Survey of Employers' Housing Needs

Sevenoaks District Council

Report of survey

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1. Introduction

Your Goal

1.1 The Sevenoaks District Council (SDC) brief was to identify employers' housing requirements and whether the local housing market (in particular, the affordability of housing), was deemed to be a challenge for the organisations' recruitment and retention.

Our Approach

1.2 We agreed an online survey with the Council. Using a purchased email list from Market Location a subsidiary of the Thomson Local Directory Group, we contacted organisations and with an email invitation and a reminder. The Survey was open from 20 July to 21 August.

1.3 We also approached directly umbrella organisations e.g. Chamber of Commerce, NFU as well as the MOD and a local housing association.

1.4 It was agreed during the process that a separate survey of residents would be launched in October so as not to overlap with this work (Sevenoaks District Council is undertaking this work).

Our Report

1.5 To enhance the flow of the narrative, we have extracted several 'non-housing' questions and located them in a different section.

1.6 Where short qualitative responses are given, they are not tabulated and the 'question' number is omitted.

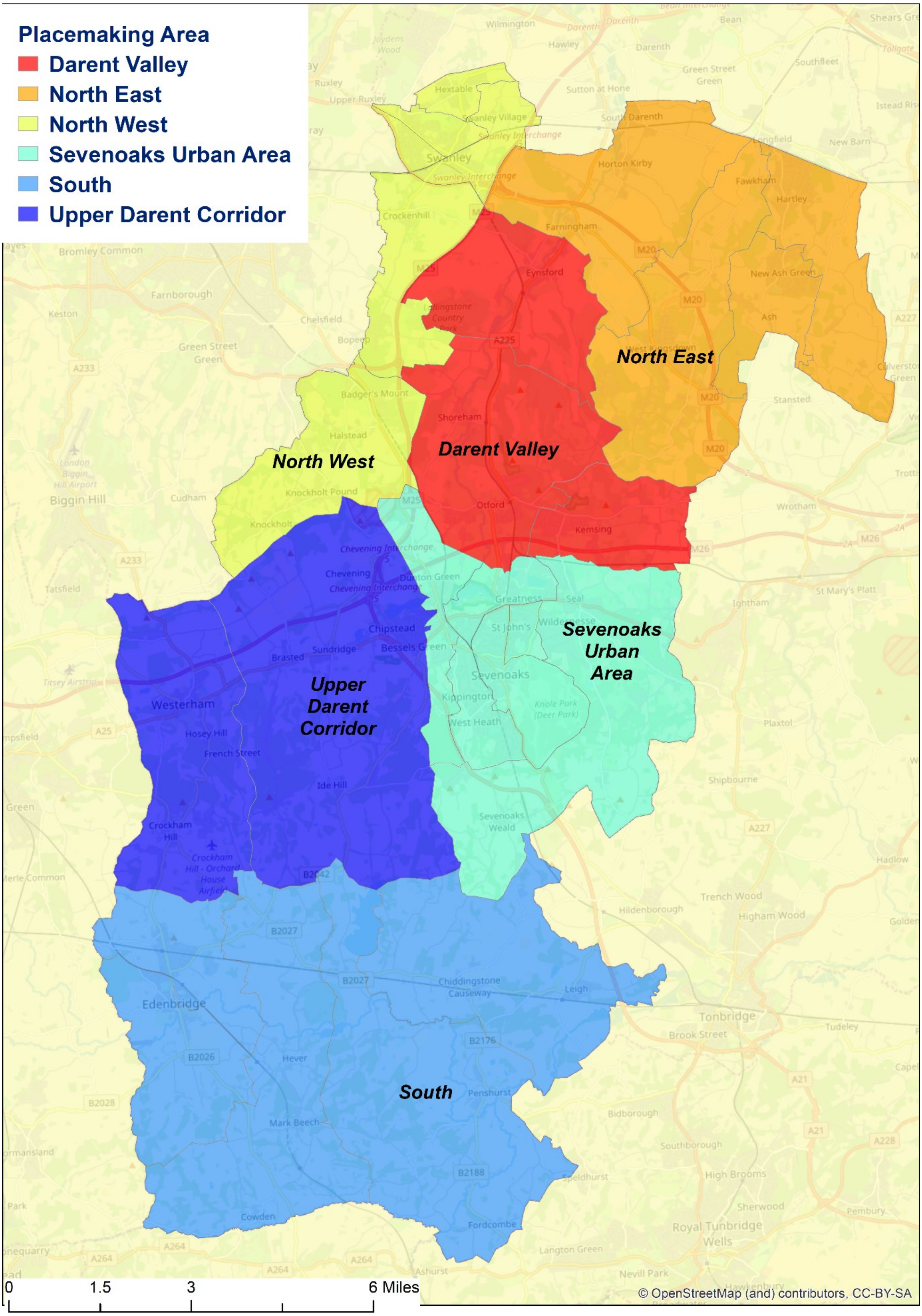
1.7 To draw out the key points, we ignore the Not sure/Don't know responses and tabulate a net score of positive and negative responses. Equally, where responses of 'other' are not relevant, we exclude them from the table.

2. Key findings

- 43% of organisations felt there was inadequate housing provision in the District (i.e. 43% of organisations did *not* agree there was an adequate provision of housing in the district)
- Lack of suitable housing was cited by 51% as (marginally) the second highest barrier to business development, after the related, travel to work times.
- ***For its impact on the local economy,*** the lack of affordable housing is by far the highest impact concern with 64% indicating that it has the highest impact and a further 17% stating it has the next highest level of impact.
- The impact ***on the organisations themselves*** of the lack of affordable housing is down to 40%, but still by far the most important factor. Transport costs and travel to work times are other middle ranking concerns.
- Skilled and semi-skilled staff were most cited as a problem in terms of recruitment or retention. Lower paid staff e.g. farm workers, were reported as a housing recruitment challenge. Care staff were also mentioned.

- 41% of organisations reported difficulties in recruiting staff due to housing factors in the past two years.
- Over 43% of responses indicated that the housing situation had *not* impacted on the organisations' bottom line in the past year. However, 47 organisations cited concrete impacts particularly in terms of recruitment costs.
- The cost of buying a home is regarded as a problem by 67% of organisations.
- Building affordable housing, either to rent or to buy via Help to Buy (shared ownership/equity loans), was by far the highest priority with more than 50% of positive responses.
- There was very strong support for the view that are insufficient homes for young people (Starter Homes).
- 62% think there needs to be more housing for couples or small families.
- 63% of respondents thought that building new affordable homes would have a positive effect on the local economy.
- Over 59% thought it would enhance recruitment and retention.
- Terraced accommodation was considered to be in short supply.
- Some felt that housing in the north east of the district is of not high enough quality for key workers or executives.
- 50.5% of organisations had less than half their employees living in the District
- A third of organisations needed their employees to live locally, almost half are accounted for by leisure & tourism, retail and manufacturing.
- Where preferences for the location of new housing are specified, 89% are for the South, Upper Darent Corridor, Sevenoaks and surrounds and the North East "place making areas" (see map overleaf) in broadly equal quarters.
- 52% of organisations addressed housing-related recruitment or retention problems with additional pay. A further 19% used help with commuting.
- Whilst Sevenoaks is not particularly regarded as a draw for employees, organisations cite good transport links to the capital, a good natural environment and a safe welcoming community as positive features.
- Just under a third thought their organisations would be less prosperous after Brexit. The "More prosperous" responders were largely in manufacturing sector and the "Less prosperous" group were more likely to be in the service industry, public or voluntary sectors

Map 2.1 Sevenoaks District Council's Placemaking Areas



3. Overview of Responses and Completions

Responses to the survey email

3.1 This section summarises the responses to the survey email.

- We emailed to over 2100 organisation addresses
- 100 viable completed surveys were received and a further 65 started. (These incomplete surveys were not analysed as they had insufficient material to place the answers in context.)
- 28 replied separately that they did not feel the survey was relevant to them – these were often sole traders or individuals who objected to being surveyed
- 71 contact addresses were unviable for various reasons (out of date, no longer in area etc.)
- This makes for a response rate of just over 9%. The completion rate was just below 5%. I have discussed this with my colleague who leads on public surveys and he considers this to be a satisfactory outcome for such a survey.

- Some individuals did not want to be identified in the survey and did not fill in those sections.
- Response bias is likely in that individuals who are content with the current arrangements are less likely to be motivated to respond to the survey request

Completions by industrial sector

3.2 The original contact list was coded by Standard Industry Classification (2007) codes. Where new organisations responded these were coded along with their peers. A number of organisations were vertically integrated and ran from production to retail, so categorisation was along the lines of the main function of the organisation.

3.3 The contact list also included assignments of total national employees. Some assumptions were made about the number of staff primary schools employed. This over-estimates the size of employees covered by the respondents

3.4 The median size of national employees for the contact list was 4. The median for respondents was 10. This is helpful in that it indicates that many sole traders did not respond.

3.5 Most sole trader organisations did not complete the survey as they were not employers. However, a few did. These have been included on the grounds that they may have previously employed or may do so in the future.

3.6 78 different categories of organisations completed the survey. These are detailed in Appendix 1. To assist with the analysis, these were recoded into broad categories and are set out below. The coverage is a reasonable reflection of employment in the Sevenoaks economy.

3.7 Some sectors e.g. farming/agriculture, were pressed but have not produced a substantial response. This may be because they appear under related industries, or because as small businesses with local labour forces, they do not feel the survey was relevant.

Coding of completed surveys by broad industry area

Broad Industrial area	Completion
Service industry	13.0%
Manufacturing	11.0%
Leisure and Tourism	10.0%
Education	9.0%
Health	8.0%
Retail	6.0%
Construction	6.0%
Housing	6.0%
Charity and voluntary organisation	5.0%
Government/Other Public Services	5.0%
Architectural and engineering	4.0%
Financial Legal and insurance services	4.0%
Wholesale food and containers	4.0%
Agriculture and related activities	3.0%
Information Technology & Knowledge Industries	3.0%
Transport	3.0%

Completions by geographical area

Q4 Where are your organisation's main activities located in this area (by Place Making area)?

Area	
Sevenoaks & Surrounds – Seal, Riverhead, Dunton Green, Sevenoaks, Sevenoaks Weald	45.5%
South – Edenbridge, Hever, Cowden, Chiddingstone, Penshurst, Leigh	19.2%
North West – Hextable, Swanley, Crockenhill, Badgers Mount, Halstead, Knockholt	11.1%
Upper Darent Corridor – Westerham, Brasted, Sundridge, Chevening	10.1%
North East – Hartley, Fawkham, W. Kingsdown, Horton Kirby & S. Darenth, Ash-cum-Ridley	8.1%
Darent Valley – Eynsford, Farningham, Otford, Shoreham, Kemsing	6.1%

3.8 These completions appear to broadly reflect the distribution of activity in the District.

3.9 50.5% of completing organisations had less than half their employees living in the District.

4. Responses to questions

The housing challenges faced by organisations

Q5 Please indicate if you think the following are high, medium or low priorities for the Sevenoaks District Council area?

99 Responses	HIgh priority
Building affordable homes to buy (shared ownership, shared equity)	57.0%
Building affordable homes to rent	54.7%
More Key worker housing	40.0%
More 'micro' (smaller) housing for new households	38.2%
Building properties designed for older people	32.2%
Improving the quality of existing stock	28.1%
Building homes to buy on the open market	25.6%
Building properties designed for people with specialist needs	23.6%
Building executive homes	12.5%

4.1 Building affordable housing to rent or via shared ownership/shared equity was by far the highest priority with more than 50% of responses. Open market housing was supported by only half as many responses.

4.2 The low support for executive homes may in part be a reflection of the number of smaller organisations responding. However, 70.4% of responses (not shown) regarded it as a low priority. This was the largest response to Question 5.

4.3 Of the 40% who regarded Key worker housing as a high priority, by far the largest group, 43% were located in the Sevenoaks and Surrounds area.

4.4 The free text qualitative answers emphasises the concerns about the impact lack of affordable housing and the right sizes of housing was having on employment and the community. The comments included:

- A need to build multi-generational homes e.g. with annexes. A number of responses commented on lack of downsizing provision.
- Overseas workers renting expensive shared houses and living in cramped conditions
- Office with flats over schemes to create some decent office space
- Mid-size family homes - £500k-£1m are in huge demand with no supply.
- Shared ownership or affordable housing in the area still requires £40-60k salaries

Q7 Which of the following, if any, do you see as barriers or opportunities to business investment; development and expansion?

96 Responses	Net Score	1. Barrier	2. Opportunity
Travel to work times for workers	-28.6%	51.6%	23.1%
Suitable housing for workforce	-26.1%	51.1%	25.0%
Availability of workforce	-19.4%	43.0%	23.7%
Staff turnover	-6.9%	25.3%	18.4%
Location of workforce	-5.6%	34.4%	28.9%
Skills of the accessible workforce	1.1%	29.3%	30.4%

4.5 Lack of suitable housing was cited as (marginally) the second highest barrier to business development and the second highest net score of opportunity over barrier.

Q8 Is there an adequate provision of housing across the District of Sevenoaks for your employees or potential employees?

4.6 Consistent with question 5, 43% of organisations did not agree there was an adequate provision of housing. 13% did agree. The qualitative comments emphasised:

- The lack of affordable housing for their staff
- Some very extensive commutes e.g. from Croydon, East Kent and Medway
- The lack of public transport

Q9 Is existing housing located in the right areas?

57 Responses	
Yes - in the main	17.5%
No - not really	52.6%
Not applicable	19.3%
Any additional comment	10.5%

4.7 In a limited response of 57, most felt that housing was not really located in the right areas. 40% of these were located in Sevenoaks & Surrounds. Long commutes were mentioned in the qualitative responses.

Q10 Are the housing conditions and quality standards in the Sevenoaks District Council area adequate to meet the needs of your employees and potential employees?

99 Responses	
Yes	21.0%
No	14.0%
Don't know/Not sure	59.0%
Other	6.0%

4.8 Most were unsure about the quality and condition of the housing. Of the 14% who disagreed, just over a third were from Sevenoaks & Surrounds and a third were from the South of the district. The other main response referred to social housing being developed well.

4.9 The qualitative responses included the following issues:

- Housing developments and existing stock are geared towards the lower end of the market in the North East of the District, but to attract/keep key workers we need higher quality developments promoted.
- It does not attract new people to the area as there is stigma attached to certain areas and anti-social behaviour in those areas leads to a high staff turnover.
- For young, up and coming employees they have either to rent sub-standard properties or move away and commute back.

Housing needs – types

Q12 Do you think there is enough of the following types of housing for RENT in the Sevenoaks District Council area (and in the neighbouring authorities where some employees may live)?

99 Responses	Net score	1. Yes - enough	2. No - not enough
Homes specifically for young people setting up their 1st home	71.3%	3.2%	74.5%
Council or housing association	32.7%	14.3%	46.9%
Homes to rent (furnished)	16.1%	15.1%	31.2%
Market rent (also known as private rent)	16.0%	23.4%	39.4%
Homes to rent (unfurnished)	15.1%	19.4%	34.4%
Executive rent	-24.5%	36.2%	11.7%

4.10 There was very strong support for the view that was insufficient homes for younger people. This had more than twice the net score of the next highest response which related to a shortage of council or housing association housing.

4.11 There was no significant evidence that there was a higher shortfall in furnished or unfurnished housing for rent.

Q13 Do you think there is enough of the following types of housing for SALE in the Sevenoaks District Council area (and in the neighbouring authorities where some employees may live)?

94 Responses	Net score	1. Yes - enough	2. No - not enough
Starter Homes	65.6%	4.4%	70.0%
Homes targeted for key workers	59.8%	3.4%	63.2%
Shared ownership (part rent/part sale)	49.5%	6.6%	56.0%
Help to Buy with an equity loan	44.6%	7.6%	52.2%
Conventional homes for sale	-3.4%	39.3%	36.0%
Executive homes	-50.0%	60.2%	10.2%

4.12 Strongest agreement was there are shortfalls in Starter Homes, homes for key workers and affordable homes (shared ownership and Help to Buy). There is least support for executive homes and conventional market sales.

Q14 Do you think there is enough of the following types of housing in the Sevenoaks District Council area (and in the neighbouring authorities where some employees may live)?

97 Responses	Net score	1. Yes - enough	2. No - not enough
Terraced	36.2%	14.9%	51.1%
Semi-detached	15.6%	26.0%	41.7%
Flats	13.5%	27.1%	40.6%
Bungalows	11.7%	23.4%	35.1%
Detached	-28.4%	48.4%	20.0%

4.13 The highest net score was for a shortfall was terraced accommodation. 40% of those with this response were in Sevenoaks & Surrounds and a further 23% were in the South around Edenbridge.

4.14 The net score for terraced housing was more than twice as high as for semi-detached housing. There was a strong net support for the view that there was sufficient detached housing.

Q15 Do you think there is enough housing for the following sorts of household in the Sevenoaks District Council area (and in the neighbouring authorities where some employees may live)?

96 Responses	Net score	1. Yes - enough	2. No - not enough
Couples or small families	61.7%	9.6%	71.3%
Single people	54.7%	9.5%	64.2%
Graduates	47.4%	6.3%	53.7%
Housing for families with school age children	29.8%	22.3%	52.1%
Housing for retired households	6.3%	30.9%	37.2%
Older adults who have not retired	-10.6%	38.3%	27.7%

4.15 Consistent with the weight of previous answers, 62% of responses consider there needs to be more housing for couples or small families. This was followed closely by single people and to a lesser extent graduates. 40% of the graduate shortfall answers came from organisations in the education, service industries and manufacturing sectors.

4.16 Housing for retired households had relatively low net score of plus 6.3%. However, the responses were polarised and over 37% felt there should be more housing for this group, whilst almost 31% felt there was enough housing already. It is probable that the perception of need is influenced by wider factors, such as age of the respondent. A number of individuals have also made reference to the need for downsizing accommodation.

Relating employees to their housing locations

Q16 From what you know – can you tell us roughly what proportion of your workforce live locally (In the Sevenoaks District Council area) and how many live in neighbouring areas or further afield?

99 Responses	
All staff live locally in the Sevenoaks District area	11.1%
Over three quarters live locally in the Sevenoaks District area	12.1%
Between a half and three quarters live locally in the Sevenoaks District area	17.2%
Under a half to a quarter live locally in the Sevenoaks District area	15.2%
Less than a quarter live locally in the Sevenoaks District area	22.2%
No one lives locally in the Sevenoaks District area	13.1%
Not sure/Don't Know	1.0%

Q17 Due to the nature of your business, do employees have to live close to their place of work?

100 Responses	
Yes	32.0%
No	63.0%
Not sure/Don't know	5.0%

4.17 A third of organisations needed their employees to live locally, almost half are accounted for by leisure & tourism, retail and manufacturing. These groups tend to have lower paid employees.

Q18 How close to their work do they need to live?

32 Responses	
Within sight/sound	0.0%
Within 15 minutes travel time	12.5%
15 to 30 minutes travel time	75.0%
Over 30 minutes travel time	12.5%

4.18 For those who need to live close to work, only 1 in 8 needs to live within 15 minutes. Three quarters need to live between 15 and 30 minutes travel time. Given the relatively small distances within the District, this suggests that the concerns may be related to congestion and poor transport links.

4.19 The qualitative comments focus on cost of commuting by public transport and the desirability for workforce to be agile to take advantage of opportunities or respond to service needs. One farming comment referred to the need to respond quickly to weather and security issues.

Q20 Thinking in terms of locational factors for your employees are there any places/towns/villages where you would like to see more housing being built/developed? Please tell us where and why you think this needed?

4.20 Of the thirty useable responses, four were non-specific. Three suggested development in villages. One in town centres (for graduates). Three indicated they were not looking for more housebuilding objecting to the prospect of a new town or greenbelt development. 89% of preferences are for the South, Upper Darent Corridor, Sevenoaks and surrounds and the North East, in broadly equal quarters.

26 Responses	
South – Edenbridge, Hever, Cowden, Chiddingstone, Penshurst, Leigh	26.9%
Upper Darent Corridor – Westerham, Brasted, Sundridge, Chevening	23.1%
North East – Hartley, Fawkham, W. Kingsdown, Horton Kirby & S. Darenth, Ash-cum-Ridley	19.2%
Sevenoaks & Surrounds – Seal, Riverhead, Dunton Green, Sevenoaks, Sevenoaks Weald	19.2%
Darent Valley – Eynsford, Farningham, Otford, Shoreham, Kemsing	7.7%
North West – Hextable, Swanley, Crockenhill, Badgers Mount, Halstead, Knockholt	3.8%

4.21 The qualitative answers to the question asking for other housing issues included:

- The need for more affordable housing is repeated most often
- “Our elderly customers all want to downsize from their massive houses. They would love a small bungalow with 4 large rooms. A small garden and parking for carers and family. Most are trapped in their homes with no handy men no maintenance.”
- Additional housing for young teachers is cited as being important for retention
- “An increase in sustainable small (1,2,3 bedroom) dwellings to provide opportunity for younger (and older) house buyers / house renting.”
- A concern that quality commercial land is unused because the owners expect to win residential zoning.
- A concern that mid-market housing (£500k- £1million) is not coming through the planning system
- One response calls for more rural housing and another calls for better broadband.

Issues that impact on the economy and organisations

Q22 Thinking about the local economy, to what extent, if at all, do you feel that the following have a negative impact on your local economy? (Rate 1-5 with 4-5 being high impact/2-3 some impact and 1 no impact)?

95 Responses	1. No impact	2.	3.	4.	5. Highest impact
Lack of affordable housing in the local area	2.2%	4.4%	13.2%	16.5%	63.7%
Lack of transport links in the local area	6.5%	20.7%	21.7%	21.7%	29.4%
High bus or train travel costs	8.0%	11.4%	26.1%	27.3%	27.3%
Lack of suitably skilled workers for local businesses	4.5%	17.0%	30.7%	27.3%	20.5%
High motoring costs	10.1%	20.2%	29.2%	23.6%	16.9%
Lack of safe cycling routes	25.6%	22.1%	19.8%	16.3%	16.3%

4.22 ***For impact on the local economy***, the lack of affordable housing is by far the highest impact concern of organisations with 64% indicating that it has the highest impact and a further 17% stating it has the next highest level of impact.

4.23 *It should be noted that there is likely to be some selection bias in this, as the completers of the survey are individuals who are interested enough to complete a housing survey.*

Q27 To what extent, if at all, do you feel that each of the following have a negative impact on your ability to recruit and retain staff (Rate 1-5 with 4-5 being high impact/2-3 some impact and 1 no impact)?

84 Responses	1. No impact	2.	3.	4.	5. Highest impact
Lack of housing that people can afford in the local area	16.0%	6.2%	9.9%	28.4%	39.5%
Lack of transport links in the local area	21.7%	10.8%	25.3%	15.7%	26.5%
Lengthy commute times	20.7%	13.4%	29.3%	17.1%	19.5%
High bus or train costs	25.0%	8.8%	23.8%	23.8%	18.8%
Lack of suitably skilled workers for local businesses	14.3%	15.6%	26.0%	26.0%	18.2%
High motoring costs	22.2%	12.3%	33.3%	14.8%	17.3%
Lack of local amenities (e.g. shops, hospitals, leisure facilities)	38.3%	28.4%	18.5%	7.4%	7.4%
Lack of environmentally friendly housing	45.5%	27.3%	19.5%	2.6%	5.2%
Lack of safe cycling	41.0%	25.6%	16.7%	12.8%	3.8%

4.24 The impact ***on the organisations themselves*** of the lack of affordable housing is down to 40%, but still by far the most important factor. Transport costs and times are other middle ranking concerns. However, high motoring costs are actually on balance less an impact.

Q24 Now thinking about your organisation specifically, do you feel that your organisation has any difficulty caused by housing factors in the past two years (i) recruiting new staff or (ii) retaining staff

98 Responses	Recruiting new staff	Retaining staff	Not applicable
Difficulties	40.8%	13.3%	27.6%
No Difficulties	8.2%	14.3%	35.7%
Don't know	6.1%	3.1%	31.6%

Percentages are from 98 responses

4.25 41% of organisations reported difficulties in recruiting staff due to housing factors in the past two years. 13% also reported difficulties with retaining staff. However, this figure was slightly smaller than those reporting no difficulties over retention.

Q25 Which types of staff, if any, do you have difficulty recruiting or retaining due to housing factors/issues?

74 Responses	
Skilled or technicians	47.3%
Semi-skilled	40.5%
Routine or low skilled/unskilled	35.1%
Graduates	24.3%
Other professional staff	24.3%
Temporary staff	21.6%
Executive	4.1%
Farm workers	4.1%

4.26 From the table on the previous page, it can be seen that skilled and semi-skilled staff were most cited as posing the greatest problem. Lower paid professions were mentioned as encountering housing problems. In the free text comments, farm workers were reported as a housing related recruitment challenge and similarly care staff were mentioned as a challenge.

Q26 What measures, if any, has your organization used to help in recruiting/ retaining staff?

68 Responses	
Pay increases	51.5%
Help with commuting to work	19.1%
Help with moving in costs	11.8%
Providing accommodation tied to posts	10.3%
Optional tenancy of the organisation's property	7.4%
Help with deposits	5.9%
Decoration allowance	0.0%

4.27 For organisations responding to housing related recruitment or retention problems additional pay is by far the most popular response. Obviously, there are some areas of the public sector or organisations with national pay determination where this may not be an option.

Q31 Now thinking about housing that employees can afford, to what extent do you agree or disagree that the cost of buying a home in the local area is a problem?

95 Responses	
Strongly agree	67.4%
Tend to agree	21.1%
Tend to disagree	1.1%
Strongly disagree	2.1%
Don't know	8.4%

4.28 The cost of buying a home is regarded as a problem for employees by over 88% of organisations.

Q32 If more housing that people can afford were to be built in your local area, which of the following effects, if any, do you believe it would have?

91 Responses	
Stimulating the local economy	63.7%
Improving staff recruitment/retention	59.3%
Bringing more business to the local area	48.4%
Bringing more customers to the local area	47.3%
Other (please specify)	9.9%

4.29 Nearly two thirds of respondents to this question thought that building new affordable homes would have a positive effect on the local economy. Over 59% thought it would enhance recruitment and retention.

4.30 The free text other category largely consisted of comments that more housing would increase congestion and bring in “a lower class of person”.

Q33 Which of the following, if any, have happened in your company in the last year?

92 Responses	
Employees commuting in to work because they cannot afford to live in the local area	54.3%
None of the above	39.1%
Employees relocating away from your local areas as the cost of buying a home in your local area is too high	29.3%
New recruits deciding not to join due to high housing costs	23.9%
Having to pay travel expenses for your employees to travel into work (e.g. fuel or a company car)	17.4%
Having to pay more than usual relocation fees to encourage employees to move to your local area	2.2%

4.31 The issue of affordable housing is having a current impact. Over half the organisations had employees who had to commute in because they could not afford to live in the district. Another 29% of responses suggest employees are relocating away from the district. Almost a quarter report new recruits not joining because of high housing costs.

Q34 Which one of those, if any, has had a significant impact on your company's bottom line in the last year ?

88 Responses	
Failure to attract suitable recruits due to high housing costs	18.2%
Employees commuting in to work because they cannot afford to live in the local area	14.8%
Having to pay travel expenses for your employees to travel into work (e.g. fuel or a company car)	11.4%
Employees relocating away from your local areas as the cost of buying a home in your local area is too high	3.4%
Having to pay more than usual relocation fees to encourage employees to move to your local area	1.1%
None of the above	43.2%

4.32 Over 43% of responses indicated that the housing situation had not impacted on the organisations' bottom line in the past year. However, 47 organisations did cite impacts, particularly in terms of recruitment costs.

Responsibility for addressing the housing challenges

Q37 Which of the following groups do you feel is most responsible for solving the shortage of housing that people can afford in your local area ?

95 Responses	
All of the above	41.1%
Local Council	31.6%
Central Government	11.6%
Don't know	6.3%
Housing Associations	4.2%
None of the above	3.2%
Private construction companies	1.1%

4.33 Whilst 32% cite the District Council as responsible for solving the housing shortage, over 41% believe this is the responsibility of all aspects of the State/social landlords. Interestingly, only 1.1% felt this was an issue for private developers.

5. Other non-housing issues

Q28 Are there any features in Sevenoaks District which help you to attract/retain staff ?

90 Responses	
Yes	21.1%
No	37.8%

5.1 This did not suggest that Sevenoaks offered pull factors for organisations seeking to recruit staff. However, the positive qualitative responses included:

- Generally people find the town and district pleasant to live and work in.
- The environment is vast and with so much green space, older unique shops, makes for a happier environment to work in and around. The natural environment often helps with recruiting.
- It's a lovely part of the country, safe and welcoming with a high standard of living
- Parking, close proximity to major road networks, attractive rural surroundings
- The main features which help us to attract staff are the relatively good transport links (M25 J3, rail links to London)
- Sevenoaks Town is historic with amenities and interesting places to visit.

Q30 And what else do you feel would have a positive impact on your ability to recruit or retain staff?

5.2 Excluding answers already given on housing

- Cheaper all day parking in Sevenoaks
- Better transport routes/links, cheaper fares
- More land for office development

Q39 Do you think your business locally will be more or less prosperous post-Brexit?

More prosperous	Less prosperous	No difference	Don't know/can't tell
10	21	15	19
15.4%	32.3%	23.1%	29.2%

5.3 Only 65 responded to this question, which is not surprising due to the overall uncertainty surrounding Brexit. Just under a third thought their organisations would be less prosperous after Brexit.

5.4 When disaggregated, the responses are not robust enough to draw definitive conclusions. However, the "More prosperous" responders were largely in manufacturing sector and the "Less prosperous" group were more likely to be in the service industry, public or voluntary sectors. In terms of reasons for their response, many were hoping for the best, but several in the "More prosperous" group were suggesting that the adverse impact on the currency would assist their businesses.

Q41 Excluding seasonal differences, how have the last six months compared to the previous six months in terms of ...?

84 Responses	Net score	1. Better	2. Worse
Sales	14.3%	31.2%	16.9%
Orders	15.9%	29.0%	13.0%
Employment	-7.9%	14.5%	22.4%
Cash flow	-9.5%	18.9%	28.4%

5.5 There is a paradox in the disaggregated views on business confidence. Sales and orders are up for just below a third of organisations, yet employment and cash flows are regarded as worse for about a quarter of responses with slightly negative net scores.

6. Conclusions and recommendations

Overall conclusions

6.1 The survey confirms that:

- There is a clear perception that the lack of affordable housing is an important challenge for both local organisations and the wider local economy.
- Respondents considered there was a shortfall of all types of housing (except Executive Homes in the North East). Terraced homes were perceived as a particular gap.
- The main impact is on recruitment of staff, rather than their retention.
- Skilled and semi-skilled employees are the principal groups experiencing problems, with farm workers and care workers also being mentioned
- The affordable housing shortfall is regarded as a problem that the Council and other parts of the public sector should resolve
- Homes for young people were considered the priority, followed by homes for key workers.
- Affordable homes for rent and sale were considered the solution, rather than market housing.
- Downsizing was mentioned as possibly helping with the redistribution of housing to families.
- Congestion and travelling within the district is also regarded as an important and often related problem.
- There is a small minority who do not see building new homes as desirable and are concerned about development of the green belt.

Recommendations

6.2 The following are recommended

- The development of affordable housing for younger people and key workers, to give the District’s business an edge.
- The use of downsizing opportunities to free up family housing for local workers.
- Designing specialist housing solutions in conjunction with key sectors e.g. offices and retail outlets with homes above, education (homes built within the school grounds) and agriculture (tied accommodation for farm workers and converting underused and disused farm buildings into affordable homes for local workers), could be explored.
- If further detailed information is required, it is recommended that telephone interviews or focus groups be held with umbrella bodies, such as the Chambers of Commerce, the NFU and Kent County Council Education/Academies.
- These recommendations should be reviewed alongside the residents’ survey in the Autumn to identify commonalities of concerns and responses

Appendix 1: Completions by category

Description	No. of Orgs	Sum of Nat. Emp-loyees	Description	No. of Orgs	Sum of Nat. Emp-loyees
Home Care & Help Services	2	8798	Public Houses	1	9
Representative Office	1	5846	Printers General	2	8
Hospitals	1	4488	Educational Supplies	1	7
Estate Agents	1	3582	Driving Schools	1	6
Dentists	1	2193	Garage Related Services	1	6
Residential Care Homes	1	1525	Nurserymen	1	6
Forestry Advisers	1	303	Pharmaceutical Wholesalers	1	6
Housing Associations etc.	1	250	Abrasive Products producer	1	5
Schools (Special)	2	230	Architects	1	5
Counselling & Advice Service	1	181	Couriers	1	5
Primary & Junior Schools LA	5	170	Fire Protection Consultants	1	5
Garden Centres	1	130	Frozen Foods (Wholesale)	1	5
Quarries	1	102	Coffee Shops	1	4
Building Contractors	3	85	Disability Equip. Suppliers	1	4
Nursing Homes	1	80	Industrial Units	1	4
Coach and Bus Hire	1	75	Joinery and Carpentry	1	4
Design Consultants	1	71	Lifts (Maintenance & Repair)	1	4
Leisure Centres	1	50	Office Rental	1	4
Patent Agents	1	50	Accounting Activities	1	3
Stationery Manufacturers of	1	30	Dental Technicians	1	3
Conference Centres	1	26	Gardening Services	1	3
Property Developers	2	23	Web Site Design & Devel.	1	3
Local Government	2	22	Clinics Private	1	2
Cinemas	1	21	E-commerce	1	2
Architectural Services	1	20	Electricians	1	2
Design Engineers	1	20	Groundwork Contractors	1	2
Doctors	1	20	Lab. Equipment Supply etc.	1	2
Stone Merchants	1	20	Playground Equipment	1	2
Fencing Contractors	1	18	Cake Makers	1	1
Letting Agents	1	17	Catering Equipment (Hire)	1	1
Central Government	1	15	Chauffeur Driven Car Hire	1	1
Health Clubs	1	15	Recruitment Consultants	1	1
Plant and Tool Hire	1	15	Farming (Mixed)	1	1
Timber Merchants	1	14	Guest Houses	1	1
Hairdressers (Unisex)	2	13	Health Insurance Services	1	1
IT Consultants	2	13	Theatrical Presentation Cos	1	1
Brewers	1	12	Travel Agency Activities	1	1
Import and Export Agents	1	10			
Places of Interest	1	10			
Precision Engineers	1	10			
Financial Services	1	9			