URS

Final Report

Sevenoaks Employment Land Review

Prepared for:

Sevenoaks District Council

Prepared by:

URS Corporation Limited

In association with:

Knight Frank

December 2007 44408094

Sevenoaks District
Employment Land Review

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Project Title:	Sevenoaks District Employment Land Review
Report Title:	Sevenoaks District Employment Land Review
Project No:	44408094
Report Ref:	
Status:	Final Report
Client Contact Name:	Andrew Steen
Client Company Name:	Sevenoaks District Council
Issued By:	St. George's House, 2nd Floor St. George's Road Wimbledon London SW19 4DR

Document Production / Approval Record

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ABBREVIATIONS

AAP	Area Action Plan
ABI	Annual Business Inquiry
CAP	Common Agricultural Policy
DC	District Council
DCLG	Department for Communities and Local Government
DEFRA	Department for the Environment, Food and Rural Affairs
ERDP	England Rural Development Programme
EU	European Union
ICT	Information, Communications and Technology
KCC	Kent County Council
LDF	Local Development Framework
LDS	Local Development Scheme
ODPM	Office of the Deputy Prime Minister
ONS	Office for National Statistics
PPG	Planning Policy Guidance Note
PPS	Planning Policy Statement
RDC	Regional Distribution Centre
SEEDA	South East of England Development Agency
SEERA	South East of England Regional Assembly
SIPPs	Self Invested Personal Pension schemes
VAT	Value Added Tax
VOA	Valuation Office Agency

1. INTRODUCTION

1.1. Context

In 2005 URS together with Knight Frank were commissioned by Sevenoaks District Council to undertake an employment land review to assess the quantity, quality and viability of the District's employment land supply and forecast the future demand for employment land.

The 2005 employment forecast covered the time period 2005 to 2016; however, subsequent advice from the Government Office for the South East (GOSE) regarding the preparation of Local Development Frameworks (LDFs) and the associated evidence base such as employment land studies, is for the planning period up to 2026 to be covered. Earlier data therefore had to be amended and forecasts extended to 2026.

This important piece of work will inform the policies in Sevenoaks District's emerging Local Development Framework (LDF) and provide an evidence base to support the Council's decisions on planning applications and appeals. The mounting pressure to increase the supply of housing, emphasised in national Planning Policy Statement (PPS) 3, coupled with the need to allocate land for commercial and industrial growth, set out in Planning Policy Guidance Note (PPG) 4, make it essential for local authorities to take account of available land and assess the likely future demand for such land.

This employment land review will provide a tool, based on sound methodology and robust analysis, for Sevenoaks District Council to use for future planning aimed at providing sustainable economic development across the District. The methodology employed conforms to government guidance as set out in the Planning Guidance Note 'Employment Land Reviews' published by the Office of the Deputy Prime Minister, December 2004.

1.2. Study Brief

The purpose of the employment land review is to provide a robust evidence base to support the retention of existing employment land where appropriate. The specific requirements for the study are to:

- Provide a comprehensive audit of the District's employment floorspace and land supply and a robust assessment of the future requirement
- Examine the nature of the rural economy and to assess the future viability and sustainability of that economy
- Review the current Local Plan policies in the light of the gathered information, government, regional and county planning guidance and provide advice on future policies for the LDF, and
- Suggest a mechanism to allow for the future monitoring of the base data.

1.3. Study Area

The study area included the whole of Sevenoaks District in Kent County. Sevenoaks, Edenbridge and Swanley are the major employment centres and there are pockets of employment land throughout the District. Business areas included in the study range from large industrial and business estates to small single occupier sites.

1.4. Report Structure

This report sets out our final findings for employment land in Sevenoaks District based on a comprehensive desk review and socio-economic analysis, individual business area appraisals and business telephone survey; and forecasting exercise.

The remainder of this report is structured as follows:

Section 2 gives details of our approach to the various research elements of the assignment

Section 3 describes the national, regional and local policy context of particular relevance to employment land and related issues in Sevenoaks District.

Section 4 provides a comprehensive analysis of socio-economic baseline conditions in Sevenoaks District relative to the wider regions of Kent, the South East and the UK.

Section 5 provides an overview of the local economy and business including findings of the business telephone survey and information on the rural economy.

Section 6 provides a brief description of the prevailing socio-economic characteristics of rural England, reviews relevant policies and strategies for the rural economy of England, the South East and Sevenoaks District; and presents the key findings of our rural business telephone survey.

Section 7 sets out the key findings of our business area appraisals and summarises the key qualitative and quantitative results.

Section 8 describes the employment land market in Sevenoaks District outlining the historical trends in the commercial and industrial property sectors.

Section 9 sets out our employment land demand forecasts. Our synthesis forecast approach takes historic completion rates as a base for forecasting future employment floorspace demand.

Section 10 sets out the conclusions and recommendations regarding the retention and release of employment land sites will be based.

The first stage of research was carried out in 2005. In 2007 updates were undertaken to sections **3**, **4**, **5.1** to **5.4**, **8**, **9** and **10**.

2. APPROACH

2.1. Introduction

There are a number of research elements informing this study:

- Employment and skills profiling
- Employment land survey
- Business telephone surveys
- Market and demand assessment
- The rural economy

These are outlined below, together with a concluding consideration on accuracy of the business survey and field survey results.

2.2. Employment and Skills Profiling

A broader socio-economic analysis was undertaken of Sevenoaks District within the context of the Kent County and wider regional area in order to provide an in depth understanding of the current population and socio-economic make-up of the District. A number of information sources were reviewed including:

- Annual Business Inquiry
- Census Data
- Local Labour Force Survey
- New Earnings Survey
- VAT Registrations

An employment and skills profile of the District was developed. This profile included:

- An overall socio-economic profile of the District;
- Review of historical employment information for the District and surrounding areas;
- Review of unemployment information;
- Identification of current and historical education and skills levels within the District; and
- An assessment of the correlation between local education and skills levels and employer requirements.

2.3. Employment Land Review

This work began with a desk based review of all the existing employment land and premises within Sevenoaks District in order to identify the areas to be targeted for survey along with the broad employment area opportunities and constraints. Forty-one[1] business areas were identified for appraisal.

Each employment area was then visited and appraised against an agreed set of economic, planning and property market criteria to assess fitness for purpose. The main attributes reviewed and recorded were:

- Size of business area;
- Existing use and estimated building floorspace;
- Building type, estimated age and condition;
- HGV access and on-site parking;
- Outline review of potential contamination and ecology issues;
- Layout and infrastructure;
- Neighbourhood and adjacent property issues; and
- Developable areas.

The surveyors used a pro-forma questionnaire along with a map of each business area to undertake the survey. The questionnaire listed the pre-identified businesses for each business area with a series of tick-box style and open-ended questions. This approach allowed for a qualitative and quantitative analysis to be undertaken.

Prior to going on site surveyors attended a briefing and were given a ‘survey pack’ which included guidance on how each of the different questions should be completed to ensure that questions were answered consistently throughout the survey. A copy of the site survey questionnaire is included at **Appendix A**.

Once the visual inspections were complete and the collected data entered into the database the survey sites were digitally mapped using GIS to provide a geographical picture of employment land distribution throughout the District.

Site surveys were completed in February 2005.

2.4. Business Telephone Surveys

A telephone interview questionnaire was developed for the purposes of the Sevenoaks District assignment. The questionnaire was made up of 27 questions regarding type and size of business, employees and travel to work, recruitment and location issues. For companies in rural areas a second questionnaire was used. This included an additional 13 questions with regards to business diversification, access and communication. Copies of the questionnaires are included in **Appendix B.**

URS worked alongside Research and Marketing Ltd to conduct the telephone business survey. We used a commercially available business directory based on data available from such sources as the post office address database, yellow pages, and business VAT

[1] Note: Number 17 was not assigned.

registration data. This comprehensive database formed the bases for the business telephone survey.

Using SIC classification we selected the businesses most likely to occupy employment land (B class uses) and omitted all retail and catering businesses. A list showing all the SICs included in the telephone business survey is given at **Appendix C.**

To target rural businesses we identified rural areas using the following definition in accordance with the latest government recommendations[2]:

- Urban businesses: All the businesses within settlements which lay in wards classified as Urban or Town and Fringe
- Rural businesses: All the businesses located outside settlements and businesses within settlements in wards classified as Village, Hamlet & Isolated Dwellings.

Settlements were defined using the Ordnance Survey Strategic 1:25,000 urban classification. For the classification of the wards we used the ONS classification, which divides wards into three groups: 1) Urban, 2) Town & Fringe, and 3) Village, Hamlet & Isolated Dwellings.

We identified a total of 1,718 relevant businesses within the District of which 997 were classified as 'urban businesses' and 721 as 'rural businesses' using the definition described above. Of these, 60 businesses (39 urban and 21 rural businesses) were omitted as they could not be contacted by telephone (for reasons such as closure of business). In total we conducted 273 interviews (140 with urban and 133 with rural businesses). These results represent a response rate of 17% (16% urban, 18% rural). **Table 2.1** gives an overview of the number of businesses in the active sample, the interviews conducted and the response rate.

Table 2.1 Telephone Business Survey Response Rate

	Total	Urban	Rural
Number of B use class businesses	1,718	997	721
Omitted	87	55	32
Active population	1,631	942	689
Interview	273	140	133
Response rate	17%	15%	19%

Source: URS, 2005

Business interviews by telephone were undertaken in 2005.

2.5. Market and Demand Assessment

URS together with Knight Frank undertook a review of trends in employment related development and occupancy rates by sector and location. Historic data was gathered from Sevenoaks District Council's planning records, plotting sheets, planning files and market information. Data was gathered, where possible, over a full business cycle in order to provide a fuller picture of potential demand over the next plan period.

[2] ONS, Rural and Urban Area Classification 2004

An analysis of demand and supply for employment land and premises was undertaken for the local area, sub-region and regional areas. This analysis was structured around a three-stage approach focusing on:

- Present market conditions
- Linear forecast change in demand
- New factors affecting future demand

An assessment of net gains and losses was undertaken to identify the proportion of development taking place on currently vacant and unoccupied land, plus development taking place on land or in premises previously in other uses.

Based on the information collected an assessment was undertaken of the current and future allocation of employment within Sevenoaks District, which included:

- An assessment of the ability of the current employment areas and sites to meet demand.
- Review of the current employment allocations in light of the proposed PPS3 and PPS4 changes.
- Assess the impact that the loss of major employment sites would have on the local economy.

As part of the demand assessment we reviewed development proposals and strategies in relevant neighbouring areas. This involved identifying, in partnership with the Council, key developments in neighbouring areas and economic development strategies that could have a potential impact on future demand and development in Sevenoaks District. An assessment was undertaken of the potential impacts of these developments and economic development strategies in the context of:

- Existing levels of employment land;
- Emerging employment patterns;
- Development and the economy;
- Current and emerging policy; and
- Opportunities and drivers for change.

2.6. Rural Economy Assessment

A review of all rural areas within the District was undertaken to provide an overview of the rural economy. This included an overall assessment of the existing Sevenoaks District rural employment floorspace and land usage.

The rural assessment was written in 2005.

2.7. Accuracy

There are a number of errors that can affect the field survey and business survey results:

Field Survey

The URS survey was based on a sample frame of 1,631 businesses. This contrasts with a total of 1,719 businesses recorded by the ODPM/VOA on number of non-retail hereditaments (i.e. properties) in the District. The ODPM data though does not take into account businesses working from home. The ODPM/VOA figures are shown in **Table 2.2**. Omitting retail premises, the VOA classifies 43% of hereditaments as offices, 35% as factories and 22% as warehouses.

Table 2.2 Number of Hereditaments in Sevenoaks District

	Number	Including Retail %	Excluding Retail %
Total	2,642	100%	–
Retail	923	35%	–
Total Exc. Retail	1,719	–	100%
Office	742	28%	43%
Factories	602	23%	35%
Warehouse	375	14%	22%

Source: ODPM/VOA 2004

The field survey results are based on visual inspections of the sites, hence sites with incorrect or out of date business details displayed on site boards and walls will lead to errors. Likewise sites that are totally enclosed or not operating on the survey day will be identified as unknown even though business activities may be undertaken. However, the data collected and entered into the database during the land survey was reviewed and cross-checked to ensure data consistency and integrity. We believe they fit into general expectations and that they can be given reasonable weight, particularly as an indication of overall business area land uses and characteristics. An independent review was carried out by an internal URS data management specialist.

Telephone Survey

There are a number of errors that can affect the telephone survey results, including:

- Differences between the database of businesses and actual population of businesses in Sevenoaks District;
- Sample bias resulting from differences in characteristics of respondents and non-respondents;
- Small sample sizes, particularly for the cross-tabulations (segmentation of data); and
- Incorrect information from respondents.

However as many results fit with expected characteristics and behaviour we believe they can be given reasonable weight, particularly as an indication of trends and characteristics.

3. POLICIES AND PROGRAMMES

3.1. Introduction

This section gives a brief overview of the strategy and policy context relevant to employment and employment land in Sevenoaks District. It also includes a review of key research reports including those supporting national and regional policy development.

3.2. National Policy

Planning Policy Guidance Notes (PPGs) and Planning Policy Statements (PPSs) provide a national guidance framework setting out a range of planning principles and objectives on specific topics.

PPS1: Delivering Sustainable Communities

PPS1 emphasises the important role that the planning system has in the delivery of sustainable development. It encourages local authorities to recognise wider sub-regional, regional and national benefits of economic development and consider these alongside any adverse local impacts.

Reference is given to the UK's strategy on sustainable development, which emphasises the role of planning to provide attractive places to live and work and development patterns that minimise the need to travel.

PPS3: Housing

PPS3 was released in November 2006 and replaces the previous PPG3. The Government's key housing policy goal is to ensure that everyone has the opportunity to live in a decent home, which they can afford, in a community where they want to live. The statement has four key objectives that include:

- To achieve a wide choice of high quality homes, both affordable and market housing, to address the requirements of the community
- To widen opportunities for home ownership and ensure high quality housing for those who cannot afford market housing, in particular those who are vulnerable or in need
- To improve affordability across the housing market, including by increasing the supply of housing
- To create sustainable, inclusive, mixed communities in all areas, both urban and rural.

The Statement identifies that to ensure effective use of land Local Planning Authorities should consider a range of incentives or interventions that could help to ensure that previously developed land is developed in line with market trajectories. This should include:

- Planning to address obstacles to the development of vacant and derelict sites and buildings, for example, use of compulsory purchase powers where that would help resolve land ownership or assembly issues.

- Considering whether sites that are currently allocated for industrial or commercial use could be more appropriately re-allocated for housing development.
- Encouraging innovative housing schemes that make effective use of public sector previously developed land.

PPG4: Industrial, Commercial Development and Small Firms

PPG4 takes a positive approach to the location of new business developments and assisting small firms through the planning system. The main message is that economic growth and a high-quality environment have to be pursued together. The locational demands of industry should be a key consideration in drawing up plans. It also notes policies within the development plans should provide for choice, flexibility and competition in allocating land for industry and commerce. Development plans should weigh the importance of industrial and commercial development with that of maintaining and improving environmental quality.

PPS6: Planning for Town Centres

PPS6 focuses on ways to promote town centre vitality and viability, such as:

- Planning for the growth and development of existing centres
- Promoting and enhancing existing centres, by focusing development in such centres
- Encouraging a wide range of services in a good environment, accessible to all

The PPS highlights the need to make efficient use of land and encourages well-designed, higher density, multi-storey development within and around existing centres. It also encourages local authorities to make better use of existing land and premises and suggests the need for redevelopment where appropriate.

PPS7 (Sustainable Development in Rural Areas) sets out the Government's key principles in relation to planning policy for development in rural areas. Decisions should be based on:

- Sustainability principles including social inclusion, protection and enhancement of the environment, prudent use of natural resources; and maintaining high and stable levels of economic growth and employment.
- Proposals should consist of 'good quality, carefully-sited accessible' development.
- Sites should be accessible especially by public transport.
- Development in the open countryside should be strictly controlled.
- Priority should be given to the re-use of previously developed (brownfield) sites.
- Development in rural areas should be well designed and inclusive.

PPS10: Planning for Sustainable Waste Management

PPS10 requires that a broad range of sites including existing industrial estates should be considered when deciding where to locate new waste and recycling facilities. Effort should be made to locate waste processing facilities close to the producers of waste which are often those operating on existing business and industrial areas.

It also suggests that local waste planners should look for opportunities to locate complementary facilities together on appropriate sites. When identifying sites for waste management facilities the PPS suggests that local waste planners assess sites using the following criteria:

> *'– The extent to which they support the policies in PPS10*
>
> *– The physical and environmental constraints on development, including existing and proposed neighbouring land uses;*
>
> *– The cumulative effect of previous waste disposal facilities on the well-being of the local community, including any significant adverse impacts on environmental quality, social cohesion and inclusion or economic potential;*
>
> *– The capacity of existing and potential transport infrastructure to support the sustainable movement of waste, and products arising from resource recovery, seeking when practicable and beneficial to use modes other than road transport; and*
>
> *- Give priority to the re-use of previously-developed land, and redundant agricultural and forestry buildings and their curtilages.'*

3.3. Regional Policy

Draft South East Plan

Following public consultation, the Draft South East Plan was submitted to Government in March 2006 for examination. The examination was completed and report received in early 2007, with adoption anticipated in 2008 and will supersede Regional Planning Guidance for the South East (RPG) 9 as the Regional Spatial Strategy for the South East of England. Once adopted the South East Plan will provide a statutory framework for development up to year 2026.

The Plan brings together policies for development and land use with other policies and programmes that influence the nature of places and people. The core of the Plan comprises issue and spatial cross-cutting policies as well as policies for specific topics, such as the economy or the countryside. Cross-cutting policies include:

- *Use of Public Land:* There are extensive areas of property and land in the public ownership in the region. The land holdings of the Ministry of Defence are particularly substantial. In some cases the current use of the land is under review and may provide opportunities for development/redevelopment. Where such sites are of regional significance, a programme of action should be agreed with the Assembly.
- *Urban Focus and Renaissance:* Development will be focused in urban areas, with a target of at least 60% of new development in the region to be on previously developed land.
- *Sustainability:* Broadly, policies relate to sustainable development (social, economic and environmental), mitigation and adaptation to climate change, sustainable design and construction, better use of natural resources.

- *Greenbelts and Strategic Gaps:* The existing Green Belt will be retained and the opportunity will be taken to improve management and access.

Part 3 of Section D2, regarding the supply of employment land, states that Local Development Documents (LDDs) will need to 'ensure that there is an adequate quantity and high quality of employment land to meet the current and future requirements of the local economies.' The Plan emphasises that changes in the productivity/profitability of different sectors will affect the amount of space and location of premises demanded by businesses. LDDs will work towards ensuring that there is an adequate quantity and quality of employment land to meet the future requirements of the local workforce (Policy RE2, Employment and Land Provision).

The South East Plan incorporates ten sub-regional policy frameworks[3] delivering focussed development guidelines for the identified sub-regions. Part of Sevenoaks District lies within the London Fringe and part within the Rest of Kent Sub-regions. Relevant policies for the London Fringe are as follows:

- *Policy LF1* aims to meet development requirements within urban areas and the protection of the Green Belt across the sub-region by sustaining growth at a level that can be supported by labour markets and infrastructure, focusing development on existing employment sites and encouraging a broad base of economic activity.
- *Policy LF6* supports LF1 and looks to LDDs (Local Development Documents) to identify strategic employment land to be safeguarded for employment purposes. For employments land that is not strategically important, residential or mixed use development may be considered appropriate.

Kent and Medway Structure Plan

The Kent and Medway Structure Plan was developed to provide a strategic framework to guide decisions on development, transport and environmental matters in Kent and Medway over the 20-year period of the plan (2001 to 2021). In due course, the Kent and Medway Structure Plan will be superseded by the South East Plan. The Kent and Medway Structure Plan outlines a number of policies with regards to development in the region. Policies particularly relevant to Sevenoaks District (as part of West Kent) include:

Policy WK1: West Kent

a) There will be no release of land from the Metropolitan Green Belt to meet strategic requirements and no major release of additional greenfield land beyond land committed in 2001 for residential or business development;

b) In seeking to make the best use of land within the principal urban areas for housing the local planning authorities should make provision to safeguard existing and/or new employment land for more intensive (office) employment uses at locations in or close to the town centres of the principal urban areas.

Policy SE1: Sevenoaks. Within Sevenoaks District the scale of new housing development reflects its location wholly within the Inner Metropolitan Green Belt, the relatively small scale of

[3] Sub-regions: South Hampshire, Sussex Coast, East Kent and Ashford, Kent Thames Gateway, London Fringe, Western Corridor and Blackwater Valley, Central Oxfordshire, Milton Keynes and Aylesbury Vale, Gatwick Area, Isle of Wight.

the principal urban areas of Sevenoaks and Swanley and the character of their built environments.

Structure Plan policies focussing on employment land include:

Policy EP1: Land, Workforce, Education and Skills. Sufficient land and floorspace will be provided throughout Kent to sustain full employment and reduce the need to travel. The varied character of the employment land provided, together with the development of other economic sectors, will provide opportunities for the workforce as a whole. To improve the skills and qualifications of the workforce in Kent and to support the development of the Kent economy, particularly the technology, research and knowledge based industries.

Policy EP2: Employment Land Provision. States that priority should be given to developing sites for financial and professional services, business, industrial and warehousing uses. The total provision for net additional floorspace for Sevenoaks 2001-2021 is given as 84,000 sq m. Existing employment sites that are well located and otherwise well suited to employment use should be retained and sites which have not succeeded because of constraints or poor quality may be replaced by alternative, more marketable and better located allocations provided that this a) does not prejudice the scale and implementation of strategic locations for business development supported and safeguarded by this Plan (Policy EP4) and b) does not conflict with other Structure Plan policies. Employment uses other than those covered by Policy EP2 (but excluding retail and leisure) may be included on the major sites provided that this does not conflict with the policies of the Plan, notably in respect of the location of major generators of travel demand.

Policy EP5: Land for Technology and Knowledge Clusters. Specifically identifies Fort Halstead in Sevenoaks District (one of six sites in Kent and Medway) as land for technology and knowledge clusters, and states that high quality proposals for the intensification or expansion of established key employers and/or institutions in the technology and knowledge sectors will be supported at this location.

The Kent and Medway Structure Plan recognises that not all investment should be directed to the towns and that rural communities also need new economic investment. *Policy EP6* states that: '*Provision for small scale business development and service industries should be made within, or adjoining, the built up area of rural service centres or of larger villages that can provide a sustainable form of development'.*

The Structure Plan supports plans for farm diversification as set out in *Policy EP7* where it is stated that the conversion, alteration or re-use of existing farm buildings to support agriculture, horticulture and forestry based in Kent will be permitted where the traffic and environmental impacts are acceptable.

A key challenge for the Structure Plan is to find ways to provide sufficient housing while protecting Kent's countryside and enhancing the quality of urban and rural environments. The Plan sets out housing targets for the districts of Kent. Sevenoaks District has a target of bringing forward development of 2,400 dwellings between 2001 and 2016 (Policy HP1F). The Plan notes that the size and character of Sevenoaks town and Swanley - the two main centres of Sevenoaks District - suggest that there is only modest potential for housing in the urban areas.

A number of policies reflect the County's strategy towards creating a balance between housing and employment land (para 7.8). This outlines the Plan's view that local planning authorities will phase and manage the release of sites for housing development, including windfalls, to ensure that generally previously developed sites are brought forward before greenfield sites whilst meeting the housing requirements for the phasing periods set out in Policy HP1.

3.4. West Kent Area Investment Framework (AIF)

In 2003 the first West Kent Area Investment Framework (AIF) was and was subsequently revised in 2006. The AIF and Action Plan for 2006-2009 provides a view on the economic position of West Kent relative to that of Kent, Surrey and the South East as a whole.

Although characterised by a high quality environment, high employment levels and a generally high standard of living, the future competitiveness and quality of life in West Kent is under threat due to globalisation; EU, national and regional policy, affecting specific sectors, high house prices and the loss of employment land to housing; increasing pressures on the transport infrastructure; increasingly ageing population; small areas of disadvantage characterised by low educational attainment, low skill levels, high levels of dependency.

To address these issues the AIF identifies seven strategic objectives:

1. Raise the profile of West Kent as a key area for investment
2. Maximise opportunities for individuals to enhance their skills
3. Sustain and strengthen the local economy
4. Improve the quality of life for residents, particularly in the Priority Community areas
5. Expand access to a range of housing options available to local residents and workers
6. Increase the effectiveness of transport infrastructure in West Kent
7. Maximise opportunities for land based and other rural businesses

Priorities for action under each strategic objective are outlined.

3.5. Sevenoaks District Local Plan

The Sevenoaks District Local Plan was adopted in 2000. Together with the Kent Structure Plan and Kent Minerals and Waste Local Plans it provides the adopted statutory basis for the consideration of development proposals. All the policies were saved for a period of three years from the commencement of the Planning and Compulsory Purchase Act on 28th September 2004 until 27th September 2007. No Local Plan policies will be replaced by policies in the Core Strategy or other new Development Plan Documents before 27th September 2007. The Council has submitted a list of all those Local Plan policies that it wishes to extend and those it does not wish to save, with reasons, to the Secretary of State, through the Government Office for the South East (GOSE). With respect to employment, the Saved Local Plan aims to:

'…Secure a sustainable local economy, which meets residents' employment needs and encourages wealth-creation.'

The Saved Local Plan gives six employment objectives to:

- Secure environmentally acceptable and sustainable business development and reduce commuting to work;
- Reduce resident unemployment;
- Encourage occupation of vacant land and floorspace for a mix of employment uses;
- Reduce loss of allocated and existing business sites to other users;
- Shift the emphasis from large scale office development towards mixed use sites and facilitate the growth of local firms and small businesses; and
- Ensure that businesses in the countryside are compatible with the Green Belt and countryside conservation objectives.

Employment Policy EP1 makes provision for land and floorspace for business development. The following allocations shown in **Table 3.1** are particular to Sevenoaks District.

Table 3.1 Development of Business Floorspace

Location	Indicative gross floorspace
Bat and Ball Railway Sidings	5,680 sq m
Land adjoining Sevenoaks Station	7,840 sq m
Land at Broom Hill, Swanley	22,300 sq m
Land at Edenbridge Town Station	4,300 sq m

Source: Sevenoaks District Council, Sevenoaks District Local Plan

Employment Policy EP8. The main business areas are identified on the Proposals Map. Subject to Policy EP7, Class B uses will be permitted within these areas. Outside the defined areas, proposals for new purpose-built premises for Class B uses, other than on sites benefiting from a lawful use within those classes, will not be permitted.

Employment Policy EP10. The Local Planning Authority will not permit the loss of allocated or lawful business premises and sites to other uses unless a lawful use site is regarded as inappropriately sited. However, where significant investment in new infrastructure or extensive site redevelopment or building renovation costs are involved, a mixed use scheme may be permitted providing that a significant Class B use element is incorporated in the scheme.

The Local Plan emphasises Sevenoaks District's location within the Metropolitan Green Belt. Sevenoaks District lies entirely within the Green Belt. This has important consequences for the future development of Sevenoaks District. Green Belt policy is present throughout the Local Plan with the intention of inhibiting urban sprawl by keeping land permanently open.

Policy GB2 states that within the Green Belt there is a general presumption against inappropriate development. The construction of new buildings in the Green Belt is inappropriate unless it is for the following purposes:

- Agriculture and forestry
- Essential facilities for outdoor sport and outdoor recreation, cemeteries, and other uses of land which preserve the openness of the Green Belt.

- Limited extension, alteration or replacement of existing dwellings.
- Limited affordable housing within existing settlements for local community need. Limited infilling/redevelopment of Major Development Sites[4].
- Limited infilling/redevelopment of sites as defined under Policy GB5[5].

The Sevenoaks District Local Plan gives four objectives for the management and development of the rural economy. These are:

- To integrate the development necessary to sustain the rural economy with the protection of the countryside for its beauty, the diversity of its landscape, its natural resources and its ecological, agricultural and recreational value;
- In areas of Outstanding Natural Beauty, Sites of Special Scientific Interest and other localities statutory designated for their landscape, wildlife or historic qualities, to give priority to restraint;
- To encourage high environmental standards in the implementation of rural development and in agricultural and forestry practice; and
- To ensure new development is sensitively related to existing settlement patterns and to the historic, wildlife and landscape resources of the area.

On a strategic level, policies throughout the District Plan play a part in the conservation of the countryside and the control of development within it. In addition to Green Belt policies, Employment Policies EP11A and EP11B, deal with the type and scale of development to be permitted in rural areas not covered under Green Belt policies. In particular, EP11A states that proposals for business development must comply with the following criteria:

- The scale of the intended use is appropriate to the locality and the employment generated will not create a demand for new housing.
- The site itself and any building(s) intended for subsequent occupation is physically suitable and that amenity, design, layout, access, parking and servicing arrangements are satisfactory.
- The use of the premises does not detract from the character and amenities of adjoining land uses.
- The local road network is able to absorb, in a satisfactory manner, any increase in vehicular movements likely to be generated by the proposal.

[4] Major development Sites are identified as: Chaucer Business Park, Kemsing; SmithKline Beecham, Leigh; North Downs Business Park, Dunton Green, Fort Halstead, Halstead.

[5] Policy GB5: Where the local planning authority has identified a site as a major developed site in the Green Belt proposals for redevelopment should: 1) Have no greater impact on the existing development on the openness of the Green Belt and the purpose of including land within it and where possible have less; 2) Contribute to the advancement of the objectives for the use of land in Green Belts; 3) Not exceed the height of existing buildings; and 4) Should not occupy a larger area of the site than the existing buildings unless this would achieve a reduction in height which would benefit visual amenity.

The loss of employment sites to other uses will be resisted except where there is the removal of a significant environmental problem.

3.6. Sevenoaks District Local Development Framework

Sevenoaks District Council is in the pre-production phases of the Local Development Framework (LDF). In accordance with Section 15 of the Planning and Compulsory Purchase Act, the Council has prepared a Local Development Scheme (LDS – available at www.sevenoaks.gov.uk/lds) that sets out the Council's project plan for the production of documents, plans and policies that are to be included in the LDF by 2008. The Council has entered into a Service Level Agreement with the Planning Inspectorate to agree the timetable set out in the LDS.

The LDF will be a portfolio of Development Plan Documents (DPD) and Supplementary Planning Documents (SPDs). DPD will include a Core Strategy setting out the vision, spatial strategy and core policies for the spatial development of Sevenoaks District. The Balanced Communities DPD will also set out site-specific allocations of land and include a proposals map.

The first DPD to be prepared will be the Core Strategy, which will set out the vision and strategic objectives for future development in the District and provide context for future LDF components. The Council intend to prepare a Balanced Communities DPD and Development Control Generic Policies DPD at a later date. There are no Area Action Plans (AAPs) proposed at present.

The Sevenoaks District LDF and the South East England Regional Spatial Strategy (the South East Plan prepared by SEERA) will form the development plan framework for Sevenoaks District. This will replace the current Sevenoaks District Local Plan and the Kent County Structure Plan.

4. SOCIO-ECONOMIC STRUCTURE

4.1. Introduction

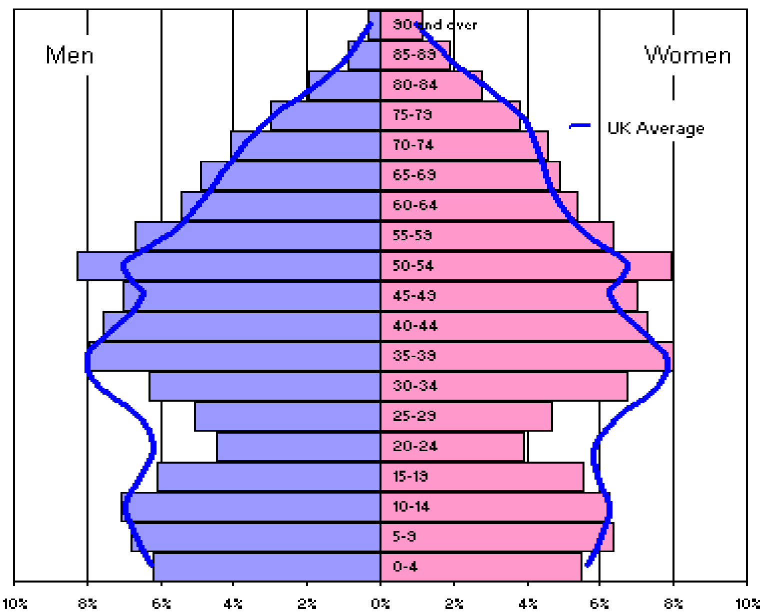
It is helpful to consider current demand and future provision of employment land in the context of the socio-economic structure of the area. Creating sustainable communities includes providing for employment suitable to the local workforce. Therefore this section analyses the socio-economic structure of Sevenoaks District and compares it to the wider Kent County and South East region, analysing population, workforce and local economy.

4.2. Population

Over the last two decades the District of Sevenoaks has experienced relatively little change in population. Between the 1991 Census and the 2001 Census Sevenoaks District had the lowest percentage growth among all districts in Kent (0.3%)[6]. Comparatively, the County population grew by 5.2% to approximately 133,000 people between 1991 and 2001[7]. The most up to date population estimates for 2005 record a population of 111,100 in Sevenoaks District.

The average age of Sevenoaks District residents is 40.2 years and 52.5% of the population is between the ages of 20 and 59 years old[7]. **Figure 4.1** below summarises the age distribution amongst men and women throughout the District. This is a similar distribution as that occurring across neighbouring districts, Kent County, the South East, and England and Wales.

Figure 4.1 Age Distribution in Sevenoaks District



Source: ONS, Census 2001

[6] Kent County Council CEN6/03, 2003
[7] ONS midyear population estimates

Census 2001 records that over half of Sevenoaks District residents are married (or have re-married) (58%) and there are 77% of families with dependent children. In terms of accommodation, there is a higher proportion of owner-occupation in Sevenoaks District (77.0%) compared to England and Wales (69% respectively) and only 13.9% of residents rent from the Council (or RSL) in comparison to 19.3% for England and Wales. Households in professional groups AB and C1 tend to be more strongly represented in Sevenoaks District in comparison to England and Wales, Kent and the South East. **Table 4.1** below summarises the population characteristics of people in Sevenoaks District.

Table 4.1 Summary of Population Characteristics (Resident Population %)

		Sevenoaks	Kent	South East	England & Wales
Age Groups					
	0-19	24.8	25.2	24.6	25.1
	20-59	52.5	52.4	54.2	54.1
	60-74	14.6	14.1	13.2	13.3
	75+	8.1	8.3	8.0	7.5
Married		58.3	53.8	53.0	50.9
Tenure					
	Owner Occupied	77.0	75.6	75.7	68.9
	Council or RSL	14.0	14.1	13.4	19.2
	Private Rented	9.0	10.3	10.9	11.9
Occupational Group					
	AB	29.7	22.3	26.4	22.0
	C1	32.3	31.3	32.1	29.7

Source: Census 2001

4.3. Workforce

Skills

Sevenoaks District is made up of a relatively skilled labour force with over 30% of residents educated to degree level or higher[8] (NVQ level 4 plus). This is higher than the rate for England and Wales (26.5%), South East (29.5%) and Kent (24%). However resident labour force in the rural areas of the District have much lower skills levels. **Table 4.2** summarises the skills and qualification levels for the workforce in Sevenoaks District and rural areas of the District in comparison to Kent, the South East and England and Wales.

[8] ONS Annual Population Survey (Jan 2005 – Dec 2005)

Table 4.2 Resident NVQ[9] Levels in Sevenoaks District

Sub-areas	No Qualifications (%)	NVQ Level 1 (%)	NVQ Level 2 (%)	NVQ Level 3 (%)	NVQ Level 4 and above (%)
Sevenoaks District	4.8	81.8	66.8	49.0	30.5
Kent	13.0	80.0	62.3	42.7	24.0
South East	10.1	82.3	67.3	48.5	29.5
Great Britain	14.3	77.2	62.9	44.4	26.5

Source: ONS Annual Population Survey (Jan 2005 – Dec 2005)

Kent has a number of higher education facilities that can contribute to the further development, either part or full time, of its resident workforce. There are campuses for Mid Kent College in Chatham, Rochester and two campuses in Maidstone. North West Kent College has a campus in Dartford and South Kent College has campuses in Ashford, Dover and Folkstone. The University of Kent has campuses in Canterbury and Medway.

Employment by Occupation

The workforce living in Sevenoaks District is primarily made up of managers, professional and associate professions (38%). This compares less favourably to the South East average of 46% and the GB average of 42%[10]. Comparably, administrative and skilled trades in Sevenoaks District make up a larger proportion of the workforce (33.5% compared with 23% in the South East and 23% in Great Britain). Less people work in elementary occupations or as plant and machine operatives and sales and service occupations compared to the rest of the South East and GB.

The workforce of Sevenoaks District tends to have a similar structure as neighbouring districts and boroughs, with the majority of residents working in professions requiring a higher level of education and training. See **Table 4.3** for details.

[9] National Vocational Qualifications

No qualifications	No formal qualifications held
Level 1 Equivalent	e.g. fewer than 5 GCSEs at grades A-C, foundation GNVQ, NVQ1, intermediate 1 national qualification (Scotland or equivalent.
Level 2 Equivalent	e.g. 5 or more GCSEs at grades A-C, intermediate GNVQ, NVQ2, intermediate 2 national qualification (Scotland) or equivalent
Level3 Equivalent	e.g. 2 or more A levels, advanced GNVQ, NVQ 3, 2 or more higher or advanced higher national qualifications (Scotland) or equivalent
Level 4 equivalent and above	e.g. HND, Degree and Higher Degree level qualifications or equivalent.

[10] ONS Labour Force Survey, 2003-2004

Table 4.3 Occupational Structure of Sevenoaks Residents

	Sevenoaks (%)	Bexley (%)	Dartford (%)	Bromley (%)	Tonbridge & Malling (%)	SE (%)	GB (%)
Managers and Senior Officials	19.2	13.8	16.3	22.4	13.2	17.1	15.0
Professional Occupations	12.4	10.8	8.7	15.7	13.4	14.1	12.8
Associate professional & technical	6.5	18.4	13.2	16.8	16.8	14.9	14.3
Administrative & secretarial	19.5	20.4	11.1	18.2	15.1	12.8	12.3
Skilled trades occupations	14.0	9.8	11.8	8.4	14.8	10.3	11.0
Personal service occupations	6.9	6.1	6.4	7.3	5.6	8.1	7.9
Sales and customer service occupations	7.8	7.2	10.1	4.1	8.1	7.1	7.6
Process plant & machine operatives and Elementary occupations	13.7	13.3	21.4	6.9	13.1	15.5	18.8

Source: ONS annual survey of hours and earnings (ASHE) – workplace and residents analysis, 2006

Earnings by Workplace[11]

The 2006 Annual Survey of Hours and Earnings (ASHE) indicates that gross weekly pay of earnings by workplace (median earnings in pounds for employees working in the area) in Sevenoaks District is £452.40, which is considerably higher than the national average (£448.60) and the county (£430.80) but lower than the South East average (£470.10). Workplace Earnings in Sevenoaks District are high in relation to neighbouring districts in Kent but lower than adjacent London Boroughs such as Bexley (£472.80) and Bromley (£480.0) (the London borough average is £572.40). **Table 4.4** below summarises Sevenoaks District average weekly workplace earnings in comparison to surrounding districts and boroughs. It also records earnings by residents for employees living in the area. One key point the data reveals is the significant difference between workplace and residents' earnings[12]. There is a £100 disparity between workplace and residents earnings, which indicates that higher earnings are captured outside the district, most probably from employment within the Greater London area, which is easily within commuting distance of Sevenoaks District.

[11] ONS New Earnings Survey 2006

[12] Workplace earnings relate to earnings generated by employment in the district as opposed to earnings by residents working outside the district, i.e. commuting to London to work.

Table 4.4 Average Gross Weekly Earnings (Workplace and Residents)

Location	Workplace	Residents	Differential (Residence less Workplace)
Sevenoaks	£452.40	£552.00	£99.60
Bexley	£472.80	£526.80	£54.00
Dartford	£544.90	£514.10	-£30.80
Bromley	£480.00	£574.90	£94.90
Tonbridge & Malling	£447.70	£512.90	£65.20
Kent	£430.80	£472.40	£41.60
South East	£470.10	£488.70	£18.60
London	£572.40	£540.80	-£31.60

Source: Annual Survey of Hours and Earnings, 2006

On a ward level, average weekly earnings levels vary across the District. The ward of Brasted records the highest average with £709 per week and Ash records the lowest with £354 per week. Consistently high earnings tend to be in the wards included in the Sevenoaks urban area, Sevenoaks Kippington, Sevenoaks Northern and Sevenoaks Town and St. John's, which is consistent with the qualification levels in those areas.

Activity Rates and Unemployment

In June 2006[13] ONS annual population survey recorded 68,900 of working age[14] residents in Sevenoaks District, which is 73.3% of the population. Of that, 51,700 (75.0%) are economically active. These proportions are not dissimilar to neighbouring districts or from the South East, where 82.1% of working age residents are economically active.

There are 17,200 (25.0%) people considered economically inactive[15] in Sevenoaks District. Economic inactivity is only slightly higher than that for the rest of the South East (17.9%) and is in line with surrounding districts and boroughs and the rest of Great Britain (21.6%).

In 2006, the unemployed made up 8.2% of economically active people in Sevenoaks District. In November 2006 there were 690 Jobseeker's Allowance (JSA) claimants in Sevenoaks District (1% of the working age population) which is lower than the r South East (1.6%) and across Great Britain (2.5%). By comparison the Sevenoaks District unemployment rate (of those of working age) is recorded at 2.4%, which is significantly lower than the South East rate of 4.3%.

[13] July 2005 to June 2006, ONS annual population survey

[14] Aged 16 and over, % are for those of working age (16-59/64)

[15] People who are either in employment or unemployed

5. LOCAL ECONOMY AND BUSINESSES

5.1. Introduction

This section provides a profile of the prevailing economic and employment conditions in Sevenoaks District. It provides the economic context to employment land demand and supply factors in the District considered later in this report. It includes analysis of employment and business sectors in the District and the results of the business survey. (Section 6 specifically considers the rural economy).

We have used a number of sources on both current and past economic statistics to give a general overview of the local economy. Sources include ONS Census data, local area labour force survey, Annual Business Inquiry, ONS VAT registrations and de-registrations.

5.2. Employment

Overall, Sevenoaks District has experienced a growth in absolute employment during the decade of 1995 and 2005 from, approximately, 36,600 to 43,800 employees - a growth of 7,200 or 19.5% increase on 1995 levels. By comparison with the geography benchmarks of Kent, the South East and Great Britain, Sevenoaks District is shown to have performed slightly below county and regional growth rates but higher than the national growth average.

Over the past decade Sevenoaks District has seen large growth rates of employment in a number of sectors - agriculture (521%), construction (102.7%), business services (55.0%) and hotels/restaurants (43.6%). In absolute terms, these three sectors plus wholesale and retail trade are the major growing sectors and collectively have generated over 7,450 jobs during the decade in Sevenoaks District. Business services represent the largest job creating industry with over 3,300 jobs between 1995-2005. By comparison, public administration, utilities, and mining and quarrying represent the biggest losers in terms of percentage growth, though the latter two sectors are very small and it is administration, which has performed worst with a loss of over 1,120 jobs. **Table 5.1** below summarises the changes in employee numbers in Sevenoaks District for each sector between 1995 and 2005.

Table 5.1 Employee Analysis by Sector in Sevenoaks

	Sevenoaks District					Kent	South East	Great Britain
Industry	**1995**	**2005**	**% of 2005 Total**	**Actual Change 95-05**	**% Change 95-05**	**% Change 95-05**	**% Change 95-05**	**% Change 95-05**
Agriculture	110	684	1.6%	574	521.8%	0%	-8%	-18%
Mining and quarrying	<150	<100	< 1.0%	-50	< -50%	2%	11%	-13%
Manufacturing	4,081	3,906	8.9%	-175	-4.3%	-20%	-21%	-26%
Electricity, gas and water supply	<100	<100	0.0%	-8	< -30%	-46%	-28%	-44%
Construction	1,788	3,624	8.3%	1,836	102.7%	56%	61%	35%
Wholesale and retail trade	7,875	9,217	21.1%	1,342	17.0%	32%	23%	17%
Hotels and restaurants	2,149	3,087	7.1%	938	43.6%	44%	40%	26%
Transport and communication	1,999	1,629	3.7%	-370	-18.5%	0%	16%	18%
Finance	1,215	1,005	2.3%	-210	-17.3%	-9%	-5%	3%
Business services	6,072	9,413	21.5%	3,341	55.0%	49%	58%	48%
Public administration	2,585	868	2.0%	-1,717	-66.4%	-7%	-5%	7%
Education	2,895	3,781	8.6%	886	30.6%	34%	38%	48%
Health and social work	3,013	3,488	8.0%	475	15.8%	23%	23%	28%
Community services	2,714	2,989	6.8%	275	10.1%	62%	49%	29%
Total	36,640	43,777	100.0%	7,137	19.5%	22%	23%	17%

Source: Annual Business Inquiry, 1995 and 2005

Note: Due to the small number of employees involved with Mining and quarrying, and Electricity, gas and water supply sectors, there are confidentiality restrictions. The table includes guideline figures instead.

Job density is defined as the ratio of total jobs to working age population in a given area. The job density for Sevenoaks District for 2005 was 0.79. This figure is less than that of the South East 0.88 and the UK 0.84 but higher than that of the adjacent London Boroughs of Bexley 0.60 and Bromley 0.68. In comparison to surrounding districts Tunbridge Wells recorded a 0.91 job density ratio and Tonbridge and Malling recorded 0.94, both relatively high figures.

In April 2007 Sevenoaks District registered a total of 2,717 job vacancies across all sectors. The majority of the jobs were in the banking, finance and insurance sector and also for the distribution, hotels and restaurants sector. In comparison to neighbouring districts total registered vacancies in Dartford were registered at 3,485 and Tunbridge Wells 2,143. The banking, finance and insurance sector make up most vacancies in the surrounding districts.

5.3. Businesses and Sectors

Business Stock

Entry on the VAT register is compulsory for companies with a turnover of over £56,000. The VAT register therefore includes all but the smallest enterprises. The number of companies signing onto the register per annum can be used as a proxy for the number of business start-ups. **Table 5.2** draws on VAT registration data from DTI Small Business Service. According to this data, the stock of businesses in Sevenoaks District has grown by 680 businesses between 1995-2005 or a net growth of 16% growth rate. The differential between the VAT start up rate and the VAT de-registration rate was just 0.5% representing a minor positive growth in businesses weaker than both the regional and national rates (1.06% and 1.39%).

Table 5.2 Stock of VAT registered businesses (1995, 2005)

	Sevenoaks	South East	Great Britain
Change Stock 1995-2005	680	47,740	230,900
Growth rate 1995-2005 (%)	16%	20%	15%
VAT Registration during 2005	415	27,695	173,595
VAT Registration rate in 2005 (A)	8.31%	9.49%	9.70%
VAT Deregistration during 2005	390	24,605	148,940
VAT Deregistration rate in 2005 (B)	7.81%	8.43%	8.31%
VAT growth rate (A-B)	0.5%	1.06%	1.39%

Source: DTI Small Business Service VAT registrations / de-registrations, and Annual Business Inquiry 1995 and 2005

Note: % is a proportion of stock (at end of year)

** Figures from Annual Business Inquiry 1995 and 2005*

Another way to interpret the VAT registration figure is relative to the population of working age. This can be interpreted as a measure for entrepreneurial activity in a region, as it is roughly the number of company start-ups divided by the number of people living locally who might start up a business. Per head the VAT registration rates for Sevenoaks District is 0.63, which is higher than the Kent county and national averages of 0.55 and 0.48 respectively.

Sectors

The 2005 Annual Business Inquiry reports a total of 5,960 businesses in Sevenoaks District. Since 1995, the total number of businesses has increased by more 22%[16]. The business services sector in Sevenoaks District saw the largest increase with an additional 2,087 businesses (51%) in the market between 1995 and 2005. The total number of business by sector units is set out in **Table 5.3**, which shows historically levels (1995), growth rates (1995-2005), which are benchmarked against area comparators.

[16] ONS, Annual Business Inquiry, 2005

Table 5.3 Business Population in Sevenoaks District, 1995 and 2005

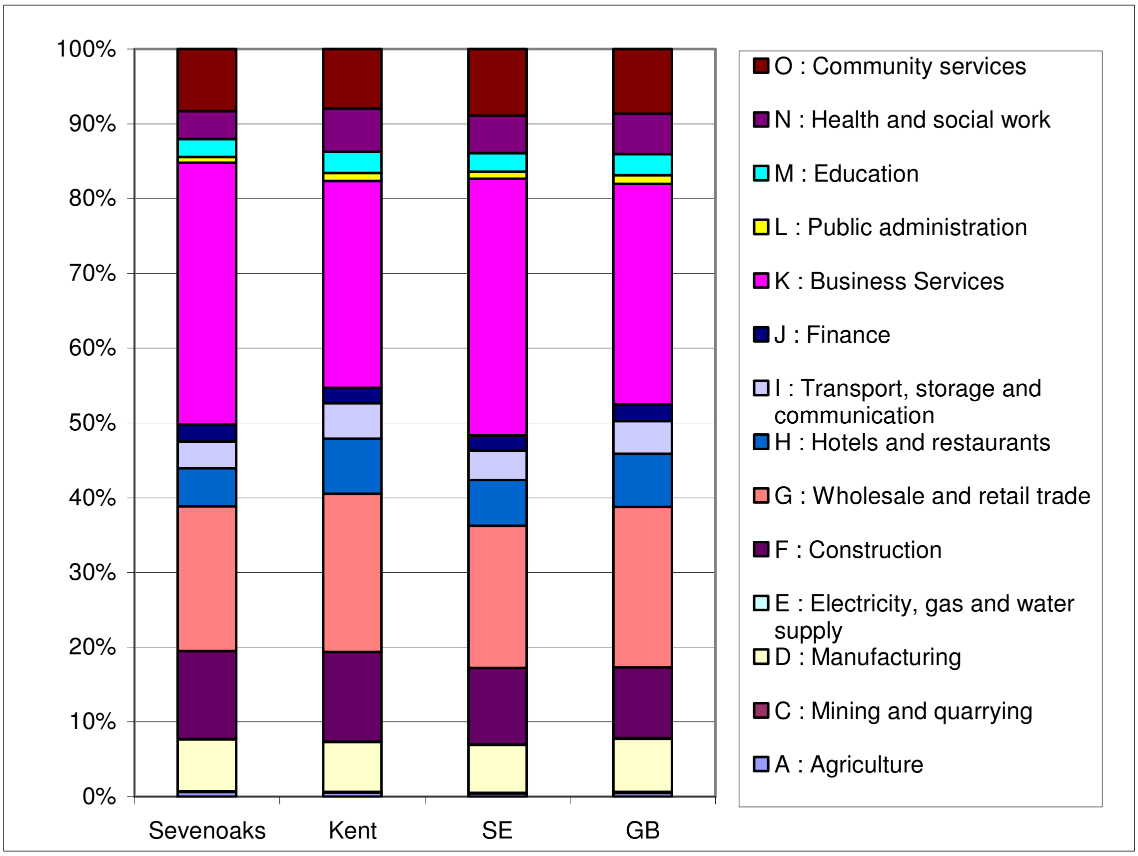
	Sevenoaks District		Kent		South East		Great Britain	
Industry	**1995**	**2005**	**Real Change 95-05**	**% of 2005**	**% Change 95-05**	**% Change 95-05**	**% Change 95-05**	**% Change 95-05**
Agriculture	34	37	3	0.6%	9%	13%	-2%	-1%
Mining and quarrying	<21	<21	< -21	0.1%	-14%	-10%	-47%	-35%
Manufacturing	416	416	0	7.0%	0%	3%	6%	-2%
Electricity, gas and water supply	<21	<21	<21	0.1%	-40%	-31%	-36%	-25%
Construction	596	699	103	11.7%	17%	18%	21%	12%
Wholesale and retail trade	1,175	1,154	-21	19.4%	-2%	0%	2%	-4%
Hotels and restaurants	240	304	64	5.1%	27%	24%	25%	12%
Transport and communication	201	211	10	3.5%	5%	8%	13%	5%
Finance	132	138	6	2.3%	5%	4%	8%	1%
Business services	1,380	2,087	707	35.0%	51%	63%	72%	65%
Public administration	44	44	0	0.7%	0%	-2%	-5%	-7%
Education	93	144	51	2.4%	55%	41%	42%	36%
Health and social work	151	222	71	3.7%	47%	33%	37%	27%
Community services	416	494	78	8.3%	19%	22%	16%	6%
Total	4,890	5,959	1,069	100.0%	22%	22%	28%	17%

Source: Annual Business Inquiry, 1995 and 2005

Note: Due to the small number of businesses in the sectors of Mining and quarrying, and Electricity, gas and water supply, there are confidentiality restrictions. The table includes guideline figures instead.

In general the distribution of sectors in Sevenoaks District is similar to the proportions in Great Britain, the South East and Kent. The business services sector is the dominant industry with a total of 35.0% of all businesses. This is equivalent to the proportion in the South East (34.4%) but more than in Kent (27.6%) and Great Britain (29.5%). See **Table 5.1** below for more detail.

Figure 5.1 Businesses by Sector in Sevenoaks District



Source: Nomis / Annual Business Inquiry, 2005

Size of Businesses

Most businesses in Sevenoaks District are small. In 2005 there were 5,237 businesses comprising 87.9% of all businesses in the district. A similar situation can be found in neighbouring districts and boroughs with the majority of businesses employing less than ten people. These figures correspond with both national and regional trends. **Table 5.4** highlights the importance of small businesses in Sevenoaks District and benchmarks against the South East for years 1995 and 2005.

Table 5.4 Number of Businesses by size in Sevenoaks District and the Region

	Sevenoaks District				South East			
	1995		2005		1995		2005	
Employment Band	**Number**	**% of total**	**Number**	**% of total**	**Number**	**% of total**	**Number**	**% of total**
1 to 10	4,265	87.1%	5,237	87.9%	248,850	85.1%	319,621	85.4%
11 to 49	506	10.3%	593	9.9%	33,830	11.6%	42,622	11.4%
50 to 199	106	2.2%	110	1.8%	7,951	2.7%	9,916	2.6%
200 or more *	<21	0.4%	<21	0.4%	1,759	0.6%	2,080	0.6%
Total	4,898	100%	5,961	100%	292,390	100%	374,239	100%

Source: Nomis / Annual Business Inquiry, 1995 and 2005

Note *Confidentiality restrictions prevent reporting on data less than 21 businesses. For this reason, the total figures for Sevenoaks differ from those of Table 5.2.*

Location Quotient and Sector Change

The location quotient (LQ) is a measure of how strongly different industries are represented in the local economy compared to the wider region. We have compared the proportion of employees in the different industrial sectors in Sevenoaks District with the proportion of employees in the South East. A location quotient larger than 1.00 implies that there are proportionally more employees in this sector in Sevenoaks District than in the South East. This might be an indication that there are some comparative locational advantages in Sevenoaks District for this sector. A location quotient smaller than 1.00 indicates that this sector is under-represented in Sevenoaks District in comparison to the rest of the South East. The following industry sectors (SIC 1992 divisions) have a location quotient greater than one (ordered highest concentration descending) and imply a potential locational advantage in the District:

- Construction (1.28);
- Health and social work (1.16);
- Public administration (1.13);
- Transport, storage and communication (1.11);
- Wholesale, retail trade and repair (1.09);
- Manufacturing (1.07); and
- Community services (1.03)

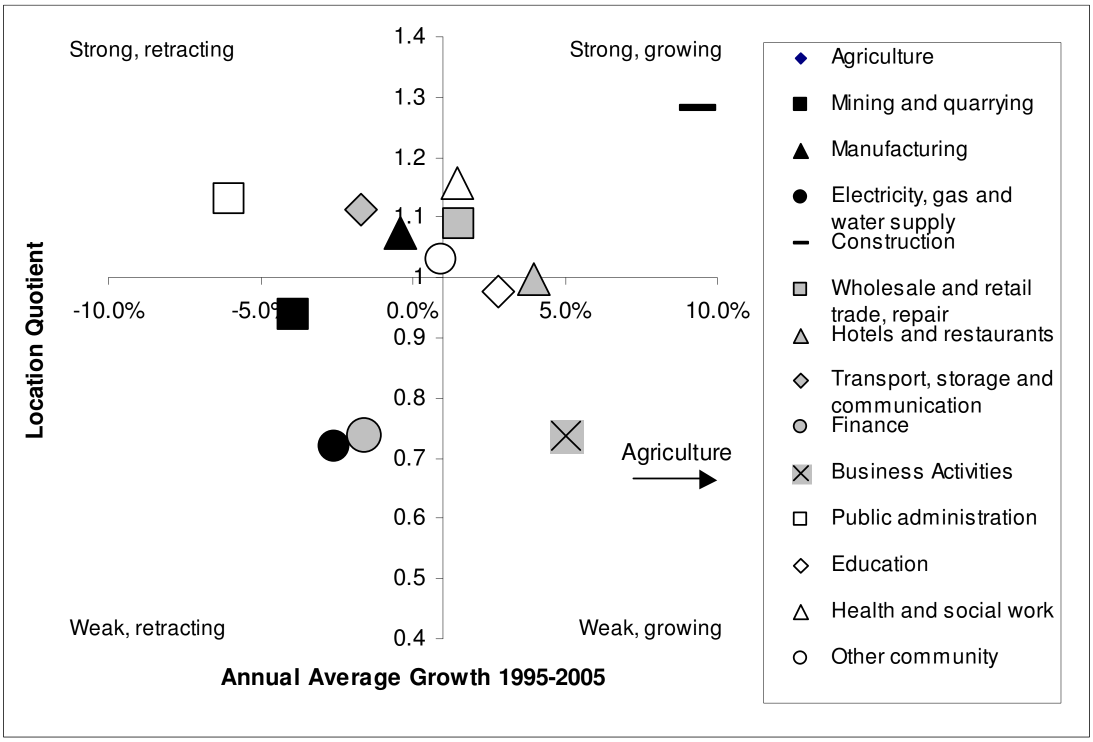
The LQ can be cross-referenced against annual employment change by sector to give a better idea of the changing significance of the sector. This data is recorded in **Table 5.5** and plotted in **Figure 5.2**, below. The upper right quadrant indicates those sectors, which present a higher concentration and high employment growth. These sectors are construction, wholesale and retail sectors and, to a lesser extent, health and social work. Manufacturing is shown to be in declining annual employment and is also underrepresented. Although employment in business services has grown significantly over the recent years, the sector is still underrepresented in the district.

Table 5.5 Employment Change per annum by Sector and Location Quotient

	Proportion of all employees, 2005	% Employment change per annum (1995 to 2005)	Sevenoaks Location Quotient (South East as 1.00)
Agriculture	0.6%	47.4%	0.53
Mining and quarrying	0.1%	-3.9%	0.94
Manufacturing	9.4%	-0.4%	1.07
Electricity, gas and water supply	0.3%	-2.6%	0.72
Construction	5.6%	9.3%	1.28
Wholesale and retail trade	20.6%	1.5%	1.09
Hotels and restaurants	6.7%	4.0%	1.00
Transport and communication	6.7%	-1.7%	1.11
Finance	2.9%	-1.6%	0.86
Business services	15.0%	5.0%	0.74
Public administration	4.7%	-6.0%	1.13
Education	9.0%	2.8%	0.98
Health and social work	12.9%	1.4%	1.16
Community services	5.4%	0.9%	1.03

Source: URS using data from Annual Business Inquiry 2005

Figure 5.2 Employment Growth (1995-2005) and Location Quotient (South East as 1.00)



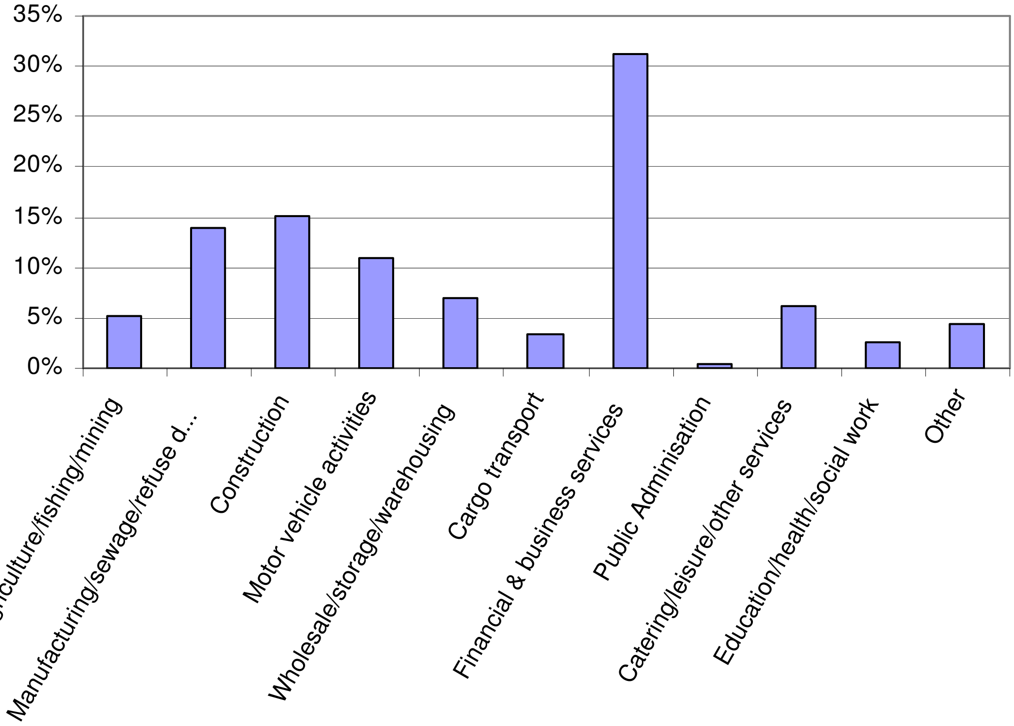
Source: URS using data from the Annual Business Inquiry 1995 and 2005

5.4. Findings from Business Survey

Business Activities

The business survey indicates that business activity in Sevenoaks District is dominated by the financial and business services sector, with 31% of surveyed businesses operating in this category. Manufacturing accounted for 14% of business activities and construction accounted for a further 15% of activities carried out by survey respondents. See **Figure 5.3** below for more detail on business sector activities in the District.

Figure 5.3 Business Activities in Sevenoaks District



Source: URS / Research & Marketing, 2005

Type of Site

The majority of businesses (80%) surveyed were on single sites with no operations elsewhere. These businesses make their location decisions locally and are not dependent on decisions taken outside the District. Only a small proportion (2%) of the businesses interviewed were branches of international businesses with headquarters outside the UK as shown in **Table 5.6**.

Table 5.6 Type of Site

	Number	%
A single site (no related operations elsewhere)	219	80%
Branch, subsidiary or division with headquarters elsewhere	28	10%
A national, regional or divisional headquarters	20	7%
Branch, subsidiary or division with headquarters outside UK	6	2%
Total	**273**	**100%**

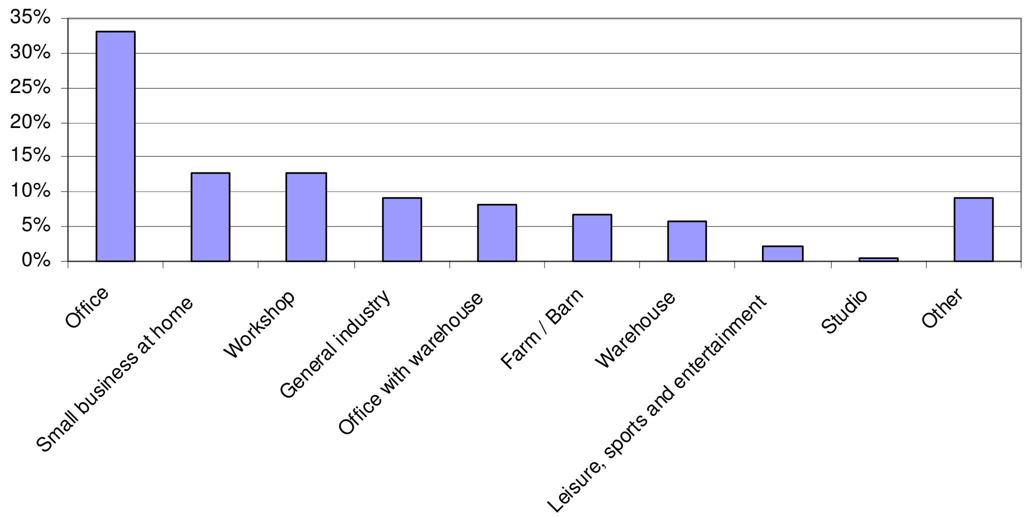
Source: URS / Research & Marketing, 2005

Type of Premises

When asked what type of premises their business occupied, 33% of businesses replied they were located in offices, 9% replied general industry and 6% warehouse with an additional 8%

defining their premises as office with warehouse. Businesses working from home accounted for 13% and a further 13% were located in workshops as shown in **Figure 5.4**.

Figure 5.4 Type of Premises



Source: URS / Research & Marketing, 2005

The majority of the buildings occupied by the businesses interviewed were custom built but a significant number (38%) were converted buildings as shown in **Table 5.7.**

Table 5.7 Custom Built or Conversions

	Number of Businesses	%
Base: All respondents	273	100%
Don't know / not applicable	52	19%
Active sample	121	100%
Custom built	60	50%
Converted farm	25	21%
Other converted building	13	11%
Converted warehouse	7	6%
Other	16	13%

Source: URS/Research & Marketing, 2005

Size of Business Premises

Most businesses occupy fairly small premises. In urban wards 47% and in rural wards 59% of the respondents in the business survey occupy premises no bigger than 90 sq m (1,000 sq ft). Eight businesses interviewed (5%) occupied premises larger than 1,860 sq m (20,000 sq ft).

Table 5.8 Size of Premises

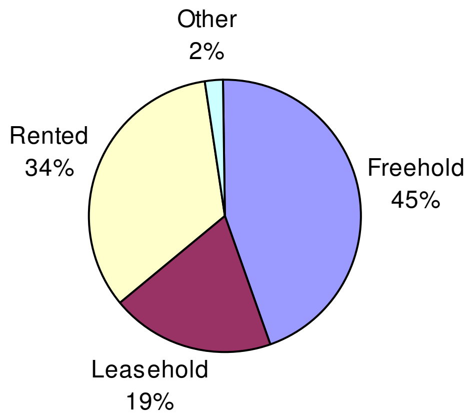
	Number of Businesses	%
Base: All respondents	273	100%
Don't Know	113	41%
Active sample	160	100%
0 - 1,000 sq ft or 0 - 90 sq m	81	51%
1,000 - 3,000 sq ft or 91 - 280 sq m	45	28%
3,001 – 5,000 sq ft or 281 - 460 sq m	12	8%
5,001 - 10,000 sq ft or 461 - 930 sq m	7	4%
10,001 - 20,000 sq ft or 931 – 1,860 sq m	7	4%
OVER 20,001 sq ft or 1,861 sq m	8	5%

Source: URS/Research & Marketing, 2005

Tenure

The business survey showed that 45% of the businesses owned the freehold to their premises, 34% rented and 19% leased their premises as shown in **Figure 5.5**.

Figure 5.5 Tenure



Source: URS/Research & Marketing, 2005

Locational Requirements

A majority of the businesses in the survey (60%) have always been at their present location. **Table 5.9** shows the previous location of the businesses that had not always been located at their current location.

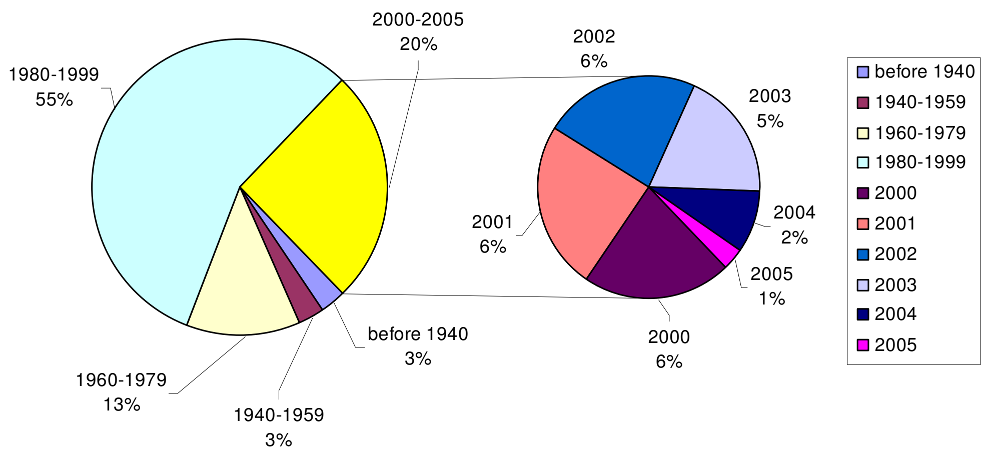
Table 5.9 Previous Address of Businesses

	Number of businesses	%
Within Sevenoaks District	55	50%
Outside Sevenoaks but within Kent	56	51%
Outside Kent but within the South East	6	5%
Within the Greater London area	12	11%

Source: URS/Research & Marketing, 2005

Figure 5.6 shows when the businesses in the survey started trading at their current location. Three quarters of the businesses have started trading at their current location within the last 25 years and 20% since 2000[17].

Figure 5.6 Year Businesses Started Trading at Current Location

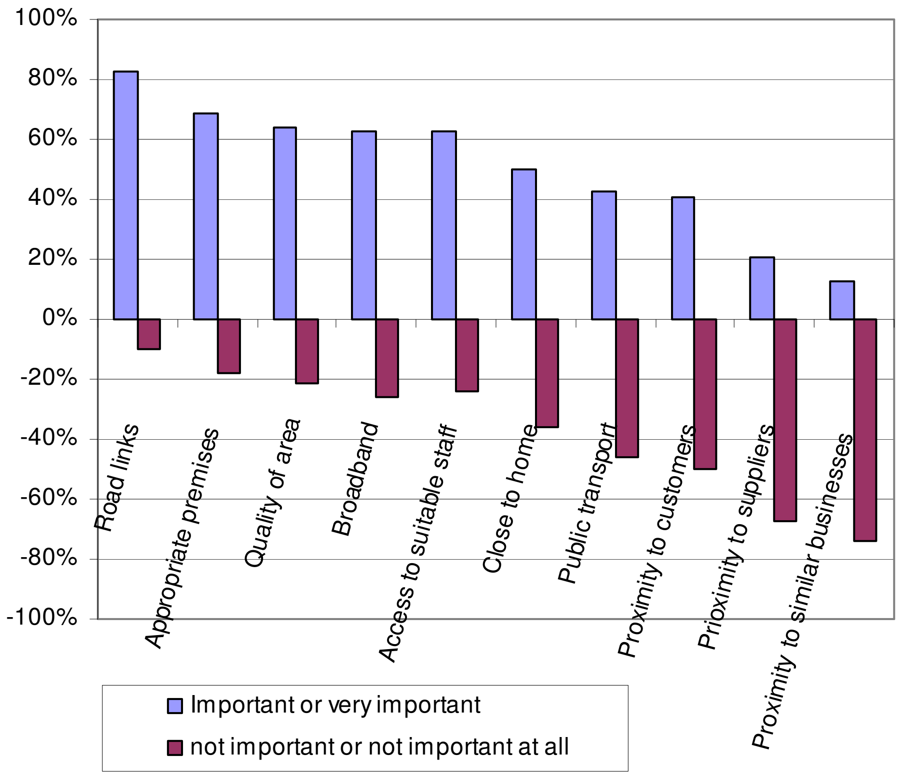


Source: URS/Research & Marketing, 2005

Asked about what factors businesses thought were important for their location, over 80% of the business replied that good road access was important or very important to them. Businesses also thought it important to have a supply of appropriate premises within the area (69%), be in a good quality area (64%), have access to modern communication technology (63%), and access to suitable staff (63%). Less important were proximity to similar businesses (13%), suppliers (21%), and customers (41%), access to public transport (43%) and closeness to home (50%) as shown in **Figure 5.7.**

[17] The relatively low figure for businesses established at their current location in 2004 might be a bias due to the time it takes for businesses to appear in business directories of the sort we used for the survey.

Figure 5.7 Locational Requirements



Source: URS/Research & Marketing, 2005

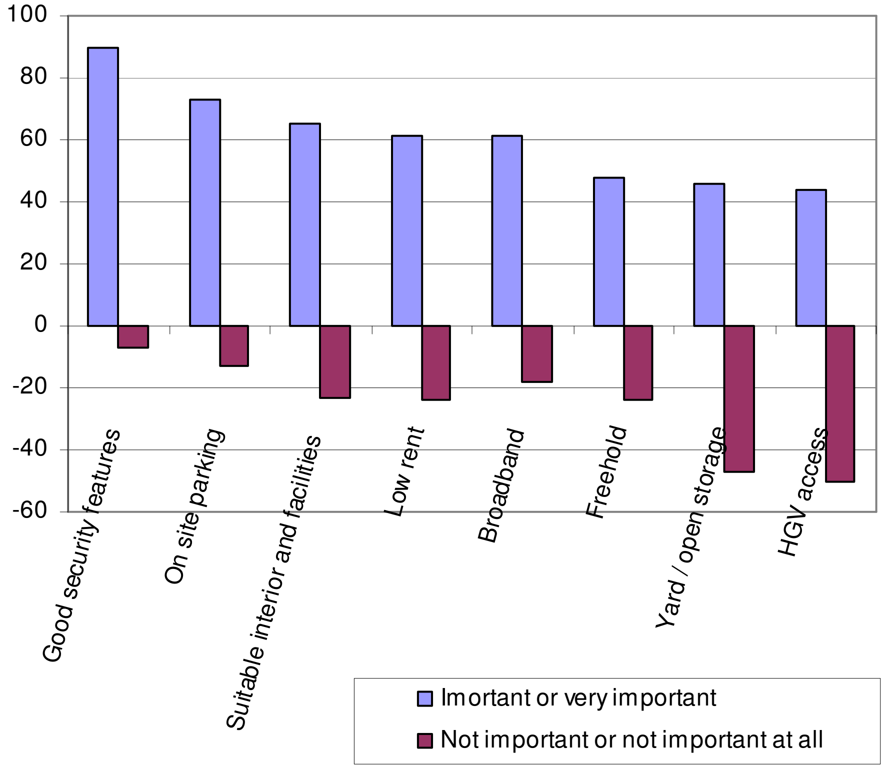
Road access seems to be important for two reasons: access for staff and ease of access for deliveries. Of the businesses interviewed 19% said that up to a quarter of their employees lived between 5 and 10 miles away from the business and 12% said that a quarter of their staff lived more than 10 miles away. This shows that a significant number of employees commute some distance to their workplace. With regards to deliveries the average business receives about three deliveries per week and nine businesses (9%) received 20 or more deliveries per week.

The survey also showed that the importance of access to suitable staff is underpinned by the fact that 79% of the businesses described the work undertaken by the majority of their workforce as professional or skilled manual and that 57% found it difficult to recruit managerial staff and 46% found it difficult to recruit technical and medium skilled staff.

Premises / Site Requirements

Good security features (90%) and on site parking (73%) were named most often as important or very important features for commercial premises. Also important were suitable interiors and facilities (65%), low rent (61%) and access to broadband (61%). Freehold (48%), access to a yard or open space (46%) and HGV access (44%) were less often named as being important.

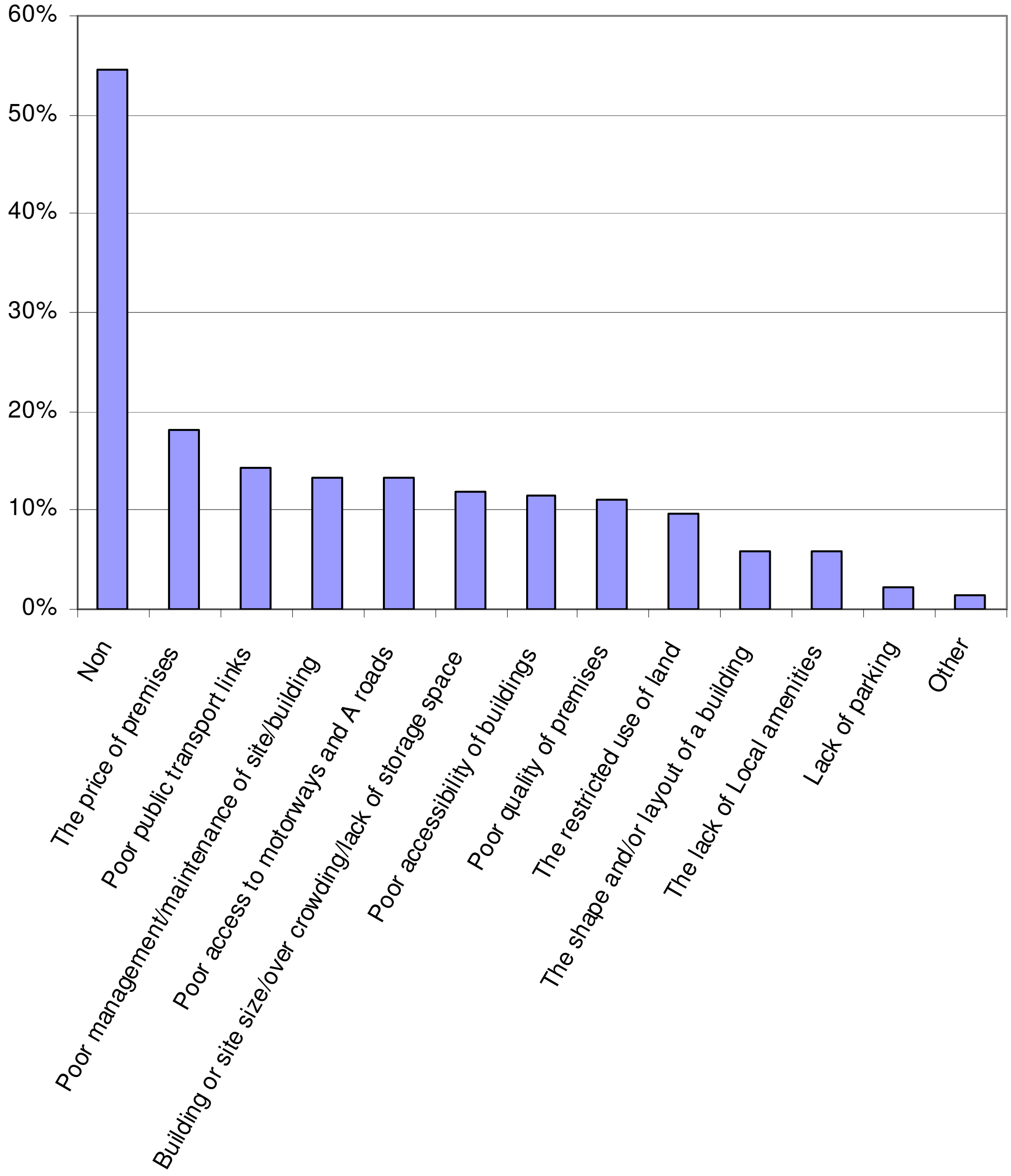
Figure 5.8 Premises / Site Requirements



Source: URS/Research & Marketing, 2005

Asked about building and site constraints that affected the operations of the business 55% of the businesses replied that there were no such constraints that affected their business. The price of the premises (18%) and poor public transport links (14%) were named most often as a constraint. An overview of the perceived site and building constraints is given in **Figure 5.9** below.

Figure 5.9 Site / Building Constraints

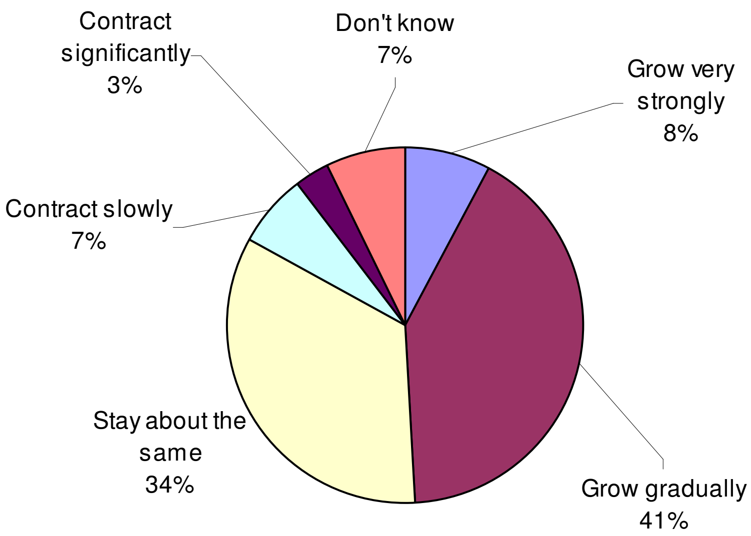


Source: URS/Research & Marketing, 2005

Anticipated Future Business Prospects

Many of the business owners surveyed reported a positive view of the future of their respective markets. Of those surveyed, only a small proportion (3%) were expecting their market sector to decrease significantly over the next five years. Most business owners (49%) were expecting gradual or very strong growth to continue over the same time period. **Figure 5.10** below provides more detail.

Figure 5.10 Expected Changes to Market

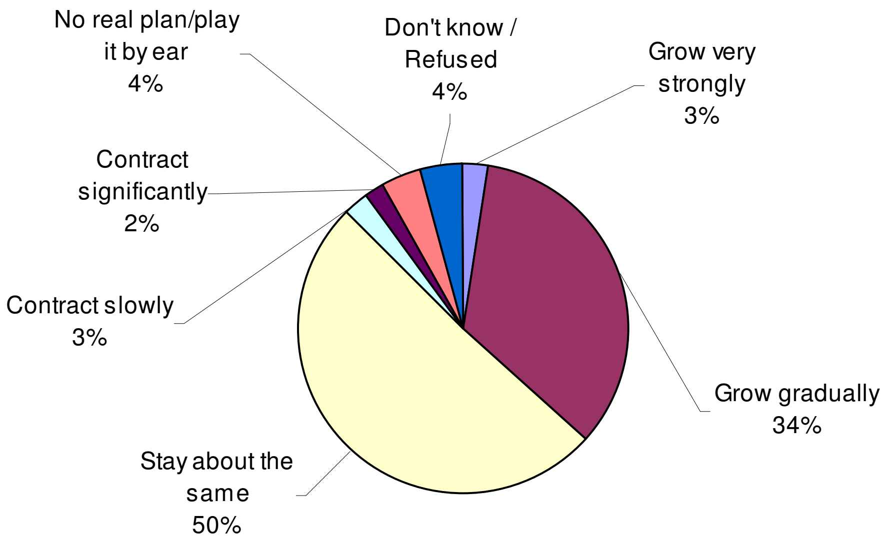


Source: URS/Research & Marketing, 2005

Expected Changes to Workforce

In accordance with expected business growth, many business owners also anticipate an increase in their workforce over the next five years. Only 2% believed their workforce would decrease and 37% were anticipating an expanded workforce, 51% thought their workforce would remain the same. See **Figure 5.11** for more detail.

Figure 5.11 Expected Changes to Workforce

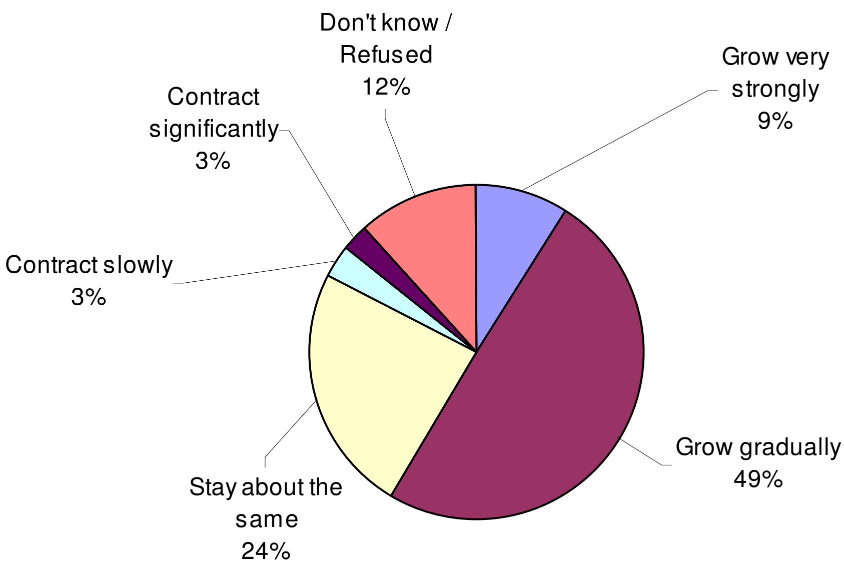


Source: URS/Research & Marketing, 2005

Anticipated Change in Turnover

Just under half of survey respondents reported an expected gradual growth in their businesses turnover over the next five years, a further 9% anticipated very strong growth and 24% expected turnover to stay about the same. **Figure 5.12** provides more detail.

Figure 5.12 Anticipated Change in Turnover

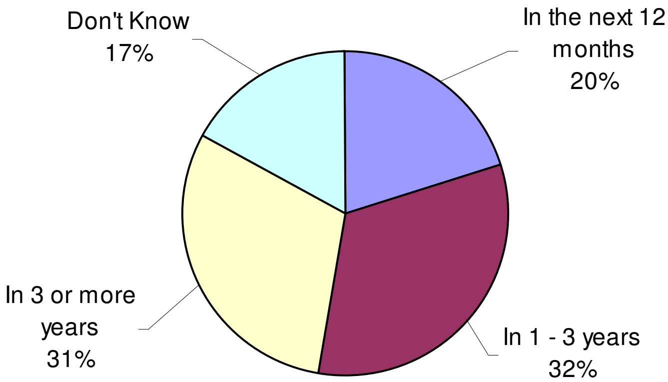


Source: URS/Research & Marketing, 2005

Future Location Plans

Businesses were asked about their future location plans and likelihood of moving premises. 10% of businesses surveyed said that they were considering moving some or all of their business within the next five years. A further 11% replied that they might move some or all of their business within the next five years. The expected date of move is recorded in the figure below for those businesses stating that they were considering moving or might move some or all of their business (10% and 11%, respectively, as mentioned above).

Figure 5.13 Expected Date of Move for Businesses Considering Moving



Source: URS/Research & Marketing, 2005

Reasons for Relocation

Of those who were looking to move, 53% required larger premises in order for their business to expand and 15% required better quality premises. Most business owners (64%) were looking to stay close to their current location and remain in Sevenoaks District.

Table 5.10 Preferred Future Location

	Number	%
Total number of respondents	59	100%
Site close to current location	12	20%
Site within Sevenoaks district	26	44%
Kent	13	22%
South East	7	12%
Greater London	5	8%
Don't Know	13	22%
Total	**76**	**129%***

** There were a total of 59 respondents. The question involved multiple answers hence the totals greater than 100%.*
Source: URS/Research & Marketing, 2005

Table 5.11 Reasons for Relocation

		Number	%
Require larger premises to facilitate expansion		32	54%
Require better quality premises		9	15%
Price of premises too expensive		8	14%
Relocate to a nicer area		3	5%
Require better transport links		1	2%
Want to consolidate to a smaller site		1	2%
Having difficulty in recruiting staff		1	2%
To realise the increased value of your site		1	2%
Don't know / Refused		5	9%
Other	Lifestyle & technological changes	2	3%
	Changing the nature of the service that we are currently off	1	2%
	Need to locate as near to Greater London as possible.	1	2%
	Lack of Parking	1	2%
	Require more parking facilities/improved access to building	1	2%
	Need to be nearer to our staff, adequate car parking	1	2%
	Need to be nearer to own home.	1	2%
	Require a commercial property as oppose to work from home.	1	2%
	Wants a freehold and to have more suitable premises	1	2%
	To have a shop for public access	1	2%
	Pressure from/problems with council	1	2%
	Require larger premises for own family.	1	2%
Total		**59**	**100%**

Source: URS / Research & Marketing, 2005

6. THE RURAL ECONOMY

6.1. Introduction

This section gives an overview of the socio-economic make-up of rural England followed by a review of related policy and strategy related to the rural economy in Sevenoaks District, the Southeast and England. We also present the findings of the rural business survey conducted in conjunction with the overall business telephone survey.

6.2. Socio-Economic Characteristics

Population

In 2001, approximately 14 million people lived in rural areas representing 29% of the English population. Between 1991 and 2001 the population of rural districts increased by 6% compared to 1.4% in urban areas. Of the rural population 8.4 million people live in accessible rural areas and 5.6 million in remote rural areas (11% of the population). Over the last 10 years 780,000 residents moved to rural areas and almost 40% of those moved into remote rural areas. Of the 14 million people living in rural areas, 7.6 million people live in districts showing significant rural disadvantage.

Approximately 2.5 million people in rural areas are aged 65 years and over, of which 1.1 million live in remote rural areas. There is a higher proportion of retirement age residents in remote rural areas where 20% of the population is over 65 years old. This disparity is a result of two factors: in-situ aging and, increasingly so, out-migration of young adults.

Employment

In general, the employment structure of rural areas is similar to that of urban areas except in the banking and finance sector (15% rural, 19% urban). Rural districts account for 6.6 million employed people in England, which represents 29% of national employment. In both accessible and remote rural areas, a large proportion of people are now employed in public administration, education and health. In particular, in remote rural areas where 25% of people are employed in public administration, education and health, compared to 5% employed in agriculture and fishing.

Unemployment

According to Census 2001, there were 244,732 unemployed people in rural areas which is equal to about 21% of national unemployment. Of those unemployed, 33% lived in remote rural areas. In general, rural areas do not have high rates of unemployment when compared to urban areas but remote rural area unemployment rates are higher than accessible rural areas. Many areas with the lowest rates of unemployment are found in the western parts of the South East.

6.3. Rural Strategies and Programmes

Rural Strategy 2004

The Rural Strategy 2004, prepared by the Department for Environment, Food and Rural Affairs (DEFRA), was developed in response to the continuing challenges, both economic and social, facing the rural economy throughout England. In the light of the Government's Rural

White Paper 2000, the Rural Strategy recognises that change in the rural economy must encompass economic, social and environmental interests. Further studies and experience has highlighted that there is no homogenous 'Rural England' and that policies need to adapt to needs at the national, regional and local level. The Government's three key priorities for rural policy are set out in the Rural Strategy and they are:

- Economic and social regeneration – supporting enterprise across rural England, but targeting greater resources at areas of greatest need;
- Social justice for all – tackling rural social exclusion wherever it occurs and providing fair access to services and opportunities for all rural people; and
- Enhancing the value of our countryside – protecting the natural environment for this and future generations.

The Rural Strategy cites the following as the main factors of rural change:

- Population growth;
- An aging population;
- Relative prosperity especially in more accessible areas;
- Economic weaknesses, with associated social deprivation, in a minority of 'lagging' rural areas;
- Convergence between the urban and rural economies;
- Increased mobility through the car; and
- Pressures on the countryside – especially through demand for housing and transport.

The Rural Strategy recognises that the majority of rural areas have a relatively strong economic performance but in the same instance there are structural economic weaknesses and associated poor social conditions in a minority of rural areas. To address both situations in policy planning is difficult and requires targeted area-based policy to maximise benefits. In this respect the Rural Strategy's economic objective for rural areas has two components:

- Building on the economic success of the majority of rural areas to ensure they contribute fully to national, regional and local economic prosperity; and
- Tackling the structural economic weaknesses and accompanying poor social conditions that exist in a minority of rural areas.

Farming and Food: Our Healthy Future

Farming and Food is a delivery plan for sustainable farming and food in the South East and London. The Plan outlines a number of actions to help put farming and food in the South East Region and London on a more sustainable route, economically, socially and environmentally. Throughout the Plan, London and the South East are recognised as a whole (the Region) due to the interaction between London's demand for food and access to the countryside and the South East's ability to meet those demands.

The Plan sets seven objectives and aims for a region where:

- Efficient farming and food industries have a profitable and sustainable future;
- Farming methods command public confidence, and maintain or improve the quality of the environment;
- Healthy food is available, affordable and acceptable to all;
- A dynamic rural economy provides rewarding jobs for people of all ages;
- Action is taken to support disadvantaged areas and sectors;
- The public sector plays its part in the procurement of local food; and
- There is full collaboration within and between Government and industry to maximise sustainability.

According to the Plan, there were 23,972 agricultural holdings (equal to 1.14m hectares) registered in the South East in 2002. In comparison there were 19,502 holdings in 1990. This reflects the fragmentation of some holdings where small parcels of land are being sold with or without property. In addition, there has been an increase in 'other' holdings where many land parcels are sublet under various tenancy agreements and not used for farming by the new occupier.

As part of the preparation of the Plan, regional stakeholders were consulted and ten key areas of action were identified:

- Advice and training – giving farmers the help they need and encouraging new entrants
- Countryside access – promoting and seizing the benefits of increased public access
- Environmental stewardship – promoting through whole-farm planning, soil and water management
- Farming mainstream – improving returns through collaboration and adding value
- Non-food diversification – overcome barriers to non-food diversification market-based action on industrial and biomass crops, wood fuel and tourism.
- Food chain connection – securing better integration and understanding between farmers and customers
- Health – driving forward action on food and nutrition for healthy eating and living
- Local food – building the market and empowering South East suppliers to exploit it
- London – developing food strategy to benefit the people and economy of London
- Public procurement – identifying the opportunities and linking in South East suppliers

Kent Countryside 2000: Understanding Rural Change

This report has been developed to provide an overview of facts and trends about the range of rural economic, social and environmental issues affecting the Kent countryside and to provide a rural dimension to strategic policy objectives.

According to the report, developed land in the county has increased from 45,988 ha in 1961 to 56,494 ha in 1990, an increase of 23%. The majority of the change is due to land converted from agricultural use. In addition, 28% of wetland and 11% of woodland was lost as it was brought in to agricultural use. Orchard and hop fields in Kent have experienced a 41% decline from 37,517 ha in 1961 to 21,915 ha in 1990.

Lack of an adequate supply of affordable housing in rural areas continues to be a problem, where high property prices and the lack of new premises is preventing people even on modest incomes from living in the countryside. At the time of the report over half of Kent parish councils reported a need for affordable housing in the parish.

The report outlines the changes that have occurred in the Kent countryside in recent years. Employment in the agriculture sector continues to decline while employment in the service is on the rise, to a point where a similar split of industries and services are seen in the rural and urban economies. An increase in popularity of the countryside opens up a wealth of opportunity for growth in the tourism sector, providing shops and other rural services to visitors.

EU Common Agricultural Policy

The Common Agricultural Policy (CAP) was proposed by the European Commission in 1958 and was built on three principles:

- Market unity;
- Community preference; and
- Financial solidarity.

Its five objectives are to:

- Increase productivity, by promoting technical progress and ensuring the optimum use of the factors of production, in particular labour;
- Ensure a fair standard of living for the agricultural Community;
- Stabilise markets;
- Secure availability of supplies; and
- Provide consumers with food at reasonable prices.

The CAP uses three instruments to achieve objectives:

- Import tariffs
- Internal intervention
- Production subsidies

The CAP is a controversial piece of legislation. The high amount of agricultural subsidies each year result in unfair competition, making it particularly difficult for Third World countries to compete in the world market. On the other hand, CAP is seen as a tool to assist economically deprived areas and preserve the rural environment. Recent reforms have seen subsidies switch towards land set aside out of cultivation and for improving the rural landscape. Further changes have switched money away from payments for planting specific crops to flat-rate payments for any land capable of cultivation.

In June 2003 EU farm ministers adopted a fundamental reform of the CAP. New ‘single farm payments’ will replace ‘per crop’ payments and are designed to make more money available for environmental, quality or animal welfare programmes by reducing direct payments for bigger farms.

In the UK, the single payment plan provides around £230 per hectare for maintaining cultivatable land even if it is not used for production. The new scheme allows for much wider non-production use of land, which may still receive subsidy, additional payments may be made if land is managed in an ecologically friendly way.

England Rural Development Programme 2000-2006

DEFRA's England Rural Development Programme (ERDP) was developed to aid in the delivery of the second pillar of the CAP – the Rural Development Regulation. The ERDP provides a general framework for rural England along with individual schemes addressing specific issues.

The Programme identifies two main challenges to England's rural areas:

- The need to develop a strong rural economy; and
- The environmental degradation of the English countryside.

To address these challenges, the Government selected two key priorities:

Priority A: Creation of a productive and sustainable rural economy, with the following operational objectives:

- Creation of more diverse and competitive agricultural and forestry sectors;
- New jobs in the countryside;
- Encourage the development of new products, market outlets and greater collaboration; and
- Provide targeted training.

Priority B: Conservation and enhancement of the rural environment, with the following operational objectives:

- Increase the area covered by funding schemes; and
- Maintain the sustainable management of Less Favoured Areas.

The ERDP identifies four key features of the South East to be:

- High quality landscape is important to those who live or work in, or visit, the region;
- Vulnerability of the traditional farming practices which underpin this landscape;
- Wide diversity of lowland wildlife habitats, including chalk rivers, ancient woodland, wood pastures, downland, heath and coast;
- The region has the highest proportion of woodland area in England, but it is an under-managed resource;
- Densely populated and highly developed region, with significant development pressures on the countryside; and
- Areas and pockets of rural deprivation and isolation in a generally prosperous region.

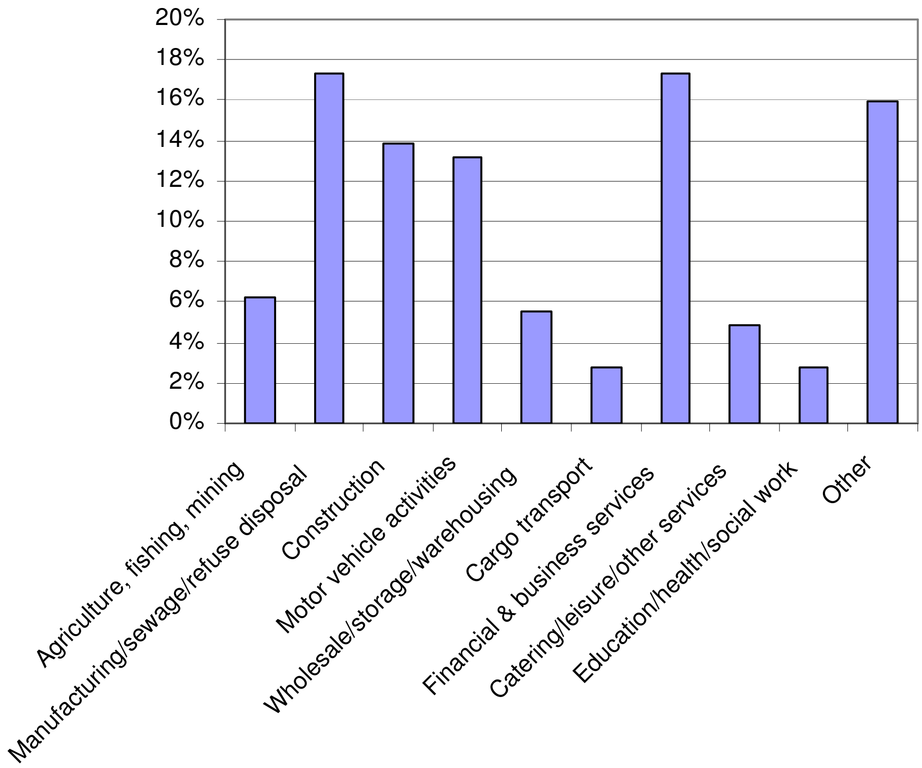
6.4. Results of Rural Business Survey

Information below is taken from the rural economy business survey completed as part of this assignment.

Business Activities

A range of business activities take place in the rural areas of Sevenoaks District, with agriculture (6%) making up a small proportion of rural business activity. When asked what their main business activity was, 17% of business owners reported to be in the manufacturing sector and 17% reported activities to be in the financial and business services sector. See **Figure 6.1** below for more detail.

Figure 6.1 Rural Businesses by Sector



Source: URS / Research & Marketing

Secondary Business Activities

A small number of businesses (15 no.) contacted by the survey reported being involved in secondary business activities. When compared to the respondents of the total survey, rural business owners are the only businesses to report secondary business activities. Most had taken on secondary activities in order to expand their business. **Table 6.1** below provides further detail.

Table 6.1 Secondary Business Activities

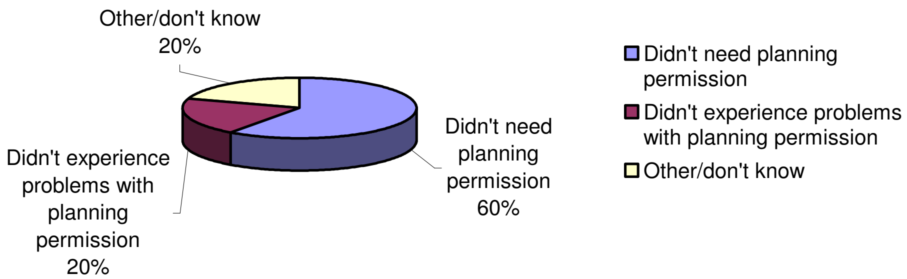
Secondary Activity	Number	%
Manufacturing	2	13.3
Wholesale/warehouse	2	13.3
Professional Services – IT, consultancy, solicitor	2	13.3
Retail	2	13.3
Farming	1	6.7
Real Estate	1	6.7
Other	5	33.3
Total	**15**	**100**
Reason for Secondary Activity	**Number**	**%**
Wanted to expand business	**5**	**33.3**
Needed to increase turnover	**2**	**13.3**
The primary area of activity market is in decline	**2**	**13.3**
It was area of the market which was growing	**1**	**6.7**
Other	**5**	**33.3**
Total	**15**	**100**

Source: URS / Research & Marketing, 2005

Planning Permissions

When asked if business owners experienced any problems with planning permissions when they diversified their business, most responded that they did not require planning permission or that they had not had problems getting planning permission. See **Figure 6.2** below for further detail.

Figure 6.2 Planning Permissions



Source: URS / Research and Marketing, 2005

Type of Business

The majority of respondents from the rural business survey (86%) were operating from a single site, which is slightly higher than the rate for the total survey. Businesses that were branches or subsidiaries accounted for 11% of respondents. This is similar to the proportion of the total survey. Only a very small proportion (1%) of the businesses surveyed were branches of international businesses with headquarters located outside the UK. More detail is given in **Table 6.2** below.

Table 6.2 Type of Rural Area Site

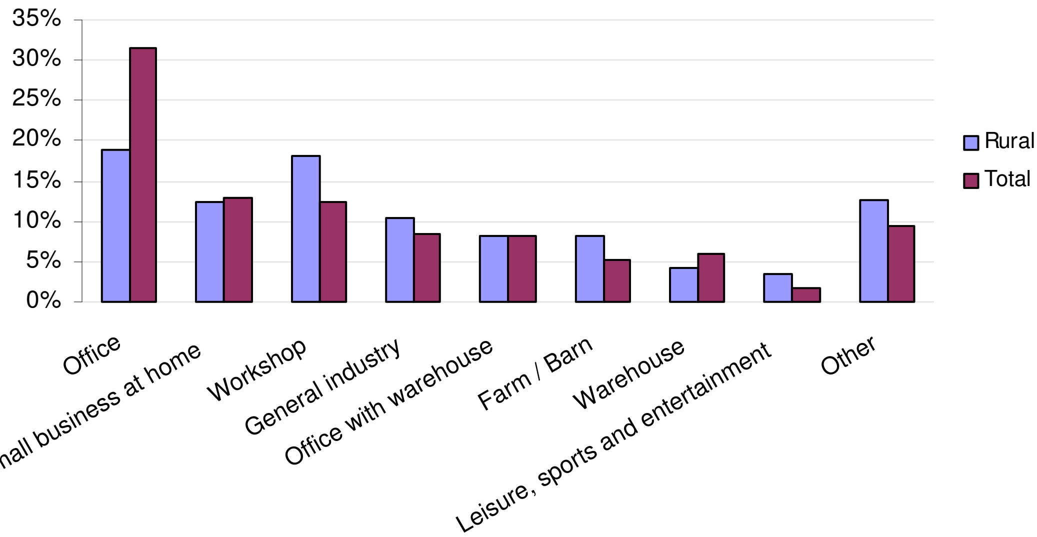
	Number	%
A single site (no related operations elsewhere)	124	86%
Branch, subsidiary or division with headquarters elsewhere	15	11%
A national, regional or divisional headquarters	3	2%
Branch, subsidiary or division with headquarters outside UK	2	1%
Total	**144**	**100%**

Source: URS / Research & Marketing, 2005

Type of Premises

When asked what type of premises their business occupied, 18% reported they were located in a workshop, 18% in offices, 12% were working from home and 10% replied general industry. The results of the rural business survey compared to the results of the total survey are given in **Figure 6.3** below.

Figure 6.3 Type of Premises



Source: URS / Research & Marketing, 2005

Type of Buildings

The type of buildings rural businesses occupied were almost divided between custom built (40%) and converted buildings (35%). See **Table 6.3** below for more detail.

Table 6.3 Custom Built or Conversions

	Number of Businesses	%
Base: All respondents	144	100%
Don't know / not applicable	15	10%
Active sample	129	100%
Custom built	52	40%
Converted farm	26	20%
Other converted building	13	10%
Converted warehouse	7	5%
Other	31	25%

Source: URS / Research & Marketing, 2005

Size of Business Premises

Similar to the total survey, the majority of rural businesses occupy small premises. Of those surveyed 59% occupy premises no bigger than 90 sq m (1,000 sq ft). and only six businesses occupied premises over 1,861 sq m (20,001 sq ft). Results on the size of rural businesses are presented in **Table 6.4** below.

Table 6.4 Size of Premises

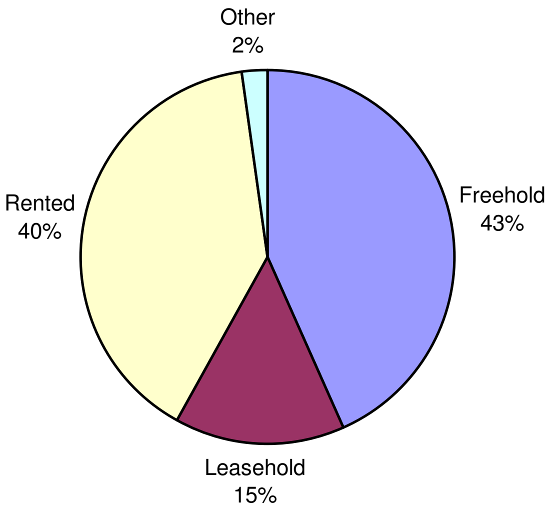
	Number of Businesses	%
Base: All respondents	144	100%
Don't Know	56	39%
Active sample	88	100%
0 - 1,000 sq ft or 0 - 90 sq m	52	59%
1,000 - 3,000 sq ft or 91 - 280 sq m	18	21%
3,001 – 5,000 sq ft or 281 - 460 sq m	6	7%
5,001 - 10,000 sq ft or 461 - 930 sq m	3	3%
10,001 - 20,000 sq ft or 931 – 1,860 sq m	3	3%
OVER 20,001 sq ft or 1,861 sq m	6	7%

Source: URS / Research & Marketing, 2005

Tenure

The rural business survey showed that 43% of rural businesses owned the freehold to their premises, compared to 45% for the total survey. Slightly more rural businesses (38%) rented their premises compared with the total survey (34%). More detail on the form of tenure of rural businesses is given in **Figure 6.4** below.

Figure 6.4 Tenure



Source: URS / Research & Marketing, 2005

Locational Requirements

Most of the rural businesses surveyed (67%), compared to 60% for the total survey, have always been at their present location. **Table 6.5** shows the previous location of the businesses that had not always been located at their current location.

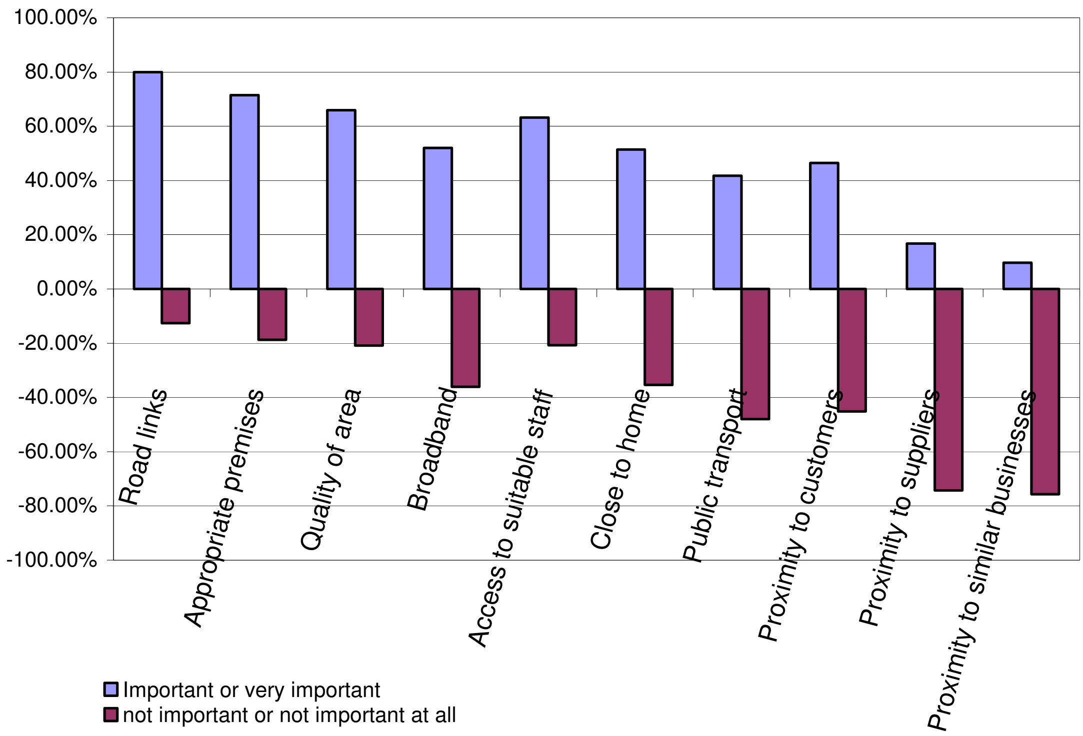
Table 6.5 Where Businesses Moved From

	Number of businesses	**%**
Within Sevenoaks district	27	56%
Within Kent	16	32%
Within the South East	3	6%
Within the Greater London area	3	6%
Total	**49**	**100%**

Source: URS/Research & Marketing, 2005

When asked what factors businesses thought were important for their location, 80% reported that having good road transport links was important or very important to their business. Having a supply of appropriate premises (71%) in a good quality area (66%) was also deemed important or very important. Being close to suppliers (17%) and proximity to similar businesses (10%) was reported as less important to rural businesses. More detail on locational factors for rural businesses are presented in **Figure 6.5** below.

Figure 6.5 Location Requirements



Source: URS / Research & Marketing, 2005

Similar to the total survey, road access was deemed important to rural businesses for two reasons: access for staff and deliveries. Of the businesses surveyed, 19% said that a quarter of their employees lived between five and ten miles away from the business and 20% said more than three quarters live more than ten miles away. With regards to deliveries the average business received about three deliveries per week and 11 businesses (9%) received 20 or more deliveries.

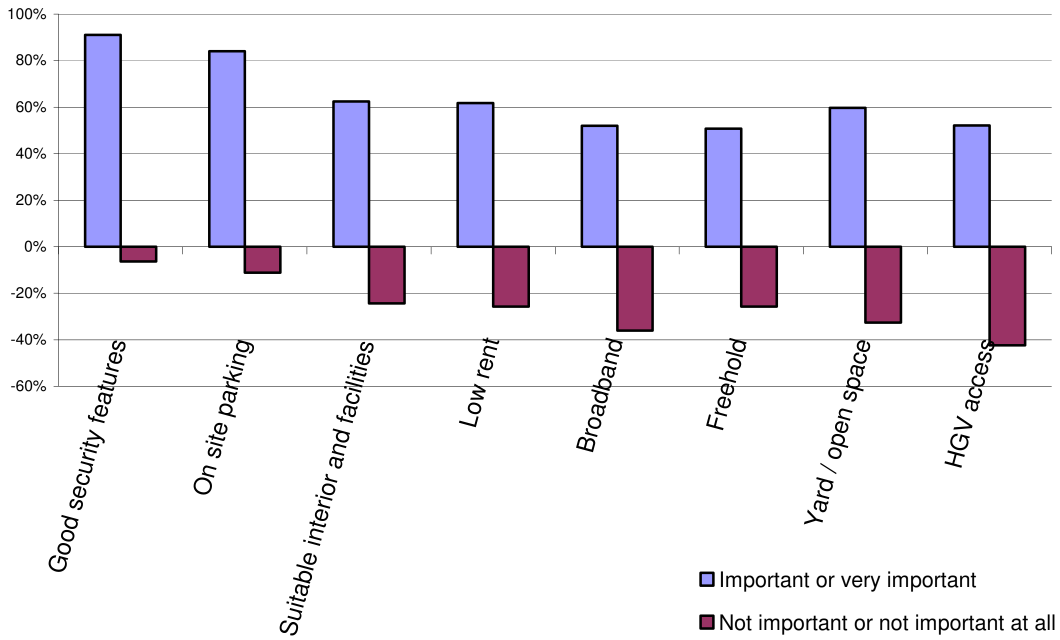
The survey showed that access to suitable staff is just as important in rural areas as urban areas, highlighting this factor is that rural business reported that 80% of their workforce was professional or skilled manual and 60% found it difficult or very difficult to recruit managerial staff and 46% found it difficult to recruit technical and medium skilled staff.

Premises / Site Requirements

Security ranked high for rural businesses with 91% reporting that having good security features was either important or very important to their business. Additionally, on-site parking was an important factor for businesses with 84% saying that having on-site parking was important or very important. Low rent, suitable interiors and access to broadband and good

HGV access were each important features for rural businesses. Figure 6.6 below provides more detail on premises and site requirements for rural premises.

Figure 6.6 Premises / Site Requirements

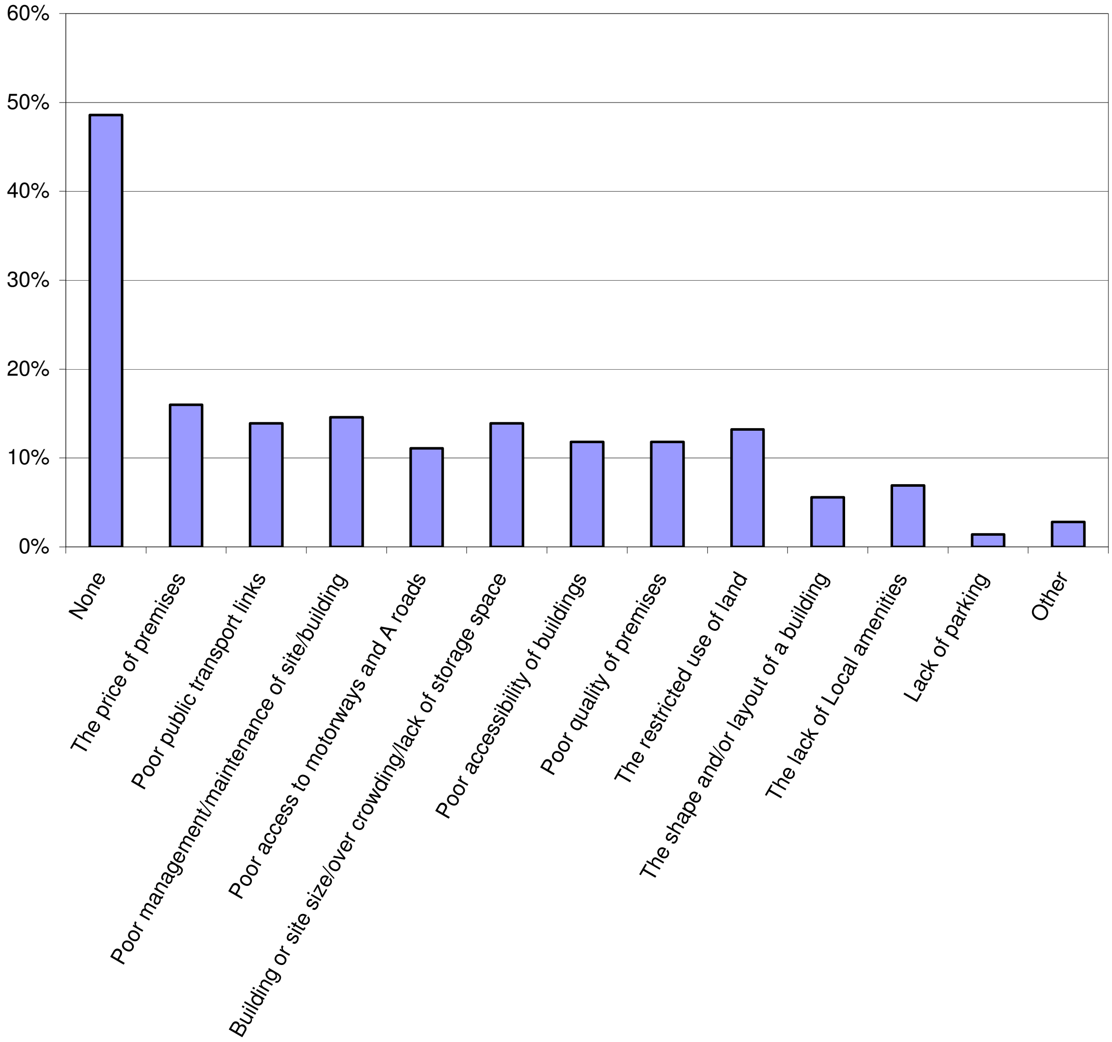


Source: URS / Research & Marketing, 2005

Building and Site Constraints

When asked what other constraints might affect their business, 49% replied that there were no constraints. The price of premises (16%) and poor building management and maintenance (15%) were considered important. Other issues were building or site size, land use restrictions, layout of buildings and poor public transport links. See **Figure 6.7** for more detail.

Figure 6.7 Site / Building Constraints



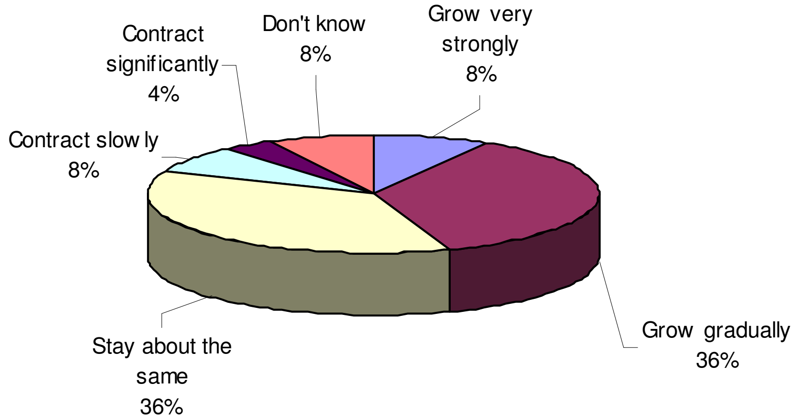
Source: URS / Research and Marketing, 2005

6.5. Anticipated Future Business Prospects

Expected Changes to Market

When rural business owners were asked how they expected their market to change over the next five years, 36% expected it to grow gradually and 36% thought it would remain the same. There were 12 (8%) business owners who anticipated their market to grow very strongly and only three business owners expected a significant decline in the market.

Figure 6.8 Expected Changes to Market

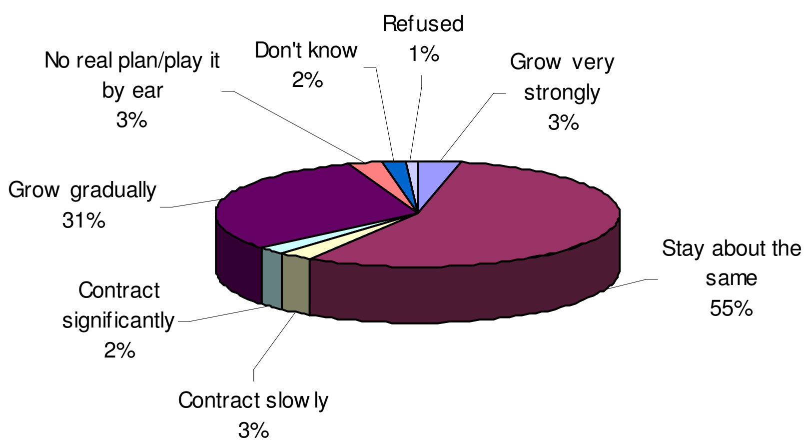


Source: URS / Research and Marketing, 2005

Expected Changes to Workforce

Most rural business owners (56%) surveyed anticipate little change in their workforce over the next five years while a further 31% thought their workforce would grow gradually. Only 2% of business owners anticipated a decline in their workforce.

Figure 6.9 Expected Changes to Workforce

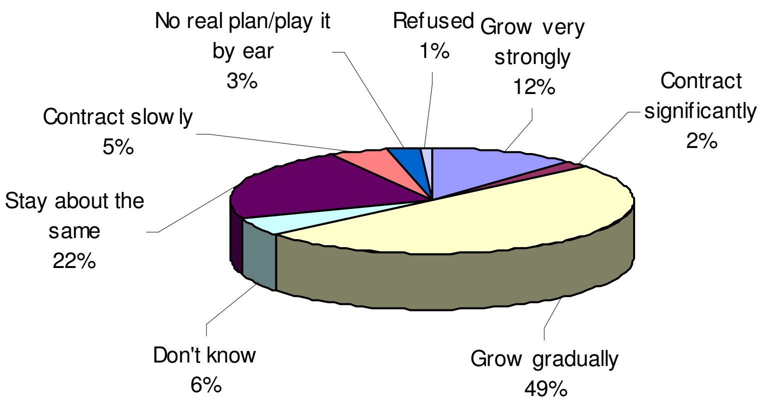


Source: URS / Research and Marketing, 2005

Expected Changes in Turnover

Of those surveyed, 50% anticipated their business turnover to grow gradually over the next five years and a further 12% were anticipating strong growth. There were three (2%) businesses owners who were anticipating a significant decline in turnover.

Figure 6.10 Expected Change in Turnover

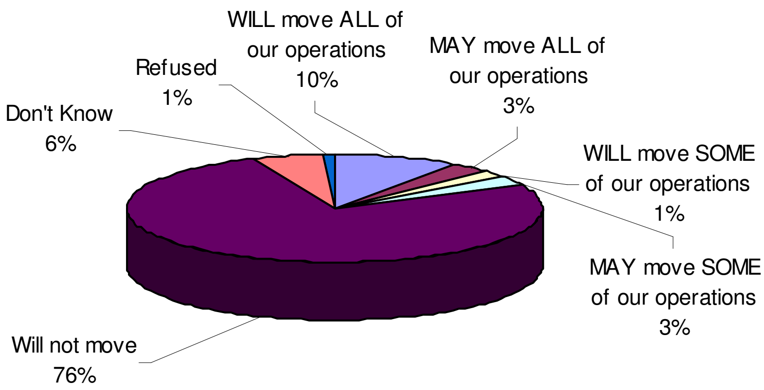


Source: URS / Research and Marketing, 2005

Future Location Plans

When asked if business owners were planning to move some or all of their operations in the next five years, 76% responded that they would not move, 18% were anticipating a move with 9% anticipating a move of all operations. The majority were moving because they would require larger premises to facilitate the expansion of the business. Of those who were moving, 44% expected to move within the next one to three years.

Figure 6.11 Plans to Move



Source: URS / Research and Marketing, 2005

Table 6.6 Reasons for Relocation

Reason	Number	%
Require larger premises to facilitate expansion	11	42%
Require better quality premises	7	27%
Require better transport links		
Want to consolidate to a smaller site	1	4%
Need to move nearer to customers / suppliers	1	4%
Having difficulty in recruiting staff	1	4%
Price of premises too expensive	2	8%
Relocate to a nicer area	2	8%
To realise the increased value of your site		
Don't Know	1	4%
Refused		
Total	26	100%

Source: URS / Research and Marketing, 2005

Table 6.7 Preferred Future Location

	Number	%
Site close to current location	7	27%
Site within Sevenoaks district	11	42%
Kent	6	23%
South East	3	12%
Greater London	2	8%
Don't Know	3	12%

Source: URS / Research & Marketing, 2005

6.6. Rural Economy Conclusions

It appears that the rural economy in Sevenoaks District is not very different from the rural economy throughout Great Britain. Following trends identified in the relevant strategy and policy documents reviewed above, the Sevenoaks rural economy is experiencing continued population growth as more urban dwellers move out to the countryside, there is declining dependency on traditional rural business activities and there is an increasing convergence of the urban and rural economies.

As emphasised by the telephone survey, non-agricultural businesses are dominating the rural economy. Agriculture made up just 6% of business activities in the survey, while manufacturing and business services each made up 17% of rural business activity. Employment in tourism and related services is increasing as it becomes evident that non-productive agricultural land attracts people to the countryside creating incentive to maintain land and premises for tourism.

Employment land will continue to play an important role in the changing rural economy, providing the basis for economic and social regeneration in areas of deprivation and diminish elements of rural exclusion. Providing places for people to work close to home is an important element of sustainable community development.

Survey results indicated that businesses do not experience problems when seeking planning permissions. For Sevenoaks District the planning system does not present an obstacle to business growth.

7. QUALITY AND CHARACTERISTICS OF EMPLOYMENT LAND

7.1. Introduction

This section provides a summary of the key findings of the field survey. Results are summarised to provide an overview of condition of sites, areas with vacant properties or vacant land, and estimated floorspace. A description of each business area is given at **Appendix D**.

7.2. Employment Floorspace and Land

The field survey team visited 41 business areas throughout Sevenoaks District. The 41 business areas included approximately 260 separate business sites over a total area of 3,135,000 sq.m, with buildings totalling approximately 460,000 sq m of floorspace. The location of the business areas is shown in **Figure 7.1** below and **Table 7.2** gives an overview of the business areas along with the number of sites, total employment floorspace and land.

The amount of floorspace calculated as part of the survey falls below the amount of floorspace reported in Sevenoaks by the Valuation Office Agency (VOA) and ODPM's Commercial and Industrial Floorspace and Rateable Value Statistics 2004. While the information is useful as a guide to levels of floorspace provision, caution should be taken when interpreting and comparing these statistics due to the definitions and conventions used. **Table 7.1** compares the values obtained from the VOA and the floorspace calculated from the survey.

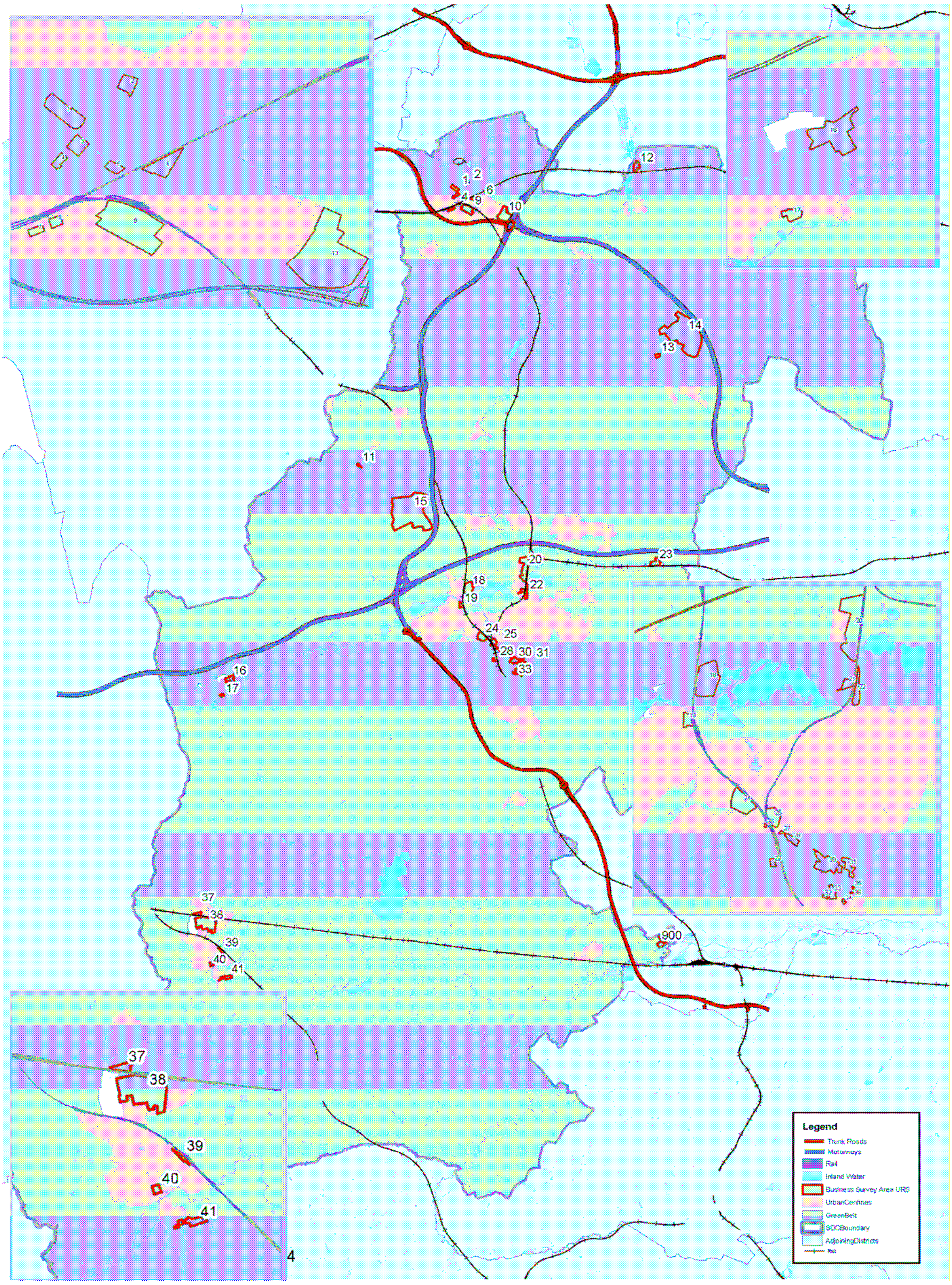
Table 7.1 Employment Floorspace in Sevenoaks District

VOA Data	Floorspace (sq m)
Office	144,000
Factories	226,000
Warehouse	253,000
Total	**623,000**
Sevenoaks Survey Data	
Office	194,877
Industry, Factories and Warehouse	239,322
Vacant Properties (good condition)	10,628
Vacant Properties (poor condition)	18,857
Total	**463,684**

Source: ODPM/VOA and URS Sevenoaks Employment Land Survey, 2005

The VOA floorspace information has been collected for the purpose of calculating business rates. The units used within the database are based upon building hereditaments and floorspace is measured by occupant and is collected from detailed internal surveys.

Figure 7.1 Business Areas



Source: URS, 2005

Table 7.2 Surveyed Business Areas

No	Name/Address	No of units	Floorspace (sq m)	Area (sq m)
1	The Technology Centre	2	6,400	18,840
2	London Road, Swanley	1	1,545	7,012
3	Swanley Library, Swanley	3	1,854	6,800
4	Council Offices, Swanley	1	2,434	3,696
5	Royal Mail, Swanley	1	795	3,978
6	Park Road Industrial Estate, Swanley	5	4,128	23,028
7	Media House, Swanley	1	3,069	3,289
8	Horizon House, Swanley	1	3,648	2,708
9	Goldsel Road, Swanley	2	45,243	58,201
10	Southern Cross Industrial Estate (Broom Hill), Swanley	6	16,760	120,000
11	Warren Court, Swanley	6	1,270	5,747
12	Horton Kirby Trading Estate, South Darenth	2	13,076	34,680
13	Blue Chalet Industrial Park, West Kingsdown	1	1,101	6,675
14	Brands Hatch Racing Circuit	6	38,034	1,356,595
15	North Downs Business Park, Dunton Green	12	9,725	838,175
16	Westerham Trading Centre, Dunton Green	19	18,040	31,194
17	Not assigned	n/a	n/a	n/a
18	West Kent Cold Storage, Dunton Green	13	30,979	77,000
19	Hardy's Yard, Riverhead	8	3,743	12,305
20	Vestry Road, Sevenoaks	35	44,149	91,822
21	Crampton's Road, St John's	3	1,081	7,260
22	Bat & Ball Enterprise Centre, Sevenoaks	8	7,552	10,304
23	Chaucer Business Park, Kemsing	11	14,269	39,167
24	Morewood Close, Sevenoaks	12	9,836	28,200
25	British Telecom, Sevenoaks	1	17,550	24,900
26	Buildmart House, Sevenoaks	1	595	693
27	Name to be confirmed	1	269	996
28	Tubs Hills House, Sevenoaks	3	8,251	6,458
29	Erskine House, Sevenoaks	1	2,850	7,190
30	London Road, Sevenoaks	22	14,937	40,608
31	High Street, Sevenoaks	8	7,164	14,300
32	South Park, Sevenoaks	2	947	2,430
33	Southpark/Lime Tree Walk, Sevenoaks	8	9,301	9,320
34	Coffee House Yard (Tricorn House), Sevenoaks	1	408	1,388

No	Name/Address	No of units	Floorspace (sq m)	Area (sq m)
35	Sackville House, Sevenoaks	1	318	653
36	Epicurus House, Sevenoaks	1	585	504
37	Albion Business Park, Edenbridge	1	N/a	11,588
38	Station Road, Edenbridge	45	111,645	161,800
39	Station Approach, Edenbridge	1	N/a	13,050
40	Co-op Store, Edenbridge	1	1,406	7,650
41	Edenbridge/Warsop Trading Centre, Edenbridge	2	4,644	11,700
900	Glaxo Smith Kline	1	N/a	33,130
	Total	260	459,601	3,135,034

Source: URS Sevenoaks Employment Land Field Survey, 2005

Table 7.3 shows the quantum of floorspace surveyed by total settlement:

Table 7.3 Business Areas Surveyed by Settlement

Settlement	Area (sq. m)	Proportion of Total Area Surveyed (%)
Horton Kirby	34,680	1.1
Dunton Green	946,369	30.2
Edenbridge	205,788	6.6
Fawkham	1,356,595[18]	43.3
Kemsing	39,167	1.2
Riverhead	12,305	0.4
Sevenoaks	247,026	7.9
Swanley	253,299	8.1
West Kingsdown	6,675	0.2
Sites SE, near Tonbridge	33,130	1.1

Source: URS Sevenoaks Employment Land Field Survey, 2005

[18] This reflects the location of Brands Hatch, which is a large site that is used as an international racing circuit.

7.3. Existing Land Uses

Table 7.4 gives an overview of the land use and floorspace for the various uses on the sites.

Table 7.4 Existing Land Uses

Land Use	Number of Sites		Site Areas		Floorspace	
	No	%	ha	%	sq m	%
Industry	27	10%	21.2	7%	64,922	14%
Construction	3	1%	0.9	0%	2512	1%
Wholesale	21	8%	7.3	2%	20,365	4%
Transport, storage and communication	48	19%	15.6	5%	103,207	22%
Mixed use transport/storage & bus. activities	3	1%	1.3	0%	9,196	2%
Real estate, renting and business activities	86	33%	27.8	9%	179,044	39%
Public administration	7	3%	62.4	20%	11,235	2%
Mixed use	17	7%	9.2	3%	43,718	10%
Health, social work, community service	12	5%	4.1	1%	22,417	5%
Race Track	1	0%	135.7	43%	-	
Not known	18	7%	0.3	0%	2,716	1%
Car Park	1	0%	0.1	0%	-	
Residential	7	3%	15.5	5%	-	
Retail	3	1%	1.4	0%	-	
Vacant Land	5	2%	10.1	3%	-	

Source: URS Sevenoaks Employment Land Field Survey, 2005

7.4. Business Areas and Condition

The condition of all Business Areas were recorded on a five-point scale: very poor, poor, average, good, and very good. Across the 41 business areas the results were:

- 10 business areas recorded with some or all sites in poor / very poor condition;
- 16 business areas recorded with 100% good / very good condition; and
- 16 business areas recorded as average condition.

The results for business areas of good/very good condition and poor/very poor condition are set out below.

Business Areas with Sites in Good/Very Good Condition

Many of the surveyed business areas contained sites in good condition. For 16 business areas, 100% of their sites were recorded as very good or good. To receive this designation sites had to fulfil the following criteria:

Building condition

Very good - building in immaculate state, no signs of paint coming off, windows and window frames in very good condition, immediate surrounding/grounds well kept.

Good – building in good conditions, small areas where paint might come off, etc., grounds in reasonable state.

Quality of environment

Very Good – the streets and the public realm within and surrounding the area are of very good quality. There is enough street lighting and no perceived safety issues. The business area is not polluted by noise or air pollution from neighbouring uses and/or heavy street traffic.

Good – the streets and public realm within and surrounding the business area are of good quality. Nothing in the local environment seems disturbing but it does not reach the 'very good' standard (some litter, street furniture shows signs of aging, etc.) There are no perceived safety issues.

Access to facilities and amenities

Very Good – shops, restaurants and/or cafes and personal services within the business area or can be reached in a five minute walk. There is a selection of places for lunch; there is the possibility to do some shopping during lunch.

Good – shops, restaurants and/or cafes within a 5-10 minute walk. There is some selection of places for lunch.

Other issues

- Servicing,
- Parking, and
- Road Access.

Table 7.5 overleaf summarises the business areas which recorded all sites in very good or good condition.

Table 7.5 Business Areas with all Sites in Good/Very Good Condition

No	Name/Address	No of sites in very good or good condition
1	The Technology Centre	2
4	Council Offices, Swanley	1
5	Royal Mail, Swanley	1
7	Media House, Swanley	1
8	Horizon House, Swanley	1
13	Blue Chalet Industrial Park, West Kingsdown	1
15	North Downs Business Park, Dunton Green	12
16	Westerham Trading Centre, Dunton Green	19
22	Bat&Ball Enterprise Centre, Sevenoaks	8
25	British Telecom, Sevenoaks	1
29	Erskine House, Sevenoaks	1
32	South Park, Sevenoaks	2
33	Southpark/Lime Tree Walk, Sevenoaks	8
34	Coffee House Yard (Tricorn House), Sevenoaks	1
35	Sackville House, Sevenoaks	1
36	Epicurus House, Sevenoaks	1
	Total Sites	61
	% of all sites	24%

Source: URS Sevenoaks Employment Land Field Survey, 2005

Business Areas with Sites in Poor/Very Poor Condition

Of the 41 surveyed business areas ten were recorded to have some poor or very poor quality sites. Factors influencing this designation include:

Building condition

Poor – paint coming off, some cracks, windows in poor state, surroundings are poorly kept.

Very Poor – building still in use but in very poor condition; paint coming off in large areas, some windows broken, surroundings not maintained and/or littered and/or cluttered with rubbish.

Quality of environment

Poor – the streets and the public realm within and surrounding the business area are of poor quality (some potholes, some litter, poorly maintained or damaged street furniture). There is not enough street lighting and some perceived safety issues. The business area might be polluted by some noise or air pollution from neighbouring uses and/or heavy street traffic.

Very poor – the streets and the public realm within and surrounding the business area are of very poor quality (potholes, litter on street, not collected rubbish, etc.) There is not enough street lighting and there are perceived safety issues. There is noise and/or air pollution from neighbouring uses and/or heavy street traffic.

Access to facilities and amenities

Poor – shops, restaurants and/or cafes within a 5-10 min walk. There is a limited selection of places for lunch.

Very poor – shops, restaurants and/or cafes more than a 15 min walk away. No or very limited selection of places for lunch.

Other issues

- Inadequate servicing;
- Limited parking facilities; and
- Inadequate or difficult road access.

There were a total of 17 sites recorded poor or very poor, representing 6% of all sites included in the survey. **Table 7.6** below summarises the business areas with sites that were in poor or very poor condition.

Table 7.6 Business Areas with Sites in Poor/Very Poor Condition

No	*Name/Address*	*No of sites*	*% of sites in business area*
6	Park Road Industrial Estate, Swanley	1	20
11	Warren Court, Swanley	6	100
12	Horton Kirby Trading Estate, South Darenth	1	50
14	Brands Hatch Racing Circuit, Fawkham	1	17
18	West Kent Cold Storage, Dunton Green	4	31
20	Vestry Road, Sevenoaks	2	5
21	Crampton's Road, St John's	1	33
28	Tubs Hill House, Sevenoaks	1	33
30	London Road, Sevenoaks	2	9
38	Station Road, Edenbridge	3	7
	Total	17	
	% of all sites surveyed	6%	

Source: URS Sevenoaks Employment Land Field Survey, 2005

7.5. Potentially Contaminated Sites

Some business areas in the survey were noted to have some potentially contaminated sites. Contamination issues were recorded if there were visual signs (i.e. fuel or chemical tanks on-site), potentially contaminative use (i.e. odour and effluents), potentially hazardous building material (i.e. asbestos) and potential noise or nuisance issues for surrounding areas. Of the 41 business areas surveyed there were 16 recorded to have some potentially contaminated sites. The 14 business areas had a total of 56 potentially contaminated sites, 22% of all sites in the survey.

Table 7.7 Business Areas with Potentially Contaminated Sites

No	Name/Address	No of sites	% of sites in business area
2	London Road, Swanley	1	100
9	Goldsel Road, Swanley	1	50
10	Southern Cross Industrial Estate (Broom Hill), Swanley	2	33
11	Warren Court, Swanley	3	50
12	Horton Kirby Trading Estate, South Darenth	1	50
14	Brands Hatch Racing Circuit, Fawkham	1	16
15	North Downs Business Park, Dunton Green	6	40
18	West Kent Cold Storage, Dunton Green	4	31
19	Hardy's Yard, Riverhead	3	27
20	Vestry Road, Sevenoaks	21	60
21	Crampton's Road, St John's	2	100
22	Bat & Ball Enterprise Centre, Sevenoaks	1	14
23	Chaucer Business Park, Kemsing	3	27
24	Morewood Close, Sevenoaks	1	8
27	London Road, Sevenoaks	1	100
38	Station Road, Edenbridge	5	11
	Total	56	
	% of all sites surveyed	22	

Source: URS Sevenoaks Employment Land Field Survey, 2005

7.6. Remaining Developable Land

Vacant Properties

This section summarises the amount of vacant land and properties that were recorded during the survey in 2005. The data on vacant properties needs to be treated with care as it was strictly a visual survey and therefore difficult to know for sure if some floors of buildings were in fact vacant. In that respect, sites that had visibly vacant units and buildings were recorded and the results are summarised in **Table 7.8** below. This does not include business areas with vacant or developable land. In 2005, there were a total of 14 business areas with a total of 33 vacant units or properties. This is approximately 29,485 sq m of vacant floorspace or 6% of all floorspace.

Table 7.8 Business Areas with Vacant Properties

No	Name/Address	No of units/properties	Sq m of Floorspace
6	Park Road Industrial Estate, Swanley	5	1,989
10	Southern Cross Industrial Estate (Broom Hill)	1	1,440
12	Horton Kirby Trading Estate, South Darenth	4	10,279
13	Blue Chalet Industrial Park, West Kingsdown	4	200
14	Brands Hatch Racing Circuit, Fawkham	3	1,071
15	North Downs Business Park, Dunton Green	1	1,875
16	Westerham Trading Centre, Dunton Green	4	938
18	West Kent Cold Storage, Dunton Green	3	2,208
20	Vestry Road, Sevenoaks	1	2,883
22	Bat & Ball Enterprise Centre, Sevenoaks	2	832
23	Chaucer Business Park	1	2,850
28	Tubs Hill House, Sevenoaks	1	1,696
30	London Road, Sevenoaks	2	1,008
41	Edenbridge/Warsop Trading Centre, Edenbridge	1	216
	Total	**33**	**29,485**

Source: URS Sevenoaks Employment Land Field Survey, 2005

Vacant Land

In 2005, of the 41 business areas surveyed, there were 18 areas with remaining developable land. Developable land was generally considered land to be under utilised and where the economic development/employment potential of land is not fully realised. Much of the vacant land was noticeably overgrown or part of an oversized and underused car park. If it was landscaped and seemed to form a part of the business site it was considered to be in use and not developable. In 2005 the total, there is approximately 171,450 sq m (17.1 ha) of remaining developable land, which is just over 5% of the surveyed employment land. The business areas with the greatest amount of vacant land are Southern Cross Industrial Estate (Broom Hill) in Swanley (84,800 sq m) and Horton Kirby Trading Estate (22,000 sq m).

Since 2005 there has been a change in stock of vacant land. Following discussions with the Sevenoaks District Council planning team the stock of vacant land has been updated to reflect the following changes:

- London Road Swanley (site 2) has become vacant;
- Southern Cross Industrial Estate (site 10), Swanley, has a reduced amount of developable land;
- Horton Kirby Trading Estate (site 12) has been granted planning permission for a mixed use scheme;

- Hardy's Yard, Riverhead (site 19) has been developed as retail;
- Tubs Hill House (site 28) has seen take up of all of its vacant land;
- Southpark/Lime Tree Walk (site 33) is currently under mixed-use redevelopment;
- Albion Business Park (site 37) has been granted planning permission for residential development; and
- Station Approach, Edenbridge (site 39), is used as a builders merchants and therefore no longer vacant.

Vacant land and land with derelict property at the end of 2007 is estimated to be 8.4ha. The 2005 and 2007 vacant land and land with derelict property is set out in the following table.

Table 7.9 Business Areas with Vacant Land (grey shade indicates 2007 updates)

No	Name/Address	Vacant Land (sq m)	Vacant Land (ha)	% of business area	Comment, 2007 update [1]
2	London Road, Swanley	7,012	0.7	100	Became vacant late 2007
10	Southern Cross Industrial Estate (Broom Hill), Swanley	84,800 (2005) 41,000 (2007)	8.5 4.1	71 34	Still vacant; however only 4.1 ha is developable. See table Note 2
12	Horton Kirby Trading Estate, South Darenth	22,100	2.21	65	Planning permission granted for mixed-use development. Under Construction
15	North Downs Business Park, Dunton Green	10,000	1.00	1.2	Still vacant
16	Westerham Trading Centre, Dunton Green	700	0.07	2.2	Still vacant
18	West Kent Cold Storage, Dunton Green	4,608	0.46	6	Recently purchased by Berkeley Homes (see page 85)
19	Hardy's Yard, Riverhead	1,138	0.11	9	Site developed as retail
20	Vestry Road, Sevenoaks	4,805	0.48	5	Still vacant
21	Crampton's Road, St John's	7,260	0.73	100	Still vacant
22	Bat & Ball Enterprise Centre, Sevenoaks	896	0.09	9	Still vacant
24	Morewood Close, Sevenoaks	2,028	0.2	7	Still vacant
28	Tubs Hill House, Sevenoaks	1,749	0.17	27	Planning permission granted for hotel & office / housing.
29	Erskine House, Sevenoaks	360	0.04	5	Still vacant
30	London Road, Sevenoaks	3,528	0.35	9	Still vacant
33	Southpark/Lime Tree Walk, Sevenoaks	759	0.08	8	Currently under development (Mixed use)
37	Albion Business Park, Edenbridge	11,588	1.16	100	Planning permission granted for residential development
38	Station Road, Edenbridge	1,540	0.15	1	Still vacant
39	Station Approach, Edenbridge	13,050	1.31	100	Not vacant: - used by a builders merchant
41	Edenbridge/Warsop Trading Centre, Edenbridge	540	0.05	11	Still vacant
	2005 Total	**171,450**	**17.1**		
	2005 % of all area	**5.5%**			
	2007 Total	**84.280**	**8.4**		
	2007 % of all area	**2.7%**			

Source: URS Sevenoaks Employment Land Field Survey, 2005 with 2007 updates

Note 1: Grey shaded rows are 2007 updates following discussions with Sevenoaks District Council planning department, and updates in Section 8 (the employment land supply chapter).

Note 2: Draft Development Brief of The Broom Hill, Swanley, by Sevenoaks District Council indicates that only 4.1ha of land is developable and guidelines suggest the development be limited to two storeys in height (maximum of 8.5m).

8. THE EMPLOYMENT LAND MARKET

8.1. Office Market Supply

M25 and South East Quadrant Office Market Overview

The M25 office market is viewed as the premier location within the UK. Broadly, the market can be divided into quadrants. These have a very different market, development and occupier profiles. The western side of the M25 and in particular the North West quadrant has proved particularly attractive in terms of both rental growth and development activity over the last decade. It is this quadrant which has attracted the majority of Information, Communications and Technology (ICT) companies locating in the UK, many with US parentage, during the late 1990s.

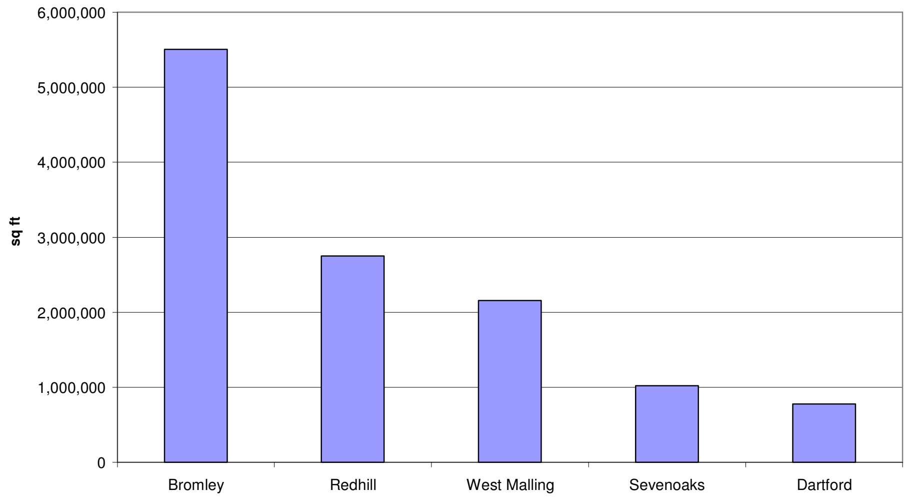
Figure 8.1 M25 Employment Land Quadrants

Source: Knight Frank

The South East quadrant encompasses several different sub-markets. Some are centred around historic regional towns such as Sevenoaks and Bromley while other areas have expanded due to business park developments such as Crossways in Dartford and Kings Hill in West Malling.

The market stocks (i.e. occupied and vacant space) of five key locations that feature in the M25 South East quadrant are illustrated in **Figure 8.2** below.

Figure 8.2 Comparable Town Office Stock on the Market



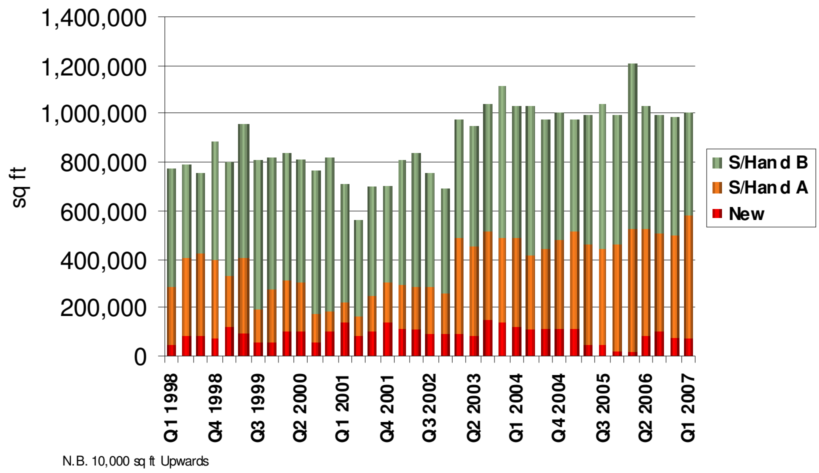
Source: Knight Frank. Updated 2007

The five towns represent over 60% of the total office space stock of the M25 South East quadrant with an average stock size of 226,841 sq m (2,441,775 sq ft).

Within the South East quadrant of the M25 office market availability generally witnessed a decline between 1998 and 2001, as illustrated in **Figure 8.3**. In Q2 2001 availability in the South East quadrant reached a low of 52,430 sq m (564,378 sq ft). Availability rates increased slowly from 2001 and stabilised to around 92,900 sq m (1,000,000 sq ft) from 2004. Availability peaked very briefly at the beginning of 2006 to over 111,480 sq m (1,200,000 sq ft) before returning broadly to the levels of 2004.

It is also clear from **Figure 8.3** that for most of the period second hand Grade B accommodation has dominated supply in the quadrant while levels of new space available have remained relatively low – averaging 8,630 sq m (92,896 sq ft). Development activity witnessed in the area has been relatively limited in contrast to both the North West and South West quadrants of the M25.

Figure 8.3 South East Quadrant Office Quarterly Availability (Upwards of 10,000 sq ft)



Source: Knight Frank

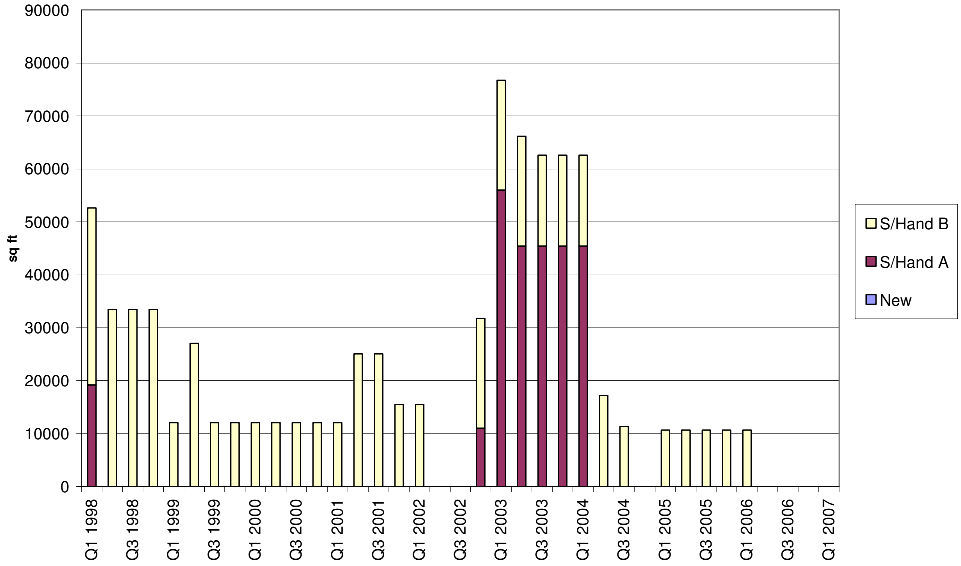
Overall the South East quadrant of the M25 office market appears relatively immature in terms of take-up and availability in comparison with the western segments. Activity within the quadrant has remained largely localised with low availability levels and relatively limited development projects. The two business parks of Crossways Park in Dartford and Kings Hill in West Malling dominate the office market in the region. Overall, demand levels are expected to remain volatile until the South East quadrant market becomes more established.

Office Availability in Sevenoaks Town[19]

Sevenoaks town has a highly localised office market and is dominated by established professional businesses, with small requirements in the town centre. **Figure 8.4** illustrates the quarterly availability levels of office space to rent or buy in Sevenoaks since 1998. It must be noted that large fluctuations may appear in the availability levels over time as a result of the withdrawal or addition of just a single site.

[19] Sevenoaks Town refers to the town of Sevenoaks as oppose to the entire District of Sevenoaks.

Figure 8.4 Sevenoaks Town Office Availability by Quality (10,000 sq ft upwards)



Source: Knight Frank . Updated 2007
N.B . 929 sq m (10,000 sq ft) upwards

There has not been any new office accommodation over 929 sq m (10,000 sq ft) available in Sevenoaks town in the last nine years. In part this is the result of the relatively small size of the office market. Second hand Grade B accommodation has dominated the supply profile – a clear indication of the age of the office stock available in the area. Over the last eight years availability levels have averaged 2,012 sq m (21,661 sq ft).

The market has remained relatively stable since 1998 although notably availability stood at zero between Q2 and Q3 2002. Clearly the greatest impact on the market in recent years was the BT Workstyle Building which more than doubled availability in the town at the end of Q1 in 2003 from 2,945 sq m (31,711 sq ft) to 7,125 sq m (76,700 sq ft). Similarly following the withdrawal of the building in Q2 2004 availability in the market fell by over 70%. More recently, there have been no available buildings larger than 929 sq m (10,000 sq ft) within the Sevenoaks market for a year since the re-occupation of Folgate House by Folgate in Q2 2006.

Office Availability Under 10,000 sq ft Across the Sevenoaks District

Owing to the fact that the Sevenoaks District is a small market, additional analysis has been carried out to examine the amount of available office space *under* 10,000 sq ft. **Table 8.1** shows that there is approximately 6,317 sq m (68,000 sq ft) of space available in Sevenoaks Town, at an average size of 175 sq m (1,882 sq ft).

Elsewhere within Sevenoaks District there are several sub-markets surrounding the main Sevenoaks town office market. These include Edenbridge, Westerham, Swanley and Hartley. These sub-markets demonstrate substantially lower levels of availability than Sevenoaks town.

It is clear from **Table 8.1** that the surrounding local markets offer limited office accommodation. The offer is also predominantly second hand Grade B quality space and there is no accommodation currently available in Hartley. Overall the size and quality of accommodation available reflects the parochial nature of the sub-markets. Indeed, outside Sevenoaks, there is currently a total 1,844 sq m (18,853 sq ft) of accommodation available,

Table 8.1 Sevenoaks District - Local Office Market Centres Availability

Sevenoaks District Market	Availability(sq m)	Availability(sq ft)	Average Size(sq m)	Average Size(sq ft)
Sevenoaks Town	6,317	67,762	175	1,882
Westerham	1,172	12,615	78	841
Swanley	574	6,174	143	1,544
Edenbridge	99	1,064	16	177
Hartley	0	0	-	-
Total	8,162	87,615		

Source: Knight Frank, Locate in Kent, EGi and Focus. Updated 2007

The development pipeline in Sevenoaks represents a potential 3,323 sq m (35,769 sq ft) of additional accommodation to the market. The largest single unit in the pipeline is the Oak House on London Road totalling 24,467 sq m (2,273 sq ft). The developer for the project is MJ Gleeson, which purchased the site from The Wood Family trust and now benefits from Grade A full planning consent. The Tekram Site remains within the development pipeline from the original 1995 report under Grade B consent.

Table 8.2 Sevenoaks Town Development Pipeline, B1 (Office) Land Use

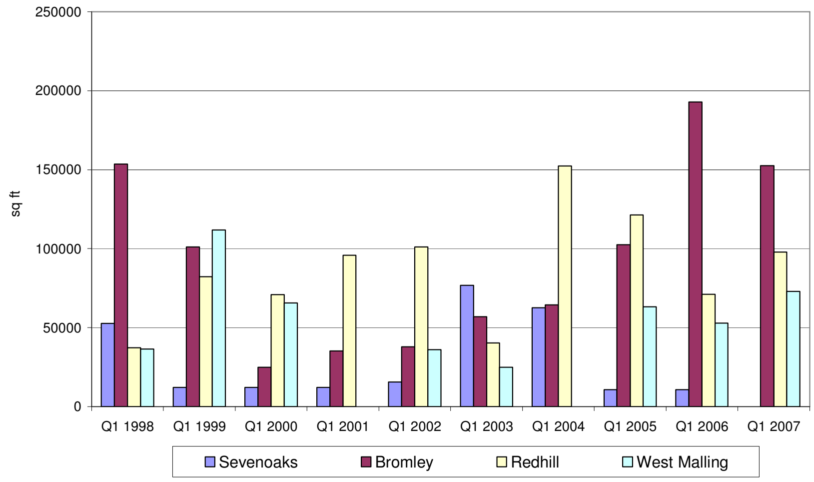
Address	Application Consent	Size (sq m)	Size (sq ft)	Type/ Grade	Developer
Tekram Site Lingfield Road	Full	1,050	11,302	B	Cathedral Group
Oak House, London Road	Full	2,273	24,467	A	MJ Gleeson Group Plc

Source: Knight Frank. Updated 2007

Sevenoaks Town and Comparative Centres

Comparing Sevenoaks town with its neighbouring markets shows that office availability in Sevenoaks town has always been significantly lower than in the surrounding centres with the exception of 2003 when the BT Workstyle Building was on the market. As **Figure 8.5** and **Table 8.3** shows, there is currently a comparatively high level of availability of new and second hand Grade A office space in Bromley, while availability has reduced considerably in Redhill since 2004.

Figure 8.5 Office Availability in Sevenoaks Town and Comparative Locations



Note: Quarterly office availability over 10,000 sq ft
Source: Knight Frank. Updated 2007

Table 8.3 Office Availability in Sevenoaks Town and Comparative Locations

Towns	Stock	Average Quarterly Availability 1998-Q1 2007	Availability Q1 2007			Pipeline	
			New	Second Hand A[1]	Second Hand B[1]	Type A[2]	Type B[2]
	sq ft	sq ft	sq ft	sq ft	sq ft	sq ft	sq ft
Sevenoaks	1,022,000	21,661	-	-	-	24,467	11,302
Bromley	5,503,000	92,048	-	46,161	99,640	27,987	53,369
Redhill	2,750,000	96,024	16,246	51,635	22,706	260,010	24,058
West Malling	2,155,900	46,111	44,594	27,908	-	118,310	-
Dartford	777,430	49,005	-	17,000	-	393,756	-

[1]Second Hand Grade A = high quality, previously occupied Second Hand B = low quality based on an assessment of age, specification, location and overall quality; previously occupied
[2]Type A and Type B refer to the likelihood of the site being successfully developed, Type A being more likely to proceed.
[3]All availability for space above 10,000 sq ft
Source: Knight Frank. Updated 2007

There is also a relatively high potential for future development in the surrounding centres. In addition to 1,735 sq m (18,675 sq ft) presently under construction at Kings Hill Avenue, West Malling, there is a total of 81,519 sq m (877,487 sq ft) in the development pipeline classified in the surrounding centres compared to the 3,323 sq m (35,769 sq ft) in the development pipeline in Sevenoaks. **Table 8.4** gives an overview of the office development pipeline in the key surrounding centres.

Table 8.4 Office Pipeline Surrounding Centres

Address	Application Consent	Size (sq ft)	Size (sq m)	Type[1]
Dartford Development Pipeline				
Crossways Business Park	Outline	328,000	30,471	A
Plot A6, Victory Way	ARM	65,758	6,109	A
Bromley Development Pipeline				
Osprey House, 60/70 Tweedy Road	Full	27,987	2,600	A
61 Widmore Road	Full	13,000	1,208	B
Garrard House, 2/6 Holmesdale Road	Full (Renewal)	40,365	3,750	B
Redhill Development Pipeline				
Land South of Brabazon House, Markfield Rd	Full	134,553	12,500	A
120/130 Station Road	Full	53,821	5,000	A
33 London Road	Full	24,058	2,235	B
St Paul House, 61-63 London Road	Full	12,744	1,184	A
Kingsgate House, Marketfield Road	Full	58,891	5,471	A
West Malling Development Pipeline				
Kings Hill, Phase I Remainder	Full	118,310	10,991	A
23 Kings Hill Avenue	Full	18,675	1,735	U/C
Total				
Total Type A		800,064	74,326	
Total Type B		77,423	7,193	
Total Type A+B		877,487	81,519	

[1]Type A and B refer to the likelihood of the site being successfully developed, Type A being more likely to proceed.
Source: Knight Frank. Updated 2007

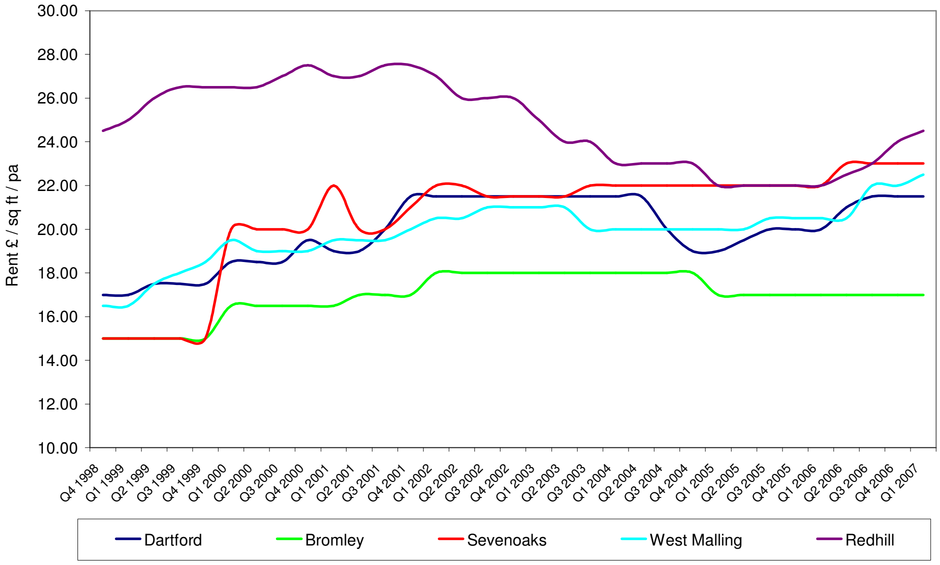
A total of some 81,519 sq m (877,487 sq ft) office space is likely to be developed in the future in key locations in the south east quadrant of the M25 of which 74,326 sq m (800,064 sq ft) are judged to be more likely to be developed. The vast majority of the development pipeline is accounted for by Dartford (45%) and Redhill (32%).

8.2. Office Market Demand

Office Rents

Comparing office best rents between the key locations in the sub-region gives some indication on the relative demand for office space and attractiveness of different centres. **Figure 8.6** demonstrates the rental levels in five of the key regional centres. Redhill rents experienced the sharpest decline since 1998. These peaked at £27.50 per sq ft in 2001 and now stand at £24.50 per sq ft, having recovered somewhat over the last 18 months. The Sevenoaks market has demonstrated steady rental growth since 1998, rising to their current level of £23.00 per sq ft in Q2 2006, an increase of 53% over the period and the strongest rate of growth of any centre featured in the analysis. This strong rental growth demonstrates that Sevenoaks is a highly localised market with relatively healthy demand in an environment of both limited availability and a lack of redevelopment schemes. In contrast, rental levels across the other centres have experienced moderate growth in line with prevailing market conditions.

Figure 8.6 Comparison of Town Office Best Rents



Source: Knight Frank. Updated 2007

Take Up Rates

The Sevenoaks town office market experienced a reasonably steady stream of take-up activity since 1998 given the limited space available in the market. Supply dictated that take-up was centred around second hand Grade B accommodation. However, notably, when second hand Grade A space was available it was not always taken – the BT Workstyle Building remained on the market for nearly two years before it was withdrawn and re-occupied. This may be due to a lack of demand for office space in this location, but is more likely to have been due to lack of demand for specifically larger sized office premises. In Sevenoaks town transactions size on average totalled 600 sq m (6,456 sq ft) between 1998 and 2006, whereas the BT Workstyle Building alone offered 4,221 sq m (45,440 sq ft).

Generally the whole Sevenoaks District witnessed a substantial amount of withdrawn space totalling 9,600 sq m (103,340 sq ft) leaving true take-up at 10,356 sq m (111,478 sq ft) between 1998 and 2004.True take-up is the total of all letting activity over a given period excluding withdrawals or re-occupied space. **Table 8.5** shows office take-ups in Sevenoaks District since 1998.

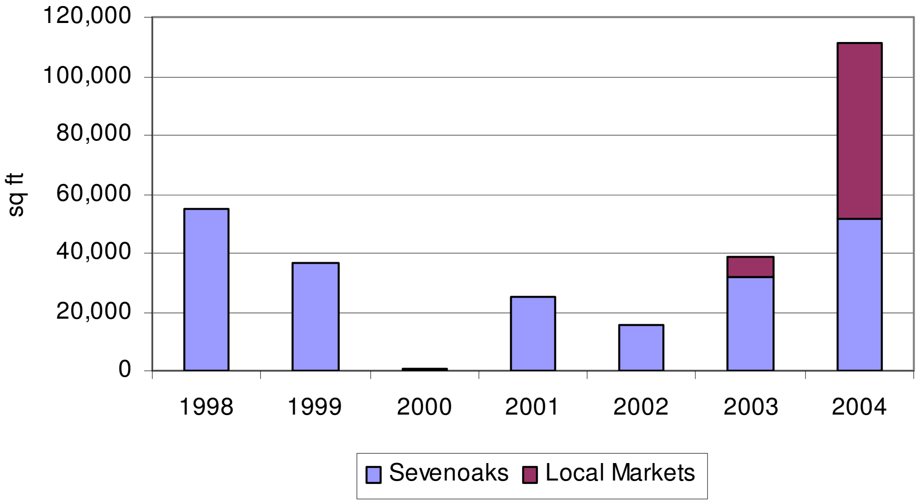
Table 8.5 Sevenoaks District Office Market Take-up

Quarter	Address	Size (sq ft)	Size (sq m)	Grade	New Occupier
Q1 1998	Beckett House	2,600	242	B	Taken by Architects
Q1 1998	Beckett House	1,500	139	B	Computer Company
Q1 1998	Beckett House	1,700	158	B	Michael Rogers
Q1 1998	Beckett House	4,000	372	B	Scoot UK Ltd
Q1 1998	Beckett House	7,500	697	B	Tesco
Q1 1998	Beckett House	11,474	1066	B	Withdrawn
Q2 1998	1 Suffolk Way	14,183	1318	B	Horizon Exploration
Q2 1998	Weald House	12,000	1115	B	The Warrior Group
Q1 1999	Nepicar House	21,388	1987	B	Withdrawn
Q3 1999	7 Oak Hill Road	14,968	1391	B	Berkley Group
Q1 2000	Swanley Centre, Swanley	636	59		World Freight Services
Q4 2001	Beckett House	13,000	1208	B	Withdrawn
Q4 2001	Oak House	12,038	1118	B	Withdrawn
Q2 2002	Darenth House	15,500	1440	B	Un-named party
Q1 2003	Unit 1, White Oak Square, Swanley	4,239	394		Woolwich Independent Financial Advisory Services Ltd
Q2 2003	Buildmark House	11,000	1022	B	ICM Recovery Services
Q3 2003	Nepicar House	20,700	1923	B	Alpha Boilers
Q3 2003	4 White Oak Square, Swanley	2,398	223		Capaz Consultancy Services Ltd
Q1 2004	Moreton Industrial Estate, Swanley	8,222	764		Unknown
Q2 2004	8 White Oak Square, Swanley	5,400	502		Unknown
Q2 2004	216-218 Main Road, Westerham	276	26		Unknown
Q2 2004	Grange, Westerham	1,111	103		Unknown
Q2 2004	Gordon Henry House, Edendridge	35,000	3252		McCarthy & Stone
Q3 2004	Workstyle Building	45,440	4221	A	Withdrawn /re-occupied by BT
Q3 2004	Swiss Life Building	5,827	541	B	RMB International
Q3 2004	Stakes House, Westerham	2,693	250		Homes Ltd
Q3 2004	High Street, Westerham	607	56		Unknown
Q3 2004	Grange, Westerham	917	85		Unknown
Q3 2004	Grange, Westerham	1,722	160		Unknown

Quarter	Address	Size (sq ft)	Size (sq m)	Grade	New Occupier
Q3 2004	Grange, Westerham	1,722	160		Unknown
Q3 2004	Grange, Westerham	1,111	103		Unknown
Q4 2004	1 Courtyard, Westerham	690	64		Unknown
Q4 2004	Mill Court, Edenbridge	183	17		Unknown
Q1 2005	Chartside House, Westerham	1,257	117		Unknown
Q1 2005	Old Meeting House	1,362	127	B	Not Known
Q1 2005	Old Harpsichord Factory	1,579	147		Not Known
Q2 2005	26 Market Square, Westerham	1,588	148	B	Not Known
Q3 2005	Swiss Life House	5,827	541		Not Known
Q1 2006	Swiss Life House	3,426	318		Foresight Venture Partners Ltd
Q1 2006	Unit C Ryedale, London Rd	2,649	246		TA Millard Ltd
Q1 2006	Tricon House	1,680	156	B	Not Known
Q1 2006	Lonsdale House	4,371	406	B	Read Group (UK) Ltd
Q2 2006	Boswell House	3,523	327	B	Not Known
Q1 2006	Tubs Hill House	2,082	193		British Accreditation Bureau Ltd
Q2 2006	Folgate House	10,627	987	B	Folgate Ltd (Re-occupied)
Q4 2006	Falcon House, Westerham	2,485	231	B	Bates Investment Services Ltd
Q4 2006	Grange, Westerham	1,087	101	B	Not Known
Q4 2006	17 Wealden Place	1,438	134		Not Known
Q4 2006	The Crown, Westerham	2,476	230		DLH Timber (UK) Ltd
Q4 2006	Clock House	2,617	243		Kit for Kids Ltd
Q1 2007	Weald House	1,616	150		Not Known
	Total	333,435	30,978		

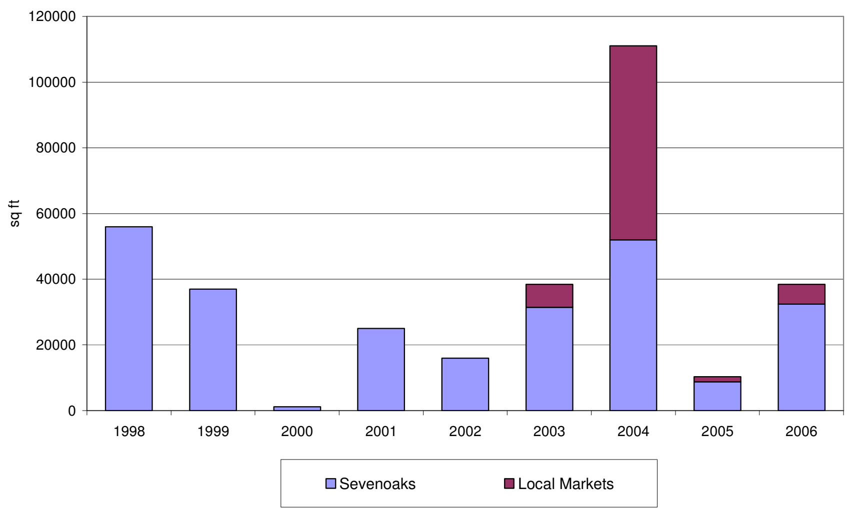
Source: Knight Frank, Focus, Egi. Updated 2007

Figure 8.7 shows quarterly take up rates in Sevenoaks town and the local markets within the District.



Source: Knight Frank / URS. Updated 2007

Figure 8.7 Sevenoaks District Office Take-up

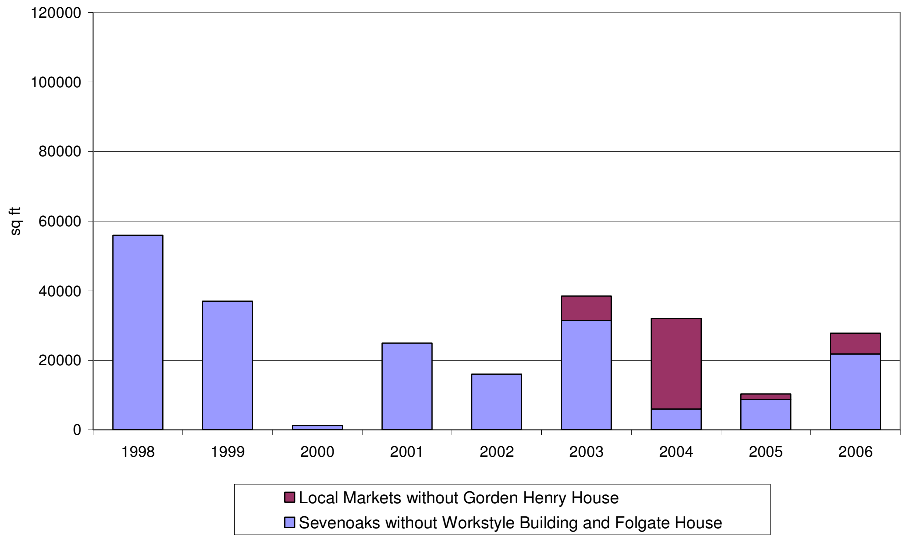


Source: Knight Frank / URS. Updated 2007

In a fairly small market such as Sevenoaks large single deals have a strong influence on the overall picture. The two largest deals since 1998 have been the withdrawal of the Workstyle building and subsequent reoccupation by BT in Sevenoaks in 2004 and the take-up of Gordon Henry House into residential use in Edenbridge in 2004. More recently, the reoccupation of Folgate House represented the most significant deal over the last two years. Omitting these three transactions from the graph, however, as shown in **Figure 8.8**, shows that take-up in

Sevenoaks District has been fairly constant over the last seven years with no clear upwards or downwards trend.

Figure 8.8 Sevenoaks District Quarterly Take-up



Note Without BT, Gordon Henry House, Edenbridge and Folgate House
Source: Knight Frank / URS. Updated 2007

Looking ahead over the next few years little change is anticipated in the Sevenoaks District and town office markets. The Sevenoaks District market remains highly localised with requirements averaging 600 sq m (6,456 sq ft) reflecting the local tenant requirements and demand strongly focused on the centre of town locations.

8.3. Industrial Market Demand

South East Industrial Market Overview

The Thames Gateway forms part of the South East industrial market. This area has received a great deal of attention in recent years. Numerous parties are acquiring strategic development sites with some speculatively building significant B1/B2/B8 schemes. The Kent Thames Gateway represents the most active area in the county in terms of industrial development and is located close to the north of the district.

The region has already benefited from several significant Government infrastructure improvements and regeneration projects with several yet to be completed. The prospects for growth of both the population and employment base are significant and as a consequence confidence in the Thames Gateway industrial market remains relatively strong.

Demand for industrial property continues to be driven by the large retailers and prospective owner-occupiers. The introduction of Self Invested Personal Pension schemes (SIPPs) in April 2006 and the relatively low interest rate environment since has further increased the demand for freehold property as many smaller companies seek a tax efficient property vehicle for their pension.

Consequently there is currently strongest demand for either:

- sub 930 sq m (10,000 sq ft) freehold units particularly between 190 sq m (2,000 sq ft) and 470 sq m (5,000 sq ft) from the relatively smaller businesses seeking to invest in property; or
- large distribution centres of 19,000 sq m (200,000 sq ft) or more. This comes mainly from the retailers who are seeking economies of scale from leasing ever larger regional distribution centres to serve the growing population in and around the Thames Gateway.

In an economic environment where occupiers have greater concern over their fixed costs, the East M25 locations of the Thames Gateway such as Dartford and Thurrock have a marked advantage over other M25 locations on the basis of lower occupational costs. Rental levels in the Thames Gateway region peak at circa £88 – £95 per sq m (£8 - £8.75 per sq ft) in East and South East London, and are £78 - £85 per sq m (£7.25 - £7.85 per sq ft) in Thurrock and Kent. This contrasts with the significantly higher rental levels of up to £135 per sq m (£12.50 per sq ft) in west M25 locations such as Heathrow.

The continuing trend for distribution occupiers to operate out of larger 'Regional Distribution Centres' (RDCs) of 18,850 sq m (200,000 sq ft) and upwards has meant that occupiers have to look in areas where significant plots of land are more readily available. Such occupiers are tending to look to the eastern half of the M25 within the Thames Gateway as opposed to western locations where the significant commercial development around Heathrow Airport and down the M4/M3 corridors has utilised the majority of available development land.

Although East M25 locations have cost advantages over West M25 locations, many logistics firms continue to seek locations in the Golden Triangle in the Midlands as a result of the access routes across the country. Therefore logistics occupiers seeking locations in Kent require a specific reason to locate in the region.

Kent Industrial Property Demand

The industrial market in Kent falls into two distinct parts and developers and occupiers remain active in both. The Dartford area is regarded as a national occupier location. However the market becomes increasingly localised further South East towards areas such as Sevenoaks and Maidstone. This divide is reflected in developer interest which is currently most focused on land available closest to the M25, in North Kent.

This preference is borne out in the industrial rental levels for the region. Dartford, arguably the heart of Kent's industrial market, is commanding the highest prime rents of £7.85 per sq ft. Demand is outstripping supply in some locations with sites in North West Kent closest to the M25 enjoying the highest levels of activity. The bulk of demand has been derived from warehouse and distribution centres. Hence demand and rental levels have been driven by the logistics sector rather than by the older more traditional industrial industries which is in line with the market trend.

While there remains a clear difference in the size of requirements between the markets of Northern Kent in areas such as Dartford and Central Kent, certain larger occupiers are beginning to show greater interest in what were previously regarded as more localised markets. The key factor is the difference in savings distribution and logistics companies benefit from by way of cheaper land compared to the additional fuel costs inherently associated with locating in the South East. There is evidence of increasing activity in locations further out, including sites at Maidstone, Tunbridge Wells and Rochester, where demand is driven by the cheaper rents aided by a more plentiful supply of land.

For example, Gazeley's purchase of a 126 acre site at Kemsley Fields in Sittingbourne is some 25 miles from the M25, but this will result in a substantial discount compared with M25 rents as well as benefitting from local labour availability. Here, Gazeley is developing buildings ranging from 1m sq ft to 100,000 sq ft, some of which is speculative. Aylesford is another location beginning to attract developers of large distribution facilities, with for example, Astral's speculatively built 245,000 sq ft building called Magnitude.

However, activity outside the M25 is not restricted to purely large-scale development and demand is strong at the small, sub 5,000 sq ft end of the market. Also in Aylesford, Teesland iDG is developing Access 4:20, a scheme consisting of units from 1,900 sq ft to 15,000 sq ft, off Junction 4 of the M20, while Easter Group has recently completed 89,000 sq ft at Stirling Park, made up of 16 units from 2,300 sq ft to 12,300 sq ft.

Demand in the region thus remains high for industrial space of up to 5,000 sq ft, accounting for over a quarter of accommodation demanded. There is an emerging trend for smaller knowledge-based companies with high growth potential demanding small sub 5,000 sq ft units. This is a reflection of the changing composition of the economy as a whole in the UK with increasing investment activity into more high-growth, knowledge-based companies and away from the older more traditional manufacturing base. Many of the emerging companies have small initial requirements although in the medium to long term space requirements are likely to grow in line for the most successful ventures.

There have been a small number of speculative schemes that have proved successful in the South East with units selling or being leased to small and medium-sized local or regional companies only shortly after entering the market. One such development was the Stag Enterprise Park in Ashford which has a speculative scheme of 22,000 sq ft. Such successes provide incentives for future investment and development for the local and regional markets. However other factors must be involved to extend interest to the national occupiers.

The industrial market in Ashford serves as a useful example of the challenges local markets face when attempting to attract occupiers. Many commentators predicted that the Ashford market would expand considerably following the completion of the international Eurostar station and the M20. However the market has remained highly localised with minimal large-scale requirements featuring in the market to date. Ashford, along with many other markets in central Kent, continues to suffer from poor infrastructure. Developments are underway to improve the rail times to the capital and increase public expenditure in infrastructure which may help encourage major developer and institutional interest.

While many of the more localised markets struggle to attract national occupiers those with smaller sites are proving increasingly popular across the region. It must be noted that the bulk of demand in the region is for smaller, modern units, which is where development activity has been focused.

8.4. Industrial Market Supply

Supply in Kent and Sevenoaks District

Currently there is a substantial amount of small industrial accommodation in the Kent market with close to 300 properties of up to 465 sq m (5,000 sq ft) available. Supply remains limited for accommodation between 3,716 sq m (40,000 sq ft) and 4,645 sq m (50,000 sq ft) and over 9,290 sq m (100,000 sq ft). Indeed, just 17 properties in excess of 40,000 sq ft are reportedly available.

Industrial space in Sevenoaks town is limited with the majority of accommodation confined to a small number of trading estates. The Sevenoaks town market is highly localised and, although the South East Industrial market has witnessed a considerable change in fortunes, it has witnessed relatively little activity. The industrial market in Sevenoaks District and the neighbouring districts are geared towards the demands of tenants with smaller requirements in contrast to the latest developments in the Thames Valley offering space in excess of 18,850 sq m (200,000 sq ft).

As **Table 8.6** demonstrates, total availability across the Sevenoaks District, including Sevenoaks town, Westerham, Edenbridge and Swanley currently stands at approximately 37,000 sq m (399,000 sq ft) of which 12,735 sq m (137,100 sq ft) is in and around Sevenoaks town. Warehouse (B8) land use availability stands at over 27,000 sq m (294,500 sq ft) which is approximately three times larger than that of factory (B2) availability.

The majority of the registered availability in Sevenoaks Town is located on either West Kent Cold Storage Company site (vacant floorspace 2,208 sq.m), the North Downs Business Park (vacant floorspace 1,875 sq.m) and the Vestry Trading Estate (vacant floorspace 2,883 sq.m) (locations shown in **Figure 7.1**). These three locations represent approximately 60% of currently available industrial accommodation in Sevenoaks town. It should be noted, however, that the West Kent Cold Storage company site is likely to close next year, as it was recently purchased by Berkeley Homes with a view to redeveloping the site for residential use.

The remainder of Sevenoaks' accommodation is also located close to the town with, for example, sites such as Eggpie Lane, which offers an industrial unit with office together with adjoining former agricultural buildings that have office (B1) planning permission for conversion to either light industrial or office use. This is a common theme in the area where increasingly redundant agricultural storage buildings are becoming available for conversion to warehouse or workshop use.

Table 8.6 Sevenoaks District Industrial Availability

Market	Factories (B2)		Warehouse (B8)		Total Available Space		Number of Units	
	Sq ft	Sq m	Sq ft	Sq m	Sq ft	Sq m	< 5,000 sq ft (> 465 sq m)	> 5,000 sq ft (> 465 sq m)
Sevenoaks	58,111	5,399	78,976	7,336	137,087	12,735	16	5
Edenbridge	37,363	3471	12,301	1,143	49,664	4,614	3	2
Westerham	2,037	189	25,536	2,373	27,573	2,562	5	2
Swanley	6,705	623	177,810	16,518	184,515	17,141	2	3
Total	104,216	9,682	294,623	27,370	398,839	37,052	26	12

Source; Knight Frank, EGi, Focus, Locate in Kent. Updated 2007

Details on activity at key industrial estates in Sevenoaks town are given below and the locations of these estates are shown in **Figure 7.1**.

West Kent Cold Storage Company

West Kent Cold Storage is situated on a 7.7 ha (20 acre) site and offers the largest cold store facilities in the county. Tenants on the site include Brake Bros, Iceland Ocean, Monarch Foods and Kentish Foods. The West Kent Cold Storage Co Ltd accounts for a large amount of highly specialised industrial space in the area with unit sizes available averaging 493 sq m (5,311 sq ft). Significantly, the site was recently acquired by Berkeley Homes with a view to completely redeveloping the site into a residential / mixed use area. Tenants have reportedly been given a notice period of until July 2008 to leave the site.

Vestry Trading Estate

The Vestry Estate is located on the edge of Sevenoaks town with access to the motorway network via Junction 5 of the M25. The estate comprises a mix of industrial, warehouse and workshop units covering a range of sizes.

North Downs Business Park.

The North Downs Business Park is located to the north of Sevenoaks, adjacent to the M25 and approximately 20 miles south of London. The site includes some speculative development which comprises industrial units with first floor office accommodation and the potential for further expansion. Available units vary in size between 1,138 sq m (12,247 sq ft) and 1,355 sq m (14,587 sq ft).

Sevenoaks Business Centre.

The Sevenoaks Business Centre is situated off Crampton's Road and has been a feature of the Sevenoaks industrial market for several years. The Centre is situated north of the town centre and close to the Bat & Ball British Rail Station. The centre has access to the motorway via Junction 5 of the M25. The centre currently has one unit available offering 191 sq m (2,056 sq ft) of warehouse and office space. Current occupiers include Regent Electrical, Sevenoaks Glass Centre and Plumbcentre.

Sevenoaks Enterprise Centre, Bat and Ball Road.

The Enterprise Centre is one of the more modern industrial centres constructed in the late 1990s with occupiers including Jewson Ltd, Superfos Pharma Pack Ltd and the NTL Group.

Sevenoaks District Sub-markets: Edenbridge, Westerham and Swanley

Taken together, availability across the sub-markets in Edenbridge, Swanley and Westerham dwarves that of Sevenoaks Town (see **Table 8.6**). However, this is due largely to the availability of a single 166,000 sq ft distribution unit at Wested Lane, Swanley. With this discounted, it is clear that the surrounding markets are rather parochial in nature. With Wested Lane excluded, there is currently 8,848 sq m (95,247 sq ft) of accommodation available in the sub-markets.

Sevenoaks District Development Pipeline

There is also a potential future development in the surrounding centres. There is a total of 13,000 sq m (140,400sq ft) of factory (B2) and warehouse (B8) development identified in the pipeline in Sevenoaks District. **Table 8.7** gives an overview of the industrial and warehouse (B2 and B8) development pipeline in the key surrounding centres. Currently, it is unclear what the land use split of the development at Westerham will be. For this reason the Westerham development is excluded from the total of B2 and B8 development pipeline used to inform the industrial and warehouse land demand. The total known development in the pipeline for B2 is 6,650 sq m and 4,525 sq m for B8 (combined total of 11,175 sq m).

Table 8.7 Sevenoaks District Development Pipeline, B2 and B8 Land Use

	Address	Land Use	Application Consent	Size (sq m)	Size (sq ft)
Sevenoaks	Plot 9 Vestry Road	B2	Full	2,496	26,867
Edenbridge	Warsop Trading Estate	B8	Full	421	4,532
Edenbridge	Colour Processing Lab	B2	Full	2,492	26,824
Westerham*	Aqualisa Flyers Way	B1 / B8	Full	1,872	20,150
Sevenoaks	North Down Business Park	B8	Reserved matters granted	4,104	44,175
Swanley	The Teardrop	B2	Full	1,662	17,890
Total				13,047	140,437

Source: Knight Frank sourcing Glenigans, 2007.
*Note *: Split between B2/B8 land use uses is not specified*

8.5. Conclusion

Offices

Second hand Grade B accommodation continues to dominate supply in the South East quadrant of the M25. There is a limited supply of new space available. This is also true for the Sevenoaks town office market where available supply has dictated that take-up is centred on Grade B accommodation.

The Sevenoaks town office market has demonstrated steady rental growth since 1998. This is in contrast to comparable centres in the region and is a consequence of limited supply and a healthy demand for town centre locations. This is also demonstrated in a reasonable steady stream of take-up activity since 1998. 'True' take-up (total take-up excluding withdrawals or re-occupied space) in Sevenoaks town totalled at 18,882 sq m (203,254 sq ft) in the time period between 1998 and 2006, which results in an annual average of 2,098 sq m (22,584 sq ft).

Average transaction size stood at 600 sq m (6,456 sq ft) demonstrating that demand is focused on relatively small office spaces. This is underpinned by the fact that the BT Workstyle Building, which offered 4,220 sq m (45,440 sq ft), was withdrawn from the market. The Sevenoaks town office market is highly localised with national companies attracted to the new and large developments in centres such as Dartford and West Malling.

The office market in the local sub-markets (Edenbridge, Westerham, Swanley and Hartley) has experienced very little take-up since 1998. From the limited data available on these markets it would appear that demand is concentrated around the 100 – 200 sq m (1,000 – 2,000 sq ft) level catering for small local businesses.

Industrial

The Thames Gateway industrial market is expected to remain relatively strong, benefiting from several significant Government infrastructure improvements. In Kent the Dartford area is regarded as a national occupier location but the market becomes increasingly localised further south east towards Sevenoaks.

Developers, supermarkets and distribution companies are most interested in large premises closest to the M25. On the other hand the introduction of Self Invested Personal Pension schemes (SIPPs) and the emerging trend for small knowledge based companies has increased the demand for small freehold property in local markets.

This has led to a 'two speed' industrial property market with a healthy demand for large distribution and warehouse premises close to the M25 and for small freehold properties but with limited demand for mid-size range stock of circa 2,300 to 9,300 sq m (25,000 to 100,000 sq ft).

9. EMPLOYMENT LAND DEMAND FORECAST

9.1. Introduction

In this section we forecast future demand of employment land by type and size. As outlined in the ODPM's 'Employment Land Reviews: Guidance Note' there are various forecasting approaches that can be used. However each approach has its weaknesses as well as strengths.

Regional econometric forecasting allows account to be taken of wider drivers of change and growth. However these models do not usually take account of the specific circumstances of local economic development, including the availability and nature of sites, and the range of local economic development initiatives and company plans. In contrast looking at historic trends on local take-up rates provides a solid record of past performance, which is particularly useful when data allows analysis of a full business cycle. However projecting such data forward in to the future does not take account of potential changes from past trends arising from wider regional economic drivers and any changes to local property market characteristics and policies.

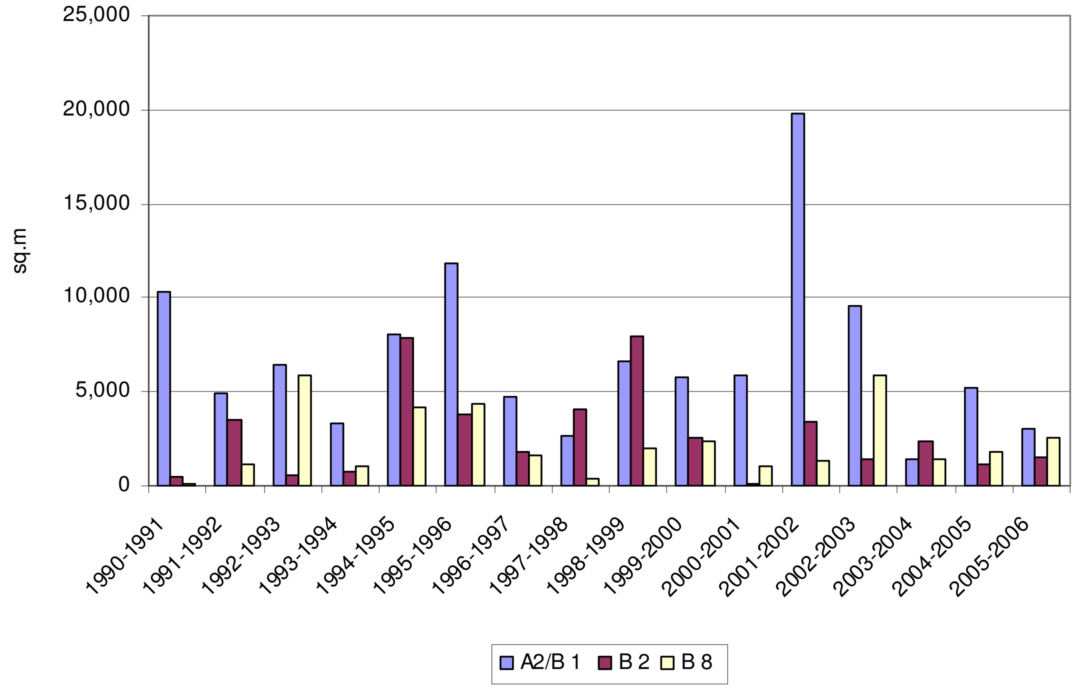
We have developed a synthesis approach to employment land demand forecasting that takes account of both the local context and the wider regional macro-economic context. This allows the weaknesses of each individual approach to be tackled. We build up this analysis by considering the following information:

- Completions
- Employment forecasts
- Synthesis forecast

9.2. Completions

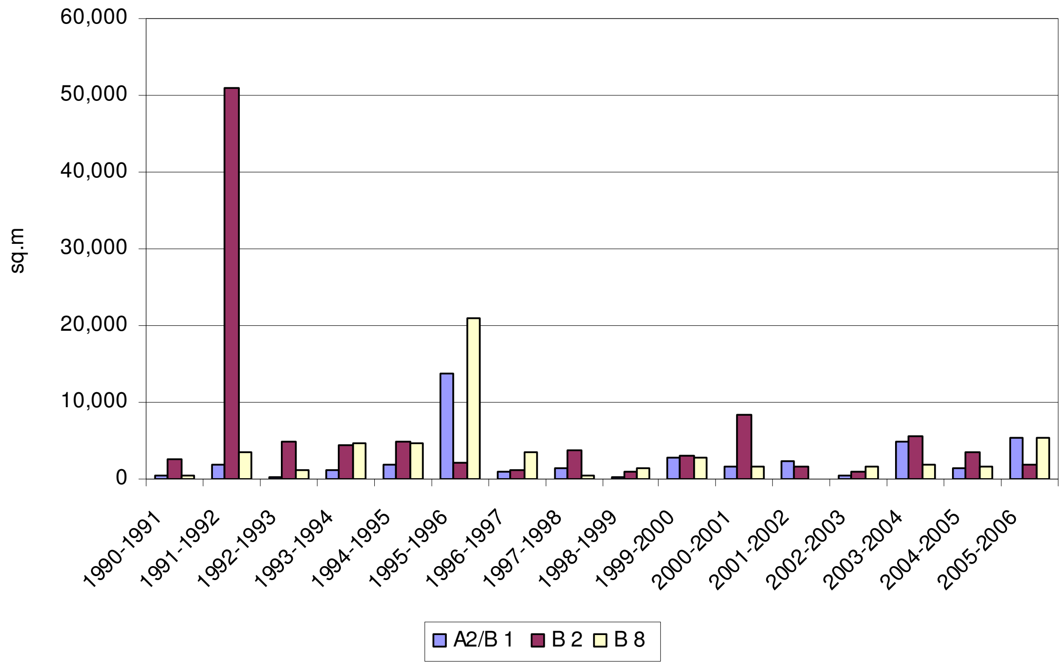
Kent County Council collects and publishes data on employment properties completions by uses (Office [A2/B1], Factories [B2], Warehouses [B8]) from all districts within Kent. Gross figures give the total floorspace built in one year. Employment floorspace lost to other uses (housing, retail etc) are recorded as losses. Net completions (gross minus losses) represent the actual change in employment floorspace. Net completions is a solid indicator for the actual demand for employment floorspace. **Figure 9.1**, **Figure 9.2**, and **Figure 9.3** show gross completions, losses and net completions of office (A2/B1), factory (B2) and warehouse (B8) floorspace respectively.

Figure 9.1 Gross Completions Sevenoaks District 1990 – 2006



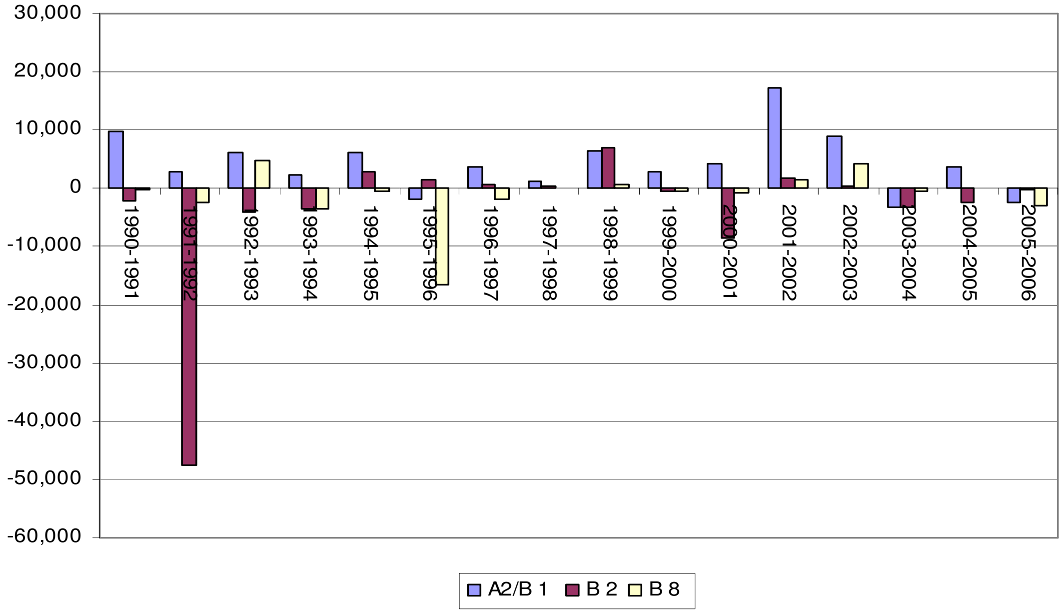
Source: Kent County Council Employment Land System Monitoring Survey, 2005/06.

Figure 9.2 Losses Sevenoaks District 1990 – 2006



Source: Kent County Council Employment Land System Monitoring Survey, 2005/06.

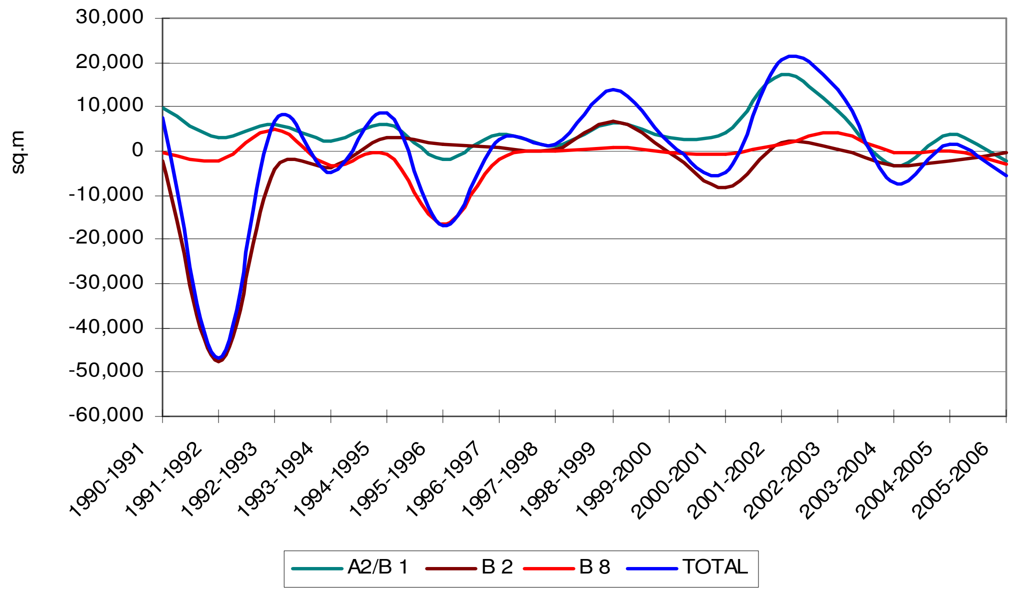
Figure 9.3 Net Completions Sevenoaks District 1990 – 2006



Source: Kent County Council Employment Land System Monitoring Survey, 2005/06.

Figure 9.4 below shows the net completions in Sevenoaks District between 1991 and 2006 for the different uses. As Sevenoaks District is a small commercial property market, completions vary significantly from year to year as a single major development can influence the overall picture. Nevertheless the rate of completions follows to some degree the economic cycle with a loss of almost 50,000 sq m of employment floorspace in the recession at the beginning of the 1990s. This corresponds to the findings on office take-up presented in Section 8.

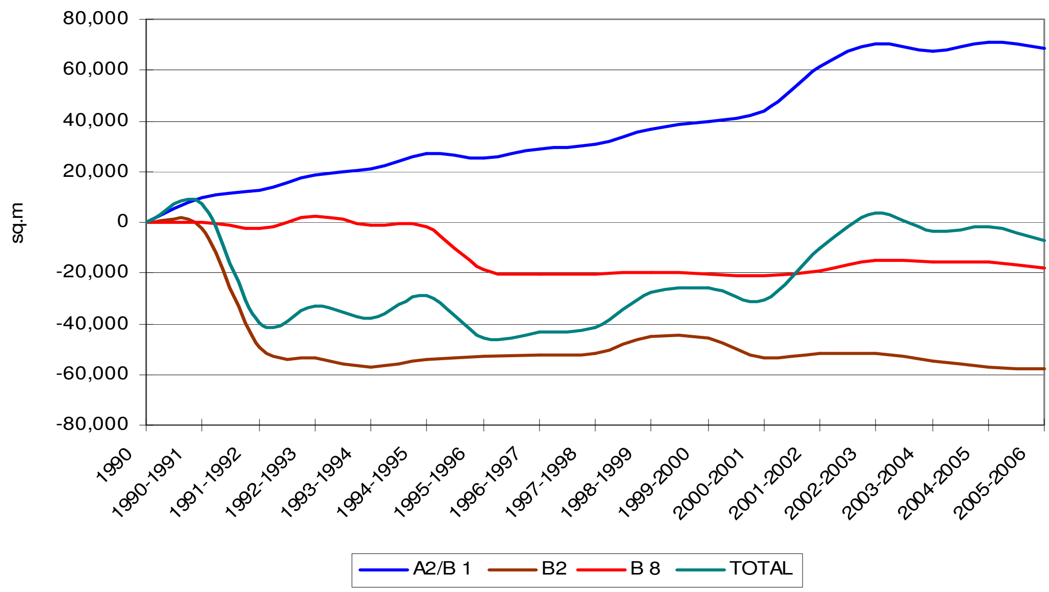
Figure 9.4 Net Completions Sevenoaks District 1990 – 2006



Source: Kent County Council Employment Land System Monitoring Survey, 2005/06.

Cumulative net completions in Sevenoaks District taking 1990 as a base year is shown in **Figure 9.5**. Total employment property floorspace in Sevenoaks District is currently at the same level as in 1991 but there has been a significant shift from industrial and warehouse uses to office premises. A steady increase in office floorspace (A2/B1) between 1991 and 2004 was offset by a loss in industrial (B2) and warehouse (B8) floorspace.

Figure 9.5 Cumulative Net Completions Sevenoaks District 1990 – 2006



Source: Kent County Council Employment Land System Monitoring Survey, 2005/06.

A linear forecast of employment floorspace from 2007 to 2026 based on past completion rates results in an additional demand for office floorspace of 85,600 sq m and a reduction in industrial and warehouse demand of 71,900 sq m and 22,900 sq m respectively. Overall there would be a decrease in demand by 9,100 sq m as shown in **Table 9.1**.

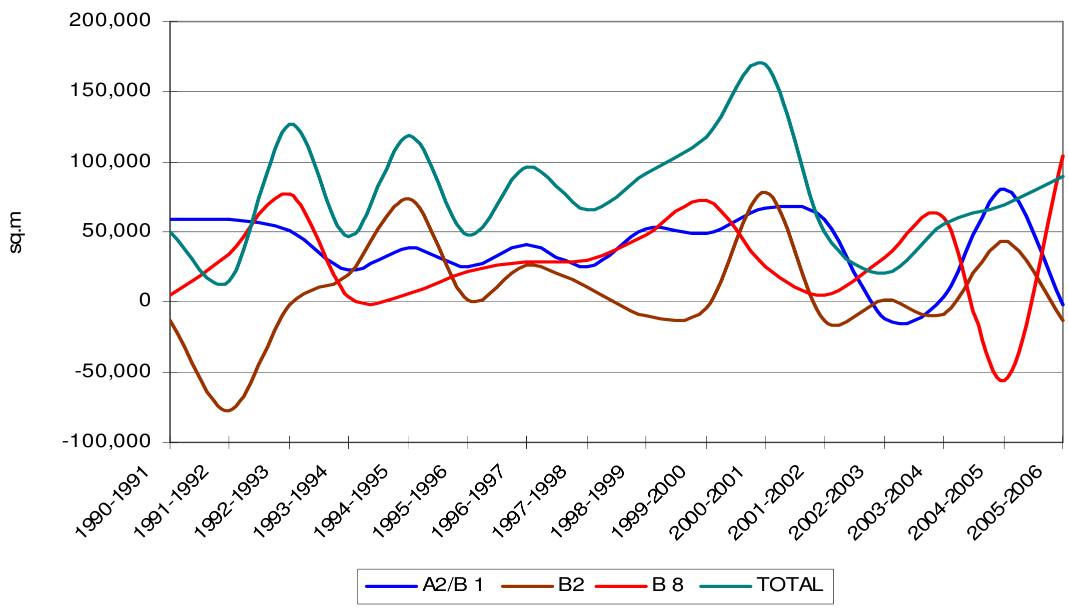
Table 9.1 Linear Forecast Based on Past Completion Rates in Sevenoaks District

	Floorspace 2006[1]	*Annual Change*[2]		*Total Changes in Floorspace Demand 2007-2026*[4]		*Total Stock of Floorspace Demanded 2026*[5]
	sq m	*sq m*	*(%)*[3]	*sq m*	*%*	*sq m*
Office	144,000	4,300	3.0%	+85,600	59%	229,600
Factories	226,000	-3,600	-1.6%	-71,900	-32%	154,100
Warehouses	253,000	-1,100	-0.5%	-22,900	-9%	230,100
Total	623,000	-500	-0.1%	-9,100	-1%	613,800

[1]*Source: ODMP/VOA. Updated 2007.*
[2]*Source: Average annual changes 1991-2006, KCC*
[3]*1991 as base year (100%) for percent*
[4]*Number of years multiplied by average annual change (e.g. 20 years x 4,280 sq m / year = 85,593 sq m)*
[5]*Floorspace in 2006 plus 20 times annual change (e.g. 144,000 + [20 years x 4,280 sq m / year] = 229,593 sq m)*

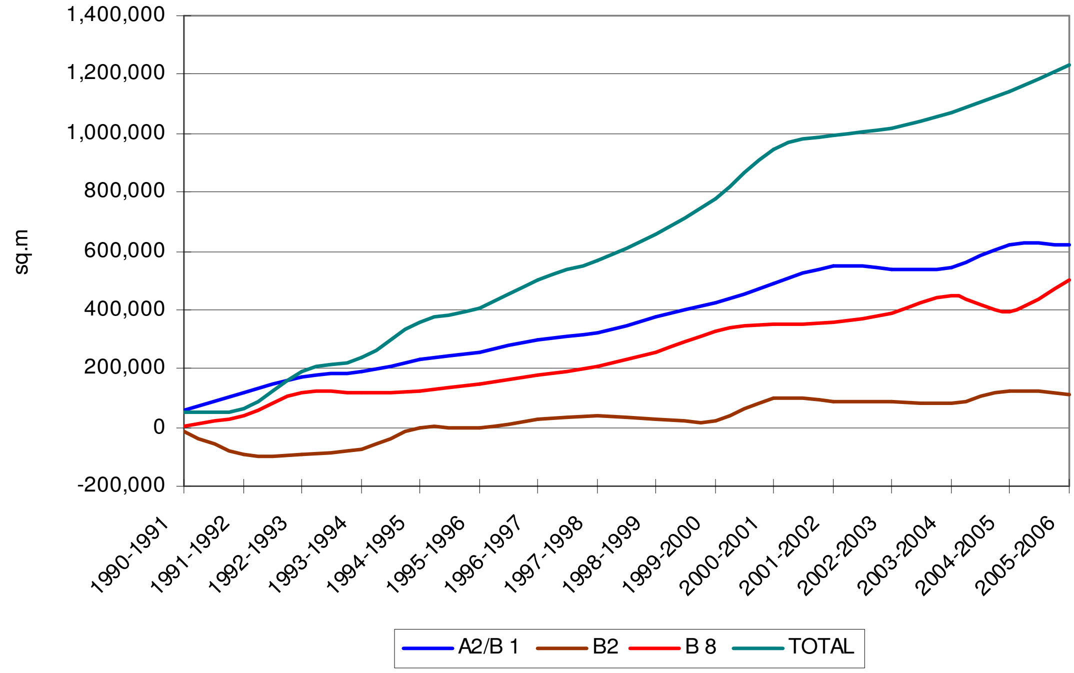
Given the Sevenoaks District market is relatively small it is useful to put it in the context of a larger sub-regional market. Looking at past completions in the Kent and Medway sub-region gives a similar picture. In absolute terms there was an overall increase in employment floorspace as a result of an increase in office and warehouse floorspace as shown in **Figure 9.6** and **Figure 9.7**.

Figure 9.6 Net Completions Kent and Medway



Source: Kent County Council Employment Land System Monitoring Survey, 2005/06.

Figure 9.7 Net Cumulative Completions Kent and Medway



Source: Kent County Council Employment Land System Monitoring Survey, 2005/06.

In relative terms the increase in office space was somewhat less in Kent and Medway (1.8% annually compared to 3.0% in Sevenoaks District), there was a small increase in industrial floorspace (compared to -1.6% in Sevenoaks District) and warehouse floorspace actually increased by 0.7% annually in comparison to the slight decrease in Sevenoaks (-0.5% annually) as shown in **Table 9.2**. A linear continuation of past completion rates in Kent and Medway would result in an additional demand of 36% office floorspace between 2007 and 2026, unchanged demand for industrial floorspace (+2%) and an increased demand for warehouse floorspace of 14%.

Table 9.2 Linear Forecast Based on Past Completion Rates Kent and Medway

	Floorspace 2006[1]	Annual Change[2]		Total Changes in Floorspace Demand 2007-2026[4]		Total Floorspace Demand 2026[5]
	sq m	sq m	(%)[3]	sq m	%	sq m
Office	2,125,000	+38,800	1.8%	775,300	36%	2,900,300
Factories	5,826,000	+7,000	0.1%	139,500	2%	5,965,500
Warehouses	4,353,000	+31,100	0.7%	622,800	14%	4,975,800
Total	12,304,000	76,900	0.6%	1,537,700	12%	13,841,700

[1]Source: ODMP/VOA. Updated 2007. *[2]Source: Average annual changes 1991-2006, KCC*
[3]1991 as base year (100%) for percent *[4]Number of years multiplied by average annual change*
[5]Floorspace in 2006 plus 20 times annual change

These findings correspond to the overall market assessment presented in **Section 8**, which identified a demand for office space and for distribution premises especially in the Kent Thames Gateway area.

9.3. Employment Forecasts

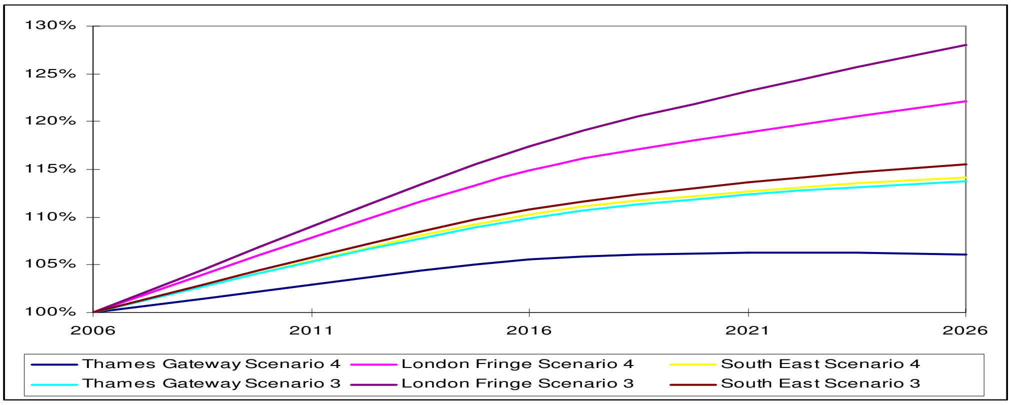
Regional and sub-regional economic forecasts are published by the South East England Regional Assembly (SEERA) and by the South East England Development Agency (SEEDA). Both base their economic forecasting on data provided by Experian Business Strategies (EBS).

Total Employment

SEERA published forecasts of total employment for sub-regions up to 2026 in its 'Technical Note 1 (updated March 2006): Economic and Labour Demand Forecasting of the draft South East Plan'. The forecasts contain two scenarios: one based on ONS sub-national population projections (Scenario 3); and one including long-term migration assumptions prepared by Anglia Polytechnic University (Scenario 4)[20]. Both scenarios assume that in the long-term employment is supply led, i.e. a function of the local population. Scenario 4 predicts a smaller employment growth as it assumes long-term out-migration for the South East.

Figure 9.8 shows the employment forecast for both scenarios for the South East Region as a whole and the Kent Thames Gateway and the London Fringe sub-regions within which Sevenoaks District lies. The employment growth forecasts for 2006 to 2026 vary between 0.6% per annum (compound average) for the Kent Thames Gateway Scenario 3 and the 1.2% for the London Fringe Scenario 3. Both Scenarios of the forecast for the South East Region lie in the centre of the range of forecasts with a forecasted employment increase of 0.7% per annum 2006 and 2026. We have therefore used the projections for the South East as a base for the employment land demand forecast in Sevenoaks District.

Figure 9.8 Employment Forecast South East, Kent Thames Gateway and London Fringe



Source: SEERA, Draft South East Plan, Technical Note 1 (updated March 2006), Economic and Labour Forecasting

[20] Scenario 1 and 2 were only draft scenarios and were never published.

Employment by Sector

The same document shows employment forecasts for the South East region broken down by sectors up to 2026 from 2001 as seen in **Table 9.3**.

Table 9.3 Employment Forecast by Sector for South East[21]

	2001		2026		Change 2001-2026	
	(000s)	%	(000s)	%	Total	Annual
Agriculture, forestry & fishing	74.97	1.8%	39.63	0.8%	-35.34	-2.5%
Mining & utilities	23.75	0.6%	11.46	0.2%	-12.29	-2.9%
Metals, minerals and chemicals	95.54	2.3%	90.34	1.9%	-5.20	-0.2%
Other manufacture[22]	360.08	8.7%	265.29	5.5%	-94.79	-1.2%
Construction	273.81	6.6%	246.12	5.1%	-27.69	-0.4%
Retailing, hotels and catering	1,000.24	24.1%	1,105.80	22.8%	105.56	0.4%
Transport and communications	252.03	6.1%	306.28	6.3%	54.26	0.8%
Financial and business services	956.20	23.1%	1,426.87	29.5%	470.66	1.6%
Mainly Public	1,109.55	26.8%	1,348.95	27.9%	239.39	0.8%
Total	**4,146.17**	100.0%	**4,840.74**	100.0%	694.56	0.6%

Source: SEERA, Draft South East Plan, Technical Note 1 (updated March 2006), Economic and Labour Forecasting. Updated 2007

The EBS' forecasts are not strictly linear in nature and therefore a linear extension of the forecast to 2026 is only a rough approximation. It would also help projection accuracy if the forecast base was more up to date rather than being based on 2001. The Economic and Business Bulletin Winter 2004/Spring 2005 (SEEDA) publishes Experian Business forecasts to 2006 for the South East. **Table 9.4** shows the forecasted position for 2006[23] and the difference in taking the average annual rate of change 2006-2026 compared with 2001-2026. This reveals the importance in taking the average rate of change based on 2006-2026 rather than 2001-2026.

[21] The sectoral breakdown is based on Scenario 6, which is very similar to Scenario 3 but incorporates a continuation of housing development targets outlined in the RPG to 2026.

[22] The total of 'other manufacture' and 'engineering'

[23] Annual Business Inquiry employment data is available for 2005 at the time of writing, but this dataset does not include self-employed workers.

Table 9.4 Sectoral Forecasts in the South East

	Forecasted Employees 2006	Forecasted Employees 2026	Average Annual Change 2006-2026	Average Annual Change 2001-2026
Agriculture, forestry & fishing	55,500	39,630	-1.7%	-2.5%
Mining & utilities	20,100	11,460	-2.8%	-2.9%
Metals, minerals and chemicals	97,100	90,340	-0.4%	-0.2%
Other manufacture[24]	323,700	265,290	-1.0%	-1.2%
Construction	294,300	246,120	-0.9%	-0.4%
Retailing, hotels and catering	1,087,300	1,105,800	+0.1%	+0.4%
Transport and communications	275,100	306,280	+0.5%	+0.8%
Financial and business services	1,028,000	1,426,870	+1.7%	+1.6%
Mainly Public	1,184,000	1,348,950	+0.7%	+0.8%
Total	4,365,100	4,840,740	+0.5%	+0.6%

Source: SEERA, Draft South East Plan, Technical Note 1 (updated March 2006), Economic and Labour Forecasting; SEEDA, Economic and Business Bulletin Winter 2004/Spring 2005. Updated 2007

It is unlikely that the sectoral changes in Sevenoaks District will be identical to those for the South East region. **Table 9.5** makes adjustments to the regional sectoral projections for Sevenoaks based on the socio-economic profile of Sevenoaks, characteristics of employment land and the property market assessment outlined in Sections 4, 7 and 8, as well as drawing upon the 'Note to Panel for the South East Examination in Public' (SEEDA; December, 2006) which published EBS' forecasts by local authority for 2006, 2016 and 2020. If we assume that employment grows at the same rate 2020-2026 as it is forecasted to grow 2016-2020 then Sevenoaks is projected to have approximately 51,000 employees in 2026 (excluding self-employed[25]). This benchmark is used to help inform the adjustments made to the sectors in **Table 9.5**.

[24] The total of 'other manufacture' and 'engineering'

[25] Using EBS data, this figure is 60,000. However, to ensure consistency with the ABI data used elsewhere we need to remove self-employed workers. If this is consistent across the timeframe we would estimate that self-employed workers account for 9,000 individuals.

Table 9.5 Employment Forecast by Sector – Adjusted for Sevenoaks District

	SE average annual growth rate 2006-2026 %	Adjusted average annual growth rate 2006-2026 for Sevenoaks %
Agriculture, forestry & fishing	-1.7%	-1.7%
Mining & utilities	-2.8%	-2.8%
Metals, minerals and chemicals	-0.4%	-1.1%
Other manufacture	-1.0%	-1.5%
Construction	-0.9%	+0.9%
Retailing, hotels and catering	+0.1%	+0.1%
Transport and communications	+0.5%	+0.5%
Financial and business services	+1.7%	+2.5%
Mainly Public	+0.7%	+0.8%
Total	+0.5%	+0.8%

Source: URS. Updated 2007

Note: Adjustments draw upon socio-economic characteristics detailed in Sections 4, 7 and 8 of this report, and the 'Note to Panel for the South East Examination in Public', SEEDA; December, 2006

There are a number of uncertainties within this forecast. They include:

- Uncertainties within the SEERA forecast for total employment
- Uncertainties within the SEEDA employment forecast by sectors, and by local authority
- Assumptions for linear extension of SEEDA employment forecast to 2026
- Adjustments made to the sectoral changes for Sevenoaks District from the wider trends within the South East

We have therefore used a narrow range of 5% (+/- 2.5%) for the employment forecast by sector to 2026 for the employment land demand forecast, shown in **Table 9.6**.

Table 9.6 Employment Forecast by Sector – Low and High Range

	Best Estimate			Low Estimate (-2.5%)			High Estimate (+2.5%)		
	Forecast 2026	Change 2006-2026		Forecast 2026	Change 2006-2026		Forecast 2026	Change 2006-2026	
	Employees	Total	Annual	Employees	Total	Annual	Employees	Total	Annual
Agriculture, forestry & fishing	481	-29%	-1.7%	469	-30%	-1.8%	493	-27%	-1.5%
Mining & utilities	48	-43%	-2.8%	46	-44%	-2.9%	49	-42%	-2.6%
Metals, minerals and chemicals	973	-20%	-1.1%	948	-22%	-1.2%	997	-18%	-1.0%
Other manufacture	1,960	-26%	-1.5%	1,911	-28%	-1.6%	2,009	-24%	-1.4%
Construction	4,366	19%	0.9%	4,257	16%	0.8%	4,475	22%	1.0%
Retailing, hotels and catering	12,528	2%	0.1%	12,215	-1%	0.0%	12,841	4%	0.2%
Transport and communications	1,826	11%	0.5%	1,780	9%	0.4%	1,871	14%	0.7%
Financial and business services	16,485	63%	2.5%	16,073	59%	2.3%	16,898	67%	2.6%
Mainly Public	12,486	17%	0.8%	12,174	14%	0.7%	12,798	20%	0.9%
Total	51,153	19%	0.9%	49,874	16%	0.7%	52,432	22%	1.0%

Source: URS. Updated 2007
Note: 'Best estimate' is the employee forecast based on the adjusted average annual growth rate 2006-26 (Table 9.5)

Of special interest are the following five sectors, as employment in each of these sectors is directly related to different employment land uses:

Sector	**Employment Land Type**
Metals, Minerals and chemicals; Other manufacture	Factories
Transport & Communication, Retailing, hotels and catering	Warehouse
Financial & Business Services	Office

Regarding high and low forecasts, employment in the primary sectors such as agriculture and mining & utilities are forecast to see the largest contractions in annual growth rates; manufacturing sectors (metals, minerals and chemicals, and other manufacturing) is forecasted to contract by between 1.0% and 1.5% per annum between 2006 and 2026; and financial and business services are forecast to grow the fastest by between 2.5% and 2.6%.

9.4. Synthesis Forecast

Our synthesis forecast approach uses floorspace trends as the basis for forecasting future employment land demand. The floorspace figures are adjusted for wider macro-economic changes by incorporating an adjustment factor into the forecast.

The average rate of change per annum of historical employment and the annual rate of change of historic floorspace provide evidence of how employment and floorspace has changed over time. The adjustment factor takes into account the forecasted changes in employment structure during the time period for which historic floorspace figures are used as a base for the forecast, and sets them in relation to the future changes in employment. For example, if employment in financial and business services is expected to grow twice as fast in the future as it has historically, this would result in an adjustment factor of 2.0 with the rate of growth in office floorspace projected to be twice as fast than it has been in the past. The adjustment factor is calculated as follows:

$$\textbf{Adjustment Factor} = \textbf{Historic Floorspace Change} \times \frac{\textbf{Employment Forecast}}{\textbf{Historic Employment Change}}$$

Table 9.7 and **Table 9.8** show the historic trend based on past completions; past and forecasted annual employment changes for relevant sectors introduced above; the adjustment factor; and the adjusted average annual floorspace demand for 2006 to 2026 for the high and low employment forecast by land use type.

Table 9.7 Employment Floorspace Demand Forecast Adjusted for Employment Changes – High Estimate

	Historic Annual Floorspace Changes 1998-2005[26] (%)	Average Annual Change in Employment (Relevant Sectors) 1998-2005	Average Annual Growth Rate 2006-2026	Adjustment Factor	Adjusted Average Annual Floorspace Demand
Office	3.1%	6.8%	2.6%	0.38	1.2%
Factories	-0.8%	-2.5%	-1.2%	0.49	-0.4%
Warehouses	0.1%	2.6%	0.3%	0.1	0.0%

Source: URS. Updated 2007.

Table 9.8 Employment Floorspace Demand Forecast Adjusted for Employment Changes – Low Estimate

	Historic Annual Floorspace Changes 1998-2005 (%)	Average Annual Change in Employment (Relevant Sectors) 1998-2005	Average Annual Growth Rate 2006-2026	Adjustment Factor	Adjusted Average Annual Floorspace Demand
Office	3.1%	6.8%	2.3%	0.34	1.1%
Factories	-0.8%	-2.5%	-1.5%	0.59	-0.5%
Warehouses	0.1%	2.6%	0.0%	0.01	0.0%

Source: URS. Updated 2007.

[26] Annual Business Inquiry employment data is available from 1998. The preceding employment data, the Annual Employment Survey, is not directly comparable and therefore only the completions data for the same time period 1998-2005 can be used. The annual average rate of change is derived from the cumulative net completions dataset from 1998-99 to 2005-06.

Table 9.9 shows the forecasted employment floorspace demand for Sevenoaks District. Over the period 2006-2026 the total requirement of B1, B2 and B8 land use is forecast to be between 14,320 sq m and 22,200 sq m. Office floorspace makes up majority of demand (between 34,500 sq m to 38,700 sq m) with marginal demand for warehousing (20 sq m to 400 sq m). A decrease in demand of industrial floorspace (factories) of between 16,900 and 20,200 sq m is forecasted.

Table 9.9 Employment Floorspace Demand Forecast Adjusted for Employment Changes

	Annual Forecasted Floorspace Demand 2006-2026 (sq m)		Total Changes in Floorspace Demand 2006-2026 (sq m)	
	Low Estimate	**High Estimate**	**Low Estimate**	**High Estimate**
Office	1,555	1,725	34,500	38,700
Factories	-1,055	-879	-20,200	-16,900
Warehouses	1	20	20	400
Total	501	866	14,320	22,200

Source: URS. Updated 2007.

Adjustments for Local Factors and Economic Development Programmes

This forecast is in accordance with past take-up rates in the office market, which has been stable over recent years and the moderate demand for industrial and warehouse premises as discussed in **Section 8**. Furthermore there are no major regeneration or economic development programmes within Sevenoaks District[27] that will have a significant bearing on employment trends. Therefore, in relation to regeneration we see no further need to adjust the findings presented in **Table 9.9**.

Employment Land Demand

In **Table 9.9** the future demand for floorspace was presented. These need to be converted into land area to show the additional need for employment land and the amount of land that can be released to other uses. This can be achieved by using plot ratios (i.e. floorspace per site area).

Table 9.10 compares the plot ratio derived from the Sevenoaks District Employment Land Survey with findings from other studies.

[27] The ‘Draft South East Plan’ specially notes that Swanley is not linked to the growth in the Kent Thames Gateway.

Table 9.10 Plot Ratio for Employment Uses

	Sevenoaks District Employment Land Survey			Other Studies[28]
	Average	Median	Standard Deviation	
Office	0.57	0.50	0.46	0.41 – 2.00
Factories	0.54	0.47	0.38	0.35 – 0.45
Warehouses	0.61	0.51	0.48	0.40 – 0.60

Source: URS Sevenoaks District Employment Land Survey and ODPM, Employment Land Reviews: Guidance Notes. Updated 2007.

The median plot ratios from the employment land survey are consistent with the results of other studies. However, both the property market review and employment land survey show that the existing stock is made up of primarily Grade B, second-hand accommodation. New demand is likely to be met from new build premises with different plot ratios. From URS' experience of employment land reviews elsewhere in the South East the plot ratios in **Table 9.11** are considered more appropriate for new build in Sevenoaks District. This evidence is drawn from surveys of employment land in the South East such as Crawley, Horsham and Mid Sussex, Medway, Cherwell, and Windsor and Maidenhead.

Table 9.11 New Build Plot Ratios

Land Use	Plot Ratio
Office	1.50[29]
Factories	0.45
Warehouses	0.40

Source: URS

By applying the new plot ratios to the employment floorspace forecasts in **Table 9.9**, the forecasted change in employment land demand can be calculated. This is set out in **Table 9.12** (note that one hectare is equivalent to 10,000 sq m).

Table 9.12 Forecasted Changes in Employment Land Demand 2006 to 2026

	Low Estimate (ha)	High Estimate (ha)
Office	2.3	2.6
Factories	-4.5	-3.8
Warehouses	0.0	0.1
Total	-2.2	-1.1

Source: URS. Updated 2007.

[28] See 'Employment Land Review: Guidance Note' (ODPM, 2004)

[29] Assumes new office premises will have a 50% plot ratio and be three storeys high.

Caution should be exercised in interpreting the sum total of these forecasts, as land becoming available from industrial decline might not meet the locational demands for new office accommodation.

Frictional Vacant Land

A degree of vacancy or friction is often necessary to enable the industrial and commercial property market to operate efficiently. Locational and operational needs of businesses change over time. This often requires businesses to move and some can choose to remain in the same property market area but at a different site. For this to happen smoothly there is the need for a certain level of vacant land.

As noted in the 'Industrial & Warehousing Land Demand in London' review (Roger Tym et al, 2004) there is no rigorous measure of what frictional vacancy should be. The report however suggests a land vacancy level of 10% to be appropriate. In our update to that report for the Greater London Authority, the 'Industrial Land Release Benchmarks' (URS et al, 2007), we built upon earlier estimates by analysing historical rates of development and site 'idle times' – the amount of time it takes for a contract negotiations, planning applications, remediation work, site reconfiguration, demolition and construction, improving access etc, before a site will become re-occupied. Vacancy in this sense can mean sites that are not ready for immediate occupation and can contain derelict buildings.

Our research in London suggests that a 5% vacancy level can be achieved through effective management of vacant industrial sites. Over the planning period, there is also the possibility that vacant brownfield land and derelict sites could become included in the business rates system, thereby adding an incentive to redevelop the site[30]. This is likely to encourage lower levels of vacancy.

The optimum level of vacant stock for smooth market operation is calculated as a proportion of total built-on stock. Figures for B1, B2 and B8 built-on stock were recorded in the business survey. The survey recorded B1 land stock but did not record the individual proportions of B2 and B8 stock (since assessment of a buildings external characteristics cannot accurately determine the difference between whether it is B2 or B8). However, 2006 VOA data tells us that the ratio of B2 floorspace to B8 floorspace is 47:53 (226,000 sq.m: 253,000sq.m). Using this ratio, the proportion of B2 and B8 built-on land can be estimated and the B2 and B8 vacant land stock then calculated[31].

Table 9.13 shows the additional demand for employment land to enable the property market to operate smoothly.

[30] Consultations on the proposal were announced in the 2007 Budget

[31] This methodology assumes that general industrial and warehousing operations have similar plot ratios.

Table 9.13 Requirement for Frictional Land Vacancy

	Current 'Built-on' Stock (2005) (hectares) [1]	Projected Stock 2026 (hectares) [2]	Optimal Levels of Vacancy at 2026 (hectares) (at 5%)[2]
High Forecast			
Office	30.9	33.5	1.7
Factories / Warehousing	54.9	51.2	2.6
Factories (at 47% of B2+B8)	25.8	24.1	1.2
Warehousing (at 53% of B2+B8)	29.1	27.2	1.4
Low Forecast			
Office	30.9	33.2	1.7
Factories / Warehousing	54.9	50.4	2.5
Factories (at 47% of B2+B8)	25.8	23.7	1.2
Warehousing (at 53% of B2+B8)	29.1	26.7	1.3

Source: URS Sevenoaks Employment Land Field Survey 2005.

Note. 1: The figure for current built-on stock is taken from the 2005 Employment Land Field Survey.

Note. 2: Projected stock and optimal levels of vacancy were updated in 2007. Figures rounded to one decimal place.

Frictional Vacant Floorspace

Just as there is a requirement for vacant land for smooth market operation, there is a requirement for vacant floorspace within premises: it is unrealistic to expect 100% occupancy rates because businesses relocate and premises can require refurbishment and/or reconfiguration before they are marketed again. This vacancy is necessary to enable the property market to operate, and is often referred to as 'frictional floorspace vacancy'. In our experience, 5% is an optimal level of office floorspace vacancy, while a slightly larger factor of 8% vacancy is considered more appropriate for industrial or warehousing premises.

The VOA publish levels of vacancy for commercial and industrial premises. Unfortunately the data is not available by floorspace type, only for the total of factories, warehouses and offices together. However, Knight Frank use commercial property databases that shows business premises that are currently vacant by land use type.

Table 9.14 shows the levels of vacancy in Sevenoaks District by land use type in 2007.

Table 9.14 Vacant Floorspace in Sevenoaks District

	Total Stock of Floorspace, 2006 sq.m	Vacant Floorspace Stock, 2007 sq.m	Floorspace Vacancy Rate (%) 2007
Office	144,000	8,162	5.7
Factory	226,000	9,682	4.3
Warehousing	253,000	27,370	10.8

Source: Knight Frank and URS, 2007

The figures above indicate that there is currently a slight oversupply of vacant office floorspace, an undersupply of vacant factory premises, and a larger oversupply of vacant warehouse premises. The vacancy levels are a snapshot in time and can change, but historical levels of office vacancy show a degree of consistency. If we assume that over the planning period floorspace vacancy levels are normalised to a more optimal level of 5% for offices and 8% for industrial/warehousing premises, then the effect on the demand projections will be twofold:

1. Demand will be met from existing vacant floorspace in excess of the optimal threshold before creating demand for new build premises. This assumes that existing vacant floorspace will meet the market requirements for new space by 2026
2. If levels of vacancy are below the optimal thresholds, this will place an additional requirement for new floorspace on the demand projections [32].

Table 9.15 shows optimal levels of frictional vacant floorspace for smooth market operation in 2026. Considering low and high forecasts there would need to be an additional 760 to 980 sq m of office floorspace; 6,780 to 7,040 sq m of factory floorspace; and, due to the current large vacancy of warehousing and small growth forecast, frictional vacant floorspace for warehousing in 2026 is already met (–7,130 to -7,100 sq m).

It also shows that optimal frictional vacant floorspace will create a negligible impact on the forecast total employment land forecast.

[32] It is worth noting that the property taxation of vacant commercial and industrial premises is due to change. It was announced in the 2007 Budget that empty offices will only be eligible for business rate relief for three months (Central Government used to subsidise the tax liability by 50% thereafter) and empty industrial premises will be eligible for six months. This is likely to encourage lower vacancy rates.

Table 9.15 Forecast of Vacant Floorspace in Sevenoaks District, 2026

	Forecast Floorspace Stock, 2026 sq.m	Optimal Floorspace Vacancy, 2026 sq.m	Additional Floorspace Vacancy for optimal operation at 2026, over 2007 levels sq.m	Area of land required to accommodate Frictional Vacant Floorspace[1] (ha)
High Forecast				
Office (5%)	182,700	9,140	980	0.1
Factories (8%)	209,100	16,730	7,040	1.6
Warehousing (8%)	253,400	20,300	-7,100	-1.8
Low Forecast				
Office (5%)	178,600	8,930	760	0.1
Factories (8%)	205,800	16,470	6,780	1.5
Warehousing (8%)	253,000	20,240	-7,130	-1.8

Source: Knight Frank and URS, 2007

Note 1: Calculated by applying the plot ratio and converting to hectares

9.5. Conclusion

There is a relatively static pattern of net change in demand for employment land compared to the total stock of employment land in the District. Within this relatively static net demand for land there is a reasonably healthy overall demand for employment premises – this represents a 'churn' demand for re-use of existing premises and land.

The table below presents the final results of our synthesis forecast approach. This approach is based on the historical completion rates in Sevenoaks District, but also takes into account the wider structural changes and objectives of the 'Draft South East Plan'. The projections then build in a requirement of frictional land vacancy and frictional floorspace vacancy.

Table 9.16 Sevenoaks District Employment Land Demand Forecasts, 2006-2026

	Low Estimate (ha)	High Estimate (ha)
Office	4.0	4.3
Industry		
Factory	-1.8	-1.0
Warehouse	-0.4	-0.3
Total	**1.8**	**3.0**

Source: URS. Updated 2007.

Development in the Pipeline

A factor which will impact upon the future supply of employment land, is the amount of land which has been given planning consent and is yet to be developed – termed here as development in the 'pipeline'.

If current planning permissions for office, factory and warehouse premises with full consent are realised there could be an increase in Sevenoaks District employment premises provision. The most likely developments in the pipeline are Grade A consent for offices and those been given full planning consent for factory and warehouse development.

Table 8.2 recorded 2,273 sq m of Grade A of office development in the pipeline and **Table 8.7** recorded full planning consent of 6,650 sq m for factory and 4,525 sq m for warehousing. (By plot ratio, this floorspace would represent 0.2ha, 1.5ha, and 1.1ha respectively). There is a further 1,870sq.of a B1/B8 with full planning consent.

Development in the pipeline is not incorporated into the demand or supply side analysis. Development in the pipeline sets out development that could come about in the future, but although full planning consent has been given it is unclear what will actually be built and what amount of floorspace will come forward. Furthermore, as development that could take place in the future, development in the pipeline is already taken into account in the future projections of the employment land demand forecast.

10. RECOMMENDATIONS

10.1. Introduction

The recommendations proposed are based on the analysis in the previous sections of this report. The recommendations have been developed from the analysis of the forecast land demand and the supply of Business Areas and in particular given the constrained nature of the District's supply, the potential to bring into use vacant and derelict land, plus the prospects for intensification of land, particularly for office use.

10.2. Loss of Employment Land since 2005

To set our analysis and recommendations in context, since 2005 there has been a quantum of employment land lost to non-employment land uses such as retail and residential.

Table 10.1 below records employment land lost to non-employment land use since 2005 and records 3.8ha of land (with over 36,000 sq. m of floorspace) lost directly to mixed-use, retail and residential led developments since 2005. It draws upon **Table 7.9**, which records the stock of vacant and derelict land in the District across all Business Areas in 2005, and how this stock of land may have changed since.

In 2005 the stock of vacant and derelict land was 17.1ha, whereas in 2007 8.4ha of Business Areas were recorded as vacant and derelict land. This means there has been an 8.7ha change in the quantum of vacant and derelict land. This is due to:

a) 3.7ha of vacant and derelict employment land has been granted planning permission for non-employment uses (see table overleaf); and

b) 5.0ha has seen a change of classification: 1.3ha of land at Station Approach, Edenbridge (Business Area 39), which is now used as a builders yard; a reduction in the amount of developable land from 8.5 to 4.1ha developable land at Southern Cross Industrial Estate, Swanley (Business Area 10); and 0.7ha at London Road, Swanley (Business Area 2) has become vacant and derelict.

Vacant and derelict land offers the potential to accommodate the additional demand of employment land / floorspace which is forecast to come forward, so any loss to non-employment uses erodes the Districts' capacity to adapt to and accommodate future business requirements.

Table 10.1 Employment Land Lost to Non-Employment Uses since 2005[33]

No	Name/Address	Vacant Land (ha)	Floorspace (sq. m)	2005 B-Class Use	Type of loss
5	Royal Mail, Swanley	0	Unknown	Warehousing	Retail with Flats development
12	Horton Kirby Trading Estate, Dartford	2.2	13,080	Mixed Industry & Office	Planning permission granted for mixed-use development. Under Construction
19	Hardy's Yard, Riverhead	0.1	3,740	Mixed-use (Office & Industry)	Site developed as retail
28	Tubs Hill House, Sevenoaks	0.2	8,250	Office	Planning permission granted for hotel and either office or housing. Neither has begun work. Not clear which may be implemented
33	Southpark/ Lime Tree Walk, Sevenoaks	0.1	9,300	Office	Currently under development (mixed use)
37	Albion Business Park, Edenbridge	1.2	1,200	Vacant	Planning permission granted for residential development
	Total	3.7	> 35,570		

Source: URS Sevenoaks Employment Land Field Survey, 2005, with updates in 2007 following discussions with Sevenoaks District Council planning department

Note: Figures may not add due to rounding

The recent loss of employment land is a concern given the need to make adequate provision for employment land needs. It will be important to keep to the recommendations presented in this report if supply and demand are to be in balance.

10.3. Potential for Intensification of Business Areas

It is also relevant to consider the scope for intensification of existing employment sites as part of the process of coming to a conclusion on recommendations.

The District's employment land operates in a constrained environment. In accordance with the principles of sustainable development and 'smart growth' the greatest economic value should be obtained from existing land assets before additional sites are identified. This research has found that there is 144,000 sq m of office floorspace[34] situated on approximately 30.9 hectares of employment land[35]. Although the data is not necessarily comparable calculating a ratio

[33] All figures have been identified and checked with the Council's Planning Policy Department.

[34] VOA data, 2006; see Table 9.14.

[35] Site surveys, 2005; see Table 9.13.

gives a plot ratio of 0.47[36] of land used to accommodate built-on office accommodation at single-storey development.

Section 9 showed that, in URS experience of employment land reviews in the South East, a plot ratio of 1.5 would be considered more appropriate for new office development in town centres – for example, this could be based on 50% of the site area used by the building footprint and a three storeys high development. This suggests there is scope for Sevenoaks District to intensify existing employment land allocations by encouraging the redevelopment of older, poor quality sites.

Given the higher land values typically associated with office development, and the scope to reduce car parking provision and/or provide underground or multi-storey car parking, we anticipate that the main opportunities for intensification are likely to come forward on town centre/edge of centre office sites. The degree to which this is assumed to meet demand is presented below.

There may also be some limited potential to intensify some industrial sites. However given lower land values, operational requirements and generally more fragmented land ownership patters we do not anticipate significant increases in floorspace being achieved through intensification. We suggest that until clear evidence comes forward that this is happening on a significant scale we do not assume that a significant element of B2 and B8 demand can be met through this mechanism.

10.4. Summary of Demand and Supply Analysis

We set our analysis on balance of supply and demand in context by summarising information on vacant land, and then combine this with demand projections.

Vacant Land

Our analysis has identified total vacant / derelict land across the District to be 8.4ha[37].

Discounting those Business Areas, which have planning permission granted for change of land use away from employment use[38], there are 13 Business Areas with vacant/derelict land. The total stock of vacant/derelict land from these 13 Business Areas is 8.4ha. This vacant/derelict land is located in areas of industrial activity (predominantly B2 and B8 class use) and the majority of these vacant/derelict sites are small in size, dispersed and do not provide opportunities for aggregation. Twelve of the 13 Business Areas have vacant/derelict land equal to or less than one hectare in size (see **Table 7.9**). The single largest contribution of vacant/derelict land is from the Southern Cross Industrial Estate (Broom Hill), Swanley, with an estimated 4.5 ha of vacant/derelict land, although only 4.1 ha is developable[39].

[36] i.e. 47% of the total site area is covered by the building.

[37] Assumes that there is 4.1ha at Southern Cross Industrial Estate (Broom Hill), Swanley.

[38] See Table 7.9.

[39] 'Broom Hill, Swanley: Draft Development Brief', Sevenoaks District Council (approved December 2005), indicates that the majority of the site should be retained as open parkland, which reduces the developable area to 4.1 ha. Building design guidelines also state that the development should be limited to two storeys in height (max. of 8.5m).

Furthermore, eight of the 13 Business Areas with vacant/derelict land are considered to be contaminated (visually surveyed by the consultants)[40].

Balance of Demand and Supply

With a relatively low total additional employment land demand forecast of 1.8ha to 3.0ha (low to high respectively), the gap between the supply of 8.4ha of vacant/derelict land and the additional demand forecast for employment land is between 6.6ha and 5.4ha surplus. These figures give an indication of the quantum of employment land that could be re-designated for other uses, if suitable, and still retain equilibrium between demand and supply. However most of this surplus is on vacant sites mainly suited to B2/B8 use whereas demand is predominately for new B1 space. We anticipate that a significant element of B1 demand could be met elsewhere in the District through site intensification or change of use from B2/B8 to B1 where appropriate.

Business Areas identified for re-designation are generally those we consider to be least suitable for employment use on the basis of the DCLG/ODPM's 2004 Employment Land Review Guidance notes policy criteria (Annex E) or sites that are suitable for change from B2/B8 to B1 use. Our proposals are presented in **Table 10.2** below.

Table 10.2 Summary of Proposed Sites for Release or Change of Use

No	Name/Address	Site area (ha)	Current/historic use or allocation	Change of B2/B8 (ha)	Change of B1 (ha)
2	London Road, Swanley	0.7	B2	-0.7	0.2
18	West Kent Cold Storage	7.7	B2/B8	-7.7	2.0
21	Crampton's Road St Jonn's	0.7	Utilities (vacant)	-0.7*	
	TOTAL	9.1		-8.4	2.2

* Note: Although sites 21 and 39 are not currently or historically B2/B8 uses, they have been counted as a loss of B2/B8 land as they would be potentially available for B2/B8 use.

Table 10.3 and **Table 10.4** set out the balance of demand and supply of employment land within Sevenoaks District for the lower and higher growth scenarios with components:

- current stock of vacant/derelict land (A)
- the forecasted demand (B)
- the amount of land proposed for re-designation away from employment land (C), and
- the resulting land reserve (D).

The resulting land surplus (D) is calculated by stock of vacant/derelict land in the District's main Business Areas[41] (A), less the forecast of additional employment land demand (B)[42], and

[40] Sixteen Business Areas were recorded with potentially contaminated sites land. Contaminated land was recorded if there were signage, potentially contaminative use, potential hazardous building material and potential noise and nuisance issues for surrounding areas. See table 7.7.

[41] As per the 2005 survey of 41 business areas updated through discussions with the Council.

the land proposed for re-designation (C). The aim is to have an approximate balance between demand and supply over the plan period, i.e. to have a zero surplus by the end of the plan period[43].

Table 10.3 Employment Land Demand and Supply: Lower Demand Scenario

	(A) Current Supply of Vacant/Derelict Land[1] (Ha across all B class)	(B) Additional Forecasted Demand 2006-2026[2] (ha)	(C) Proposed for Re-designation [3] (ha)	(D) Resulting Land Surplus [3] (ha)
B1	0.0[3]	4.0	2.2	-1.8
B2	8.4	-1.8	-9.1	1.5
B8		-0.4		
Total	8.4	1.8	-6.9	-0.3

Source: URS

[1] From Table 7.9
[2] Forecast figures from Table 9.16
[3] Assuming supply is only suitable for B2/B8 use. There may be some exceptions to this in which case the excess demand gap for B1and excess supply gap for B2/B8 could both be narrowed.

Table 10.4 Employment Land Demand and Supply: Higher Demand Scenario

	(A) Current Supply of Vacant/Derelict Land[1] (Ha across all B class)	(B) Additional Forecasted Demand 2006-2026[2] (ha)	(C) Proposed for Re-designation [3] (ha)	(D) Resulting Land Reserve [3] (ha)
B1	0.0[3]	4.3	2.2	-2.1
B2	8.4	-1.0	-9.1	0.6
B8		-0.3		
Total	8.4	3.0	-6.9	-1.5

Source: URS

[1] From Table 7.9
[2] Forecast figures from Table 9.16
[3] Assuming supply is only suitable for B2/B8 use. There may be some exceptions to this in which case the excess demand gap for B1and excess supply gap for B2/B8 could both be narrowed.

[42] Note where there is a negative demand for additional space then this gives a double negative, i.e. an increase in the surplus land reserve.

[43] There will clearly be a need to look at the situation again nearer the end of the plan period and at that stage sites will be found or designated as appropriate.

The recommendations result in a suggested re-designation of a total of 9.1ha of B2/B8 land with 2.2ha of this being designated for B1 use, giving a net release of 6.9ha of employment land.

The recommendations suggest there will be a small deficit of supply of land for B1 use. However we anticipate this deficit can be made good through intensification of existing B1 sites and/or through some of the B2/B8 sites/vacant land being redeveloped for B1 use where appropriate.

Though urban areas offer the greatest prospects for employment land provision and intensification, rural areas of Sevenoaks District also offer minor prospects for development and intensification.

10.5. Overall Recommendations

R1	All premises and land currently in B class uses should remain allocated or designated for business uses except for sites where a change of use is considered in the recommendations below. Intensification of premises and land currently in B class uses should be encouraged where appropriate.

Justification

Given the recent loss of employment land in the District we recommend that no further loss of employment land is allowed other than sites outlined below.

Overall average demand for employment land within the District is expected to be relatively low until 2026. Within this low net demand for land there is a reasonably healthy overall demand for employment premises – this represents primarily a 'churn' demand for re-use of existing premises and land.

10.6. Site Recommendations

The justifications for the re-designations of employment land are set out below in the recommendations.

In sum, there are three types of recommendations proposed:

- Employment land to be protected (in addition to those Business Areas already identified for protection in the Local Plan) or intensified;
- Employment land for re-designation to non-employment land use and/or change of uses within B use classes; and
- Sites of specific note where comment and recommendations are relevant

The Business Areas maps in this section are of different scales. For all maps, the direction north faces upwards.

Sites Recommend for Release

R2	Business Area 2 – London Road, Swanley This Business Area (0.7 ha) is recommended for mixed-use development, led by non-employment use, but with a component of 0.2ha retained for office use.

Justification

This Business Area is currently vacant. It is a constrained site away from main road frontages and is no longer suitable for B2/B8 use. An element of small scale office use could be an appropriate element of development proposals. The Business Area is now owned by Belway Homes and a planning application is anticipated. Designation for office development would allow for retention of some employment land.

Figure 10.1 Business Area 2 – London Road, Swanley

R3	Business Area 18 – West Kent Cold Storage, Dunton Green The Business Area (7.7ha) is recommended for division in two, with two hectares for B1 employment and the other part (5.7 ha) re-designated for non-employment use. This is subject to further detailed site analysis. Such a re-designation would be subject to a master plan for the Business Area demonstrating that the uses can be accommodated in an appropriate way.

Justification

The Business Area, although reasonably well occupied and used (there were an estimated 218 employees on-site), suffers from poor site access through narrow residential roads and under a railway bridge. The Business Area also has a long and circuitous route to the trunk road network. The location and size of the Business Area would allow for a comprehensive redevelopment of the site for a mixed-use scheme.

We understand from the Council that there is currently a planning application pending for the redevelopment of part of the Business Area to include B1 employment uses alongside existing employment uses. We have not viewed the planning application.

We recommend that the developers and the Council assist in the identification of alternative provision for existing occupiers elsewhere.

R4	Business Area 21 – Crampton's Road, Sevenoaks This Business Area (0.7 ha) is recommended for re-designation.

Justification

The Business Area is largely disused with an old derelict waterworks building and pumping station on-site and should be re-designated for alternative uses compatible with the area.

The Business Area is small (0.7 ha) and there are currently no jobs on site. The Business Area has restricted access through a narrow lane along residential properties and has a circuitous route to the trunk road network. The Business Area is not visible from the main street and therefore lacks prominence, which is often a factor in commercial locational decisions.

Figure 10.2 Business Area 21 – Crampton's Road, St John's

Sites Recommended for Protection (in addition to Sites Protected in the Local Plan)

R5	The land south of Business Area 21 (Crampton's Road, Sevenoaks, Local Plan Policy EP1 (J), approximately 1 ha) currently occupied by light industry and warehouses should be considered for designation as a Business Area in line with current Local Plan Policy EP8 and EP10.

Justification

Although relatively small this is well maintained and used employment land with good site access and close to the A26.

R6	Business Area 22 (Bat and Ball Railway Sidings, EP1(A), approximately 1 ha) currently allocated as an Employment Area within the Local Plan should be considered for designation as a Business Area in line with current Local Plan Policy EP8 and EP10.

Justification

The area has been developed for business use. Buildings are in good condition and there is good site access and it is located close to the A26.

Other Site Recommendations

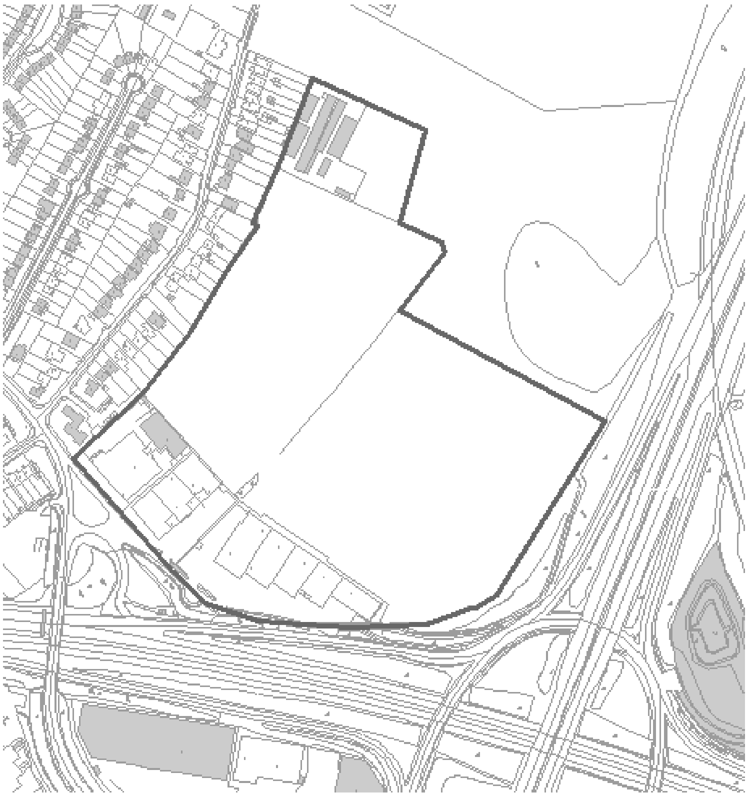
R7	Business Area 10 – Southern Cross Industrial Estate, Swanley (Broom Hill) The allocation of the Business Area as Employment Allocation (EP1) is found to be appropriate though it could be widened to allow industrial land use B2. The Business Area is located closely to the M20/M25 junction and would be suitable for a modern distribution development. The Business Area would therefore be appropriate for B2 and B8 use. This is subject to amenity. An element of B1 could also be included though town centres sites with good public transport links are likely to be more sustainable in terms of reducing the need to travel.

Justification

The Business Area is located closely to the M20/M25 junction in Swanley and therefore potentially attractive for distribution uses. The employment land market assessment identified a potential market for warehouses with good trunk road access in the northern part of the District.

The Business Area is exposed to noise and air pollution, which limits the use of the Business Area for residential purposes. Furthermore the Business Area has limited public transport access, which hampers its use for high-density employment use.

Figure 10.3 Business Area 10 – Southern Cross Industrial Estate, Swanley (Broom Hill)



R8	Business Area 15 – North Downs Business Park, Dunton Green (Fort Halstead) Subject to a wider review of the site's sub-regional role we suggest retaining the Business Area as employment land, primarily for technology and knowledge related activities. Currently, the main employment use on the site is for science and technology related activities.

Justification

The total Business Area is 83.8 ha with the DRA occupying the majority of the sites (60 ha of the Business Area). The Business Area is primarily occupied by science and defence related research and due to the nature of activity was not accessible for surveying. There are a variety of other business activities on the site relating to research and manufacturing. There is also 15 ha of residential development.

The DRA occupation of the Business Area could not be surveyed, and only 7.8 ha of the Business Area was surveyed. The condition of the land and buildings of this surveyed area was recorded as good and well maintained, with provision of on-site parking and good HGV access in most areas.

The Kent and Medway Structure Plan specifically identifies the North Downs Business Park for technology and knowledge employment activities (*Policy EP5, Land for Technology and Knowledge Clusters)*. The policy supports the intensification or expansion of established key employers and/or institutions in the technology and knowledge sectors at this location.

There are a number of other factors, which indicate the likely continuing demand for science and research employment at this Business Area:

1. Premises are used to conduct highly important national security work
2. We understand that the current site and premises are well maintained and serviced, well occupied and employ a significant number of workers
3. Science and research activities carried out at the site require a pool of highly qualified workers: the socio-economic characteristics of the district indicate that there is high level of education achievement at NVQ4+ plus a high proportion of managers and senior officials occupations, and
4. Office premises, which have similar locational characteristics as science and research premises, are forecast to grow strongly[44].

We understand that the current uses at the site may be relocating/closing down. If this is the case we suggest that a separate study is carried out on the potential for the site and appropriate land uses. This exercise should place the site in a wider context than just the local demand in Sevenoaks. We have assumed that any future uses on this site will be of a nature

[44] Science and research activities cut across a number of SIC categories. It is therefore not possible to extract employment forecasts or land forecasts relating to science and research activities. However, assuming the locational requirements for science and research premises are similar to those of high quality offices, the forecast for office premises provides some indication as to whether there will be a demand for science and research premises.

that meets demand that is distinct from demand assessed for other sites in Sevenoaks, and that it will generally not play a role in providing supply to such local demand.

10.7. Monitoring

The loss of employment land over the past two years is testimony to the need for close monitoring of planning applications, particularly applications for development of land designated as a Business Area. The District Council should therefore adopt a monitoring mechanism, to assess, on an annual basis, all planning applications coming forward for development and occupation.

The data of surveyed employment land held in **Table 7.2**, which sets out the quantum, unit number and floorspace, is a good basis from which to begin recording any changes in area, floorspace and class use.

Critically, to ensure equilibrium between land demand and supply, it is recommended that planning applications do not contradict the site-specific proposed recommendations set out in this paper.

APPENDICES

Appendix A - Site Survey Questionnaire

NOTES

*** Condition** Good - G, Reasonable - R, Poor - P, Very Poor - V

****Contamination** Visual Signs / Tanks - C, Potentially Contaminative Use - CU, Potentially Hazardous Building Material - CB, Potential Noise or Nuisance Issues - CN

*****Remaining Developable Area** Not including car park, outdoor storage etc. (if > 0% draw on map)

General Information | **Business Information** | **Building / Site Information** | **Other Information**

Region	Business Area	Business Area Desc	Site Identifier -	Business Identifier	Business Name	Land Use Categories - Use Categories provided on list	Area - Estimate from map error	Area - Estimate from Map	Footprint of Buildings (sq m) - Estimate from map error	Footprint of Buildings (sq.m) Estimate from map	Address Line 1	Address Line 2	AddressL_2	Address Line 3	Post Code	Total number of storeys	Percentage of building that is 1 storey	Percentage of building that is 2 storeys	Percentage of building that is 3 or more storeys	Approximate Age of Buildings	Condition of Buildings *	Potential Architectural Value - Yes - Y, No - N	HGV Access - Good - G, Reasonable - R, Poor - P, Very Poor - V	On-site Parking Yes - Y, No - N	Contamination **	Layout Issues Yes - Y, No - N	Remaining Developable Area - percent ***	sqm of Remaining Develop. Area	Floorspace Ground Level	Floorspace 1st Floor	Floorspace 2nd floor and higher	Total Floorspace	Total Site Floorspace consolidated and checked	Comments	Photo Number

Appendix B - Urban and Rural Telephone Business Survey Questionnaire

Sevenoaks Urban Business Telephone Survey

F1 Good morning/afternoon. My name is AgentName from Research & Marketing Ltd.

We're conducting research on behalf of Sevenoaks District Council and would like to ask you a few questions regarding your thoughts about the area as a place to do business, your premises and other issues such as recruitment, skills and future plans.

The information you give us will play an important role in helping the Council assist local business.

Could we speak with you now?

- ❑ Yes
- ❑ No

If = 2, Prompt interviewee with message 'ASK TO CALL BACK. IF NOT, THANK AND CLOSE'

Can I confirm?

Your name is S_Contact?

IF INCORRECT, PLEASE ENTER CORRECTION UNDER 'OTHER'

- ❑ Name is correct
- ❑ Other (specify) ____________

F3 The Company name is S_Company?

IF INCORRECT, PLEASE ENTER CORRECTION UNDER 'OTHER'

- ❑ Company name is correct
- ❑ Other (specify) ____________

F4 The company's address is S_Address1 S_Address2 S_Address3 S_Address4 S_Address5 S_Address6?

IF INCORRECT, PLEASE ENTER CORRECTION UNDER 'OTHER'

- ❑ Company address is correct
- ❑ Other (specify) ____________

F5 What is the company's postcode? S_Postcode

PROBE FOR FULL POSTCODE

____

Q1 What is the main business activity carried out at this establishment?

PROMPT: WHAT ARE THE MAIN SERVICES YOU PROVIDE OR PRODUCTS THAT YOU MAKE?

SINGLE ANSWER ONLY

- ❑ Farming - Crops
- ❑ Farming - Dairy
- ❑ Farming - Livestock
- ❑ Manufacturing
- ❑ Construction, building, architecture
- ❑ Motor trades

- ❑ Wholesale/Warehouse
- ❑ Transport
- ❑ Professional services - IT, consultancy, solicitor
- ❑ Financial services
- ❑ Personal services - e.g. Hair dressing
- ❑ Real estate, renting
- ❑ Education - Schools and colleges
- ❑ Health
- ❑ Retail
- ❑ Hotel & Catering
- ❑ Public Administration
- ❑ Other (specify) ______

Q2 Is this site?

READ OUT - SINGLE ANSWER ONLY

- ❑ A single site (No related Operations elsewhere)
- ❑ A national, regional or divisional headquarters (co-ordinating business operations across two or more sites)
- ❑ A branch, subsidiary or division with Headquarters elsewhere in the UK
- ❑ A branch, subsidiary or division with Headquarters outside of the UK
- ❑ A franchise
- ❑ Don't know (DO NOT READ OUT)
- ❑ Refused (DO NOT READ OUT)
- ❑ Other (specify) ______

Q3 Including yourself, in total how many employees are there at your site?

UNPROMPTED

WRITE IN EXACT NUMBER - IF RESPONDENT GIVES A RANGE, THEN USE MID POINT

8888 DON'T KNOW
9999 REFUSED

______

Q4 And how many are part-time employees?

(By part time we mean people working less than 30 hours per week)

UNPROMPTED

WRITE IN EXACT NUMBER - IF RESPONDENT GIVES A RANGE, THEN USE MID POINT

8888 DON'T KNOW
9999 REFUSED

______

Q5 And how many are full time?

(Over 30 hours per week)

UNPROMPTED

WRITE IN EXACT NUMBER - IF RESPONDENT GIVES A RANGE, THEN USE MID POINT

8888 DON'T KNOW
9999 REFUSED

Q6 How would you describe the work undertaken by the MAJORITY of your workforce?

READ OUT AND SINGLE ANSWER ONLY

- ❑ Professional
- ❑ Skilled Manual
- ❑ Clerical
- ❑ Sales and Care
- ❑ Semi-Skilled
- ❑ Unskilled
- ❑ Don't Know
- ❑ Refused

Approximately what proportion of your staff would you say live

Q7a Within a mile of the business?

READ OUT - SINGLE ANSWER ONLY

- ❑ Up to a quarter
- ❑ One quarter up to a half
- ❑ One half up to three quarters
- ❑ More than three quarters
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q7b Between 1 and 5 miles of the business?

READ OUT - SINGLE ANSWER ONLY

- ❑ Up to a quarter
- ❑ One quarter up to a half
- ❑ One half up to three quarters
- ❑ More than three quarters
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q7c Between 5 and 10 miles of the business?

READ OUT - SINGLE ANSWER ONLY

- ❑ Up to a quarter
- ❑ One quarter up to a half
- ❑ One half up to three quarters
- ❑ More than three quarters
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q7d More than 10 miles from the business?

READ OUT - SINGLE ANSWER ONLY

- ❑ Up to a quarter
- ❑ One quarter up to a half
- ❑ One half up to three quarters
- ❑ More than three quarters
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

For the next couple of questions I would like to rank your experiences in recruiting staff

Q8a How easy or difficult do you find it recruiting managerial/qualified/highly skilled staff?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very easy/no problems
- ❑ Easy/few problems
- ❑ Neither easy nor difficult
- ❑ Difficult/some problems
- ❑ Very difficult
- ❑ Not applicable
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q8b Technical/medium skilled staff?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very easy/no problems
- ❑ Easy/few problems
- ❑ Neither easy nor difficult
- ❑ Difficult/some problems
- ❑ Very difficult
- ❑ Not applicable
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q8c Low/unskilled staff?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very easy/no problems
- ❑ Easy/few problems
- ❑ Neither easy nor difficult
- ❑ Difficult/some problems
- ❑ Very difficult
- ❑ Not applicable
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Now looking at your business and premises:

Q9 In what year was your business established at its current location?

PLEASE ENTER DATE AS FOUR DIGIT NUMBER I.E. 1963

8888 DON'T KNOW
9999 REFUSED

Q10 What type of premises do you occupy?

UNPROMPTED - SINGLE ANSWER ONLY

- ❑ Office
- ❑ Office, with research & design
- ❑ Office with warehouse
- ❑ General Industry
- ❑ Warehouse
- ❑ Small business at home
- ❑ Farm
- ❑ Workshop
- ❑ Studio
- ❑ Leisure, sports and entertainment
- ❑ Service shop i.e. hairdressers
- ❑ High Street offices, with shop front severing the public
- ❑ Retail/Shop
- ❑ Don't Know
- ❑ Refused
- ❑ Other (specify) ______

Q11 What is the approximate floorspace of your premises?

READ OUT - SINGLE ANSWER ONLY

- ❑ 0 - 1,000 Square Foot (SQ.FT) or 0 - 90 SQ. Meters (SQ.M)
- ❑ 1,000 - 3,000 SQ.FT or 91 - 280 SQ.M
- ❑ 3,001 - 5,000 SQ.FT or 281 - 460 SQ.M
- ❑ 5,001 - 10,000 SQ.FT or 460 - 930 SQ.M
- ❑ 10,001 - 20,000 SQ.FT or 931 - 1860 SQ.M
- ❑ OVER 20,001 SQ.FT or 1861 SQ.M
- ❑ Don't Know (DON'T READ OUT)
- ❑ Refused (DON'T KNOW)

Q12a And what is the tenure of the site?

READ OUT - SINGLE ANSWER ONLY

- ❑ Freehold
- ❑ Leasehold
- ❑ Rented
- ❑ Don't Know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)
- ❑ Other (specify) ______

If <> 1, do not ask 'Q12b'
If <> 2, do not ask 'Q12c'
If <> 3, do not ask 'Q12d'

Q12b Who is the freeholder?

UNPROMPTED - SINGLE ANSWER ONLY

- ❑ The business
- ❑ Don't know
- ❑ Refused
- ❑ Other (specify) ______

Q12c How long is left on the lease?

UNPROMPTED

WRITE IN EXACT NUMBER OF YEARS - IF RESPONDENT GIVES A RANGE, THEN USE MID POINT

888 DON'T KNOW
999 REFUSED

Q12d When does the contract expire?

UNPROMPTED - SINGLE ANSWER ONLY

PROBE FOR FULL DATE - WRITE IT IN AS EIGHT DIGIT NUMBER I.E. 17031976

Q13a Has your business always been based at its current site?

UNPROMPTED - SINGLE ANSWER ONLY

- ❑ Yes
- ❑ No

If = 1, goto 'Q14a'

Q13b Where was your business prior to moving to the current location?

READ OUT - SINGLE ANSWER ONLY

- ❑ Within Sevenoaks district
- ❑ Within Kent
- ❑ Within the South East
- ❑ Within the Greater London Area
- ❑ Within the UK
- ❑ Don't Know
- ❑ Refused
- ❑ Other (specify)

If <> 1, do not ask 'Q13c'
If <> 1, do not ask 'Q13d'

Q13c In which area of Sevenoaks?

UNPROMPTED - SINGLE ANSWER ONLY

- ❑ Ash
- ❑ Brested, Chevening and Sundridge
- ❑ Cowden and Hever
- ❑ Crochenhill and Well Hill
- ❑ Edenbridge North and East
- ❑ Eynsford
- ❑ Farningham, Horton, Kirby and South Darenth
- ❑ Fawkham and West Kingdown
- ❑ Halstead, Knockholt and Badgers Mount
- ❑ Hartley and Hodsoll Street
- ❑ Leigh and Chiddingstone Causeway
- ❑ Otford and Shoreham
- ❑ Penshurst, Fordcombe and Chiddingston
- ❑ Seal and Weald

- ❑ Sevenoaks
- ❑ Swanley
- ❑ Westerham and Crockham Hill
- ❑ Other (specify)

Q13d In which town/area within Kent?

UNPROMPTED - SINGLE ANSWER ONLY

- ❑ Ashford
- ❑ Canterbury
- ❑ Dartford
- ❑ Dover
- ❑ Gravesham
- ❑ Maidstone
- ❑ Sevenoaks
- ❑ Shepway
- ❑ Swale
- ❑ Thanet
- ❑ Tonbridge and Malling
- ❑ Turnbridge Wells
- ❑ Other (specify)

Q14a When deciding to locate in the current area, how important or unimportant were the following factors?

Being near to similar businesses?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q14b Being near to suppliers?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q14c Being near to customers?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q14d Having good public transport links?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant

- ❑ Not important
- ❑ Not important at all

Q14e Having good road transport links?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q14f Being near to own residence?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q14g Having access to modern information and communications services i.e. broadband?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q14h Having a supply of suitable staff?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q145i The quality of area?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q14j Having a supply of appropriate premises?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q14k Is there anything else which is important to your business when deciding to locate in an area?

UNPROMPTED - SINGLE ANSWER ONLY - IF YES PLEASE TYPE ANSWER IN OTHER

- ❑ No
- ❑ Other (specify)

For the next few of questions we would like you to rate the following site and building characteristics. How important for your business operations is?

Q15a Cheap rents?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q15b Having suitable interiors and facilities?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q15c Having access to broadband connections?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q15d Having heavy goods access?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q15e Having on-site car parking?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q15f Having a yard/open storage space?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q15g Having good security features?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q15h Having freehold ownership?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q15i Is there any other site or building factor, which is important to your business?

UNPROMPTED - SINGLE ANSWER ONLY - IF YES PLEASE TYPE ANSWER IN OTHER

- ❑ No
- ❑ Other (specify) ____

Q16 Could you tell me if any of the following site and building constraints affect your business?

READ OUT- MARK AS MANY APPLY

(11 maximum responses)

- ❑ The price of premises
- ❑ Poor quality of premises
- ❑ Building or site size/over crowding/lack of storage space
- ❑ Poor management/maintenance of site/building
- ❑ Poor accessibility of buildings
- ❑ Poor public transport links
- ❑ Poor access to motorways and A roads
- ❑ The shape and/or layout of a building
- ❑ The restricted use of land
- ❑ The lack of local amenities
- ❑ Problem neighbours i.e. noise
- ❑ Nothing/no problems
- ❑ Other (specify) ____

If <> 1, do not ask 'Q17a'
If <> 2, do not ask 'Q17b'
If <> 3, do not ask 'Q17c'
If <> 4, do not ask 'Q17d'
If <> 5, do not ask 'Q17e'
If <> 6, do not ask 'Q15f'
If <> 7, do not ask 'Q15g'
If <> 8, do not ask 'Q17i'
If <> 9, do not ask 'Q17j'
If <> 10, do not ask 'Q17l'

Q17a How much of a problem is the price of premises?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q17b How much of a problem is poor quality of premises?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q17c How much of a problem is building or site size/over crowding/lack of storage?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q17d How much of a problem is poor management/maintenance of the site/building?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q17e How much of a problem is poor public transport links?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q17f How much of a problem is poor accessibility of buildings?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q17g How much of a problem is poor access to motorways and A roads?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q17h How much of a problem is shape and/or layout of building?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q17i How much of a problem is restricted use of land?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q17j How much of a problem is lack of local amenities?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q17k How much of a problem are problem neighbours?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q17l How much of problem is Q27 other?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)
- ❑ Other (specify) ____________

Q18 What is your nearest town?

UNPROMPTED - SINGLE ANSWER ONLY

- ❑ Ashford
- ❑ Maidstone
- ❑ Royal Turnbridge Wells
- ❑ Sevenoaks
- ❑ Swanley
- ❑ Westerham
- ❑ Edenbridge
- ❑ Canterbury
- ❑ West Kingsdown
- ❑ London
- ❑ Other (specify) ____________

Q19a How long does it take to travel from your premises to this town BY CAR?

UNPROMPTED

WRITE IN EXACT NUMBER IN MINUTES - IF RESPONDENT GIVES A RANGE, THEN USE MID POINT

8888 - DON'T KNOW
9999 - REFUSED

____

Q19b How long does it take to travel from your premises to this town BY PUBLIC TRANSPORT?

UNPROMPTED

WRITE IN EXACT NUMBER IN MINUTES - IF RESPONDENT GIVES A RANGE, THEN USE MID POINT

8888 - DON'T KNOW
9999 - REFUSED

____

I would now like to ask you some questions about the future of your business.

Q20 How do you expect the nature of your market to change over the next 5 years?

READ OUT - SINGLE ANSWER ONLY

- ❑ Grow very strongly
- ❑ Grow gradually
- ❑ Stay about the same
- ❑ Contract slowly
- ❑ Contract significantly
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q21a What changes do you anticipate in the size of your workforce for the next 5 years?

READ OUT - SINGLE ANSWER ONLY

- ❑ Grow very strongly
- ❑ Grow gradually

- ❑ Stay about the same
- ❑ Contract slowly
- ❑ Contract significantly
- ❑ No real plan/play it by ear
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q21b What changes do you anticipate in the size of your turnover for the next 5 years?

READ OUT - SINGLE ANSWER ONLY

- ❑ Grow very strongly
- ❑ Grow gradually
- ❑ Stay about the same
- ❑ Contract slowly
- ❑ Contract significantly
- ❑ No real plan/play it by ear
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q22 Do you anticipate that your business will move all or some of it's operations away from these current premises in the next 5 years??

READ OUT - SINGLE ANSWER ONLY

- ❑ Yes, WILL move ALL of our operations
- ❑ Yes, MAY move ALL of our operations
- ❑ Yes, WILL move SOME of our operations
- ❑ Yes, MAY move SOME of our operations
- ❑ Will not move
- ❑ Don't Know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

If = 5, 6, 7, goto 'Q26'

Q23 When do you expect to move?

READ OUT - SINGLE ANSWER ONLY

- ❑ In the next 12 months
- ❑ In 1 - 3 years
- ❑ In 3 or more years
- ❑ Don't Know
- ❑ Refused

Q24 And why are you planning to relocate some/all of your operations?

READ OUT AND CODE ALL THAT APPLY

(12 maximum responses)

- ❑ Require larger premises to facilitate expansion
- ❑ Require better quality premises
- ❑ Require better transport links
- ❑ Want to consolidate to a smaller site
- ❑ Need to move nearer to customers / suppliers
- ❑ Having difficulty in recruiting staff
- ❑ Price of premises too expensive
- ❑ Relocate to a nicer area
- ❑ To realise the increased value of your site
- ❑ Don't Know
- ❑ Refused
- ❑ Other (specify) ______

Q25 Where would you consider relocating to?

READ OUT AND CODE ALL THAT APPLY

(8 maximum responses)

- ❑ Site close to current location
- ❑ Site within Sevenoaks district
- ❑ Kent
- ❑ South East
- ❑ Greater London
- ❑ Don't Know
- ❑ Refused
- ❑ Other (specify) [ ]

Q26 This survey is confidential and will be presented in a way that does not identify your individual company. However, Sevenoaks District Council would like to use the individual information to help improve their business support programmes.

Would you be willing for your individual results to be passed on to:

The District Council?

- ❑ Yes
- ❑ No

Q27 Their Support Agencies?

- ❑ Yes
- ❑ No

INTERVIEWERS PLEASE READ OUT TO ALL RESPONDENTS:

Thank you for your time - I can assure you that the information you have given will be treated as absolutely confidential, unless you have specified that Lewisham Borough Council and their support agencies may have access to your results.
If you wish to check the credentials of Research and Marketing Limited, I can provide the telephone number for the Market Research Society, who will be able to verify our company. Would you like to take the number? 0500 39 69 99
Please check your work because once you move on you will not be able to return to this record.

- ❑ Checking (Return to start of survey)
- ❑ Continue to end of survey

If = 1, goto 'F1'

Enter your initials to complete the survey

[ ]

J7035 Sevenoaks Rural Business Telephone Survey

F1 Good morning/afternoon. My name is Agent Name from Research & Marketing Ltd.

We're conducting research on behalf of Sevenoaks District Council and would like to ask you a few questions regarding your thoughts about the area as a place to do business, your premises, and other issues such as recruitment, skills and future plans.

The information you give us will play an important role in helping the Council assist local business.

Could we speak with you now?

- ❑ Yes
- ❑ No

If = 2, Prompt interviewee with message 'ASK TO CALL BACK. IF NOT, THANK AND CLOSE'

Can I confirm?

Your name is S_Contact?

IF INCORRECT, PLEASE ENTER CORRECTION UNDER 'OTHER'

- ❑ Name is correct
- ❑ Other (specify) ______

F3 The Company name is S_Company?

IF INCORRECT, PLEASE ENTER CORRECTION UNDER 'OTHER'

- ❑ Company name is correct
- ❑ Other (specify) ______

F4 The company's address is S_Address1 S_Address2 S_Address3 S_Address4 S_Address5 S_Address6?

IF INCORRECT, PLEASE ENTER CORRECTION UNDER 'OTHER'

- ❑ Company address is correct
- ❑ Other (specify) ______

F5 What is the company's postcode? S_Postcode

PROBE FOR FULL POSTCODE

______

Q1 What is the main business activity carried out at this establishment?

PROMPT: WHAT ARE THE MAIN SERVICES YOU PROVIDE OR PRODUCTS THAT YOU MAKE?

SINGLE ANSWER ONLY

- ❑ Farming - Crops
- ❑ Farming - Dairy
- ❑ Farming - Livestock
- ❑ Manufacturing
- ❑ Construction, building, architecture

- ❑ Motor trades
- ❑ Wholesales/Warehouse
- ❑ Transport
- ❑ Professional services - e.g. IT, consultancy, solicitor
- ❑ Financial services
- ❑ Personal services - Hairdressing
- ❑ Real estate, renting
- ❑ Education - Schools and colleges
- ❑ Health
- ❑ Retail
- ❑ Hotel & Catering
- ❑ Public Administration
- ❑ Other (specify) __________

Q2 Is your business involved in other activities, at this establishment, other than the one you just have mentioned?

UNPROMTED - SINGLE ANSWER ONLY

- ❑ Yes
- ❑ No
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

If = 2, 3, 4, goto 'Q9'

Q3 What is the second most important activity at this establishment?

PROMPT: WHAT ARE THE SECONDARY SERVICES YOU PROVIDE OR PRODUCTS THAT YOU MAKE?

SINGLE ANSWER ONLY

- ❑ Farming - Crops
- ❑ Farming - Dairy
- ❑ Farming - Livestock
- ❑ Manufacturing
- ❑ Construction, building, architecture
- ❑ Motor trades
- ❑ Wholesales/Warehouse
- ❑ Transport
- ❑ Professional services - e.g. IT, consultancy, solicitor
- ❑ Financial services
- ❑ Personal services - Hairdressing
- ❑ Real estate, renting
- ❑ Education - Schools and colleges
- ❑ Health
- ❑ Retail
- ❑ Hotel & Catering
- ❑ Public Administration
- ❑ Other (specify) __________

Q4 For how long has your business been involved in the second activity?

READ OUT - SINGLE ANSWER ONLY

- ❑ Less than 12 Months
- ❑ 1-2 Years
- ❑ 2-5 Years
- ❑ More than 5 Years
- ❑ Don't Know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q5 Why did your business get involved in the second activity?

UNPROMPTED - SINGLE ANSWER ONLY

- ❑ Needed to increase turnover
- ❑ It was area of the market which was growing
- ❑ Wanted to expand the business
- ❑ The primary area of activity market is in decline
- ❑ Changes in the subsidy system
- ❑ Other (specify)

Q6 Did you experience any problems with planning permissions when you diversified your business?

UNPROMTED - SINGLE ANSWER ONLY

- ❑ No, didn't need planning permission
- ❑ No, didn't experience problems with receiving planning permission
- ❑ Yes, did experience problems
- ❑ Other (specify)

Q7 Is there any other business activity that your business undertakes?

UNPROMPTED - SINGLE ANSWER

- ❑ Yes
- ❑ No
- ❑ Don't know
- ❑ Refused

If = 2, 3, 4, goto 'Q9'

Q8 What is this business activity?

PROMPT: WHAT ARE THE SERVICES YOU PROVIDE OR PRODUCTS THAT YOU MAKE OTHER THAN WHAT HAS BEEN ALREADY MENTIONED.

MARK AS MANY AS APPLY

(18 maximum responses)

- ❑ Farming - Crops
- ❑ Farming - Dairy
- ❑ Farming - Livestock
- ❑ Manufacturing
- ❑ Construction, building, architecture
- ❑ Motor trades
- ❑ Wholesales/Warehouse
- ❑ Transport
- ❑ Professional services - e.g. IT, consultancy, solicitor
- ❑ Financial services
- ❑ Personal services - Hairdressing
- ❑ Real estate, renting
- ❑ Education - Schools and colleges
- ❑ Health
- ❑ Retail
- ❑ Hotel & Catering
- ❑ Public Administration
- ❑ Other (specify)

Q9 Is this site?

READ OUT - SINGLE ANSWER ONLY

- ❑ A single site (No related Operations elsewhere)
- ❑ A national, regional or divisional headquarters (co-ordinating business operations across two or more sites)
- ❑ A branch, subsidiary or division with Headquarters elsewhere in the UK
- ❑ A branch, subsidiary or division with Headquarters outside of the UK
- ❑ A franchise
- ❑ Don't know (DO NOT READ OUT)
- ❑ Refused (DO NOT READ OUT)
- ❑ Other (specify)

Q10 Do you have Internet access?

READ OUT - SINGLE ANSWER ONLY

- ❑ Yes, dial-up
- ❑ Yes, broadband
- ❑ No
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q11 Including yourself, in total how many employees are there at your site?

UNPROMPTED - WRITE IN EXACT NUMBER - IF RESPONDENT GIVES A RANGE, THEN USE MID POINT

8888 DON'T KNOW
9999 REFUSED

Q12 And how many are part-time employees?

(By part time we mean people working less than 30 hours per week)

UNPROMPTED - WRITE IN EXACT NUMBER - IF RESPONDENT GIVES A RANGE, THEN USE MID POINT

8888 DON'T KNOW
9999 REFUSED

Q13 And how many are full time?

(Over 30 hours per week)

UNPROMPTED - WRITE IN EXACT NUMBER - IF RESPONDENT GIVES A RANGE, THEN USE MID POINT

8888 DON'T KNOW
9999 REFUSED

Q15 How would you describe the work undertaken by the MAJORITY of your workforce?

READ OUT AND SINGLE ANSWER ONLY

- ❑ Professional
- ❑ Skilled Manual
- ❑ Clerical
- ❑ Sales and Care
- ❑ Semi-Skilled
- ❑ Unskilled
- ❑ Don't Know
- ❑ Refused

Approximately what proportion of your staff would you say live

Q16a Within a mile of the business?

READ OUT - SINGLE ANSWER ONLY

- ❑ Up to a quarter
- ❑ One quarter up to a half
- ❑ One half up to three quarters
- ❑ More than three quarters
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q16b Between 1 and 5 miles of the business?

READ OUT - SINGLE ANSWER ONLY

- ❑ Up to a quarter
- ❑ One quarter up to a half
- ❑ One half up to three quarters
- ❑ More than three quarters
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q16c Between 5 and 10 miles of the business?

READ OUT - SINGLE ANSWER ONLY

- ❑ Up to a quarter
- ❑ One quarter up to a half
- ❑ One half up to three quarters
- ❑ More than three quarters
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q16d More than 10 miles from the business?

READ OUT - SINGLE ANSWER ONLY

- ❑ Up to a quarter
- ❑ One quarter up to a half
- ❑ One half up to three quarters
- ❑ More than three quarters
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

For the next couple of questions I would like to rank your experiences in recruiting staff?

Q17a How easy or difficult do you find it recruiting managerial and qualified staff?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very easy/No problems
- ❑ Easy/Few problems
- ❑ Neither easy nor difficult
- ❑ Difficult/Some problems
- ❑ Very Difficult
- ❑ Not applicable
- ❑ Don't Know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q17b Technical and medium skilled staff?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very easy/No problems
- ❑ Easy/Few problems
- ❑ Neither easy nor difficult
- ❑ Difficult/Some problems
- ❑ Very Difficult
- ❑ Not applicable
- ❑ Don't Know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q17c Low/unskilled staff

READ OUT - SINGLE ANSWER ONLY

- ❑ Very easy/No problems
- ❑ Easy/Few problems
- ❑ Neither easy nor difficult
- ❑ Difficult/Some problems
- ❑ Very Difficult
- ❑ Not applicable
- ❑ Don't Know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Now looking at your business and premises:

Q18 In what year was your business established at its current location?

PLEASE ENTER DATE AS FOUR DIGIT NUMBER I.E. 1963

8888 DON'T KNOW
9999 REFUSED

Q19 What type of premises do you occupy?

UNPROMPTED - SINGLE ANSWER ONLY

- ❑ Office
- ❑ Office, with research & design
- ❑ Office with warehouse

- ❑ General Industry
- ❑ Warehouse
- ❑ Small business at home
- ❑ Farm
- ❑ Workshop
- ❑ Studio
- ❑ Leisure, sports and entertainment
- ❑ Service shop i.e. hairdressers
- ❑ High Street offices, with shop front serving the public
- ❑ Retail/shop
- ❑ Don't Know
- ❑ Refused
- ❑ Other (specify) [ ]

Q20 Are these premises?

READ OUT - SINGLE ANSWER ONLY - IF RESPONDENT STATES OTHER PLEASE POBE FULLY AND TYPE ANSWER IN OTHER

- ❑ Custom built
- ❑ Converted Farm
- ❑ Converted Warehouse
- ❑ Don't Know
- ❑ Refused
- ❑ Other (specify) [ ]

Q21 What is the approximate floorspace of your premises?

READ OUT - SINGLE ANSWER ONLY

- ❑ 0 - 1,000 Square Foot (SQ.FT) or 0 - 90 SQ. Meters (SQ.M)
- ❑ 1,000 - 3,000 SQ.FT or 91 - 280 SQ.M
- ❑ 3,001 - 5000 SQ.FT. or 281 - 460 SQ.M
- ❑ 5,001 - 10,000 SQ.FT or 461 - 930 SQ.M
- ❑ 10,001 - 20,000 SQ.FT or 931 - 1860 SQ.M
- ❑ OVER 20,001 SQ.FT or 1861SQ.M
- ❑ Don't Know (DON'T READ OUT)
- ❑ Refused (DON'T KNOW)

Q22a And what is the tenure of the site?

READ OUT - SINGLE ANSWER ONLY

- ❑ Freehold
- ❑ Leasehold
- ❑ Rented
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)
- ❑ Other (specify) [ ]

If <> 1, do not ask 'Q22b'
If <> 2, do not ask 'Q22c'
If <> 3, do not ask 'Q22d'

Q22b Who is the freeholder?

UNPROMPTED - SINGLE ANSWER ONLY

- ❑ The business
- ❑ Don't know
- ❑ Refused
- ❑ Other (specify) [ ]

Q22c How long is left on the lease?

UNPROMPTED

WRITE IN EXACT NUMBER OF YEARS - IF RESPONDENT GIVES A RANGE, THEN USE MID POINT

888 DON'T KNOW
999 REFUSED

Q22d When does the contract expire?

UNPROMPTED - SINGLE ANSWER ONLY

PROBE FOR FULL DATE - WRITE IT IN AS EIGHT DIGIT NUMBER I.E. 17031976

Q23 How many deliveries and despatches are made to the site each day? (EXCLUDING employee trips to and from work)

UNPROMPTED

WRITE IN EXACT NUMBER - IF RESPONDENT GIVES A RANGE, THEN USE MID POINT

888 - DON'T KNOW
999 - REFUSED

If = , do not ask 'Q24'

Q24 And of these, how many are made by HGV?

UNPROMPTED

WRITE IN EXACT NUMBER - IF RESPONDENT GIVES A RANGE, THEN USE MID POINT

8888 - DON'T KNOW
9999 - REFUSED

Q25a Has your business always been based at its current site?

UNPROMPTED - SINGLE ANSWER ONLY

- ❑ Yes
- ❑ No

If = 1, goto 'Q26a'

Q25b Where was your business prior to moving to the current location?

READ OUT - SINGLE ANSWER ONLY

- ❑ Within Sevenoaks district
- ❑ Within Kent
- ❑ Within the South East
- ❑ Within the Greater London area
- ❑ Within the UK
- ❑ Don't Know
- ❑ Refused
- ❑ Other (specify) ______

If <> 1, do not ask 'Q25c'
If <> 2, do not ask 'Q25d'

Q25c In which area of Sevenoaks?

UNPROMPTED - SINGLE ANSWER ONLY

- ❑ Ash
- ❑ Brested, Chevening and Sundridge
- ❑ Cowden and Hever
- ❑ Crochenhill and Well Hill
- ❑ Edenbridge North and East
- ❑ Eynsford
- ❑ Farningham Horton Kirby and South Darenth
- ❑ Fawkham and West Kingsdown
- ❑ Halstead and Hodsoll Street
- ❑ Leigh and Chiddingstone Causeway
- ❑ Otford and Shoreham
- ❑ Penshurst Fordcombe and Chiddingston
- ❑ Seal and Weald
- ❑ Sevenoaks
- ❑ Swanley
- ❑ Westerham and Crockham Hill
- ❑ Other (specify) ______

Q25d Which area within Kent?

UNPROMPTED - SINGLE ANSWER ONLY

- ❑ Ashford
- ❑ Canterbury
- ❑ Dartford
- ❑ Dover
- ❑ Gravesham
- ❑ Maidstone
- ❑ Sevenoaks
- ❑ Shepway
- ❑ Swale
- ❑ Thanet
- ❑ Tonbridge and Malling
- ❑ Tunbridge Wells
- ❑ Other (specify) ______

Q26a When deciding to locate in the current area, how important or unimportant were the following factors?

Being near to similar businesses?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q26b Being near to suppliers?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q26c Being near to customers?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q26d Having good public transport links?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q26e Having good road transport links?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q26f Being near to own residence?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q26g Having access to modern information and communications services i.e. broadband?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q26h Having a supply of suitable staff?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q26i The quality of the area?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q26j Having a supply of appropriate premises?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q26k Is there anything else which is important to your business when deciding to locate in an area?

UNPROMPTED - SINGLE ANSWER ONLY

IF YES PLEASE TYPE ANSWER IN OTHER

- ❑ No
- ❑ Other (specify) ____________

For the next few questions we would like you to rate the following site and building characteristics. How important for your business operations is...

Q27a Cheap rents?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q27b Having suitable interiors and facilities?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q27c Having access to broadband connections?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q27d Having heavy goods access?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q27e Having on-site car parking?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q27f Having a yard/open storage space?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q27g Having good security features?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q27h Having freehold ownership?

READ OUT - SINGLE ANSWER ONLY

- ❑ Very important
- ❑ Important
- ❑ Neither important nor unimportant
- ❑ Not important
- ❑ Not important at all

Q27i Is there another site or building factor that is important to your business?

UNPROMPTED - SINGLE ANSWER ONLY

IF YES PLEASE TYPE ANSWER IN OTHER

- ❑ No
- ❑ Other (specify) ________

Q28 Could you tell me if any of the following site and building constraints, affects your business?

READ OUT- MARK AS MANY APPLY

(10 maximum responses)

- ❑ The price of premises
- ❑ Poor quality of premises
- ❑ Building or site size/over crowding/lack of storage space
- ❑ Poor management/maintenance of site/building
- ❑ Poor accessibility of buildings
- ❑ Poor public transport links
- ❑ Poor access to motorways and A roads
- ❑ The shape and/or layout of a building
- ❑ The restricted use of land
- ❑ The lack of Local amenities
- ❑ Other (specify) ________

If <> 1, do not ask 'Q28a'
If <> 2, do not ask 'Q28b'
If <> 3, do not ask 'Q28c'
If <> 4, do not ask 'Q28d'
If <> 5, do not ask 'Q28e'
If <> 6, do not ask 'Q28f'
If <> 7, do not ask 'Q28g'
If <> 8, do not ask 'Q28h'
If <> 9, do not ask 'Q28i'
If <> 10, do not ask 'Q28j'
If <> 11, do not ask 'Q28k'

Q28a How much of a problem is the price of premises?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't Know

Q28b How much of a problem is poor quality of premises?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't Know

Q28c How much of a problem is building or site size/over crowding/lack of storage?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't Know

Q28d How much of a problem is poor management/maintenance of the site/building?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't Know

Q28e How much of a problem is poor accessibility of buildings?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't Know

Q28f How much of a problem is poor public transport links?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't Know

Q28g How much of a problem is access to motorways and A roads?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't Know

Q28h How much of a problem is the shape and/or layout of buildings?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't Know

Q28i How much of a problem is restricted use of land?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem

- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't Know

Q28j How much of problem is the lack of local amenities?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't know

Q28k How much of a problem is Q28b other?

READ OUT - SINGLE ANSWER ONLY

- ❑ Not a problem
- ❑ A problem
- ❑ A severe problem
- ❑ A critical problem
- ❑ Don't Know

Q29 What is your nearest town?

UNPROMPTED - SINGLE ANSWER ONLY

- ❑ Ashford
- ❑ Maidstone
- ❑ Royal Turnbridge Wells
- ❑ Sevenoaks
- ❑ Swanley
- ❑ Westerham
- ❑ Edenbridge
- ❑ West Kingsdown
- ❑ London
- ❑ Other (specify) ______

Q30a How long does it take to travel from your premises to this town BY CAR?

UNPROMPTED

WRITE IN EXACT NUMBER IN MINUTES - IF RESPONDENT GIVES A RANGE, THEN USE MID POINT

8888 - DON'T KNOW
9999 - REFUSED

______

Q30b How long does it take to travel from your premises to this town BY PUBLIC TRANSPORT?

UNPROMPTED

WRITE IN EXACT NUMBER OF MINUTES - IF RESPONDENT GIVES A RANGE, THEN USE MID POINT

8888 - DON'T KNOW
9999 - REFUSED

I would now like to ask you some questions about the future of your business.

Q31 How do you expect the nature of your market to change over the next 5 years?

READ OUT - SINGLE ANSWER ONLY

- ❑ Grow very strongly
- ❑ Grow gradually
- ❑ Stay about the same
- ❑ Contract slowly
- ❑ Contract significantly
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q32a What changes do you anticipate in the size of your workforce for the next 5 years?

READ OUT - SINGLE ANSWER ONLY

- ❑ Grow very strongly
- ❑ Grow gradually
- ❑ Stay about the same
- ❑ Contract slowly
- ❑ Contract significantly
- ❑ No real plan/play it by ear
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q33 What changes do you anticipate in the size of your turnover for the next 5 years?

READ OUT - SINGLE ANSWER ONLY

- ❑ Grow very strongly
- ❑ Grow gradually
- ❑ Stay about the same
- ❑ Contract slowly
- ❑ Contract significantly
- ❑ No real plan/play it by ear
- ❑ Don't know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

Q34 Do you anticipate that your business will diversify in the next five years?

UNPROMTED - SINGLE ANSWER ONLY

- ❑ Yes
- ❑ No
- ❑ Don't Know
- ❑ Refused
- ❑ Other (specify)

Q35 Do you anticipate that your business will move all or some of it's operations away from these current premises in the next 5 years?

READ OUT - SINGLE ANSWER ONLY

- ❑ Yes, WILL move ALL of our operations
- ❑ Yes, MAY move ALL of our operations
- ❑ Yes, WILL move SOME of our operations
- ❑ Yes, MAY move SOME of our operations
- ❑ Will not move
- ❑ Don't Know (DON'T READ OUT)
- ❑ Refused (DON'T READ OUT)

If = 5, 6, 7, goto 'Q39'

Q36 When do you expect to move?

READ OUT - SINGLE ANSWER ONLY

- ❑ In the next 12 months
- ❑ In 1 - 3 years
- ❑ In 3 or more years
- ❑ Don't Know
- ❑ Refused

Q37 And why are you planning to relocate some/all of your operations?

READ OUT AND CODE ALL THAT APPLY

(12 maximum responses)

- ❑ Require larger premises to facilitate expansion
- ❑ Require better quality premises
- ❑ Require better transport links
- ❑ Want to consolidate to a smaller site
- ❑ Need to move nearer to customers / suppliers
- ❑ Having difficulty in recruiting staff
- ❑ Price of premises too expensive
- ❑ Relocate to a nicer area
- ❑ To realise the increased value of your site
- ❑ Don't Know
- ❑ Refused
- ❑ Other (specify) ____________

Q38 Where would you consider relocating to?

READ OUT AND CODE ALL THAT APPLY

(8 maximum responses)

- ❑ Site close to current location
- ❑ Site within Sevenoaks district
- ❑ Kent
- ❑ South East
- ❑ Greater London
- ❑ Don't Know
- ❑ Refused
- ❑ Other (specify) ____________

Q39 This survey is confidential and will be presented in a way that does not identify your individual company. However, Sevenoaks District Council would like to use the individual information to help improve their business support programmes. Would you be willing for your individual results to be passed on to:

The District Council?

- ❑ Yes
- ❑ No

Q40 Their Support Agencies?

- ❑ Yes
- ❑ No

INTERVIEWERS PLEASE READ OUT TO ALL RESPONDENTS:

Thank you for your time - I can assure you that the information you have given will be treated as absolutely confidential, unless you have specified that Lewisham Borough Council and their support agencies may have access to your results.
If you wish to check the credentials of Research and Marketing Limited, I can provide the telephone number for the Market Research Society, who will be able to verify our company. Would you like to take the number? 0500 39 69 99
Please check your work because once you move on you will not be able to return to this record.

- ❑ Checking (Return to start of survey)
- ❑ Continue to end of survey

If = 1, goto 'F1'

Enter your initials to complete the survey

Appendix C - SIC Codes

SIC 1992 included in Telephone Survey

SIC	SIC 1992 Description
0112	Growing of vegetables, horticultural specialities and nursery products
0113	Growing of fruit, nuts, beverage and spice crops
0121	Farming of cattle, dairy farming
0122	Farming of sheep, goats, horses, asses, mules,and hinnies
0124	Farming of poultry
0125	Other farming of animals
0130	Growing of crops combined with farming of animals (mixed farming)
0141	Agricultural service activities
0142	Animal husbandry service activities, except veterinary activities
0201	Forestry and logging
0202	Forestry and logging related service activities
0501	Fishing
0502	Operation of fish hatcheries and fish farms
1120	Service activities incidental to oil and gas extraction excluding surveying
1320	Mining of non-ferrous metal ores, except uranium and thorium ores
1411	Quarrying of stone for construction
1552	Manufacture of ice cream
1571	Manufacture of prepared feeds for farm animals
1581	Manufacture of bread; manufacture of fresh pastry goods and cakes
1587	Manufacture of condiments and seasonings
1588	Manufacture of homogenised food preparations and dietetic food
1596	Manufacture of beer
1598	Production of mineral waters and soft drinks
1821	Manufacture of workwear
1830	Dressing and dyeing of fur; manufacture of articles of fur
1920	Manufacture of luggage, handbags and the like, saddlery and harness
2010	Sawmilling and planing of wood, impregnation of wood
2030	Manufacture of builders' carpentry and joinery
2040	Manufacture of wooden containers
2051	Manufacture of other products of wood
2122	Manufacture of household and sanitary goods and of toilet requisites
2123	Manufacture of paper stationary
2124	Manufacture of wallpaper
2125	Manufacture of other articles of paper and paperboard not elsewhere classified
2212	Publishing of newspapers
2213	Publishing of journals and periodicals
2214	Publishing of sound recordings
2215	Other publishing
2222	Printing not elsewhere classified
2223	Bookbinding and finishing
2224	Composition and plate-making
2416	Manufacture of plastics in primary forms
2441	Manufacture of basic pharmaceutical products
2461	Manufacture of explosives
2466	Manufacture of other chemical products not elsewhere classified
2512	Retreading and rebuilding of rubber tyres
2521	Manufacture of plastic plates, sheets, tubes and profiles
2522	Manufacture of plastic packing goods
2524	Manufacture of other plastic products
2612	Shaping and processing of flat glass
2613	Manufacture of hollow glass
2614	Manufacture of glass fibres
2621	Manufacture of ceramic household and ornamental articles
2621	Manufacture of ceramic household and ornamental articles
2622	Manufacture of ceramic sanitary fixtures
2626	Manufacture of refractory ceramic products
2640	Manufacture of bricks, tiles and construction products, in baked clay
2661	Manufacture of concrete products for construction purposes
2663	Manufacture of ready-mixed concrete
2664	Manufacture of mortars
2670	Cutting, shaping and finishing of stone
2681	Production of abrasive products
2743	Lead, zinc and tin production
2751	Casting of iron
2754	Casting of other non-ferrous metals
2812	Manufacture of builders' carpentry and joinery of metal
2822	Manufacture of central heating radiators and boilers
2840	Forging, pressing, stamping and roll forming of metal; powder metallurgy
2851	Treatment and coating of metals
2852	General mechanical engineering
2863	Manufacture of locks and hinges
2871	Manufacture of steel drums and similar containers
2874	Manufacture of fasteners, screw machine products, chain and springs
2875	Manufacture of other fabricated metal products not elsewhere classified
2913	Manufacture of taps and valves
2914	Manufacture of bearings, gears, gearing and driving elements
2922	Manufacture of lifting and handling equipment
2923	Manufacture of non-domestic cooling and ventilation equipment
2924	Manufacture of other general purpose machinery not elsewhere classified
2932	Manufacture of other agricultural and forestry machinery
2940	Manufacture of machine tools
2953	Manufacture of machinery for food, beverage and tobacco processing
2954	Manufacture of machinery for textile, apparel and leather production
2956	Manufacture of other special purpose machinery not elsewhere specified
2960	Manufacture of weapons and ammunition
3001	Manufacture of office machinery
3002	Manufacture of computers and other information processing equipment

3110	Manufacture of electric motors, generators and transformers
3140	Manufacture of accumulators, primary cells and primary batteries
3150	Manufacture of lighting equipment and electric lamps
3161	Manufacture of electrical equipment for engines and vehicles not elsewhere classified
3162	Manufacture of other electrical equipment not elsewhere classified
3210	Manufacture of electronic valves and tubes and other electronic components
3230	Manufacture of television and radio receivers, sound or video recording or reproducing apparatus and associated goods
3310	Manufacture of medical and surgical equipment and orthopaedic appliances
3350	Manufacture of watches and clocks
3410	Manufacture of motor vehicles
3430	Manufacture of parts and accessories for motor vehicles and their engines
3512	Building and repairing of pleasure and sporting boats
3530	Manufacture of aircraft and spacecraft
3541	Manufacture of motorcycles
3542	Manufacture of bicycles
3543	Manufacture of invalid carriages
3611	Manufacture of chairs and seats
3612	Manufacture of other office and shop furniture
3613	Manufacture of other kitchen furniture
3614	Manufacture of other furniture
3622	Manufacture of jewellery and related articles not elsewhere classified
3630	Manufacture of musical instruments
3640	Manufacture of sports goods
3710	Recycling of metal waste and scrap
4100	Collection, purification and distribution of water
4511	Demolition and wrecking of buildings; earth moving
4521	General construction of buildings and civil engineering works
4522	Erection of roof covering and frames
4523	Construction of highways, roads, airfields and sport facilities
4525	Other construction work involving special trades
4531	Installation of electrical wiring and fittings
4533	Plumbing
4541	Plastering
4542	Joinery installation
4543	Floor and wall covering
4544	Painting and glazing
4545	Other building completion
5020	Maintenance and repair of motor vehicles
5112	Agents involved in the sale of fuels, ores, metals and industrial chemicals
5114	Agents involved in the sale of machinery, industrial equipment, ships and aircraft
5116	Agents involved in the sale of textiles, clothing, footwear and leather goods
5117	Agents involved in the sale of food, beverages and tobacco
5121	Wholesale of grain, seeds and animal feeds
5122	Wholesale of flowers and plants
5131	Wholesale of fruit and vegetables
5132	Wholesale of meat and meat products
5134	Wholesale of alcoholic and other beverages
5138	Wholesale of other food including fish, crustaceans and molluscs
5139	Non-specialised wholesale of food, beverages and tobacco
5141	Wholesale of textiles
5142	Wholesale of clothing and footwear
5143	Wholesale of electrical household appliances and radio and television goods
5144	Wholesale of china and glassware, wallpaper and cleaning materials
5152	Wholesale of metals and metal ores
5153	Wholesale of wood, construction materials and sanitary equipment
5154	Wholesale of hardware, plumbing and heating equipment and supplies
5155	Wholesale of chemical products
5156	Wholesale of other intermediate products
5157	Wholesale of waste and scrap
5164	Wholesale of office machinery and equipment
5165	Wholesale of other machinery for use in industry, trade and navigation
5170	Other wholesale
5261	Retail sale via mail order houses
5263	Other non-store retail sale
6023	Other passenger land transport
6024	Freight transport by road
6321	Other supporting land transport activities
6322	Other supporting water transport activities
6323	Other supporting air transport activities
6340	Activities of other transport agencies
6412	Courier activities other than national post activities
6420	Telecommunications
6601	Life insurance
6603	Non-life insurance
6711	Administration of financial markets
6713	Activities auxiliary to financial intermediation not elsewhere classified
6720	Activities auxiliary to insurance and pension funding
7011	Development and selling of real estate
7012	Buying and selling of own real estate
7032	Management of real estate on a fee or contract basis
7121	Renting of other land transport equipment
7132	Renting of construction and civil engineering machinery and equipment
7220	Software consultancy and supply
7230	Data processing
7240	Data base activities
7250	Maintenance and repair of office, accounting and computing machinery
7260	Other computer related activities
7310	Research and experimental development on natural sciences and engineering

7320	Research and experimental development on social sciences and humanities
7411	Legal activities
7412	Accounting,book-keeping and auditing activities; tax consultancy
7413	Market research and public opinion polling
7414	Business and management consultancy activities
7420	Architectural and engineering activities and related technical consultancy
7430	Technical testing and analysis
7440	Advertising
7450	Labour recruitment and provision of personnel
7460	Investigation and security activities
7470	Industrial cleaning
7481	Photographic activities
7482	Packaging activities
7483	Secretarial and translation activities
7484	Other business activities not elsewhere classified
7512	Regulation of the activities of agencies that provide health care, education, cultural services and other social services excluding social security
7523	Justice and judicial activities
8532	Social work activities without accomodation
9000	Sewage and refuse disposal, sanitation and similar activities
9111	Activities of business and employers organisations
9120	Activities of trade unions
9131	Activities,of religious organisations
9133	Activities of other membership organisations not elsewhere classified
9211	Motion picture and video production
9212	Motion picture and video distribution
9220	Radio and television activities
9234	Other entertainment activities not elsewhere classified
9262	Other sporting activities
9272	Other recreational activities not elsewhere classified
9303	Funeral and related activities
9304	Physical well-being activities
9305	Other service activities not elsewhere classified
9900	Extra-territorial organisations and bodies
1010	Deep coal mines
1511	Slaughtering of animals other than poultry and rabbits
1513	Bacon and ham production
1513	Other meat and poultry meat processing
1520	Other fish processing and preserving
1551	Liquid milk and cream production
1584	Manufacture of sugar confectionary
1589	Manufacture of other food products not elsewhere classified
1740	Manufacture of soft furnishings
1740	Manufacture of canvas goods, sacks, etc
1740	Manufacture of household textiles
1554	Manufacture of other textiles not elsewhere classified
1822	Manufacture of other men's outwear
1822	Manufacture of other women's outwear
1824	Manufacture of other wearing apparel and accessories not elsewhere specified
2121	Manufacture of cartons, boxes, cases and other containers
2320	Mineral oil refining
2430	Manufacture of mastics and sealants
2523	Manufacture of other builders' ware of plastic
2682	Manufacture of other non-metallic mineral products not elsewhere classified
2912	Manufacture of pumps
2912	Manufacture of compressors
3220	Manufacture of radio and electronic capital goods
3320	Manufacture of electronic instruments and appliances for measuring, checking, testing, navigating and other purposes, except industrial process control equipment
3340	Manufacture of spectacles and unmounted lens
3340	Manufacture of photograhic and cinematographic equipment
3420	Manufacture of bodies (coachwork) for motor vehicles (except caravans)
3420	Manufacture of trailers and semi-trailers
3420	Manufacture of caravans
3650	Manufacture of professional and arcade games and toys
3650	Manufacture of other games and toys not elsewhere classified
3663	Other manufacturing not elsewhere classified
4010	Electricity transmission, distribution and supply
5147	Wholesale of furniture
5147	Wholesale of other household goods not elsewhere classified
5151	Wholesale of petroleum and petroleum products
6021	Other scheduled passenger land transport not elsewhere classified
6220	Non-scheduled passenger air transport
6330	Other tourist assistance activities not elsewhere classified
6522	Credit granting by non-deposit taking finance houses and other specialist consumer credit grantors
6522	Factoring
6523	Activities of investment trusts
6523	Activities of venture and development capital companies
2523	Financial intermediation not elsewhere classified
6523	Financial intermediation not elsewhere classified
6712	Fund management activities
6712	Security broking and related activities
7020	Letting of conference and exhibition centres
7020	Other letting of own property
8042	Activities of private training providers
8042	Other adult and other education not elsewhere classified

SIC not included in Telephone Survey

5010	Sale of motor vehicles
5030	Sale of motor vehicle parts and accessories
5040	Sale, maintenance and repair of motorcycles and related parts and accessories
5050	Retail sale of automotive fuel
5211	Retail sale in non-specialised stores with food, beverages or tobacco predominating
5212	Other retail sale in non specialised stores
5221	Retail sale of fruit and vegetables
5222	Retail sale of meat and meat products
5223	Retail sale of fish, crustaceans and molluscs
5224	Retail sale of bread, cakes, flour confectionery and sugar confectionery
5225	Retail sale of alcoholic and other beverages
5226	Retail sale of tobacco products
5227	Other retail sale of food, beverages and tobacco in specialised stores
5231	Dispensing chemists
5233	Retail sale of cosmetic and toilet articles
5241	Retail sale of textiles
5242	Retail sale of clothing
5243	Retail sale of footwear and leather goods
5244	Retail sale of furniture, lighting equipment and household articles not elsewhere classified
5245	Retail sale of electrical household appliances and radio and television goods
5246	Retail of sale of hardware, paints and glass
5247	Retail sale of newspapers and stationery
5248	Retail sale of floor coverings
5248	Retail sale of photographic, optical and precision equipment, office supplies and equipment (including computers, etc)
5248	Other retail sale in specialised stores not elsewhere classified
5250	Retail sale of second-hand goods in stores
5262	Retail sale via stalls and markets
5271	Repair of boots, shoes and other articles of leather
5272	Repair of electrical household goods
5274	Repair not elsewhere classified
5511	Licensed hotels and motels
5511	Unlicensed hotels and motels
5512	Hotels and motels, without restaurant
5522	Camping sites, including caravan sites
5523	Other tourist or short-stay accommodation
5530	Licensed Restaurants
5530	Unlicensed restaurants and cafes
5530	Take-away food shops
5540	Licensed clubs with entertainment
5540	Public houses and bars
5540	Public houses and bars
5552	Catering
6022	Taxi operation
6330	Activities of travel agencies
6411	National post activities
6512	Banks
6512	Building societies
7031	Real estates agencies
7110	Renting of automobiles
7122	Renting of other water transport equipment
7134	Renting of other machinery and equipment not elsewhere classified
7140	Renting of sporting and recreational equipment
7140	Renting of other personal and household goods not elsewhere classified
8010	Primary education
8021	General secondary education
8022	Technical and vocational secondary education
8030	Sub-degree level higher education
8041	Driving school activities
8511	Hospital activities
8512	Medical practice activities
8513	Dental practice activities
8514	Other human health activities
8520	Veterinary activities
8531	Social work activities with accomodation
9213	Motion picture projection
9231	Live theatrical presentation
9231	Other artistic and literary creation and interpretation
9232	Operation of arts facilities
9240	News agency activities
9251	Library and archives activities
9252	Museum activities and preservation of historical sites and buildings
9261	Operation of sports arenas and stadiums
9271	Gambling and betting activities
9301	Washing and dry cleaning of textile and fur products
9302	Hairdressing and other beauty treatment
9500	Private households with employed persons

Appendix D - Business Area Descriptions

Based on 2005 Survey.
Updated information is contained in Table 7.9

Business Area Description

Business Area 1 – The Technology Centre, Swanley

Business Area 1 is located in Swanley. It is located along London Road, one of the main business and shopping areas in Swanley.

The business area is approximately 1.9 ha and there is no further developable area. The business area consists of two separate business sites, with an area of approximately 7,984 sq.m and 9,264 sq.m respectively. There are three buildings on-site built in the 1980's and 1990's. The buildings are one, two and three stories tall and cover an approximate area of 3,776sq.m providing approximately 6,400sq.m of floorspace.

The business area is primarily catering to the office and high quality business park market sector and is utilised for a variety of uses. There is approximately 1,280sq.m of floorspace being used for various manufacturing (DI, DK, DL), 704sq.m for construction (F) and 4,416sq.m of general office use (K).

The business area is in good condition without any apparent infrastructure issues or visible signs of contamination. The buildings are all in good condition but not of any particular architectural value. There is on-site parking and reasonably good HGV access.

Summary

Total Area (ha)	1.9
Floorspace (sq.m)	6,400
Developable area	0
Use	Industry
Number of jobs on-site	215
Links to trunk road network	Medium distance to A-roads
HGV Access	Good
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 2 – London Road, Swanley

Business Area 2 is located in Swanley on London Road. It has an approximate area of 0.7 ha and there is no further developable area and it is a single site business area. There are four buildings on site that are either two or three storeys tall. The buildings cover an approximate area of 1,240sq.m and provide 1,545sq.m of floorspace.

The main building is used by one business and falls into the 'specific occupier' market segment. It is currently used for general business activities (K) and appears to be a laundry service of some kind.

The main building was built around the 1940's, is in reasonable condition, and could be of some architectural value. There are some old trees on site that may be of ecological value to retain. There are also two exposed steel tanks containing cleaning fluids on-site. There is on-site parking and reasonable HGV access from London Road.

Summary

Total Area (ha)	0.7
Floorspace (sq.m)	1,545
Developable area	0
Use	Industry
Number of jobs on-site	Unknown
Links to trunk road network	Medium distance to A-roads
HGV access	Reasonable
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Reasonable
Other issues/ compatibility	None

Business Area 3 – Swanley Library, Swanley

Business Area 3 is located in Swanley on London Road. The Business Area is approximately 0.7 ha with three separate business areas. There are three buildings, each either one or two stories tall. They cover an area of 1,635sq.m and provide approximately 1,854sq.m of floorspace.

The business area is primarily office use providing a range of services. There is 875sq.m of community, social and personal service office use(O), 3,062sq.m of real estate, renting and business activities(K) and 875sq.m of public administration office use(L). The business area falls into the specific occupier(SO) market segment.

The buildings are in reasonable condition and one area is currently being redeveloped. There is on-site parking and good HGV access from the main road.

Summary

Total Area (ha)	0.7
Floorspace (sq.m)	1,854
Developable Area	0
Use	Office
Number of jobs on-site	9
Links to trunk roads	Medium distance to A-roads
HGV access	Good
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 4 – Council Offices, Swanley

Business Area 4 is located in Swanley along London Road. The business area is approximately 0.4 ha and there is no available developable land. There is one building on-site which is home to the local Council offices. The 1980's two-storey building has an approximate area of 1,432sq.m and provides 2,434sq.m of floorspace.

The business area and building are in good condition. There is on-site parking with reasonable HGV access.

Summary

Total Area (ha)	0.4
Floorspace (sq.m)	2,434
Developable area	0
Use	Office
Number of jobs on-site	Unknown
Links to trunk road network	Medium distance to A-roads
HGV	Reasonable
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 5 – Royal Mail, Swanley

Business Area 5 is located in Swanley and is the site of the local Royal Mail Delivery Office. The business area is approximately 0.4 ha, has a single occupier and there is no remaining developable area. The two-storey Royal Mail building, built around the 1960's, covers 1,432 sq.m of the site and provides 795sq.m of floorspace. The primary use of the business area is transport and distribution.

The area and building are in good condition. There is on-site parking and good HGV access.

Summary

Total Area (ha)	0.4
Floorspace (sq.m)	795
Developable area	0
Use	Warehouse
Number of jobs on-site	44
Links to trunk roads	Medium distance to A-Roads
HGV Access	Good
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 6 – Park Road Industrial Estate, Swanley

Business Area 6 is a large industrial park located in Swanley. It covers an approximate total area of 2.3 ha and there is no available developable land. There are five identifiable separate business sites with a variety of buildings. The approximate total area covered by the buildings is 3,799 sq.m. There is a vacant dilapidated cottage on-site covering approximately 67sq.m.

The age of buildings range from around the 1960's and 70's. The buildings are primarily one-storey and divided into units. The total floorspace available at the business area is 4,128sq.m. The business area is mixed-use but is primarily used for the wholesale and repair of motor vehicles, motorcycles and personal and household goods(G). There is also some manufacturing and general office use on-site. Approximately five units are vacant.

The business area is in reasonable condition and most of the buildings are in reasonable to good condition. In some areas of the site the buildings are built close together making car access difficult. There is a residential area nearby but there does not appear to be any conflicting uses. There is on-site parking and reasonable HGV access.

Summary

Total Area (ha)	2.3
Floorspace (sq.m)	4,128
Developable area	0
Use	Mixed-use industry
Number of jobs on-site	99
Links to trunk road network	Far distance to A-Roads
HGV Access	Reasonable
Access to public transport / sustainability	Poor
Parking	Adequate
Quality	Reasonable
Other issues / compatibility	None

Business Area 7 – Media House, Swanley

Business Area 7 is located in Swanley on Azalea Drive. It covers an approximate area of 0.3 ha and there is no further developable land. There is one three-storey building on-site, built around the 1960's, with an area of approximately 1,023sq.m. The building provides 3,069sq.m of floorspace and is used as offices(K).

The business area and building are in good condition with no apparent infrastructure or layout issues. There is plenty of on-site parking including covered garages but HGV access is poor due to a tight turn into a narrow entrance way.

Summary

Total Area (ha)	0.3
Floorspace (sq.m)	3,069
Developable Area	0
Use	Office
Number of jobs on-site	Unknown
Links to trunk road network	Far distance to A-Roads
HGV Access	Poor
Access to public transport / sustainability	Medium
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 8 – Horizon House, Swanley

Business Area 8 is located in Swanley along Alazea Drive. It covers an approximate area of 0.3 ha and there is no available developable land.

There is one eight-storey office building on-site covering approximately 456sq.m of the site area. The building was built around the 1960's and provides 3,648sq.m of office floorspace (K).

The business area and building are in good condition. There is plenty of on-site parking but HGV access is limited.

Summary

Total Area (ha)	0.3
Floorspace (sq.m)	3,648
Developable Area	0
Use	Office
Number of jobs on-site	364
Links to trunk roads	Far distance to A-roads
HGV Access	Poor
Access to public transport / sustainability	Medium
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 9 – Goldsel Road, Swanley

Business Area 9 is located in Swanley along a 350m stretch of Goldsel Road. The site backs onto the rail lines. The business area covers approximately 5.8 ha and there is no available developable land.

There are two identifiable business sites with an area of 25,388sq.m and 32,813sq.m respectively. The business area consists of a number of buildings, which cover approximately 18,619sq.m of the site. The buildings are generally one and two-stories tall and range from the 1950's up to the 1990's in age. The total available floorspace in the business area is 45,243sq.m. The business area is mixed-used with 13,175q.m of floorspace used for the manufacturing of pulp, paper and paper products(DE) and 29,987q.m of warehouse(I) and 2,081sq.m general business use(K).

The business area is in reasonable condition but the buildings are all well maintained and in good condition. There is on-site parking available and the HGV access is good. There does not appear to be any infrastructure issues or visible signs of contamination.

Summary

Total Area (ha)	5.8
Floorspace (sq.m)	45,243
Developable area	0
Use	Mixed Industry, warehousing and office
Number of jobs on-site	498
Links to trunk roads	Close to A-roads
HGV Access	Good
Access to public transport / sustainability	Medium
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area Description

Business Area 10 – Southern Cross Industrial Estate, Swanley

Business Area 10 is located in Swanley along London Road. It is a large site covering 12 ha. There are five separate business sites, two of which are empty which provides 8.5ha of developable land. (However, the Draft Development Brief of The Broom Hill, Swanley, by Sevenoaks District Council (approved December 2005) indicates that there there is 4.1 ha of developable land). There is a sector of land (9,600sq.m) that surveyors were unable to visually inspect.

The buildings on site are between one and three stories tall and built between the 1950's and 1970's. There is 16,760sq.m of available floorspace, which is used for various manufacturing (D). Some of the units appeared vacant.

The business area appears to be in reasonable condition and most of the buildings are well maintained. There is on-site parking but there are some layout issues making HGV access in some areas more difficult. There were signs posted around the site opposing the development of the vacant land. The signs indicate the neighbourhood residents would like to see the land retained for it's scenic and recreation value.

The Draft Development Brief of The Broom Hill, Swanley, by Sevenoaks District Council (approved December 2005) indicates that only 4.1ha of land is developable, and building design guidelines state that development should be limited to two storeys in height (maximum of 8.5m).

Summary

Total Area (ha)	12.0
Floorspace (sq.m)	16,760
Developable area (ha)	4.1 (as per the Draft Development Brief of The Broom Hill, Swanley, by Sevenoaks District Council, approved December 2005)
Use	Industry
Number of jobs on-site	72
Links to trunk roads	Close to A-roads
HGV Access	Good
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Reasonable
Other issues / compatibility	None

Business Area 11 – Warren Court, Halstead

Business Area 11 is located in Sevenoaks and covers an approximate area of 0.6 ha and there is no available developable land. There are six separate identifiable business sites ranging in size from 303sq.m to 2,750sq.m.

The buildings on-site are all one-storey and provide approximately 1,270sq.m of floorspace. They were built around the 1970's and 336sq.m of floorspace is used for manufacturing (D), 939sq.m for construction (F) and 3,322sq.m of general business activities (K).

The business area tends to be in poor condition and many of the buildings appear run down and neglected. Some of the activities undertaken on site could be potentially contaminative to the area. There is on-site parking and reasonable HGV access.

Summary

Total Area (ha)	0.6
Floorspace (sq.m)	1,270
Developable area	0
Use	Mixed Industry & Office
Number of jobs on-site	Unknown
Links to trunk roads	Medium Distance to A-roads
HGV Access	Reasonable
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Poor
Other issues / compatibility	None

Business Area 12 – Horton Kirby Trading Estate, South Darenth

Business Area 12 is located in South Darenth along Station Road. It was the location of a large paper mill but is in longer is use. The site is in the middle of a large residential area of South Darenth.

The entire business area, including the disused mill site, is 3.5 ha and the mill site accounts for 2.2 ha of the area and could be redeveloped. The remaining 1.3 ha of the site is occupied by a number of buildings and is used for manufacturing(D), repair of household goods(G) and general business activities(K). The buildings on the 1.3 ha site are primarily one-storey tall and provide 2,796sq.m of floorspace. The majority of the buildings were built in the 1960's while two were built in the 1990's.

The business area, besides the derelict mill site, is in good condition and the occupied buildings are all well maintained. Some of the uses being undertaken on-site may be contaminative and there are visible chemical holding tanks. There is on-site parking and good HGV access. The area is close to the residential neighbourhood but there does not appear to be any conflict of use.

Summary

Total Area (ha)	3.5
Floorspace (sq.m)	13,076
Developable area (ha)	1.3
Use	Mixed Industry & Office
Number of jobs on-site	15
Links to trunk roads	Close to A-roads
HGV access	Good
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 13 – Blue Chalet Industrial Park, West Kingsdown

Business Area 13 is located in West Kingsdown along Water Lane. It covers an area of 0.7 ha. The business area is made up of approximately 46 one-storey units, which provide approximately 1,100sq.m of floorspace.

The units were built in the 1970's and are in good condition. The business area is used for a number of different activities including 184sq.m of floorspace used for manufacturing(D), 118sq.m for automotive and household goods repair(G) and 162sq.m of general business use(K). Some of the units were vacant or there use was not directly evident. The site is a general industry and business area.

The business area is generally in good condition with good HGV access and plenty of on-site parking. There are no infrastructure issues or apparent conflicting uses with the neighbourhood.

Summary

Total Area (ha)	0.7
Floorspace (sq.m)	1,101
Developable Area (ha)	0
Use	Mixed Industry & Office
Number of jobs on-site	82
Links to trunk roads	Close to A-roads
HGV Access	Good
Access to public transport / sustainability	Poor
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 14 – Brands Hatch Racing Circuit, Fawkham

Business Area 14 is located between Sevenoaks and Swanley, just outside Fawkham. It is the site of The Brands Hatch Racing Circuit, one of the UK's premier Grand Prix racing courses.

The business area covers 136 ha and is used primarily for the management and operations of the racing circuit and related industry. There is approximately 2.9 ha of available developable land. Buildings are spread around the site and are primarily for office and automotive repair use. Buildings and grandstands cover approximately 2.2 ha of the site and provide approximately 38,034sq.m of floorspace. Buildings tend to be one-storey high and generally include a garage/work area. Buildings range in age dating from the 1950's up to the 1990's. One exception to the general automotive industry is the recent addition of a hotel on-site, which was built in the 1990's.

The business area is in good condition and the buildings are generally well maintained. There is on-site parking and good HGV access. It is located on the A20 and is easily accessible from the M25. The site is located near to a residential area of Fawkham but as the circuit has been there for over 50 years there does not appear to be any conflict.

Summary

Total Area (ha)	136
Floorspace (sq.m)	38,034
Developable Area (ha)	2.9
Use	Mixed Industry & Office
Number of jobs on-site	45
Links to trunk roads	Far from A-roads
HGV Access	Good
Access to public transport / sustainability	Poor
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 15 – North Downs Business Park, Dunton Green

Business Area 15 is located in Dunton Green along Limepit Lane. The site is primarily occupied by the Fort Halstead Defence Research Agency(DRA), which was not accessible for surveying. The total business area is 83.8 ha and the DRA occupied 60 ha of that area. There is also 15 ha of residential development.

The business area that could be surveyed makes up the remaining 7.8 ha of the site. There is approximately ten separate identifiable business sites and 1.0 ha of vacant/developable land. Buildings are one and two-stories tall and range in age dating from the 1950's to 2000's. The buildings cover an area of 7,188sq.m and provide 9,725sq.m of floorspace.

The surveyed business area is being used for a variety of activities including manufacturing and various business uses. There is 2,800sq.m of warehouse use (I), 1,550sq.m of floorspace being used for manufacturing(D), 625sq.m for automotive repair (G) and 3,937sq.m of general office use(K). Some of the units are vacant.

The business area is in good condition and the majority of the surveyed buildings are well maintained. There is on-site parking and good HGV access in most areas.

Summary

Total Area (ha)	83.8
Floorspace (sq.m)	9,725
Developable Area (ha)	1.0
Use	Mixed-use (Warehouse, Industry & Office)
Number of jobs on-site	132
Links to trunk roads	Medium distance to A-roads
HGV Access	Good
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 16 – Westerham Trading Centre, Westerham

Business Area 16 is located in Westerham along The Flyers Way. It covers an area of approximately 3.1 ha and can be divided into nineteen separate business sites.

The buildings on-site cover approximately 12,294sq.m of the business area and were built around the 1980's. Buildings range in size from one to five stories and provide a total of 18,040sq.m of floorspace. The business area is predominantly utilized for general business activities (K) and some warehousing and distribution (I).

The business area is in reasonably good condition. The buildings are well maintained and in good condition. There is a residential area close by but no apparent conflicts of use. There is plenty of on-site parking and good HGV access.

Summary

Total Area (ha)	3.1
Floorspace (sq.m)	18,040
Developable Area (ha)	0.07
Use	Mixed-use (Warehouse & Office)
Number of jobs on-site	549
Links to trunk roads	Medium distance to A-roads
HGV Access	Good
Access to public transport / sustainability	Medium
Parking	Adequate
Quality	Good
Other issues / compatibility	Surrounded by residential

Business Area 17

Area had been redeveloped as residential and was not assigned to the survey.

Business Area 18 – West Kent Cold Storage, Dunton Green

Business Area 18 is located in Dunton Green along Rye Lane. It is off the main road of Dunton Green next to a residential area. It is a large storage and transport hub serving primarily the food and beverage industry. It is a mixed-use site and in addition to the main uses of transport and storage(I), some of the sites are being used for auto repairs(G), manufacturing(D) and general office use(K).

The total business area is approximately 7.7 ha and there are thirteen separate identifiable business sites. Three sites are vacant with derelict buildings, offering 0.46 ha of developable land. The other sites range is size from 256sq.m to 8,704sq.m. The buildings on site are primarily large warehouses with delivery bays and some general office space. There are also two two-storey office buildings on-site. The total built area is approximately 26,388sq.m, which provides 30,979sq.m of floorspace. The buildings range in age dating from around the 1950's up to the 1990's.

The business area is in good condition. Some of the office accommodation is a bit rundown but in general the majority of the occupied buildings are well maintained. The site is located through a residential neighbourhood and large trucks have to pass through narrow residential streets to access the site. There is also a railway underpass that narrows to one lane that trucks need to negotiate. There is a slight slope to the site but roads are well laid out making HGV access throughout the estate good but access to the business area is through narrow residential streets and a one-way railway underpass. There is also on-site parking at various locations around the estate. Safe pedestrian paths are marked and labelled along the roadways of the business area. There does not appear to be any direct access to public transport as the area is off the main roads.

Summary

Total Area (ha)	7.7
Floorspace (sq.m)	30,979
Developable Area (ha)	0.46
Use	Mixed-use (Warehouse, Industry & Office)
Number of jobs on-site	218
Links to trunk roads	Medium distance to A-roads
HGV Access	Reasonable
Access to public transport / sustainability	Medium
Parking	Adequate
Quality	Good
Other issues / compatibility	Large lorries pass through residential area to reach site

Business Area 19 – Hardy's Yard, Riverhead

Business Area 19 is located in Riverhead along London Road. It covers an approximate area of 1.2 ha and there is approximately 0.11 ha of developable land.

Within the business area there are eight separate business sites. Sites range is size from 533sq. to 1,549sq.m. The total area covered by buildings is approximately 2,550sq.m providing 4,524sq.m of floorspace. The majority of buildings were built around the 1970's but there are some new additions from the 1990's. General business uses(K) take up approximately 1,508sq.m of floorspace and the remaining 3,016 sq.m is used for auto sales and repairs(G), and manufacturing(D).

The general business area is in good condition but most of the buildings are not very well maintained and in need of renovations. There is on-site parking and HGV access is good. There does not appear to be any conflicting use with the neighbourhood. The River Darent runs along the northern boundary of the business area close to a site that is manufacturing tools. This could be potentially contaminative use and would need further investigation.

Summary

Total Area (ha)	1.2
Floorspace (sq.m)	3,743
Developable area (ha)	0.11
Use	Mixed-use (Office & Industry)
Number of jobs on-site	106
Links to trunk roads	Close to A-roads
HGV Access	Good
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Reasonable
Other issues / compatibility	Some contamination issues and within residential area.

Business Area 20 – Vestry Road, Sevenoaks

Business Area 20 is located in Sevenoaks occupying a large industrial estate and adjacent business sites along Vestry Road.

The total business area covers 9.2 ha and there is 0.48 ha of vacant land. There are approximately 35 separate business sites ranging in size from 527sq.m to 10,788sq.m. Site use is primarily general business activities(K) with some manufacturing(D), transport(I) and auto repairs(G). The built area takes up approximately 29,490 sq.m and provides over 44,149 sq.m of floorspace. Business activities(K) take up approximately 28,961sq.m of floorspace, 4,061sq.m is utilized for motor vehicle sale or repair(G) and the remaining 11,127sq.m is used for various manufacturing(D).

The business area and most of the buildings, dating from the 1940's up to the 1990's, are in reasonable to good condition. There is on-site parking but HGV access is made difficult by narrow roads and tight corners. Surveyors noted some potentially contaminative use of asbestos.

Summary

Total Area (ha)	9.2
Floorspace (sq.m)	44,149
Developable area (ha)	0.48
Use	Mixed-use (Office & Industry)
Number of jobs on-site	500
Links to trunk roads	Close to A-roads
HGV Access	Poor
Access to public transport / sustainability	Medium
Parking	Adequate
Quality	Reasonable
Other issues / compatibility	Potential Asbestos clad buildings

Business Area 21 – Crampton's Road, St John's

Business Area 21 is located in St. John's along Crampton's Road. The business area is largely disused with an old derelict waterworks buildings and pumping station on-site. The business area is approximately 0.73 ha and there is a small 0.03 ha plot of developable land. There is another one-storey building on-site that is still in use but it was not evident what is was used for, maybe some general office use. It was built around the 1950's and it was noted that it may be built with potentially hazardous building materials.

The business area and buildings are in very poor condition. The site has been overgrown and the buildings are vacant or very rundown. The entire site has potential for redevelopment.

Summary

Total Area (ha)	0.73
Floorspace (sq.m)	1,081
Developable area (ha)	0.03 ha plus 0.7 ha disused land
Number of jobs on-site	Unknown
Links to trunk roads	Medium distance to A-roads
HGV access	Reasonable
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Poor
Other issues / compatibility	None

Business Area 22 – Bat & Ball Enterprise Centre, Sevenoaks.

Business Area 22 is located in Sevenoaks along Bat & Ball Road. The business area is approximately 1.0 ha and there is approximately 0.09 ha of vacant developable land.

The business area is made up of eight separate business sites, ranging in size from 768 sq.m to 5,094 sq.m. Buildings on-site take up approximately 3,776 sq.m of the business area and provide 7,552 sq.m of floorspace. Most of the buildings are two-stories and built around the 1980's. The primary use tends to be warehousing(I) with some auto sale and repairs(G). At the time of the survey there were two vacant units offering 832sq.m of floorspace.

The business area and buildings are in good condition. There is on-site parking and good HGV access. There does appear to be any conflict of use within the surrounding neighbourhood.

Summary

Total Area (ha)	1.0
Floorspace (sq.m)	7,552
Developable area (ha)	0.09
Use	Mixed-use (Warehouse & Industry)
Number of jobs on-site	39
Links to trunk road network	Medium distance to A-roads
HGV Access	Good
Access to public transport / sustainability	Medium
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 23 – Chaucer Business Park, Kemsing

Business Area 23 is located in Kemsing along Watery Lane. It covers an area of approximately 3.9 ha and there is no available developable land.

There are eleven separate business sites within the business area. The sites range in size from 1,520 sq.m to 5,625 sq.m and are primarily used for transport and storage(I) or general business use(K) with some manufacturing(D). The buildings on-site are either one or two stories tall and range in age dating from the 1970's through to the 1990's. The buildings cover an approximate area of 11,547sq.m and provide 14,269sq.m of floorspace.

There is a large pond and greenspace in the centre of the business area covering approximately 4,500 sq.m.

The business area is in reasonable condition and most of the buildings are new and in good condition. There is on-site parking and good HGV access. Some of the land-use may be potentially contaminative.

Summary

Total Area (ha)	3.9
Floorspace (sq.m)	14,269
Developable Area (ha)	0
Use	Mixed-use (Warehouse & Office)
Number of jobs on-site	338
Links to trunk roads	Far from A-roads
HGV Access	Good
Access to public transport / sustainability	Poor
Parking	Adequate
Quality	Reasonable
Other issues / compatibility	Some potentially contaminative land use

Business Area 24 – Morewood Close, Sevenoaks

Business Area 24 is located between Sevenoaks and Riverhead just off London Road. The business area covers approximately 2.8 ha and there is 0.2 ha of available developable land.

There are twelve identifiable business sites ranging is size from 798 sq.m to 5,586 sq.m. Buildings on-site tend to be built between the 1960's and 1980's and are between one and three stories tall. The buildings cover approximately 5,838sq.m of the business area and provide approximately 9,837sq.m of floorspace. The sites and buildings are utilised for a variety of activities. Transport, storage and communications (I) occupies 2,877sq.m of floorspace; automotive sales and repairs (G) occupies 1,680sq.m of floorspace and various office and public administration use (K, L and N) occupies 2,939 sq.m of floorspace. There was 2,340sq.m of disused floorspace in one of the buildings at the time of the survey.

The business area is in reasonable condition and the most of the buildings are well maintained. Some of the site is landscaped and there are some very old trees on-site. There is on-site parking throughout the business area and HGV access is good.

Summary

Total Area (ha)	2.8
Floorspace (sq.m)	9,836
Developable area (ha)	0.20
Use	Mixed-use (Industry, Warehouse & Office)
Number of jobs on-site	106
Links to trunk roads	Close to A-roads
HGV Access	Good
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Reasonable
Other issues / compatibility	None

Business Area 25 – British Telecom, Sevenoaks

Business Area 25 is located in Sevenoaks at 160 London Road, directly opposite the train station. It is a large, single occupancy site covering an area of approximately 2.5 ha. The building was built in the 1990's and covers approximately 5,850 sq.m of the site. The building is three stories tall and provides approximately 17,550sq.m of office floorspace.

The business area is in good condition and the building is of a modern and high quality design. There is on-site parking and HGV access is good.

Summary

Total Area (ha)	2.5
Floorspace (sq.m)	17,550
Developable Area (ha)	0
Use	Office
Number of jobs on-site	Unknown
Links to trunk roads	Close to A-roads
HGV Access	Good
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Very Good
Other issues / compatibility	None

Business Area 26 – Buildmart House, Sevenoaks

Business Area 26 is located in Sevenoaks along Tubs Hill Road. The business area covers approximately 0.1 ha and is occupied by one building covering an area of approximately 298sq.m

The two-storey building was built in the 1980's and provides approximately 595 sq.m of office floorspace. The business area is utilized for general business activities (K).

The business area and building are in good condition. The car parking facilities is outside of the marked business area boundary but is accessible on an adjacent site. There is good HGV access to the business area.

Summary

Total Area (ha)	0.1
Floorspace (sq.m)	595
Developable area (ha)	0
Use	Office
Number of jobs on-site	Unknown
Links to trunk roads	Close to A-roads
HGV Access	Good
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 27 – London Road, Sevenoaks (name to be confirmed)

Business Area 27 is location along London Road in Sevenoaks. The site covers a total area of 0.1 ha and is currently occupied by a vacant building with approximately 269 sq.m of floorspace.

Summary

Total Area (ha)	0.1
Floorspace (sq.m)	269
Developable area (ha)	0.07
Use	Vacant
Number of jobs on-site	Unknown
Links to trunk roads	Close to A-roads
HGV Access	Good
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Very poor
Other issues / compatibility	None

Business Area 28 – Tubs Hill House, Sevenoaks

Business Area 28 is located in Sevenoaks on Tubs Hill Road, which is the main route from the train station to Sevenoaks town centre.

The business area covers approximately 0.6 ha and there are three separate business sites. The sites range in size from 0.17 ha (1,749sq.m) to 0.23 ha (2,337 sq.m). The business area is dominated by the middle site, which has two office towers that are joined together by a one level reception area. The building covers approximately 1,150 sq.m of the business area. The towers are each eight stories tall and provide approximately 6,555 sq.m of office floorspace.

Another site has a vacant and derelict old building on it. The 1950's building covers 424sq.m and is four stories tall (1,696sq.m of floorspace). Renovations would be required to make the existing building habitable or the entire site and building could be redeveloped.

The third site is all retail with residential accommodation above.

The business area and office towers are in good condition. The four-storey building is in very poor condition and in need of renovations. The entrance to the business area around the office towers is quite steep and narrow. The HGV access would be possible but difficult. There is underground parking for the office towers and on-site parking available for the rest of the business area.

Summary

Total Area (ha)	0.6
Floorspace (sq.m)	8,251
Developable area (ha)	0.2
Use	Office
Number of jobs on-site	175
Links to trunk roads	Close to A-roads
HGV Access	Reasonable
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 29 – Erskine House, Sevenoaks

Business Area 29 is located in Sevenoaks along Oak Hill Road. The business area covers approximately 0.7 ha and there is approximately 0.04 ha of developable land.

The site is occupied by a single, two-storey 1980's building that covers 0.15 ha of the business area. The building provides 2,850sq.m of floor space and is used for general business activities (K).

The business area and building are in good condition. There is on-site parking but the narrow entrance makes HGV access difficult.

Summary

Total Area (ha)	0.7
Floorspace (sq.m)	2,850
Developable area (ha)	0.04
Use	Office
Number of jobs on-site	Unknown
Links to trunk roads	Far from A-roads
HGV Access	Reasonable
Access to public transport / sustainability	Medium
Parking	Adequate
Quality	Good
Other issues / compatibility	Within a residential area

Business Area 30 – London Road, Sevenoaks

Business Area 30 is located in Sevenoaks situated around a busy four-way intersection leading into the town centre. The business area covers approximately 4.1 ha and approximately 0.35 ha of available developable land.

The business area can be divided into 22 separate business areas, ranging in size from 108 sq.m to 3,240 sq.m. The buildings within the business area offer a range of age, size and use. Buildings are predominantly built over the last 30 years but there are a few buildings from the early 1900's that may be of some architectural value. The total built area of the business area is approximately 6,552sq.m and provides approximately 14,937sq.m of floorspace. The business area is primarily general business use with different types of services including the District Council offices.

The business area is in good condition and the majority of the buildings are well maintained and in good condition. There is an old vacant building on one of the identified sites, which is of no notable architectural value and could be redeveloped. The business area is on a slight slope but HGV access is reasonable and there is on-site parking throughout.

Summary

Total Area (ha)	4.1
Floorspace (sq.m)	14,937
Developable Area (ha)	0.35
Use	Office
Number of jobs on-site	124
Links to trunk roads	Close to A-roads
HGV Access	Reasonable
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 31 – High Street, Sevenoaks

Business area 31 is located in Sevenoaks along a 120m section of the High Street. The business area is approximately 1.4 ha and there are eight separate business sites. The sites range in size from 150 sq.m to 2,750 sq.m and are primarily general business use.

The buildings on site cover approximately 3,095sq.m of the business area, are two and three stories tall and provide 7,164 sq.m of floorspace. The buildings range in age dating from the 1980's and 1990's but there are a couple from the 1950's and one that could be of some architectural value dating from the 1920's.

The business area and the majority of buildings are in good condition. The area is accessed via local main roads and intersections. There is on-site parking and HGV access is good throughout the area. The does not appear to be any conflict of uses with the surrounding area. There is no available developable land.

Summary

Total Area (ha)	1.4
Floorspace (sq.m)	7,164
Developable Area (ha)	0
Use	Office
Number of jobs on-site	46
Links to trunk roads	Close to A-roads
HGV Access	Good
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 32 – South Park, Sevenoaks

Business Area 32 is located in Sevenoaks along South Park Road. The business area covers approximately 0.2 ha and there is no developable land.

There are two separate business areas occupied by one building each. The built area covers approximately 660 sq.m of the business area and provides 947sq.m of floorspace. One building was built in the 1990's and the other was difficult to date but is considered to be an 'old' building. The business area is office use including general business use (K) and health and social work activities (N).

The business area and buildings are in good condition. There is on-site parking and HGV access is reasonable throughout the area.

Summary

Total Area (ha)	0.2
Floorspace (sq.m)	947
Developable Area (ha)	0
Use	Office
Number of jobs on-site	Unknown
Links to trunk roads	Medium distance to A-roads
HGV Access	Reasonable
Access to public transport / sustainability	Medium
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 33 – Southpark/Lime Tree Walk, Sevenoaks

Business Area 33 is located in Sevenoaks on Lime Tree Walk just off of London Road. The business area is approximately 0.9 ha and there is 0.07 ha of developable land (currently a car park).

There are eight separate business sites ranging from 614 sq.m to 3,590 sq.m in size. The buildings in the area are predominately three stories tall and cover approximately 7,148 sq.m of the business area - providing 9,301 sq.m of floorspace. The buildings range in age dating from the 1990's to 'old'. The older buildings could be of some architectural or heritage value. The sites are used for general business use (K).

The business area is in good condition and the buildings, especially the older ones, are very well maintained and in good condition. There is on-site parking and HGV access is reasonable throughout the site.

Summary

Total Area (ha)	0.9
Floorspace (sq.m)	9,301
Developable Area (ha)	0.07
Use	Office
Number of jobs on-site	122
Links to trunk roads	Close to A-roads
HGV Access	Reasonable
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 34 – Coffee House Yard (Tricorn House), Sevenoaks

Business Area 34 is located in Sevenoaks along London Road. The business area is approximately 0.14 ha and there is no available developable land.

The business area is a single site with a single two-storey building dating from the 1970's. The building covers approximately 204 sq.m of the business area and provides 408 sq.m of office floorspace. The site is primarily used for health and social work activity (N).

The business area and building are in good condition. There is on-site parking but HGV access is poor due to a narrow entrance way.

Summary

Total Area (ha)	0.14
Floorspace (sq.m)	408
Developable Area (ha)	0
Use	Office
Number of jobs on-site	7
Links to trunk roads	Close to A-roads
HGV Access	Poor
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 35 – Sackville House, Sevenoaks

Business Area 35 is located in Sevenoaks along Buckhurst Avenue. The business area is approximately 0.1 ha and there is no available developable land.

The business area is a single site with a single two-storey building built around the 1970's. The building covers approximately 159 sq.m of the business area and provides 318 sq.m of office space. The rest of the site is taken up by the car park up to the site boundary. The business area is used for general business activities (K).

The business area is in good condition and the building is very well maintained with secure on-site parking. The business area is located on a main road and HGV access to the area is good.

Summary

Total Area (ha)	0.1
Floorspace (sq.m)	318
Developable Area (ha)	0
Use	Office
Number of jobs on-site	12
Links to trunk roads	Medium distance to A-roads
HGV Access	Good
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 36 – Epicurus House, Sevenoaks

Business Area 36 is located in Sevenoaks along Akehurst Lane. The business area is approximately 0.05 ha and there is no further developable land.

The business area is a single site with a single three-storey building. The built area covers 279 sq.m of the business area and provides 585 sq.m of office floorspace. The business area is used for general business activity (K) including the offices of the Kent County Police.

The business area is quite narrow and the buildings frontage is onto a single lane road. There is limited on-site parking and HGV access would be difficult. The building appears to be built around the 1990s and is very good condition.

Summary

Total Area (ha)	0.05
Floorspace (sq.m)	585
Developable Area (ha)	0
Use	Office
Number of jobs on-site	18
Links to trunk roads	Medium distance to A-roads
HGV Access	Poor
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Good
Other issues / compatibility	None

Business Area 37 – Albion Business Park, Edenbridge

Business Area 37 is located in Edenbridge on Albion way just behind Edenbridge Station. The business park has not been built yet and the site was vacant at the time of the survey. The business area is approximately 1.2 ha in size and triangular in shape. The site was fenced off but from where surveyors were able to see there did not appear to be any buildings on-site.

The entrance road – Albion Way – comes off the main road leading into Edenbridge, which can be busy at times. HGV access may be difficult as the access road is steep and can only be accessed coming down the hill into Edenbridge. The development is advertised, at the entry road, as live-work units. There is some woodland on-site, which may be of ecological value.

Summary

Total Area (ha)	1.2
Floorspace (sq.m)	0
Developable Area (ha)	1.2
Use	Mixed use
Number of jobs on-site	0
Links to trunk roads	Medium distance to A-road
HGV Access	Poor
Access to public transport / sustainability	Medium
Parking	N/a
Quality	Poor
Other issues / compatibility	None

Business Area 38 – Station Road, Edenbridge

Business Area 38 is located in Edenbridge along a 340m section of Station Road. The business area is very large, covering 161,800sq.m of land. There is a residential area situated in the middle of the area that covers 7,200sq.m and another residential area is already being developed taking up a further 5,600sq.m of the business area. There are some pockets of land that could be developed throughout the area covering approximately 1,540sq.m.

There are approximately 45 separate business areas ranging in size from 800sq.m to 13,600sq.m. The built area covers approximately 72,941sq.m of the business area and provides approximately 111,645sq.m of floorspace. Business activity in the area is primarily general business use(K) with some manufacturing(D), warehouses and transport(I); and motor vehicle repairs(G).

There are a variety of buildings on-site dating from the 1950's to 1980's. Buildings are between one and three stories tall and are generally in good condition though there are some sites that are getting a bit rundown and in poorer condition.

The business area is in good condition with good access roads for HGV's. There does not appear to be any infrastructure issues but some of the site uses maybe potentially contaminative. There is already residential development encroaching on the business area, which could lead to potential conflicts of use within the neighbourhood.

Summary

Total Area (ha)	16.2
Floorspace (sq.m)	111,645 sq.m
Developable area (ha)	0.15
Use	Mixed-use (Office, Warehouse & Industry)
Number of jobs on-site	1,080
Links to trunk roads	Close to A-roads
HGV Access	Good
Access to public transport / sustainability	Good
Parking	Adequate
Quality	Good
Other issues / compatibility	Near to residential development

Business Area 39 – Station Approach, Edenbridge

Business Area 39 is located in Edenbridge at the end of Grange Close. The business area covers approximately 1.3 ha of land and at the time of the survey was mostly unused. There was a garden centre on-site with a couple of temporary buildings but the rest of the site was overgrown with grass and woodland. Surveyors could not see the entire site so it was unclear what was further along but the access road was muddy and there did not appear to be any permanent infrastructure. The entire site could be ready for redevelopment.

Summary

Total Area (ha)	1.3
Floorspace (sq.m)	0
Developable Area (ha)	1.3
Use	Vacant – some retail
Number of jobs on-site	0
Links to trunk roads	Medium distance to A-roads
HGV Access	Good
Access to public transport / sustainability	Good
Parking	N/a
Quality	Poor
Other issues / compatibility	Within residential area
Other issues / compatibility	None

Business Area 40 – Coop Store, Edenbridge

Business Area 40 is located in Edenbridge on the High Street. The business area covers approximately 0.77 ha and is occupied by the local Co-op Store with an area of 1,406 sq.m. The rest of the business area is fully covered by the car park. The store is new and likely built in the early 2000's.

Summary

Total Area (ha)	0.77
Floorspace (sq.m)	1,406sq m
Developable Area (ha)	0
Use	Retail
Number of jobs on-site	Unknown
Links to trunk roads	Not Direct
HGV Access	Good
Access to public transport / sustainability	Good – bus within a 5 min walk.
Parking	On-site
Quality	Very Good
Other issues / compatibility	None

Business Area 41 – Edenbridge Trading Centre/Warsop Trading Centre and Leigh Builders Yard, Edenbridge

Business Area 41 is located in Edenbridge along Hever Road. The original business area boundaries encompassed an area of 1.2 ha but at the time of the survey 0.38 ha of the area was being redeveloped for special needs housing. The surveyed business area is therefore 0.78 ha in total.

There are three parts to the area – Edenbridge Trading Centre, Warsop Trading Centre (accessed from Hever Road) and Leigh Builders Yard (accessed from Mill Hill). The sites are made up of a number of different units and there is an old house, converted into offices, on one of sites. The built area covers approximately 2,580 sq.m and provides 4,644 sq.m of floorspace. The business area is mixed-use with 2,412 sq.m of floorspace for general business use (K), 1,782 sq.m for various manufacturing(D) and 450 sq.m for automotive repair use(G). There is an empty and derelict building covering 0.05 h a of one of the sites that could be redeveloped.

The Business Area and buildings are in reasonable condition. Some of the buildings are getting rundown and the general maintenance of roads and common areas has been neglected. There is plenty of on-site parking and HGV access is good, though it does involve travel through a residential area.

Summary

Total Area (ha)	1.2
Floorspace (sq.m)	4,644
Developable Area (ha)	0.05
Use	Mixed-use (Office, Warehouse & Industry)
Number of jobs on-site	162
Links to trunk roads	Far distance from A-roads
HGV Access	Good
Access to public transport / sustainability	Medium
Parking	Adequate
Quality	Reasonable
Other issues / compatibility	Access through residential area

Business Area 900 – Glaxo Smith Kline

Access prohibited.

Appendix E - Glossary

GLOSSARY

Economic activity rate	The number of people, who are economically active aged 16 to 59/64, expressed as a percentage of all working age people.
Economically active	People ages 16 and over who are either in employment or unemployed.
Economically inactive	People who are neither in employment nor unemployed. This group includes, for example, all those who were looking after a home or retired.
Employment rate	The number of people in employment aged 16 to 59/64 expressed as a percentage of all working age people.
Grade A Office Space	New high quality in a desirable location, not previously occupied.
Grade B Office Space	Low quality based on an assessment of age, specification, location and overall quality.
Hereditaments	A real inheritable or taxable property on which rates can be charged.
HGV	Heavy Goods Vehicle
In Employment	People ages 16 or over who did some paid work in the reference week (whether as an employee or self-employed); those who had a job that they were temporarily away from; those on Government supported training and employment programmes; and those doing unpaid family work.
Location Quotient	A measure of how strongly different industries are represented in the local economy compared to the wider region.
Market Stocks	Occupied and vacant space.
Not wanting a job	People who are neither in employment nor unemployed and who do not want a job.
Second Hand Grade A	High quality, previously occupied.
Second Hand Grade B	Low quality, previously occupied.
Social Grade AB	Higher and intermediate managerial/administrative professional.
Social Grade C1	Supervisory, clerical, junior managerial/administrative professional.
Take-up rate	Rate at which available properties become occupied once on the market.
Type A Development Pipeline	Planned development which is likely to proceed. The assessment is based on experience and market knowledge of estate agents.
Type B Development Pipeline	Planned development which is less likely to be proceeded than Type A. The assessment is based on the experience and market knowledge of estate agents.
Unemployment	Refers to people without a job who were available to start work in the two weeks following their interview and who had either looked for work in the four weeks prior to interview or were waiting to start a job they had already obtained.
Unemployment rate	The number of unemployed people aged 16 to 59/64 expressed as a percentage of the economically active population aged 16 to 59/64.
Working Age	Includes males aged 16 to 64 and females aged 16 to 59.