 6.4 The EEFM has 3 core growth scenarios, a Baseline with two 'alternative' scenarios based on different interpretations of population growth factors and recessionary impacts (a high and low growth scenario respectively).
- 6.5 These scenarios have significant impacts for overall forecast employment growth as shown below.

Figure 13 - Forecast Employment Growth



Source: East of England Forecasting Model, 2013

6.6 Under these scenarios Rochford District would experience employment growth of between 1% and 7% over the plan period. These scenarios would also have differing impacts on the scale and nature of growth by broad sector:

Table 20 - Forecast Growth by Sector

	BASE		LOW		HIGH	
	Change	%	Change	%	Change	%
Construction	455	16.2%	338	12.0%	526	18.7%
Business services	406	31.8%	342	26.7%	443	34.7%
Professional services	363	22.7%	289	18.1%	405	25.3%
Hotels and restaurants	268	17.9%	204	13.6%	308	20.5%
Arts and entertainment	212	23.5%	168	18.7%	238	26.4%
Other services	210	20.0%	167	15.9%	236	22.6%
Land Transport	116	9.4%	63	5.1%	148	11.9%
Education	90	3.0%	-27	-0.9%	153	5.0%
Computer related activity	88	24.8%	73	20.5%	97	27.3%
Real Estate	85	25.3%	70	20.8%	93	27.8%
Employment activities	69	21.3%	54	16.8%	78	23.9%
Water and air transport	15	53.9%	13	48.2%	15	57.4%
Publishing and broadcasting	13	21.8%	10	17.3%	15	24.4%
Health and care	9	0.5%	-64	-3.2%	52	2.6%
R+D	4	48.6%	3	43.3%	4	51.8%

Source: East of England Forecasting Model, 2013

- 6.7 Having established the scale and nature of growth by broad sector it is necessary to translate these economic activities in broad property types based on the land use planning class system. To do this we have analysed each of the EEFM sectors to understand the composition of each in terms of detailed SIC code. Using our professional experience we have then assigned each of these SIC codes to a use type across three categories – B1a/b, B1c/B2 and B8.
- 6.8 Employment shares are attributed to each of the use classes in the base year (2012) using estimated employment shares drawn from ONS data; this forms the basis of the land use forecasting model. Onto this base the EEFM growth rates are applied, ensuring floorspace growth forecasts are driven by employment growth expectations.
- 6.9 Once 'assigned' to a floorspace type each FTE job is then translated into a floorspace (in square metres) based on 'industry standards' provided by the HCA Density Guide, 2010. In this model these are:

- B1a/b – 12sqm per employee
 - B1c/B2 – 36sqm per employee
 - B8 – 85sqm per employee
- 6.10 Ultimately this floorspace is then translated into a 'land requirement' using a standard set of plot ratios drawing on our professional experience and the nature of market delivery within the District. These plot ratios are:

- B1a/b – 0.8
- B1c/B2 – 0.4
- B8 – 0.4

Contingency Allowance and Market 'Churn'

- 6.11 In order for future employment forecasts to be based on more than economic growth 'predictions' and to better reflect the fluid nature of land allocations, the forecasting model makes two 'additional allowances'.
- 6.12 Firstly, a contingency allowance is made which takes into account the fact that a proportion of designated employment land will not be entirely used by B-Use-Class employment. Land uses such as: recycling, waste management, combined heat and power plants and bus depots can, under certain circumstances and where appropriate, be located on employment land.
- 6.13 A significant part of the projected employment growth also arises from sectors which have traditionally not been located on B Class employment land such as healthcare, education, hotels and leisure.
- 6.14 Under specific circumstances and where appropriate, employment land might also be used as part of a more mixed-use scheme which would enable employment development to come forward on a proportion of it.
- 6.15 Furthermore, with the extension of Permitted Development Rights (albeit only for three years) making the conversion of office premises to residential use more straightforward, there is the potential for an increase in the unexpected loss of employment floorspace.

- 6.16 To estimate the amount of land that may be used for non-B class activities, historic losses of employment land to other uses such as housing and leisure as reported in the Council's Annual Monitoring Report have been used.

Table 21 - Allowance for Windfall Losses

	Office (sqm)	Industrial (sqm)	Warehouse (sqm)
2012-2013	0	750	0
2011-2012	0	1,032	6210
2010-2011	168	518	0
2009-2010	1,200	0	0
Average Annual Loss	6,498	10,925	29,498

Source: Rochford District Council Annual Monitoring Reports

- 6.17 Over the Plan Period the allowance for windfall losses is calculated to be circa 47,000sqm of floorspace.
- 6.18 This approach has its limitations, principally because the information has only been consistently collated for four previous years. This data is still used, however, with the proviso that it should be monitored each year and new figures considered to give a longer term projection of losses of employment land. This could have a considerable effect on future employment land needs, depending on employment land losses in each year.
- 6.19 As well as making an allowance for unexpected losses of employment land, allowance is made for the fact that locational and premises needs of businesses change over time. This requires businesses to move. In other instances an existing business might cease its operations and a new business take over a site for redevelopment. For this to happen smoothly there is a need for a certain level of available vacant land. This type of demand has been called 'churn' demand or 'frictional vacancy'.
- 6.20 An allowance for 'churn' is calculated from the average annual construction rate of space within the District as recorded within the Annual Monitoring Report.

Table 22 - Allowance for Churn

	Office (sqm)	Industrial (sqm)	Warehouse (sqm)
2012-2013	0	240	0
2011-2012	0	110	0
2010-2011	0	0	0
2009-2010	0	853	1,185
Average Annual Loss	0	602	593

Source: Rochford District Council Annual Monitoring Reports

- 6.21 It typically takes two years to achieve a planning consent, site preparation and construction after a site has changed hands. For these reasons the annual net take-up of employment floorspace is multiplied by two to estimate the churn demand. This is, in effect, an allowance for the necessary frictional vacancy to allow the market and relocation chains to operate.
- 6.22 This allowance for churn, allows the commercial property market realities to be added to the economic forecast.

Base Forecast

- 6.23 The baseline scenario EEFM forecast for Rochford sets out the 'business as usual' employment growth scenario for the District to 2031 across 30 economic sectors. This forecasts total employment will grow by 5%, a total of 1,287 FTE jobs.

Table 23 - Base Forecast Land Requirement

	Floorspace Demand 2012 - 2031	Allowance for windfall losses	Allowance for Churn	Change in floorspace	Change in Land
	m ²	m ²	m ²	m ²	Ha
Office	7,761	6,498	0	14,259	2
Industrial	-13,134	10,925	602	-1,607	-1
Warehouse	-195	29,498	593	29,895	4
Total	-5,568	46,921	1,194	42,546	4

Source: EEFM, GVA, 2014 – figures may not sum due to rounding

6.24 The base forecast identifies a total land requirement of 4ha, with a predominant increase in land for warehousing needed. The need for additional office land, in quantitative terms, largely offsets the forecast loss of industrial space.

The Low Growth Scenario

6.25 Using the EEFM “Lost Decade” scenario it is possible to test the potential implications for employment land of a prolonged impact and weak recovery from the recession. As shown above this decreases overall employment growth to 1%, an increase of just 294 FTE jobs.

Table 24 – Low Growth Forecast Land Requirement

	Floorspace Demand 2012 - 2031	Allowance for windfall losses	Allowance for Churn	Change in floorspace	Change in Land
	m ²	m ²	m ²	m ²	Ha
Office	5,413	6,498	0	11,911	1
Industrial	-19,795	10,925	602	-8,269	-3
Warehouse	-4,256	29,498	593	25,834	3
Total	-18,639	46,921	1,194	29,476	1

Source: EEFM, GVA, 2014– figures may not sum due to rounding

6.26 Overall this would see a more modest requirement of 1ha additional land. This scenario would see a large decrease in land for industrial activity, offsetting a requirement for warehousing land. There would also be a requirement for additional land for office development.

The High Growth Scenario

6.27 Using the EEFM High Migration scenario it is possible to forecast the potential requirements for employment land should the local economy grow faster than historic economic trends would suggest. As noted this would increase employment by over 7%, a total job increase of 1,875 FTE jobs.

Table 25 – High Growth Forecast Land Requirement

	Floorspace Demand 2012 - 2031	Allowance for windfall	Allowance for losses	Change in floorspace	Change in Land
	m ²	m ²	m ²	m ²	Ha
Office	9,107	6,498	0	15,605	2
Industrial	-9,157	10,925	602	2,369	0
Warehouse	2,378	29,498	593	32,468	5
Total	2,328	46,921	1,194	50,442	6

Source: EEFM, GVA, 2014 – figures may not sum due to rounding

- 6.28 This scenario would result in the largest requirement of employment land, with additional demand for both office and warehouse space and a need to retain the existing level of industrial land.

Sensitivity Test – The Airport Impact

- 6.29 The EEFM scenarios provide a consistent and robust basis for understanding future economic potential; however, as a centrally prepared model for the whole region there are limitations in how local dynamics and economic drivers can be factored in. It is our experience that such strategic models often under-estimate the full economic impact a major economic driver can have on a local economy.
- 6.30 The presence of London Southend Airport is of critical importance to much of Rochford District's economic and employment performance. It is clearly an important employer in its own right but also supports a much larger network of supply chain businesses in a range of sectors.
- 6.31 More widely the Airport acts as a significant economic identifier for the area, drawing businesses to the area which, whilst not directly associated with airport operations, benefit from the connections and profile it gives the area.
- 6.32 These factors will be important for the economic future of the District yet are not likely to be captured within any 'trend based' forecasts given the airport services are changing significantly. Therefore, to fully understand potential future impacts of the airport a sensitivity test is required.

- 6.33 Ultimately, there is no standard approach to measuring this impact, particularly when more intangible factors such as the area's profile are likely to influence occupier decisions. Therefore to provide a 'best estimate' of potential future impacts we have undertaken a high level economic impact assessment of the airport related jobs expected to be delivered within the JAAP boundary to understand how these may influence wider economic growth.
- 6.34 It should be noted that the JAAP anticipates a total of 4,700 jobs to be created within its boundary, shared between three areas – Aviation Way, Saxon Business Park and Nestuda Business Park. Our sensitivity test examines the impact of these jobs on the wider economy given that, as suppliers to these businesses they are likely to be more footloose and therefore able to populate properties in other parts of the District.
- 6.35 Firstly we have tested the additional employment impact within the District, the results of which are set out below:

Table 26 – Potential Employment Impacts

Element	Gross Jobs	Leakage	Local Jobs	Multiplier	Total jobs	Additional'
Saxon Business Park	3450	55%	1553	1.05	1630	78
Aviation Way	750	55%	338	1.05	354	17
Nestuda Business Park	500	75%	125	1.05	131	6

- 6.36 We have assumed a leakage rate of 55%, which reflects the proportion of workers that live outside the District in the 2011 Census as a proxy for the scale of employment that would be contained locally. Leakage is increased for Nestuda Business Park given it lies wholly outside of the District; as such the majority of impacts are likely to be experienced elsewhere.
- 6.37 We have assumed that there would be no 'displacement' as demand is not geographically constrained, therefore existing businesses could serve new demand from their current locations in the District.
- 6.38 The employment impact is likely result in a total of 101 jobs.

- 6.39 Increased employment within the economy will also have significant impacts on the spend within the local economy; with each job creating additional worker and business spend in other businesses.

Table 27 – Potential Spend Impacts

Element	Gross Jobs	Leakage	Local Jobs	Multiplier	Total jobs	Additional'
Saxon Business Park	3450	55%	1553	1.15	1785	233
Aviation Way	750	55%	338	1.15	388	51
Nestuda Business Park	500	75%	125	1.15	144	19

- 6.40 This additional spend impact could see a further 302 jobs created within the District. Overall this would result in over 400 new jobs in the District in addition to those already forecast within the EEFM.
- 6.41 Given the nature of the Rochford District economy and the types of businesses likely to benefit from these economic impacts, it is our expectation that property requirements would be shared between office and 'industrial' activity. We would not expect significant distribution activity given the nature of airport operations (which will not focus on cargo) and the proximity of the area to other major distribution locations, such as London Gateway Port. Therefore, to provide an estimate of additional land requirements we have shared this additional employment equally between office and industrial uses.
- 6.42 By using the employment density and plot ratio assumptions outlined above this would translate into an additional land requirement of 2.1ha. An additional requirement of 0.8ha for office uses and 1.3ha for industrial uses.

Conclusions

- 6.43 By combining each of the scenarios with the sensitivity test we see that there is potentially a demand for additional employment land of between 3.1ha and 8.8ha of employment land. This is would be shared as follows under each scenario:

Scenario	Office (ha)	Industrial (ha)	Warehouse (ha)	Total (ha)
Base	2.3	0.8	4	7.1
Low Growth	1.3	-1.2	3	3.1
High Growth	2.3	1.8	5	8.8

7. Conclusions

7.1 Within this section we draw the findings of the Employment Land Study together and make recommendations for the appropriate portfolio of sites to meet future demand. We also consider the wider actions and interventions required to ensure a fit for purpose choice of sites is retained that continue to meet expected economic growth requirements.

Demand and Supply Balance

7.2 The previous sections have considered the demand and supply dynamics within the District separately. However to understand the future requirement for employment land provision it is important to consider both together, enabling an understanding of whether allocated land is sufficient to accommodate forecast growth.

7.3 As noted within the supply analysis there is some scope to deliver new development within the existing, active, employment sites where there are vacant properties that could be redeveloped, remaining undeveloped land and a number of under-utilised plots. These provide some scope for both intensification and extension of current activities within existing site boundaries.

7.4 However, this intensification and redevelopment approach is unable to meet all future forecast requirements. Therefore, it is likely that the capacity to accommodate the majority of future employment growth requirements will need to come from sites that are yet to be developed. Such capacity exists within sites that have been identified within the Allocations Plan, the Hockley Area Action Plan and London Southend Airport and Environs Joint Area Action Plan, including:

- Land West of the A1245, which provides 8.8ha of land;
- Land South of Great Wakering, which provides 3.2ha of land;
- Eldon Way, Hockley, which provides approximately 1.2ha; and
- Land North of Southend Airport, which could provide approximately 27.1ha

7.5 The assessment undertaken as part of this study has considered the appropriateness of these locations to accommodate the scale and nature of forecast growth. However, when compared against a forecast requirement of up to 9ha of

employment land these sites would, at first glance, provide a significant oversupply of employment land.

- 7.6 However, the demand and supply balance within the District is not necessarily that straight forward, and needs more careful consideration before confirming the 'appropriate' portfolio of sites to meet future need.

Land Supply within the London Southend Airport JAAP Area.

- 7.7 The largest proportion of land supply lies within the area north of London Southend Airport which is identified within the Submission Draft of the JAAP as the core location of employment growth resulting from increased activity at the Airport itself.

- 7.8 As discussed in the preceding chapter there are likely to be two components to employment growth resulting from the Airport. The first will be direct employment generated from airport related and aircraft servicing activities. Separate assessments of the scale of this growth estimate a potential total jobs impact of c.4,700 new jobs that will directly flow from the airport growth itself and the cache of locating close to it.

- 7.9 Previous work to underpin the JAAP considered that the nature of this growth linked to the airport directly in this manner is likely to require a direct relationship/access to the airport in order to service its functions efficiently. As such it is unlikely to be 'footloose' and able to locate in areas that are not directly accessible from the airport.

- 7.10 The forecasting approach for this District-wide Employment Land Study has therefore not included the anticipated 4,700 additional jobs as part of the basis for calculating future land requirements. Therefore, for consistency within this study and also the wider evidence base used to support the JAAP it is not appropriate to consider the land north of Southend Airport wholly as part of the 'general supply' of employment land.

- 7.11 The second impact will be employment generated by those businesses benefitting from locating close to an airport, as identified within the previous chapter. Whilst some of these businesses may service the airport as part of the wider 'supply chain', on the whole they are likely to be less reliant on direct links to it and therefore, whilst some may locate within the JAAP area, they are likely to be more 'footloose'.

7.12 As such, to calculate the actual supply of land available to accommodate general economic growth we do not include the land north of Southend Airport within the 'general portfolio' but do recognise it is likely to play a role in accommodating some level of future growth.

7.13 However, to maximise the opportunity presented by land assets in the area north of Southend Airport the allocation here should principally focus on airport-related activity and other businesses that seek close proximity. Therefore, 'general' employment growth should be ancillary to the core purpose of the allocation.

Capacity to Enable the Redevelopment of Out-moded Sites

7.14 Based on evidence prepared previously the adopted Core Strategy de-allocates a small number of active employment sites within the District as, at the time, they were considered to be of poor quality and unlikely to be 'fit for purpose' over the plan period. Three sites were de-allocated in their entirety through the adoption of the Allocations Plan, these were:

- Star Lane, Great Wakering – 5.8ha
- Rawreth Industrial Estate, Rayleigh – 5.9ha
- Stambridge Mills, Rochford – 1.8ha.

7.15 The de-allocation of these sites from employment use is intended to encourage their redevelopment over the plan period for alternative uses, providing capacity for the District to meet other growth requirements. However, at present, whilst the Stambridge Mills site has been cleared, neither Star Lane or Rawreth Industrial Estate have come forward for redevelopment and are still (in part at least) 'active' employment sites.

7.16 Therefore, as and when the two active sites do come forward for redevelopment for other (non-B class) uses the businesses within them will need relocating to other suitable B class sites. This relocation requirement has not been factored in to the demand forecasts and therefore an additional allowance is likely to be required to ensure these activities are not lost from the District.

7.17 Given these sites have been assessed as no longer fit for purpose they are currently not fully utilised, with a number of vacant properties accommodated within each.

Furthermore, the nature of the built stock suggests that the properties themselves may not be as efficient as modern, purpose built stock, and therefore similar employment levels could be achieved with a lower quantum of floorspace within a new development.

- 7.18 For these reasons it would therefore be inappropriate to plan to reprovide their full existing floorspace capacity, however some re-provision will be necessary. Based on our understanding of the scale and nature of activity within the Rawreth Industrial Estate and at Star Lane we would suggest planning to reprovide approximately 50% of the existing land would be appropriate to accommodate displaced businesses.
- 7.19 In addition to these sites, a further 3.4ha of allocated employment land was 'lost' through the adoption of the Hockley Area Action Plan. However, within the Hockley AAP, the area in Eldon Way included a 'new' allocation of 1.2ha in the same location.
- 7.20 The AAP seeks to change the mix and nature of employment activity within the Eldon Way area. This Study has also identified the opportunity to provide a different type of employment floorspace, with potential for small office-based activity which can greatly increase the employment density within the area – retaining the jobs capacity of the area overall.
- 7.21 However, the redevelopment of the area has the potential to displace some of the remaining business activities and this capacity is likely to require being replaced elsewhere, otherwise employment activity will be lost from the District. In line with the assumptions of the other sites no longer allocated this would result in a re-provision requirement of 1.7ha.
- 7.22 This supply requirement to accommodate displaced businesses would therefore increase the total 'demand' for land within the District over the plan period by 7.6ha.

The 'New' Supply Portfolio

- 7.23 Based on the above analysis it is clear that the initial understanding of land supply and future requirements requires modification to identify an appropriate portfolio of land to meet future needs.

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- 7.24 As discussed previously, the major supply of new capacity lies within the two new 'general' employment sites identified and allocated within the Allocations Plan, namely:
- Land West of the A1245 (8.8ha); and
 - Land South of Great Wakering (3.2ha).
- 7.25 Taken together these provide approximately 12ha of additional employment land. This excludes the 27ha of land north of Southend Airport, some of which can accommodate 'general' employment needs.
- 7.26 The future requirement for employment land will be comprised of two components: the requirement needed to accommodate economic growth and the requirement needed to reprovide land lost through the deallocation of currently active sites. These identify a requirement of:
- Up to 8.8ha to accommodate growth; and
 - 7.6ha to reprovide existing capacity.
- 7.27 Together these indicate a total potential land requirement of 16.4ha over the plan period.
- 7.28 The majority (75%) of this requirement can be met within the sites allocated within the Allocations Plan; however a residual of 4.4ha will need to be accommodated elsewhere.
- 7.29 We would anticipate that this additional requirement can be accommodated within the wider portfolio through the intensification and regeneration of under-utilised land parcels. The site survey identified opportunities to make a more efficient use of land within the Purdey's Industrial Estate in particular, with some smaller scale opportunities within Brook Road Trading Estate, Rochford Way Business Park and the Aviation Way Estate.
- 7.30 There is also the opportunity to accommodate some general employment growth within the land north of Southend Airport. Accommodating the whole unmet requirement within this area would absorb c.16% of the total allocated land, which may be appropriate as it would keep 'general' activities as ancillary to the core airport-related uses for which the land is allocated.
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- 7.31 In reality, it is unlikely that the full 4.4ha would need to be accommodated within the JAAP area given the capacity within existing sites, therefore the vast majority of JAAP land would be retained for airport-related activities. This approach will maximise the use of existing land assets and support the delivery of new allocations which serve to broaden the land portfolio in the District.

Implications for Land West of Purdey's Industrial Estate

- 7.32 In addition to the sites allocated in the Allocations Plan a further opportunity has been promoted to the Council through the Call for Sites exercise. As considered within the supply section this site (referred to as Land West of Purdey's Industrial Estate) could potentially provide an additional 15ha of employment land.
- 7.33 In line with guidance provided by the NPPG this site has been assessed alongside, and using a method consistent with, the allocated and existing employment sites. This assessment demonstrated there were considerable challenges relating to its delivery, principally related to achieving an appropriate access solution and impacts on the Green Belt.
- 7.34 As shown above, there is no over-riding demand requirement for employment land outside of the existing allocated sites, with future expected demand able to be accommodated within the allocated and existing portfolio. Therefore, we have not identified a need or justification for allocating additional land within the District to meet requirements and would recommend not allocating Land West of Purdey's Industrial Estate for employment uses.

Wider Considerations

- 7.35 It is clear that there is both a qualitative and quantitative need for additional employment land to remain allocated within the District alongside the existing, active, employment site portfolio. Overall this provides a range of property types and development opportunities to meet the identified needs of the market, based on past take up trends and identified market drivers for the future.
- 7.36 However, as has been noted, it is not appropriate to consider the allocation and protection of sites as the end of the process. It has been highlighted within our review that, whilst sites are generally fit for purpose as a whole, there are areas where stock is (or will become) of poor quality and not suitable for modern business needs.

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- 7.37 In these locations it will be important for the Council and its partners to support the selective redevelopment of sites or parts of sites to ensure the most efficient use is made of land assets. In particular, and where appropriate, RDC should encourage land and sites to be used more intensively, generating higher employment numbers from existing sites. The delivery of vacant land parcels and the provision of new, more efficient buildings can both help achieve this aim.
- 7.38 Importantly, the redevelopment of stock should not be undertaken in isolation from the improvement in quality of the wider employment sites. Increasingly businesses are seeking higher quality environments from which to trade and it is likely that Rochford District could lose out to its larger neighbours if sites aren't improved and upgraded over the plan period.
- 7.39 This will be a particular issue for the major employment hubs at Aviation Way, which should be seeking to grow the high quality manufacturing activity, and Purdey's Way, which has seen the growth of Albon and other small companies encourage higher quality development. Both have delivered new stock, but overall environments remain largely unchanged. To secure future activity from more 'footloose' businesses this will need to be addressed.
- 7.40 Improving stock quality and business environments should not be a sole focus for the District's major industrial estates. The delivery of new, good quality, well connected space for SMEs (particularly for office based activity) should continue to be promoted via the AAPs for each town centre.
- 7.41 Similarly the role of smaller, rural business locations should not be ignored. Whilst not a core part of this Study, the increasing trend for farm building conversion to employment use should be welcomed, enabling a greater choice for residents and local businesses. With the rise of internet trading these types of provision are becoming increasingly demanded, allowing people to work closer to home. Where appropriate, and conforming with other planning considerations, this activity should be encouraged.
- 7.42 This more dispersed form of delivery will require a wider set of interventions and investments, beyond employment stock. Ensuring rural sites are well connected is paramount. This will include good quality road connections but equally importantly ensuring that ICT connections can meet business requirements. In a District with such
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large areas of undeveloped land and dispersed rural communities coordinating these enhancements will be a key role for the Council.

- 7.43 Fulfilling local economic potential will require the ability to accommodate new forms of property demand, particularly for the production sector, where industrial, office and distribution spaces are increasingly merged. The strategy should therefore not be too restrictive in terms of the mix of B class activity, providing the flexibility for bespoke spaces to be delivered that combine a range of space typologies that modern businesses require.
- 7.44 Ultimately, the delivery of new employment space is focussed on enabling the District to fulfil its economic potential by providing a range of accessible, attractive and viable employment locations that can provide choice in terms of stock. The strategy for employment land is not focussed on seeking to alter the District's place in the regional economy, but to ensure there is sufficient capacity and flexibility to retain the existing business base and accommodate growth driven by local assets and character.