**Medway Council**

# Employment Land & Accommodation Study 2007

**Medway Council**

## Employment Land & Accommodation Study 2007

## Volume 1:
## Introduction and Executive Summary

## Introduction

The Medway Employment Land Study 2007 is an innovative study produced through collaborative research involving the University of Greenwich, Sue Millar Associates and Medway Council staff designed to create a robust baseline study of current employment land use and accommodation together with the views of local businesses in Medway.

The Study was designed so that each element of the study, whilst being undertaken separately, was configured to cross-reference other elements. This triangulation ensured that conclusions drawn from any element had supporting findings from other elements. A significant level of comparability was noted in the findings from each element of this Study.

This Study will support and inform:

- the Local Development Framework (LDF)
- economic development strategies/ policy
- regeneration strategy

The survey work for the Study was undertaken during 2006.

This is a large Study and has therefore been divided into volumes:

| | |
|---|---|
| Volume 1 | Introduction and Executive Summary |
| Volume 2 | Land Use Survey |
| Volume 2a | Sector Groups |
| Volume 3 | Employment Site Audit, main text |
| Volume 3a | Employment Site Audit, Appendices |
| Volume 4 | Current Demand for Land and Accommodation, main text |
| Volume 4a | Current Demand for Land and Accommodation, Appendix A, results of the Face to Face interviews |
| Volume 4b | Current Demand for Land and Accommodation, Appendix B, feedback from the telephone survey interviews |
| Volume 5 | Future Demand for Land & Accommodation |
| Volume 6 | Conclusions |

## Scope

Employment land reviews are a key component of the evidence base for policy and proposals in Local Development Frameworks (LDFs) and are intended to enable LDFs to deliver an appropriate local balance between competing uses for land, particularly housing and employment. Government's view is that the market alone will not necessarily deliver that balance, particularly where land values for housing are substantially higher than those achievable for employment uses.

This Study is a technical research report and follows the guidance contained in the Department of Communities and Local Government's (formerly Office of the Deputy Prime Minister) Employment Land Reviews Guidance Note. It emphasises that the outcome of the Reviews should provide robust data.

The guidance breaks down the process into three stages:

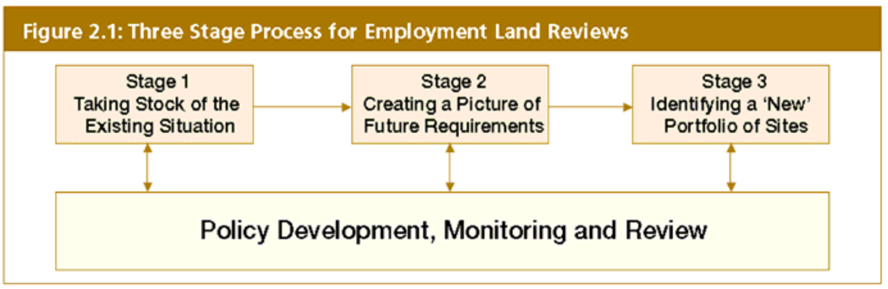


Figure 2.1: Three Stage Process for Employment Land Reviews

*Source: Employment Land Reviews: Guidance Note, ODPM (now DCLG)*

Government seeks to ensure that the preparation process of all Development Plan Documents should include consideration of all the alternative options derived from the development of the evidence base, the authority's awareness of local issues, the views of stakeholders and community involvement.

This Study undertakes part of the full review of employment land envisaged by government in its guidance. It covers all of Stage 1 and the business view element of the future requirements for Stage 2. The remainder of stage 2 will be completed as part of an analysis of the Study and the assessment of future needs for Medway to be conducted as part of the production of a Commercial Development Plan Document.

Thus this Study covers the 'factual' elements of the guidance. Many options for growth and policy implications can be tested against this study to achieve an optimum solution for Medway's future growth.

It is anticipated that the Study will also provide a foundation for multiple future analyses.

**Medway Council**
**Employment Land & Accommodation Study 2007**

# Executive Summary

| |
|---|
| ***'****Medway is a gem but how do you unlock it?'* <br> *Quote from an interviewee* |

***The significance of employment land in Medway in the context of sustainable development policies: an exceptional location with distinctive opportunities for economic growth***

1. Geographically, historically and economically different, this differentiation offers unparalleled opportunities for Medway to implement sustainable development initiatives responding to national, regional and local policies.

2. The *South East Plan* identifies Medway as one of the main economic locations to be promoted in the context of the development of the Thames Gateway Growth area - the largest regeneration project of its type in Europe.

3. The Kent Thames Gateway Spatial Strategy highlights the urgency of issues relating to employment land. It makes connections between the quantity and ready availability of employment land and the ability of local authorities to boost the local economy.

4. The Regional Economic Strategy 2006 also recognises the importance of employment land in order to improve the sustainability of communities, reduce congestion and stem the emergence of dormitory towns and villages.

5. Around 90,000 people are currently employed in Medway, although Medway exports 41% of its workforce to the London and South East economies on a daily basis, with less than 20,000 people commuting into Medway.

6. Medway's Gross Value Added (GVA) *per capita* of population is very low in national terms at 66% of the average for England both as a consequence of workers commuting out of Medway and a predominance of low wages.

7. Medway is considered capable of sustaining economic growth rates of twice the national average (achieved by Brighton & Hove in recent years) and has set an ambitious target of 40,000 jobs reflecting both renewed confidence in the regeneration process and a need to increase the jobs to workers ratio to avoid encouraging commuting.

8. However, the potential shortage of suitable employment land particularly within the urban core is noted in the Medway Economic Development Statement 2006 as a serious block to job creation.

***Changing business expectations: the demand for new prestige employment sites and an improved image.***

9. A shift in the expectations of Medway businesses is taking place. An improved professional profile and external facade is required in order to expand market share, increase competitiveness and recruit skilled employees.

10. The business community considers the mainly negative perceptions of Medway, poor physical image, unfocussed economic profile and negative branding, have an impact on business development. They are viewed as obstacles to be overcome.

11. In general successful high value, high prestige businesses prefer river frontage premises with a landscaped setting, cafes and restaurants and are prepared to pay for the privilege. Even for engineering and manufacturing companies there is an increasing emphasis on a stylish external profile in an attractive setting.

12. Small and Medium-sized Enterprises that grow to be successful high status businesses consider moving out because at present in Medway there is no suitable widely available space matching their needs.

13. Companies based in the Historic Dockyard or Chatham Maritime experience different challenges. The immediate setting is attractive but suitable grow on space is non-existent.

14. Demand for current and future accommodation represents a more dynamic business model that currently exists in Medway. The requirements of businesses include:
    a. small unit sizes;
    b. high profile offices in prime locations;
    c. affordable modern multi-purpose flexible workspace (for office, light industry or other business uses);
    d. quality affordable workspace for motor trades and engineering;
    e. shorter lease structures;
    f. serviced office accommodation;
    g. additional freehold premises;
    h. parking

15. The qualitative evidence from interviewees suggests that they consider there is a lack of realistic planning policies to meet the needs of Medway businesses and inward investment in the short term.

16. The lack of a comprehensive vision for future employment land development in the urban centre and lack of investment in meeting current needs of businesses on many sites has created a risk of decline relative to competitors and may be leading to business stasis.

17. The 2006 Economic Development Statement highlights that although Medway has had success in recent years in growing business, an increase of 25% since 2005, performance has fallen back against other places in the region.

***Key supporting evidence from the Medway Employment Land Audit and Accommodation Survey***

18. The Employment Land Audit estimates there is some 1,400,000 sq.m. of floorspace on industrial estates in Medway. Overall, including non-estate units, there is some 1,535,000 sq.m. of floorspace

19. The Accommodation Survey shows an overall growth of 9% between 1999 and 2006 corresponding to the Medway Economic Statement's finding of an increase in Medway's business stock to 13,000 businesses since 2000.

20. Vacancy rates on non-estate employment sites are extremely low. This is potentially as a result of the differential in land values between residential and commercial uses. However, vacancy rates on estates are considered to be reasonable at 8.9%, which allows for a 'healthy churn'.

21. Most employment sites in the urban area are fully developed and the options for expanding employment land within the urban area appear to be limited.

22. Many sites lack modern facilities – cafes, restaurants, shops, leisure or other communal facilities.

23. Many sites are visually unattractive and unwelcoming with issues of access and traffic congestion. Roadside parking and the unloading of lorries were noted as causing further obstruction.

24. A decline in the amount of manufacturing (B2) floorspace was recorded. This has been matched by an increase in warehouse (B8) floorspace.

25. Many properties are considered to lack the flexibility needed to ensure businesses are able to adapt to meet anticipated future needs.

26. Some companies may be located in their present position because rent is at an appropriate or attractive level. It was noticeable that at some sites companies were operating nationally from modest premises.

***An enhanced role for Medway's business community to support Medway Council to maximise opportunities for regeneration and sustainable development***

27. The business view is that Medway has the potential to become an increasingly thriving, successful and sustainable business community building on its past glories and present strengths.

28. The employment land and accommodation currently in use in Medway is not seen as ideal although the perception (backed by the evidence) is of a high level of business activity and accompanying traffic congestion.

29. Medway business leaders believe they have a significant role to play in the regeneration of Medway. A clear coherent strategic vision should be developed and realised with the business community, as well as the wider community.

30. They would support Medway Council in developing 'A bigger bolder approach' to employment land when planning for business development with reference to successful European practice.

31. Medway businesses expect regeneration to provide better shops, good cafes and restaurants, hotels, high quality, high profile office/ small business accommodation in quality locations (park or riverside setting) and affordable workspace in more discreet locations.

32. Dedicated employment land for advanced manufacturing, traditional engineering and distribution companies; and riverside wharfage sites for recycling, ship repair and imports by sea are also seen by some of the business community as essential for sustainable business development.

33. The majority of businesses participating in the survey put easy access to transport links as a priority. Improvements in the road infrastructure and public transport, bus and rail, were considered important and respondents often remarked on the complete absence of an effective public transport system.

34. Going green is not seen as a commercial priority. Green issues do not stretch to individual business decisions where car use and car parking is concerned. Alternative public transport is currently seen as unavailable and may account for this extreme position. River transport, however, is mentioned by some as a potential lost opportunity for 'greening' Medway.

### *A changing work dynamic and the changing nature of business activity in Medway: 'locational loyalty' – a question of choice*

35. Medway currently has a successful economy. On-going incremental growth is thought to be one reason why demand will exceed supply to meet future business needs. Almost 50% of Medway businesses estimate they will be looking for additional accommodation over the next decade.

36. Companies are increasingly mobile and will go where they are welcomed and supported.

37. Important influences on changing patterns of 'locational loyalty' have been identified.
    a. the increasing mobility of companies with global supply chains
    b. the rapid changes in communications technologies
    c. increased demand for flexible working patterns

38. Future work and employment is also likely to be characterised by: individuality; mobility; personal choice; personal identity; independence; anxiety and risk taking.

39. A shortage of skilled and semi-skilled workers is seen as one of the major threats to the future of Medway-based businesses.

40. The trend of the growth in services in Britain is expected to continue over the next decade particularly in the area of business services a sub-sector where Medway has already seen significant growth. However increased competition for market share is anticipated from the rapidly growing economies of China and India.

41. In some Medway manufacturing and distribution companies there is a shift from a concentration of staff 'on the shop floor' to office work at the interface with the customer. After-sales service is seen as an increasing necessity.

## Conclusions

42. Companies need to adapt quickly to changing circumstances to maintain profit margins and stay competitive. In particular businesses are required to expand or contract at accelerated rates to remain viable, far more so than in the 20$^{th}$ century.

43. Land, accommodation and location are required to work to their maximum advantage. A considerable amount of the manufacturing process is now done overseas, mainly in the Far East, and assembly is carried out on premises in Medway.

44. Even though new development has occurred there is a perception of delays in addressing the development of new employment land or improving existing sites within the business community. This lack of action is considered to have had a demonstrable impact on the negative perceptions of Medway as a business location.

45. Medway business leaders consider planning for employment land and accommodation in isolation from reference to the future needs of present businesses is a potential threat to their on-going successful development.

46. In short there is currently a cycle of planning uncertainty in Medway resulting in an impasse in business decision-making.

47. Medway has a structural problem in terms of the immediate and short-term availability of sufficient urban employment land. Some of the accommodation available in Medway is old and lacks the flexibility required or has no moving on space. As a result many businesses are forced to move out.

48. The overall the image of Medway as a place to work requires improvement. Specific improvements need to be made to the business and industrial sites: many are unwelcoming and cluttered. Businesses wish to present a public face that is presentable even the 'dirty trades'.

## The Issues

49. Medway Council will have difficult choices to make in conflicting planning time frames, adapting and adjusting decision-making frequently, to meet new and often competing pressures for land use.

50. Strong leadership and a comprehensive but focused strategic vision will be necessary if Medway is to continue successfully and prosper economically in the face of global, regional and local competition.

51. A key issue that emerges is the need to negotiate a fine line between the two objectives of inward investment and internal business growth in order that they both remain a catalyst for wealth creation.

52. Medway has the potential to be a major player in 'smart growth' due to its large resident workforce and low cost base. However, smart growth may not provide sufficient growth space for companies started here to grow on.

53. There is a need to support the development of existing Medway businesses by providing 'grow on' space to negate the current cycle of businesses starting in Medway but then moving out.

54. The qualitative evidence from interviewees suggests that they consider there is a lack of realistic planning policies to meet the needs of Medway businesses and inward investment in the short term.

55. The delivery of a 'sustainable spatial vision' through the Local Development Framework requires a sequence of sophisticated on-going responses to meeting current and future demands for employment land, maximise its capabilities and sustain its target for economic growth rates.

56. Planning for the right type of accommodation in the right place with the right cost structures will be necessary if Medway is to continue successfully and flourish economically.

57. In parallel, there is a need for the commercial sector to re-consider rent and lease structures to allow greater flexibility. Many companies are also looking more towards freehold ownership of premises.

58. The potential exists for conflict in mixed-use developments or where there is no buffer zone between employment land and residential areas. This conflict already exists on some sites.

59. Some unsuitable trades are located on sites near town centres. These sites have potential for higher value commercial uses but suitable space will need to be found for the displaced uses.

60. In short the challenge for Medway is making sense of the planning jigsaw and to enable delivery on the current demand whilst working to develop future provision for existing businesses and inward investment through the Local Development Framework documents.

## Recommendations for future work

61. This study has highlighted the need for future research and potential new approaches to managing employment growth in Medway including a full assessment of the extent, or otherwise, of a 'healthy churn' of employment land and accommodation in Medway. These include:

    a. 'A bigger bolder approach' to employment land when planning for business development;

    b. A review as part of the Commercial DPD, of;
        i. where new employment land might be located to meet the requirement for the proportion of the 40,000 new jobs identified in the Economic Development Strategy.

   ii. This could including an examination of the idea of an ‘outer ring’ of business activity around the urban centre complementing the future developments at Chattenden, Kingsnorth and Grain.
   iii. A review of workspace locations
   iv. Exploring mechanisms for establishing specialist business clusters sited in the right location with the right accommodation, cost and legal structures.

c. Planning priority improvements to existing industrial/ business sites;

d. Investigating the potential for setting up a high level strategic economic forum involving local business leaders and key opinion formers;

e. A shortage of grow-on space has been identified and yet there are vacancies. This may be potential issue of time-scales as well as inappropriate provision;

f. A seminar to review of the legal tenure of employment land and accommodation in Medway with a view to facilitating a more fluid and responsive business community.

Medway Council

**Employment Land & Accommodation Study 2007**

**Volume 2:**

# Land Use Survey for Medway City Council

By

## the University of Greenwich

## Introduction

For comparison purposes this Accommodation Audit had to relate to the boundaries of the industrial estates as existing in 1999. The Site Audit (Volume 3) has used a larger grouping of estates and identified areas of employment.

The survey was carried out during June to September 2006 by a team of researchers from the University of Greenwich.

The data collected for the survey was entered into (a copy of) the Medway Council Lupin database. The data was then verified and compared to the existing data entries from 1999 survey, a copy of which was provided to the Research Team by Medway Council. The outcome of the survey is shown in detail in the following pages.

## Summary


### Main Findings:

### Estates:

There has been growth (in area) across a number of estates. The exception to this is evident in some estates where there have been significant decreases caused by redevelopment. For example: Rochester Riverside, Steel Fields, Gads Hill)

There is a significant reduction in the B2 use Class on many estates. This may be due in part to the reduction in size of some estates. This reduction in the B2 use Class has been replaced by growth in the B1, B8 and Other Use Classes.

There is evidence of significant change in occupiers on many estates. For example; On Medway City Estate this change is recorded as being in the region of 40% change in occupiers. There is inconclusive data as to whether the change is due to “new” occupiers or to organisational name changes, or a combination of both.

Despite attempts to verify the rationale for the change in occupiers, the survey was unable to determine the reason for this change and whether it was indeed relocation of organisations or name changes or a combination of both, or to where an organisations relocated to if it had relocated.

There has been significant growth on Chatham Maritime Estate due to the (now complete) location of the Universities at Medway and the growth of the Retail Centre.

### Non estates:

There was no data from the previous survey from which to make any comparison.

“High Street” location comprised of what can be described as a “reasonable mix” of producer and consumer service organisations. A reasonable mix can be described as including, real estate services, financial services and recruitment / employment agencies.

“Non High Street” location indicates that B1 business office/ light industrial uses account for almost 31 thousand square metres. General industrial and storage/distribution account for nearly 13 thousand and 9 thousand square metres respectively.

# Land Use Survey for Medway City Council

## Contents and Index of tables

### *Section 1:*

### *The Survey*



### *Estate properties*



### Section 2: *Individual estates*

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| Otterham Quay Lane |
| Pier Road |
| Railway Street |
| Rochester Airport Industrial Estate |
| Rochester High Street and Bardell Terrace |
| Rochester Riverside (Castle View) |
| Second Avenue |
| Steel Fields |
| Temple Industrial Estate |
| ThamesPort (Isle of Grain) |
| Thameside Terminal |

- General comments
- Specific variables, including comparison with other estates
- Comments on size and change size
- Comments on use and change of use
- Comments on occupancy and change
- Comments on SIC classification and change
- Comments on size class of units and change

**Section 3: Non-Estate Locations**

These are considered under the same general headings as given in Section 1 above as far as possible.

**Notes:**
Throughout this report the following size classifications have been used:

large > 1000m$^2$,
medium 250-1000m$^2$,
small <250m$^2$.

The large volume of data gathered and included with this report is such that it is not possible or good practice to show all of the outcomes in a single table. Therefore, a large number of separate tables are provided to allow the reader to access the information required in a more direct manner. However, this may require some cross referencing between the tables depending on the complexity of the information required by the reader.

# Section 1: The Survey

## Summary tables
## Total survey

**Table 1:** Total areas and units surveyed and percentages for High Street, estate and non-estate properties

**Table 1a: 1999 total area and percentages**

| | Total area | Total number of units | % of total database (area) | % of total database (number of units) |
|---|---|---|---|---|
| Estate Units | 1178107 | 1671 | 96.73% | 98.76% |
| High Street | 0 | 0 | 0.00% | 0.00% |
| Non- Estate | 39886 | 21 | 3.27% | 1.24% |
| Grand Total | 1217993 | 1692 | 100.00% | 100.00% |

Notes:

No High Street data Incomplete data

**Table 1b: 2006 total area and percentages**

| | Total area | Total number of units | % of total database (area) | %of total database (number of units) |
|---|---|---|---|---|
| Estate Units | 1462518 | 1774 | 93.01% | 82.67% |
| High Street | 30966 | 214 | 1.97% | 9.97% |
| Non- Estate | 78866 | 158 | 5.02% | 7.36% |
| Grand Total | 1572350 | 2146 | 100.00% | 100.00% |

**Note:** The recorded changes in percentage total of database for High Streets and Non Estate properties reflect only the incomplete or missing data sets from the 1999 survey. The figures are not of themselves indicators of change.

**Table 2: (2a to 2d)** For total survey: total areas of use classes and percentages for High Street, estate and non-estate properties .

**Table 2a: 1999 area of use classes**

| | Total area | B1[1] | B2 | B8 | Other[2] |
|---|---|---|---|---|---|
| Estate Units | 1178107 | 283593 | 439646 | 360663 | 94205 |
| High Street | 0 | 0 | 0 | 0 | 0 |
| Non-Estate | 39886 | 25775 | 9686 | 1940 | 2485 |
| Grand Total | 1217993 | 309368 | 449332 | 362603 | 96690 |

**Table 2b: 2006 area of use classes**

| | Total area | B1 | B2 | B8 | Other |
|---|---|---|---|---|---|
| Estate Units | 1462518 | 405528 | 387920 | 467633 | 201437 |
| High Street | 30966 | 25671 | 1508 | 949 | 2838 |
| Non-Estate | 81744 | 36925 | 15890 | 9832 | 20197 |
| Grand Total | 1575228 | 468124 | 405318 | 478414 | 224472 |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

**Table 2c: 1999 use classes area percentages**

| | Total area | B1%[1] | B2% | B8% | Other%[2] |
|---|---|---|---|---|---|
| Estate Units | 1178107 | 24.07% | 37.32% | 30.61% | 8.00% |
| High Street | 0 | 0.00% | 0.00% | 0.00% | 0.00% |
| Non-Estate | 39886 | 64.62% | 24.28% | 4.86% | 6.23% |
| Grand Total | 1217993 | 24.32% | 39.57% | 28.51% | 7.60% |

**Table 2d: 2006 total area and percentages**

| | Total area | B1% | B2% | B8% | Other% |
|---|---|---|---|---|---|
| Estate Units | 1462518 | 27.73% | 26.52% | 31.97% | 13.77% |
| High Street | 30966 | 82.90% | 4.87% | 3.06% | 9.16% |
| Non-Estate | 81744 | 45.17% | 19.44% | 12.03% | 24.71% |
| Grand Total | 1575228 | 29.69% | 25.66% | 30.37% | 14.28% |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

**Estate properties**

**Table 3:** Alphabetical list showing estates by size in both 1999 and 2006

| Name of Estate | 1999 total area | 2006 total area |
|---|---|---|
| Ballard Bus Pk | 5544 | 5551 |
| Beechings Way | 33278 | 36256 |
| Bridgewood Bus Pk | 6021 | 8916 |
| Canal Road | 840 | 1186 |
| Chatham Maritime | 123301 | 254441 |
| Commercial Road | 3981 | 6243 |
| Commissioners Rd | 91563 | 92494 |
| Courtney Rd Ind Est | 86671 | 85600 |
| Cuxton Ind Est | 6180 | 6090 |
| Cuxton Road | 2395 | 1760 |
| Elm Court | 3175 | 7227 |
| Fenn Street | 2315 | 2116 |
| Formby Road | 31595 | 31795 |
| Gads Hill | 4860 | 3340 |
| Gillingham Bus Pk | 145803 | 169575 |
| Hoo Indust Est | 14935 | 16127 |
| Hopewell Drive | 12188 | 18211 |
| Isle of Grain &Thamesport | 0 | 93739 |
| Jenkins Dale | 3473 | 3920 |
| Lower Twydall Lane | 1056 | 1780 |
| Kingsnorth | 11560 | 62940 |
| Lordswood Ind Est | 32462 | 36584 |
| Medway City Estate | 184454 | 179487 |
| Medway Valley Pk | 32375 | 27190 |
| Otterham Quay Lane | - | 10500 |
| Pier Road | 1135 | 1151 |
| Railway Street | 4005 | 3696 |
| Rochester Airport Ind Estate | 101564 | 97490 |
| Rochester High Street and Bardell Terrace | 7837 | 2895 |
| Rochester Riverside | 46634 | 6517 |
| Second Ave | 22051 | 23292 |
| Steel Fields | 8045 | 6480 |
| Temple Ind Est | 146811 | 143511 |
| Thameside Terminal | 0 | 1250 |
| Min | 840 | 1151 |
| Max | 184454 | 254441 |
| Mean | 34655 | 42628 |

**Note:** The relative differences between the various estates are shown below in table 4 with comments that indicate the reasons for changes where these are available.

**Table 4:** Showing change in area of estates from 1999 to 2006. The table shows the most significant (positive) changes first.

| Name of Estate | 1999 total area | 2006 total area | % change | Comments |
|---|---|---|---|---|
| Kingsnorth | 11560 | 62940 | 444.5% | Increase may be due (in part) to recording of Power Generation activity. not collected in 1999 |
| Elm Court | 3175 | 7227 | 127.6% | Possibly due to small units being replaced by large joinery works |
| Chatham Maritime | 123301 | 254441 | 106.36% | Combination of new construction at Dockside outlet Centre, plus Historic Dockyard units |
| Lower Twydall Lane | 1056 | 1780 | 68.6% | No visible new structures evident |
| Commercial Road | 3981 | 6243 | 56.82% | Located in the heart of Strood, across the road from Morrisons |
| Hopewell Drive | 12188 | 18211 | 49.42% | Some increase in units due to subdivision. |
| Bridgewood Bus Pk | 6021 | 8916 | 48.08% | Small increase in the number of units (from 2 to 5) shows large percentage increase. |
| Canal Road | 840 | 1186 | 41.19% | Poor access, cul-de-sac |
| Gillingham Bus Pk | 145803 | 169575 | 16.30% | Good road access |
| Jenkins Dale | 3473 | 3920 | 12.87% | Poor location with difficult access |
| Lordswood Ind Est | 32462 | 36584 | 12.70% | Possibly due to good access to motorway |
| Beechings Way | 33278 | 36256 | 8.95% | In the process of being redeveloped |
| Hoo Indust Est | 14935 | 16127 | 7.98% | Lost 25% of units but marginal size increase. |
| Second Ave | 22051 | 23292 | 5.63% | Lost 40% of number of units, increase size. |
| Pier Road | 1135 | 1151 | 1.41% | Relatively stable, lost 1 unit |
| Commissioners Rd | 91563 | 92494 | 1.02% | Poor road access |
| Formby Road | 31595 | 31795 | 0.63% | Road widening and changes to the cement works |
| Ballard Bus Pk | 5544 | 5551 | 0.13% | Site restricted with access problems |
| Courtney Rd Ind Est | 86671 | 85600 | -1.24% | Demolition of large office block may have contributed to this |
| Temple Ind Est | 146811 | 143511 | -2.25% | |
| Medway City Estate | 184454 | 179487 | -2.69% | Road access problems and southern end next to the river becoming moribund |
| Rochester Airport Industrial Estate | 101564 | 97490 | -4.01% | B8 grown but B1 and B2 declined |
| Railway Street | 4005 | 3696 | (-7.72%)* | . |
| Fenn Street | 2315 | 2116 | -8.60% | Poor location with no direct access to A228, |
| Cuxton Ind Est | 6680 | 6090 | -8.83% | Access restricted |
| Medway Valley Pk | 32375 | 27190 | (-16.02%)* | Possible access problems |
| Steel Fields | 8045 | 8460 | (-19.45%)* | Estate size reduced due to housing construction. |
| Cuxton Road | 2395 | 1760 | -26.51% | Isolated with difficult access |
| Gads Hill | 4860 | 3340 | (-31.28%)* | Estate reduced in size due to construction of housing |
| Rochester High St and Bardell Terrace | 7837 | 2895 | -63.06% | This is a small enclave surrounded by roads and railway |
| Rochester Riverside | 46634 | 6517 | (-86.03%)* | Redevelopment of the site is ongoing |
| Isle of Grain & Thamesport | - | 93739 | | No 1999 data |
| Otterham Quay Lane | - | 10500 | | No 1999 data |
| Thameside terminal | - | 1250 | | No 1999 data |
| Min | 840 | 1151 | | |
| Max | 184454 | 254441 | | |
| Mean | 34665 | 42628 | | |

Fourteen estates show a significant increase (more than 5%) in the total areas available for units, while a further four other estates have shown a marginal increase in area (less than 5% increase). This is balanced by four estates showing a small decrease in area, with 9 estates showing a significant decrease in area.

* The reduction in the size of these estates is due to factors independent of the estate. For example, other development work such as housing has taken place on the (previous) footprint of the estate.

**Table 5a:** Alphabetical list of estates by Use Class and size (1999)

| Name of Estate | **1999** total area | **B1**[1] area | **B2** area | **B8** area | **Other**[2] area |
|---|---|---|---|---|---|
| Ballard Bus Pk | 5544 | 0 | 300 | 2668 | 2576 |
| Beechings Way | 33278 | 5074 | 25988 | 508 | 1708 |
| Bridgewood Bus Pk | 6021 | 5033 | 0 | 988 | 0 |
| Canal Road | 840 | 90 | 140 | 210 | 400 |
| Chatham Maritime | 123301 | 56515 | 8940 | 8265 | 49581 |
| Commercial Road | 3981 | 358 | 1618 | 1105 | 900 |
| Commissioners Rd | 91563 | 9811 | 28914 | 52463 | 375 |
| Courtney Rd Ind Est | 86671 | 1063 | 72284 | 8047 | 5277 |
| Cuxton Ind Est | 6180 | 1370 | 4340 | 470 | 0 |
| Cuxton Road | 2395 | 1330 | 665 | 400 | 0 |
| Elm Court | 3175 | 283 | 1344 | 413 | 1135 |
| Fenn Street | 2315 | 290 | 930 | 1095 | 0 |
| Formby Road | 31595 | 2350 | 25710 | 3535 | 0 |
| Gads Hill | 4860 | 215 | 4645 | 0 | 0 |
| Gillingham Bus Pk | 145803 | 35609 | 37969 | 55799 | 16426 |
| Hoo Indust Est | 14935 | 545 | 12190 | 2200 | 0 |
| Hopewell Drive | 12188 | 3389 | 6774 | 2025 | 0 |
| Isle of Grain & Thamesport | - | - | - | - | - |
| Jenkins Dale | 3473 | 1803 | 300 | 0 | 1370 |
| Lower Twydall Lane | 1056 | 658 | 165 | 166 | 67 |
| Kingsnorth | 11560 | 1260 | 5100 | 5090 | 110 |
| Lordswood Ind Est | 32462 | 9895 | 13339 | 8948 | 280 |
| Medway City Estate | 184454 | 77182 | 29734 | 71894 | 5644 |
| Medway Valley Pk | 32375 | 3095 | 11206 | 18074 | 0 |
| Otterham Quay Lane | - | - | - | - | - |
| Pier Road | 1135 | 473 | 470 | 192 | 0 |
| Railway Street | 4005 | 0 | 1706 | 2299 | 0 |
| Rochester Airport Industrial Estate | 101564 | 40102 | 53519 | 4225 | 3718 |
| Rochester High St and Bardell Terrace | 7837 | 1414 | 2284 | 2324 | 1815 |
| Rochester Riverside | 46634 | 3305 | 3642 | 39307 | 380 |
| Second Ave | 22051 | 8404 | 6072 | 6435 | 1140 |
| Steel Fields | 8045 | 630 | 7415 | 0 | 0 |
| Temple Ind Est | 146811 | 12047 | 71943 | 61518 | 1303 |
| Thameside Terminal | - | - | - | - | - |
| Min | 840 | 90 | 140 | 166 | 67 |
| Max | 184454 | 77182 | 72284 | 71894 | 49581 |
| Mean | 34650.21 | 8593.72 | 12930.76 | 10607.74 | 2770.74 |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

**Table 5b:** Alphabetical list of estates by Use Class and size (2006)

| Name of Estate | **2006** total area | **B1**[1] area | **B2** area | **B8** area | **Other**[2] area |
|---|---|---|---|---|---|
| Ballard Bus Pk | 5551 | 567 | 2120 | 150 | 2714 |
| Beechings Way | 36256 | 12603 | 15441 | 6804 | 1408 |
| Bridgewood Bus Pk | 8916 | 2516 | 0 | 6400 | 0 |
| Canal Road | 1186 | 116 | 292 | 778 | 0 |
| Chatham Maritime | 254441 | 97028 | 35261 | 22408 | 99744 |
| Commercial Road | 6243 | 1632 | 1895 | 2390 | 326 |
| Commissioners Rd | 92494 | 15319 | 31164 | 43099 | 2912 |
| Courtney Rd Ind Est | 85600 | 27510 | 32000 | 23720 | 2370 |
| Cuxton Ind Est | 6090 | 2255 | 1715 | 2120 | 0 |
| Cuxton Road | 1760 | 976 | 544 | 120 | 120 |
| Elm Court | 7227 | 1076 | 0 | 3209 | 2942 |
| Fenn Street | 2116 | 519 | 761 | 836 | 0 |
| Formby Road | 31795 | 2150 | 26110 | 3535 | 0 |
| Gads Hill | 3340 | 240 | 3100 | 0 | 0 |
| Gillingham Bus Pk | 169575 | 69871 | 21524 | 65020 | 13160 |
| Hoo Indust Est | 16127 | 4500 | 4955 | 6336 | 336 |
| Hopewell Drive | 18211 | 4395 | 6030 | 5430 | 2356 |
| Isle of Grain & Thamesport | 93739 | 810 | 56209 | 36720 | 0 |
| Jenkins Dale | 3920 | 1795 | 1075 | 680 | 370 |
| Lower Twydall Lane | 1780 | 616 | 224 | 880 | 60 |
| Kingsnorth | 62940 | 5640 | 44470 | 4303 | 8527 |
| Lordswood Ind Est | 36584 | 13258 | 11029 | 12260 | 37 |
| Medway City Estate | 179487 | 71708 | 27135 | 66811 | 13833 |
| Medway Valley Pk | 27190 | 10665 | 760 | 15765 | 0 |
| Otterham Quay Lane | 10500 | 0 | 1250 | 9250 | 0 |
| Pier Road | 1151 | 329 | 362 | 338 | 122 |
| Railway Street | 3696 | 1666 | 851 | 1005 | 174 |
| Rochester Airport Industrial Estate | 97490 | 37958 | 45611 | 8483 | 5438 |
| Rochester High St and Bardell Terrace | 2895 | 400 | 560 | 610 | 1325 |
| Rochester Riverside | 6517 | 2668 | 2106 | 1713 | 30 |
| Second Ave | 23292 | 10653 | 5373 | 7176 | 90 |
| Steel Fields | 6480 | 2240 | 4240 | 0 | 0 |
| Temple Ind Est | 143511 | 24648 | 10913 | 100042 | 7908 |
| Thameside Terminal | 1250 | 404 | 630 | 216 | 0 |
| Min | 1151 | 116 | 0 | 0 | 0 |
| Max | 254441 | 97028 | 56209 | 100042 | 99744 |
| Mean | 42627.9 | 12609.7 | 11638.5 | 13488.4 | 4891.2 |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so 1999 is not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so 1999 is not comparable to 2006

**Table 6:** Estates by change in use size 1999 - 2006

| Name of Estate | B1 | B2 | B8 | Other |
|---|---|---|---|---|
| Ballard Bus Pk | | 606.7% | -94.4% | 5.4% |
| Beechings Way | 148.4% | -40.6% | 1239.4% | -17.6% |
| Bridgewood Bus Pk | -50.0% | | 547.8% | |
| Canal Road | 28.9% | 108.6% | 270.5% | -100.0% |
| Chatham Maritime | 71.7% | 294.4% | 171.1% | 101.2% |
| Commercial Road | 355.9% | 17.1% | 116.3% | -63.8% |
| Commissioners Rd | 56.1% | 7.8% | -17.8% | 676.5% |
| Courtney Rd Ind Est | 2488.0% | -55.7% | 194.8% | -155.1% |
| Cuxton Ind Est | 64.6% | -18.2% | 351.1% | |
| Cuxton Road | -26.6% | -30.2% | -70.0% | |
| Elm Court | 280.2% | -100.0% | 677.0% | 159.2% |
| Fenn Street | 79.0% | -18.2% | -23.7% | |
| Formby Road | -8.5% | 1.6% | 0% | |
| Gads Hill | 11.6% | -33.3% | | |
| Gillingham Bus Pk | 96.2% | -43.3% | 16.5% | -19.9% |
| Hoo Indust Est | 725.7% | -59.4% | 188.0% | |
| Hopewell Drive | 29.7% | -11.0% | 168.1% | |
| Isle of Grain & Thamesport | - | - | - | - |
| Jenkins Dale | -.04% | 258.3% | 0 | -73.0% |
| Lower Twydall Lane | -6.4% | 35.8% | 430.1% | -10.4% |
| Kingsnorth | 347.6% | 772.0% | -15.5% | 7651.8% |
| Lordswood Ind Est | 34.0% | -17.3% | 37.0% | -86.8% |
| Medway City Estate | -7.1% | -8.7% | -7.1% | 145.1% |
| Medway Valley Pk | 244.6% | -93.2% | -12.8% | - |
| Otterham Quay Lane | - | - | - | - |
| Pier Road | -30.4% | -23.0% | 76.0% | - |
| Railway Street | - | -50.1% | -56.3% | - |
| Rochester Airport Industrial Estate | -5.3% | -14.8% | 100.8% | 46.3% |
| Rochester High St and Bardell Terrace | -71.7% | -75.5% | -73.8% | -27.0% |
| Rochester Riverside | -19.3% | -42.2% | -95.6% | -92.1% |
| Second Ave | 26.8% | -11.5% | 11.5% | -92.1% |
| Steel Fields | 255.6% | -42.8% | - | - |
| Temple Ind Est | 104.6% | -84.8% | -62.6% | 506.9% |
| Thameside Terminal | - | - | - | - |
| Min | -71.7% | -100% | -95.6% | -100% |
| Max | 248.0% | 720% | 129.4% | 761.0% |
| Mean | 10.1% | 40.5% | 19.7% | 450.2% |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

Table 6 shows an increase in B2 on 9 estates with a reduction on 21 estates Generally there has been growth in most use classes on estates with only three estates having reduced in size across all of the use classes. For the cells with no data, the magnitude of change is such that it is not possible to enter a figure here. A direct reading of the data in Tables 5a and 5b explains this further.

**Table 7:** Estates by occupancy 1999 and 2006

| Name of Estate | 1999 total area | 1999 Area vacant | 1999 % area vacant | 2006 total area | 2006 Area vacant | 2006 % area vacant |
|---|---|---|---|---|---|---|
| Ballard Bus Pk | 5544 | 1300 | 23.45% | 5551 | 0 | 0.00% |
| Beechings Way | 33278 | 6852 | 20.59% | 36256 | 1100 | 3.03% |
| Bridgewood Bus Pk | 6021 | 0 | 0.00% | 8916 | 0 | 0.00% |
| Canal Road | 840 | 0 | 0.00% | 1186 | 0 | 0.00% |
| Chatham Maritime | 123301 | 33627 | 27.27% | 254441 | 40000 | 15.72% |
| Commercial Road | 3981 | 0 | 0.00% | 6243 | 36 | 0.58% |
| Commissioners Rd | 91563 | 20859 | 22.78% | 92494 | 6543 | 7.07% |
| Courtney Rd Ind Est | 86671 | 5638 | 6.51% | 85600 | 20000 | 23.36% |
| Cuxton Ind Est | 6180 | 425 | 6.88% | 6090 | 970 | 15.92% |
| Cuxton Road | 2395 | 800 | 33.4% | 1760 | 0 | 0.00% |
| Elm Court | 3175 | 337 | 10.61% | 7227 | 632 | 8.74% |
| Fenn Street | 2315 | 0 | 0.00% | 2116 | 0 | 0.00% |
| Formby Road | 31595 | 0 | 0.00% | 31795 | 0 | 0.00% |
| Gads Hill | 4860 | 0 | 0.00% | 3340 | 0 | 0.00% |
| Gillingham Bus Pk | 145803 | 20084 | 13.77% | 169575 | 16315 | 9.62% |
| Hoo Indust Est | 14935 | 1230 | 8.24% | 16127 | 0 | 0.00% |
| Hopewell Drive | 12188 | 354 | 2.90% | 18211 | 850 | 4.67% |
| Isle of Grain & Thamesport | - | - | - | 93739 | 0 | 0.00% |
| Jenkins Dale | 3473 | 0 | 0.00% | 3920 | 800 | 20.41% |
| Lower Twydall Lane | 1056 | 102 | 9.66% | 1780 | 412 | 23.15% |
| Kingsnorth | 11560 | 950 | 8.22% | 62940 | 9907 | 15.74% |
| Lordswood Ind Est | 32462 | 335 | 1.03% | 36584 | 3652 | 9.98% |
| Medway City Estate | 184454 | 26151 | 14.18% | 179487 | 20341 | 11.33% |
| Medway Valley Pk | 32375 | 0 | 0.00% | 27190 | 2000 | 7.36% |
| Otterham Quay Lane | - | - | - | 10500 | 0 | 0.00% |
| Pier Road | 1135 | 180 | 15.86% | 1151 | 32 | 2.78% |
| Railway Street | 4005 | 0 | 0.00% | 3696 | 843 | 22.81% |
| Rochester Airport Industrial Estate | 101564 | 4290 | 4.22% | 97490 | 1360 | 1.40% |
| Rochester High St and Bardell Terrace | 7837 | 264 | 3.37% | 2895 | 130 | 4.49% |
| Rochester Riverside | 46634 | 15759 | 33.79% | 6517 | 894 | 13.72% |
| Second Ave | 22051 | 2746 | 12.45% | 23292 | 225 | 0.97% |
| Steel Fields | 8045 | 0 | 0.00% | 6480 | 0 | 0.00% |
| Temple Ind Est | 146811 | 2335 | 1.59% | 143511 | 5805 | 4.04% |
| Thameside Terminal | - | - | - | 1250 | 0 | 0.00% |
| Min | 0 | 0 | 0 | 1151 | 0 | 0 |
| Max | 184454 | 33627 | 33.79% | 254441 | 40000 | 24.96 |
| Mean | 34650.21 | 4253.47 | 8.26% | 42627.9 | 3907.26 | 7.61 |

From the above it can be seen that 13 estates have reduced the total amount of vacant space while 12 others have shown an increase in vacant space. Another 9 estates have indicated that there is no change in vacancy rate.

**Table 8:** Estates vacancy rates (1999 and 2006) and percentage change in occupancy between 1999 and 2006

| Name of Estate | 1999<br>% area vacant | 2006<br>% area vacant | 1999-2006<br>Change in % area vacant |
|---|---|---|---|
| Ballard Bus Pk | 23.45% | 0.00% | -23.45% |
| Beechings Way | 20.59% | 3.03% | -17.56% |
| Bridgewood Bus Pk | 0.00% | 0.00% | 0.00% |
| Canal Road | 0.00% | 0.00% | 0.00% |
| Chatham Maritime | 27.27% | 15.72% | -11.55% |
| Commercial Road | 0.00% | 0.58% | 0.58% |
| Commissioners Rd | 22.78% | 7.07% | -15.71% |
| Courtney Rd Ind Est | 6.51% | 23.36% | 16.85% |
| Cuxton Ind Est | 6.88% | 15.92% | 9.04% |
| Cuxton Road | 33.4% | 0.00% | -33.40% |
| Elm Court | 10.61% | 8.74% | -1.87% |
| Fenn Street | 0.00% | 0.00% | 0.00% |
| Formby Road | 0.00% | 0.00% | 0.00% |
| Gads Hill | 0.00% | 0.00% | 0.00% |
| Gillingham Bus Pk | 13.77% | 9.62% | -4.15% |
| Hoo Indust Est | 8.24% | 0.00% | -8.24% |
| Hopewell Drive | 2.90% | 4.67% | 1.77% |
| Isle of Grain & Thamesport | - | 0.00% | 0.00% |
| Jenkins Dale | 0.00% | 20.41% | 20.41% |
| Lower Twydall Lane | 9.66% | 23.15% | 13.49% |
| Kingsnorth | 8.22% | 15.74% | 7.52% |
| Lordswood Ind Est | 1.03% | 9.98% | 8.95% |
| Medway City Estate | 14.18% | 11.33% | -2.85% |
| Medway Valley Pk | 0.00% | 7.36% | 7.36% |
| Otterham Quay Lane | - | 0.00% | - |
| Pier Road | 15.86% | 2.78% | -13.08% |
| Railway Street | 0.00% | 22.81% | 22.81% |
| Rochester Airport Industrial Estate | 4.22% | 1.40% | -2.82% |
| Rochester High St and Bardell Terrace | 3.37% | 4.49% | 1.12% |
| Rochester Riverside | 33.79% | 13.72% | -20.07% |
| Second Ave | 12.45% | 0.97% | -11.48% |
| Steel Fields | 0.00% | 0.00% | 0.00% |
| Temple Ind Est | 1.59% | 4.04% | 2.45% |
| Thameside Terminal | - | 0.00% | 0.00% |
| Min | 0 | 0 | |
| Max | 33.79% | 23.36% | |
| Mean | 7.50% | 6.88% | |

**Table 9a:** Units on estates by SIC classification 1999 (%)

| 1999 | Use code | Area | Number of units | Percentage Area | Percentage number of units |
|---|---|---|---|---|---|
| Agriculture | 1000 | 1327 | 2 | 0.11% | 0.12% |
| Forestry | 2000 | 85 | 2 | 0.01% | 0.12% |
| Fishing | 5000 | 10086 | 9 | 0.86% | 0.54% |
| Mineral extraction | 10100 | 483 | 3 | 0.04% | 0.18% |
| Food production / processing / manufacturing. | 15000 | 9681 | 8 | 0.82% | 0.48% |
| Textile prep. Manu (clothing) | 17110 | 9518 | 16 | 0.81% | 0.96% |
| Wood processing/manufacture | 20100 | 2030 | 7 | 0.17% | 0.42% |
| Paper manufacture | 21110 | 70295 | 20 | 5.97% | 1.20% |
| Publishing and printing | 22110 | 28104 | 31 | 2.39% | 1.86% |
| Paint and varnish manufacturing | 24300 | 744 | 2 | 0.06% | 0.12% |
| Manufacturing medical products | 24410 | 300 | 1 | 0.03% | 0.06% |
| Other chemical manufacture | 24422 | 1053 | 3 | 0.09% | 0.18% |
| Manufacturing rubber and plastic | 25110 | 7146 | 16 | 0.61% | 0.96% |
| Manufacturing of glass | 26110 | 3599 | 2 | 0.31% | 0.12% |
| Manufacturing ceramics | 26210 | 302 | 2 | 0.03% | 0.12% |
| Manufacturing for construction | 26400 | 35537 | 4 | 3.02% | 0.24% |
| Stone working | 26700 | 196 | 1 | 0.02% | 0.06% |
| Other manufacturing | 26810 | 3108 | 8 | 0.26% | 0.48% |
| Metal working | 27310 | 2710 | 4 | 0.23% | 0.24% |
| Manufacture of finished metals | 28110 | 47238 | 96 | 4.01% | 5.75% |
| Manufacture of pumps and compressors | 29110 | 44200 | 2 | 3.75% | 0.12% |
| Manufacturing of metal components | 29130 | 6380 | 18 | 0.54% | 1.08% |
| Manufacturing of machinery | 29400 | 5877 | 10 | 0.50% | 0.60% |
| Manufacture of appliances and household goods | 29710 | 23028 | 39 | 1.95% | 2.34% |
| Manufacturing of medical equipment | 33100 | 820 | 2 | 0.07% | 0.12% |
| Manu of measuring & control equipment | 33200 | 691 | 6 | 0.06% | 0.36% |
| Specialist manufacture | 33400 | 2022 | 2 | 0.17% | 0.12% |
| Motor vehicle manufacture | 34100 | 58709 | 13 | 4.98% | 0.78% |
| Ship construction | 35110 | 1326 | 4 | 0.11% | 0.24% |
| Other Transport Manufacture | 35200 | 74432 | 2 | 6.32% | 0.12% |
| Other Furniture manufacture | 36110 | 12068 | 15 | 1.02% | 0.90% |
| Other Manufacture | 36210 | 390 | 3 | 0.03% | 0.18% |
| Recycling | 37100 | 1143 | 1 | 0.10% | 0.06% |
| Energy production and supply | 40100 | 130 | 1 | 0.01% | 0.06% |
| Test drilling | 45120 | 320 | 1 | 0.03% | 0.06% |
| General Building Construction | 45210 | 14012 | 31 | 1.19% | 1.86% |
| Building completion | 45310 | 10531 | 30 | 0.89% | 1.80% |
| Renting of construction equipment | 45500 | 30 | 2 | 0.00% | 0.12% |
| Vehicle sale | 50100 | 6022 | 7 | 0.51% | 0.42% |
| Motor vehicle maintenance | 50200 | 12576 | 53 | 1.07% | 3.17% |
| Vehicle parts sales | 50300 | 1129 | 6 | 0.10% | 0.36% |
| Agents | 51110 | 1919 | 4 | 0.16% | 0.24% |
| Wholesale of food and feed | 51210 | 11469 | 11 | 0.97% | 0.66% |
| Wholesale of textiles | 51410 | 2180 | 2 | 0.19% | 0.12% |
| Wholesale of household goods | 51430 | 4155 | 10 | 0.35% | 0.60% |

Nec = not elsewhere classified

## Table 9a (continued): Units on estates by SIC classification 1999 (%)

| 1999 | Use code | Area | Number of units | Percentage Area | Percentage number of units |
|---|---|---|---|---|---|
| Other Wholesale | 51520 | 29978 | 41 | 2.54% | 2.46% |
| Food Retail | 52200 | 1200 | 1 | 0.10% | 0.06% |
| Retail sale of Clothing & footwear | 52410 | 600 | 1 | 0.05% | 0.06% |
| Retail sale of Household goods | 52440 | 5182 | 12 | 0.44% | 0.72% |
| Retail sale of DIY and Hardware Materials | 52460 | 21836 | 25 | 1.85% | 1.50% |
| Retail sale of paper based items | 52470 | 295 | 3 | 0.03% | 0.18% |
| Specialised Retail | 52480 | 5361 | 21 | 0.46% | 1.26% |
| Non store based retail | 52600 | 612 | 6 | 0.05% | 0.36% |
| Household repair | 52700 | 144 | 2 | 0.01% | 0.12% |
| Hotels and Restaurants inc Pubs | 55100 | 1233 | 10 | 0.10% | 0.60% |
| Transport (General) | 60000 | 26379 | 21 | 2.24% | 1.26% |
| Cargo handling and storage | 63110 | 129812 | 78 | 11.02% | 4.67% |
| Other Transport activities | 63210 | 267 | 2 | 0.02% | 0.12% |
| Travel Agents and Tourist information | 63300 | 1887 | 7 | 0.16% | 0.42% |
| Postal Services | 64100 | 5567 | 5 | 0.47% | 0.30% |
| Telecommunications | 64200 | 3678 | 12 | 0.31% | 0.72% |
| Banking and finance | 65110 | 41086 | 17 | 3.49% | 1.02% |
| real estate/property | 70110 | 1800 | 6 | 0.15% | 0.36% |
| Transport rental | 71100 | 1187 | 4 | 0.10% | 0.24% |
| equipment rental | 71300 | 6669 | 11 | 0.57% | 0.66% |
| Computer and related activities | 72000 | 5671 | 25 | 0.48% | 1.50% |
| research -natural/social sci | 73100 | 6520 | 2 | 0.55% | 0.12% |
| Accounting | 74120 | 506 | 7 | 0.04% | 0.42% |
| misc office | 74130 | 27158 | 124 | 2.31% | 7.43% |
| public services | 75110 | 11440 | 16 | 0.97% | 0.96% |
| education | 80100 | 21551 | 9 | 1.83% | 0.54% |
| training | 80410 | 4967 | 14 | 0.42% | 0.84% |
| human med/dental | 85110 | 2708 | 10 | 0.23% | 0.60% |
| social care | 85310 | 528 | 2 | 0.04% | 0.12% |
| sewage | 90000 | 416 | 2 | 0.04% | 0.12% |
| membership organisations | 91110 | 100 | 1 | 0.01% | 0.06% |
| media entertainment | 92110 | 4365 | 6 | 0.37% | 0.36% |
| Sports and exercise activities | 92620 | 232 | 3 | 0.02% | 0.18% |
| Other recreational activities | 92720 | 3365 | 4 | 0.29% | 0.24% |
| Washing and dry cleaning of textile and fur products | 93010 | 2983 | 4 | 0.25% | 0.24% |
| Other service activities not elsewhere classified | 93050 | 194 | 2 | 0.02% | 0.12% |
| Other | 99999 | 3795 | 2 | 0.32% | 0.12% |
| Music (Retail) | 52450c | 540 | 3 | 0.05% | 0.18% |
| Invalid SIC | | 117554 | 202 | 9.98% | 12.10% |
| No SIC | | 30176 | 132 | 2.56% | 7.90% |
| vacant | | 118909 | 300 | 10.09% | 17.96% |
| | min | 30 | 1 | 0.003% | 0.06% |
| | max | 129812 | 300 | 11.02% | 17.96% |
| | mean | 13541.5 | 19.1954023 | 1.15% | 1.15% |

**Table 9b:** Units on estates by SIC classification 2006 (%)

| 2006 | Use code | Area | Number of units | Percentage Area | Percentage number of units |
|---|---|---|---|---|---|
| agriculture | 1000 | 3000 | 3 | 0.21% | 0.17% |
| Forestry | 2000 | 69 | 1 | 0.00% | 0.06% |
| fishing | 5000 | 2200 | 2 | 0.15% | 0.11% |
| mineral extraction | 10100 | 2625 | 1 | 0.18% | 0.06% |
| food production/processing/manufact | 15000 | 180 | 1 | 0.01% | 0.06% |
| textile prep. Manu (clothing) | 17110 | 41713 | 14 | 2.86% | 0.79% |
| wood processing/manu | 20100 | 11915 | 19 | 0.82% | 1.07% |
| paper manufact | 21110 | 6243 | 5 | 0.43% | 0.28% |
| publishing and printing | 22110 | 24904 | 33 | 1.71% | 1.86% |
| oil | 23100 | 2400 | 1 | 0.16% | 0.06% |
| chemical manufacturing | 24120 | 750 | 1 | 0.05% | 0.06% |
| other chemical manufacture | 24422 | 7040 | 1 | 0.48% | 0.06% |
| manufacturing rubber and plastic | 25110 | 11536 | 10 | 0.79% | 0.56% |
| manufacturing ceramics | 26210 | 173 | 1 | 0.01% | 0.06% |
| manufacturing for construction | 26400 | 41328 | 9 | 2.83% | 0.51% |
| stone working | 26700 | 573 | 2 | 0.04% | 0.11% |
| other manufacturing | 26810 | 1001 | 5 | 0.07% | 0.28% |
| metal working | 27310 | 3924 | 5 | 0.27% | 0.28% |
| manufacture of finished metals | 28110 | 31511 | 75 | 2.16% | 4.23% |
| manufacture of pumps and compressors | 29110 | 40794 | 5 | 2.79% | 0.28% |
| manufacturing of metal components | 29130 | 2494 | 8 | 0.17% | 0.45% |
| manufacturing of machinery | 29400 | 1830 | 5 | 0.13% | 0.28% |
| manufacture of appliances and household goods | 29710 | 6171 | 10 | 0.42% | 0.56% |
| manufacturing of medical equipment | 33100 | 816 | 3 | 0.06% | 0.17% |
| manufacturing of measuring and control equipment | 33200 | 200 | 2 | 0.01% | 0.11% |
| Motor vehicle manufacture | 34100 | 2576 | 6 | 0.18% | 0.34% |
| Ship construction | 35110 | 5705 | 9 | 0.39% | 0.51% |
| Other Transport Manufacture | 35200 | 72832 | 1 | 4.99% | 0.06% |
| Other Furniture manufacture | 36110 | 5873 | 12 | 0.40% | 0.68% |
| Other Manufacture | 36210 | 5329 | 5 | 0.37% | 0.28% |
| Recycling | 37100 | 615 | 2 | 0.04% | 0.11% |
| Energy production and supply | 40100 | 104036 | 7 | 7.13% | 0.39% |
| Water purification | 41000 | 150 | 1 | 0.01% | 0.06% |
| General Building Construction | 45210 | 20488 | 46 | 1.40% | 2.59% |
| Building completion | 45310 | 22183 | 63 | 1.52% | 3.55% |
| Vehicle sale | 50100 | 2320 | 4 | 0.16% | 0.23% |
| Motor vehicle maintenance | 50200 | 26486 | 79 | 1.81% | 4.46% |
| Vehicle parts sales | 50300 | 6687 | 10 | 0.46% | 0.56% |
| Petrol Stations | 50500 | 471 | 2 | 0.03% | 0.11% |
| Agents | 51110 | 10540 | 9 | 0.72% | 0.51% |
| Wholesale of food and feed | 51210 | 2802 | 4 | 0.19% | 0.23% |
| Wholesale of textiles | 51410 | 196 | 1 | 0.01% | 0.06% |
| Wholesale of household goods | 51430 | 12808 | 13 | 0.88% | 0.73% |
| Other Wholesale | 51520 | 28391 | 24 | 1.94% | 1.35% |

## Table 9b (Continued): Units on estates by SIC classification 2006 (%)

| | Use code | Area | Number of units | Percentage Area | Percentage number of units |
|---|---|---|---|---|---|
| General Retail | 52100 | 10686 | 4 | 0.73% | 0.23% |
| Food Retail | 52200 | 216 | 2 | 0.01% | 0.11% |
| Health related retail | 52300 | 200 | 1 | 0.01% | 0.06% |
| Retail sale of Clothing and footwear | 52410 | 6093 | 49 | 0.42% | 2.76% |
| Retail sale of Household goods | 52440 | 7213 | 11 | 0.49% | 0.62% |
| Retail sale of DIY and Hardware Materials | 52460 | 14219 | 23 | 0.97% | 1.30% |
| Retail sale of paper based items | 52470 | 870 | 4 | 0.06% | 0.23% |
| Specialised Retail | 52480 | 8343 | 24 | 0.57% | 1.35% |
| Household repair | 52700 | 180 | 1 | 0.01% | 0.06% |
| Hotels and Restaurants including Pubs | 55100 | 12145 | 36 | 0.83% | 2.03% |
| Transport (General) | 60000 | 64135 | 27 | 4.39% | 1.52% |
| Cargo handling and storage | 63110 | 174225 | 144 | 11.93% | 8.12% |
| Other Transport activities | 63210 | 560 | 3 | 0.04% | 0.17% |
| Travel Agents and Tourist information | 63300 | 3840 | 6 | 0.26% | 0.34% |
| Postal Services | 64100 | 12622 | 18 | 0.86% | 1.02% |
| Telecommunications | 64200 | 10534 | 13 | 0.72% | 0.73% |
| Banking and finance | 65110 | 32319 | 20 | 2.21% | 1.13% |
| real estate/property | 70110 | 6388 | 24 | 0.44% | 1.35% |
| Transport rental | 71100 | 580 | 4 | 0.04% | 0.23% |
| equipment rental | 71300 | 11637 | 32 | 0.80% | 1.80% |
| Computer and related activities | 72000 | 4900 | 23 | 0.34% | 1.30% |
| research -natural/social sci | 73100 | 560 | 4 | 0.04% | 0.23% |
| legal | 74110 | 4485 | 4 | 0.31% | 0.23% |
| Accounting | 74120 | 3391 | 15 | 0.23% | 0.85% |
| misc office | 74130 | 175422 | 371 | 12.02% | 20.92% |
| public services | 75110 | 26019 | 27 | 1.78% | 1.52% |
| education | 80100 | 68901 | 24 | 4.72% | 1.35% |
| training | 80410 | 5873 | 11 | 0.40% | 0.62% |
| human med/dental | 85110 | 9076 | 20 | 0.62% | 1.13% |
| vets | 85200 | 1250 | 3 | 0.09% | 0.17% |
| social care | 85310 | 5349 | 13 | 0.37% | 0.73% |
| sewage | 90000 | 412 | 2 | 0.03% | 0.11% |
| membership organisations | 91110 | 1769 | 6 | 0.12% | 0.34% |
| media entertainment | 92110 | 3339 | 15 | 0.23% | 0.85% |
| Tourist attractions | 92520 | 18560 | 6 | 1.27% | 0.34% |
| Sports and exercise activities | 92620 | 1140 | 2 | 0.08% | 0.11% |
| Gambling | 92710 | 405 | 3 | 0.03% | 0.17% |
| Other recreational activities nec | 92720 | 4340 | 2 | 0.30% | 0.11% |
| Physical well-being activities (saunas, spas, massage, fitness centres etc.) | 93040 | 1192 | 3 | 0.08% | 0.17% |
| Other service activities not elsewhere classified | 93050 | 518 | 5 | 0.04% | 0.28% |
| Other | 99999 | 37192 | 24 | 2.55% | 1.35% |
| Music (Retail) | 52450C | 180 | 3 | 0.01% | 0.17% |
| Vacant | Vacant | 132835 | 221 | 9.10% | 12.46% |

Nec = not elsewhere classified

**Table 10:** Estates by change in SIC classification 1999- 2006 (%)

| | SIC | 1999 | 2006 | %change |
|---|---|---|---|---|
| agriculture | 1000 | 1327 | 3000 | 126.07% |
| Forestry | 2000 | 85 | 69 | -18.82% |
| fishing | 5000 | 10086 | 2200 | -78.19% |
| mineral extraction | 10100 | 483 | 2625 | 443.48% |
| food production/processing/manufact | 15000 | 9681 | 180 | -98.14% |
| textile prep. Manu (clothing) | 17110 | 9518 | 41713 | 338.25% |
| wood processing/manu | 20100 | 2030 | 11915 | 486.95% |
| paper manufact | 21110 | 70295 | 6243 | -91.12% |
| publishing and printing | 22110 | 28104 | 24904 | -11.39% |
| other chemical manufacture | 24422 | 1053 | 7040 | 568.57% |
| manufacturing rubber and plastic | 25110 | 7146 | 11536 | 61.43% |
| manufacturing ceramics | 26210 | 302 | 173 | -42.72% |
| manufacturing for construction | 26400 | 35537 | 41328 | 16.30% |
| stone working | 26700 | 196 | 573 | 192.35% |
| other manufacturing | 26810 | 3108 | 1001 | -67.79% |
| metal working | 27310 | 2710 | 3924 | 44.80% |
| manufacture of finished metals | 28110 | 47238 | 31511 | -33.29% |
| manufacture of pumps and compressors | 29110 | 44200 | 40794 | -7.71% |
| manufacturing of metal components | 29130 | 6380 | 2494 | -60.91% |
| manufacturing of machinery | 29400 | 5877 | 1830 | -68.86% |
| manufacture of appliances and household goods | 29710 | 23028 | 6171 | -73.20% |
| manufacturing of medical equipment | 33100 | 820 | 816 | -0.49% |
| manufacturing of measuring and control equipment | 33200 | 691 | 200 | -71.06% |
| Motor vehicle manufacture | 34100 | 58709 | 2576 | -95.61% |
| Ship construction | 35110 | 1326 | 5705 | 330.24% |
| Other Transport Manufacture | 35200 | 74432 | 72832 | -2.15% |
| Other Furniture manufacture | 36110 | 12068 | 5873 | -51.33% |
| Other Manufacture | 36210 | 390 | 5329 | 1266.41% |
| Recycling | 37100 | 1143 | 615 | -46.19% |
| Energy production and supply | 40100 | 130 | 104036 | 79927.69% |
| General Building Construction | 45210 | 14012 | 20488 | 46.22% |
| Building completion | 45310 | 10531 | 22183 | 110.64% |
| Vehicle sale | 50100 | 6022 | 2320 | -61.47% |
| Motor vehicle maintenance | 50200 | 12576 | 26486 | 110.61% |
| Vehicle parts sales | 50300 | 1129 | 6687 | 492.29% |
| Agents | 51110 | 1919 | 10540 | 449.24% |
| Wholesale of food and feed | 51210 | 11469 | 2802 | -75.57% |
| Wholesale of textiles | 51410 | 2180 | 196 | -91.01% |
| Wholesale of household goods | 51430 | 4155 | 12808 | 208.26% |
| Other Wholesale | 51520 | 29978 | 28391 | -5.29% |
| Food Retail | 52200 | 1200 | 216 | -82.00% |
| Retail sale of Clothing and footwear | 52410 | 600 | 6093 | 915.50% |
| Retail sale of Household goods | 52440 | 5182 | 7213 | 39.19% |
| Retail sale of DIY and Hardware Materials | 52460 | 21836 | 14219 | -34.88% |
| Retail sale of paper based items | 52470 | 295 | 870 | 194.92% |
| | | | | |

**Table 10** (continued)**:** Estates by change in SIC classification 1999- 2006 (%)

| | SIC | 1999 | 2006 | %change |
|---|---|---|---|---|
| Specialised Retail | 52480 | 5361 | 8343 | 55.62% |
| Household repair | 52700 | 144 | 180 | 25.00% |
| Hotels and Restaurants including Pubs | 55100 | 1233 | 12145 | 885.00% |
| Transport (General) | 60000 | 26379 | 64135 | 1.43129 |
| Cargo handling and storage | 63110 | 129812 | 174225 | 34.21% |
| Other Transport activities | 63210 | 267 | 560 | 109.74% |
| Travel Agents and Tourist information | 63300 | 1887 | 3840 | 103.50% |
| Postal Services | 64100 | 5567 | 12622 | 126.73% |
| Telecommunications | 64200 | 3678 | 10534 | 186.41% |
| Banking and finance | 65110 | 41086 | 32319 | -21.34% |
| real estate/property | 70110 | 1800 | 6388 | 254.89% |
| Transport rental | 71100 | 1187 | 580 | -51.14% |
| equipment rental | 71300 | 6669 | 11637 | 74.49% |
| Computer and related activities | 72000 | 5671 | 4900 | -13.60% |
| research -natural/social sci | 73100 | 6520 | 560 | -91.41% |
| Accounting | 74120 | 506 | 3391 | 570.16% |
| misc office | 74130 | 27158 | 175422 | 545.93% |
| public services | 75110 | 11440 | 26019 | 127.44% |
| education | 80100 | 21551 | 68901 | 219.71% |
| training | 80410 | 4967 | 5873 | 18.24% |
| human med/dental | 85110 | 2708 | 9076 | 235.16% |
| social care | 85310 | 528 | 5349 | 913.07% |
| sewage | 90000 | 416 | 412 | -0.96% |
| membership organisations | 91110 | 100 | 1769 | 1669.00% |
| media entertainment | 92110 | 4365 | 3339 | -23.51% |
| Sports and exercise activities | 92620 | 232 | 1140 | 391.38% |
| Other recreational activities nec | 92720 | 3365 | 4340 | 28.97% |
| Other service activities not elsewhere classified | 93050 | 194 | 518 | 1.6701031 |
| Other | 99999 | 3795 | 37192 | 880.03% |
| Music (Retail) | 52450c | 540 | 180 | -66.67% |
| vacant | | 118909 | 132835 | 11.71% |
| | | | | |

Nec = not elsewhere classified

**Table 11a:** Estates by Unit size (%) (1999)

| 1999<br>Name of Estate | Total area | Small units% | Medium units% | Large units% |
|---|---|---|---|---|
| Ballard Bus Pk | 5544 | 44.44% | 22.22% | 33.33% |
| Beechings Way | 33278 | 54.72% | 22.64% | 22.64% |
| Bridgewood Bus Pk | 6021 | 0.00% | 0.00% | 100.00% |
| Canal Road | 840 | 83.33% | 16.67% | 0.00% |
| Chatham Maritime | 123301 | 34.67% | 26.67% | 38.67% |
| Commercial Road | 3981 | 50.00% | 50.00% | 0.00% |
| Commissioners Rd | 91563 | 56.58% | 10.53% | 32.89% |
| Courtney Rd Ind Est | 86671 | 80.43% | 0.00% | 19.57% |
| Cuxton Ind Est | 6180 | 52.94% | 41.18% | 5.88% |
| Cuxton Road | 2395 | 0.0% | 100.0% | 0.0% |
| Elm Court | 3175 | 93.75% | 6.25% | 0.00% |
| Fenn Street | 2315 | 20.00% | 80.00% | 0.00% |
| Formby Road | 31595 | 0.00% | 0.00% | 100.00% |
| Gads Hill | 4860 | 100.00% | 0.00% | 0.00% |
| Gillingham Bus Pk | 145803 | 38.06% | 33.58% | 28.36% |
| Hoo Indust Est | 14935 | 32.26% | 54.84% | 12.90% |
| Hopewell Drive | 12188 | 70.97% | 16.13% | 12.90% |
| Isle of Grain & Thamesport | - | - | - | - |
| Jenkins Dale | 3473 | 28.57% | 71.43% | 0.00% |
| Lower Twydall Lane | 1056 | 100.00% | 0.00% | 0.00% |
| Kingsnorth | 11560 | 50.00% | 38.46% | 11.54% |
| Lordswood Ind Est | 32462 | 58.00% | 34.00% | 8.00% |
| Medway City Estate | 184454 | 81.19% | 15.70% | 3.11% |
| Medway Valley Pk | 32375 | 7.69% | 0.00% | 92.31% |
| Otterham Quay Lane | - | - | - | - |
| Pier Road | 1135 | 100.00% | 0.00% | 0.00% |
| Railway Street | 4005 | 81.25% | 18.75% | 0.00% |
| Rochester Airport Industrial Estate | 101564 | 0.00% | 62.07% | 37.93% |
| Rochester High St and Bardell Terrace | 7837 | 38.46% | 46.15% | 15.39% |
| Rochester Riverside | 46634 | 69.64% | 16.07% | 14.29% |
| Second Ave | 22051 | 42.55% | 44.68% | 12.77% |
| Steel Fields | 8045 | 33.33% | 33.33% | 33.34% |
| Temple Ind Est | 146811 | 41.51% | 44.34% | 14.15% |
| Thameside Terminal | - | - | - | - |
| Min | 840 | 7.69% | 6.25% | 3.11% |
| Max | 184454 | 100.00% | 80.00% | 100.00% |
| Mean | 35627.64 | 46.80% | 24.41% | 19.70% |

**Note**: Size classification: large > $1000m^2$, medium $250\text{-}1000m^2$, small $<250m^2$.

In 1999 there were 16 estates that comprised predominantly small units, 6 that had the majority of units in the medium size with only 3 that had over 50% of the units classified as large. 7 others had a mixture of all three sizes with no one size being over 50% of the total.

**Table 11b:** Estates by Unit size (%) 2006

| 2006<br>Name of Estate | Total area | Small units% | Medium units% | Large units% |
|---|---|---|---|---|
| Ballard Bus Pk | 5551 | 15.38% | 84.62% | 0.00% |
| Beechings Way | 36256 | 44.44% | 42.59% | 12.96% |
| Bridgewood Bus Pk | 8916 | 20.00% | 0.00% | 80.00% |
| Canal Road | 1186 | 75.00% | 25.00% | 0.00% |
| Chatham Maritime | 254441 | 69.43% | 14.72% | 15.85% |
| Commercial Road | 6243 | 55.56% | 38.89% | 5.56% |
| Commissioners Rd | 92494 | 61.43% | 12.86% | 25.71% |
| Courtney Rd Ind Est | 85600 | 10.00% | 20.00% | 70.00% |
| Cuxton Ind Est | 6090 | 41.18% | 58.82% | 0.00% |
| Cuxton Road | 1760 | 33.33% | 66.67% | 0.00% |
| Elm Court | 7227 | 66.67% | 22.22% | 11.11% |
| Fenn Street | 2116 | 40.00% | 60.00% | 0.00% |
| Formby Road | 31795 | 0.00% | 0.00% | 100.00% |
| Gads Hill | 3340 | 20.00% | 60.00% | 20.00% |
| Gillingham Bus Pk | 169575 | 36.09% | 39.85% | 24.06% |
| Hoo Indust Est | 16127 | 34.78% | 43.48% | 21.74% |
| Hopewell Drive | 18211 | 68.57% | 8.57% | 22.86% |
| Isle of Grain & Thamesport | 93739 | 40.00% | 0.00% | 60.00% |
| Jenkins Dale | 3920 | 0.00% | 100.00% | 0.00% |
| Lower Twydall Lane | 1780 | 100.00% | 0.00% | 0.00% |
| Kingsnorth | 62940 | 36.11% | 44.45% | 19.44% |
| Lordswood Ind Est | 36584 | 49.18% | 44.26% | 6.56% |
| Medway City Estate | 179487 | 77.91% | 19.15% | 2.95% |
| Medway Valley Pk | 27190 | 14.29% | 14.29% | 71.43% |
| Otterham Quay Lane | 10500 | 0.00% | 0.00% | 100.00% |
| Pier Road | 1151 | 100.00% | 0.00% | 0.00% |
| Railway Street | 3696 | 100.00% | 0.00% | 0.00% |
| Rochester Airport Industrial Estate | 97490 | 5.00% | 45.00% | 50.00% |
| Rochester High St and Bardell Terrace | 2895 | 69.23% | 30.77% | 0.00% |
| Rochester Riverside | 6517 | 83.33% | 12.50% | 4.17% |
| Second Ave | 23292 | 42.86% | 39.29% | 17.86% |
| Steel Fields | 6480 | 20.00% | 20.00% | 60.00% |
| Temple Ind Est | 143511 | 28.57% | 53.33% | 18.10% |
| Thameside Terminal | 1250 | 71.43% | 28.57% | 0.00% |
| Min | 1151 | 0.00% | 0.00% | 0.00% |
| Max | 254441 | 100.00% | 100.00% | 100.00% |
| Mean | 42628 | 44.99% | 30.88% | 24.13% |

**Note**: Size classification: large > 1000m$^2$, medium 250-1000m$^2$, small <250m$^2$.

In 2006 there were 19 estates that comprised predominantly small units, 3 that had the majority units in the medium size with 7 that had over 50% of the units classified as large. 7 others had a mixture of all three sizes with no one size being over 50% of the total.

**Table 12:** Estates by change (Small, Medium and Large) in Unit size from 1999 - 2006 (%)

| Name of Estate | Small units% | Medium units% | Large units% |
|---|---|---|---|
| Ballard Bus Pk | -29.06% | 62.39% | -33.33% |
| Beechings Way | -10.28% | 19.95% | -9.68% |
| Bridgewood Bus Pk | - | 0.00% | -20.00% |
| Canal Road | -8.33% | 8.33% | 0.00% |
| Chatham Maritime | 34.76% | -11.95% | -22.82% |
| Commercial Road | 5.56% | -11.11% | - |
| Commissioners Rd | 4.85% | 2.33% | -7.18% |
| Courtney Rd Ind Est | -70.43% | - | 50.43% |
| Cuxton Ind Est | -11.76% | 17.64% | -5.88% |
| Cuxton Road | - | -33.33% | 0 |
| Elm Court | -27.08% | 15.97% | 11.11% |
| Fenn Street | 20.00% | -20.00% | 0.00% |
| Formby Road | 0.00% | 0.00% | 0.00% |
| Gads Hill | -80.00% | - | 20.00% |
| Gillingham Bus Pk | -1.97% | 6.27% | -4.30% |
| Hoo Indust Est | 2.52% | -11.36% | 8.84% |
| Hopewell Drive | -2.40% | -7.56% | 9.96% |
| Isle of Grain & Thamesport | - | - | - |
| Jenkins Dale | -28.57% | 28.57% | 0.00% |
| Lower Twydall Lane | 0.00% | 0.00% | 0.00% |
| Kingsnorth | -13.89% | 5.99% | 7.90% |
| Lordswood Ind Est | -8.82% | 10.26% | -1.44% |
| Medway City Estate | -3.28% | 3.45% | -0.16% |
| Medway Valley Pk | 6.60% | 14.29% | -20.88% |
| Otterham Quay Lane | - | - | - |
| Pier Road | 0.00% | 0.00% | 0.00% |
| Railway Street | 18.75% | -18.75% | 0.00% |
| Rochester Airport Industrial Estate | 5.00% | -17.07% | 12.07% |
| Rochester High St and Bardell Terrace | 30.77% | -15.38% | -15.39% |
| Rochester Riverside | 13.69% | -3.57% | -10.12% |
| Second Ave | 0.31% | -5.39% | 5.09% |
| Steel Fields | -13.33% | -13.33% | 26.66% |
| Temple Ind Est | -12.94% | 8.99% | 3.95% |
| Thameside Terminal | - | - | - |
| Min | -80.00% | -33.33% | -33.33% |
| Max | 40.00% | 62.39% | 100.00% |
| Mean | -2.61% | 3.50% | 5.16% |

**Note:** Size classification: large > 1000m$^2$, medium 250-1000m$^2$, small <250m$^2$.

**Table 13:** Estates by number of units 1999 and 2006

| Name of Estate | 1999 units | 2006 units |
|---|---|---|
| Ballard Bus Pk | 9 | 13 |
| Beechings Way | 53 | 54 |
| Bridgewood Bus Pk | 2 | 5 |
| Canal Road | 6 | 8 |
| Chatham Maritime | 75 | 265 |
| Commercial Road | 12 | 18 |
| Commissioners Rd | 76 | 70 |
| Courtney Rd Ind Est | 46 | 10 |
| Cuxton Ind Est | 17 | 17 |
| Cuxton Road | 6 | 6 |
| Elm Court | 32 | 18 |
| Fenn Street | 5 | 5 |
| Formby Road | 1 | 1 |
| Gads Hill | 2 | 5 |
| Gillingham Bus Pk | 134 | 133 |
| Hoo Indust Est | 31 | 23 |
| Hopewell Drive | 31 | 35 |
| Isle of Grain & Thamesport | - | 10 |
| Jenkins Dale | 7 | 7 |
| Lower Twydall Lane | 29 | 27 |
| Kingsnorth | 26 | 36 |
| Lordswood Ind Est | 50 | 61 |
| Medway City Estate | 707 | 679 |
| Medway Valley Pk | 13 | 14 |
| Otterham Quay Lane | - | 2 |
| Pier Road | 31 | 30 |
| Railway Street | 16 | 16 |
| Rochester Airport Industrial Estate | 29 | 20 |
| Rochester High St and Bardell Terrace | 13 | 13 |
| Rochester Riverside | 56 | 24 |
| Second Ave | 47 | 28 |
| Steel Fields | 3 | 5 |
| Temple Ind Est | 106 | 105 |
| Thameside Terminal | - | 7 |
| Min | 1 | 1 |
| Max | 707 | 679 |
| Mean | 49.15 | 52.06 |

**Table 14:** Estates by change in number of units 1999 – 2006%

| Name of Estate | 1999 units | 2006 units | Change 1999-2006% |
|---|---|---|---|
| Ballard Bus Pk | 9 | 12 | 33.33% |
| Beechings Way | 53 | 52 | -1.89% |
| Bridgewood Bus Pk | 2 | 5 | 150.00% |
| Canal Road | 6 | 8 | 33.33% |
| Chatham Maritime | 75 | 266 | 254.67% |
| Commercial Road | 12 | 25 | 108.33% |
| Commissioners Rd | 76 | 73 | -3.95% |
| Courtney Rd Ind Est | 46 | 10 | -78.26% |
| Cuxton Ind Est | 17 | 15 | -11.76% |
| Cuxton Road | 6 | 6 | 0.00% |
| Elm Court | 32 | 18 | -43.75% |
| Fenn Street | 5 | 5 | 0.00% |
| Formby Road | 1 | 2 | 100.00% |
| Gads Hill | 2 | 1 | -50.00% |
| Gillingham Bus Pk | 134 | 133 | -0.75% |
| Hoo Indust Est | 31 | 23 | -25.81% |
| Hopewell Drive | 31 | 35 | 12.90% |
| Isle of Grain & Thamesport | - | 10 | - |
| Jenkins Dale | 7 | 7 | 0.00% |
| Lower Twydall Lane | 29 | 27 | -6.90% |
| Kingsnorth | 26 | 36 | 38.46% |
| Lordswood Ind Est | 50 | 94 | 88.00% |
| Medway City Estate | 707 | 680 | -3.82% |
| Medway Valley Pk | 13 | 13 | 0.00% |
| Otterham Quay Lane | - | 2 | - |
| Pier Road | 31 | 30 | -3.23% |
| Railway Street | 16 | 16 | 0.00% |
| Rochester Airport Industrial Estate | 29 | 25 | -13.79% |
| Rochester High St and Bardell Terrace | 13 | 13 | 0.00% |
| Rochester Riverside | 56 | 23 | -58.93% |
| Second Ave | 47 | 28 | -40.43% |
| Steel Fields | 3 | 2 | -33.33% |
| Temple Ind Est | 106 | 98 | -7.55% |
| Thameside Terminal | - | 7 | - |
| Min | 0 | 1 | Not applicable |
| Max | 707 | 680 | |
| Mean | 45.76 | 48.12 | 8.60% |

# Section 2: the Individual Estates

## **2.0:** Individual estates

Each estate will be considered in relation to four criteria. These are:

1. The size (area) of the estate both in 1999 and in 2006.
2. The number of organisations by use class in both 1999 and 2006.
3. The occupancy rates for both 1999 and 2006.
4. the growth / reduction in size of the organisations in relation to the space each occupies.

**Table 2.0:** The list of Estates within the Survey

| |
|---|
| Ballard Business Park |
| Beechings Way |
| Bridge Wood Business Park |
| Canal Road |
| Chatham Maritime |
| Commercial Road |
| Commissioners Road |
| Courtney Road |
| Cuxton Industrial Estate |
| Cuxton Road |
| Elm Court |
| Fenn Street |
| Formby Road |
| Gads Hill |
| Gillingham |
| Hoo Industrial Estate |
| Hopewell Drive |
| Jenkins Dale |
| Lower Twydall Lane |
| Kingsnorth |
| Lordswood Industrial Estate |
| Medway City |
| Medway Valley Park |
| Otterham Quay Lane |
| Pier Road |
| Railway Street |
| Rochester Airport Industrial Estate |
| Rochester High Street and Bardell Terrace |
| Rochester Riverside (Castle View) |
| Second Avenue |
| Steel Fields |
| Temple Industrial Estate |
| Thameside Terminal |
| Thamesport (Isle of Grain) |

Differences in the way some use classes were recorded in 1999 compared with 2006 mean that direct comparisons cannot be made. However, for the purposes of interpretation, it is reasonable to assume for 1999 that the industrial estates contained comparatively few conventional retail outlets (A1), financial and professional services such as accounts, law firms and the like (A2), restaurants and cafes (A3), drinking establishments (A4) and hot food establishments (A5). Similarly, the inclusion of A1, D1 and D5 in the "other" category in 1999 should not be over emphasised as comparatively few shops, institutions and assembly and leisure facilities are likely to have been present in an industrial estate. It is acknowledged, however, that retail counters attached to warehousing units will be present in the A1 category. These assumptions were tested in Medway City Estate as the largest and most diverse of the industrial estates.

## 2.1 Ballard Business Park

Ballard Business Park is a small business park close to Medway Valley Park. It has shown a very small increase in size since the 1999 survey.

### *2.1.1 Size and change in size*

**Table 2.1.1: Estate Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 5544 | 5551 | |
| Percentage change | | | 0.1% |

### *2.1.2 Estate use and change of use*

**Table 2.2.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| 1999 | Total | 0 | 300 | 2668 | 2576 |
| 2006 | Total | 567 | 2120 | 150 | 2714 |
| | Change | | 607% | -94% | 5% |

Notes:
1. 1999 survey included uses A2, A3, A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

Changes in use show an increase in B1 and a substantial increase in B2 uses at the expense of B8 whilst Other class uses have remained relatively static.

### *2.1.3: Estate occupancy and change*

**Table 2.1.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 23.45% | 0% | 23.45% |

The percentage of vacant space reduced substantially. It is now zero compared to over 23% in 1999.

### *2.1.4 Estate size of units and change*

**Table 2.1.4: Change in area (m2) related to size class of units%**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| 1999 | Total area | 44.44% | 22.22% | 33.33% |
| 2006 | Total area | 15.38% | 84.62% | 0.0%- |
| | Change | -29.06% | 62.39% | -33.33% |

In terms of the size of units, Ballard has shown an increase in medium sized units but a decrease in the total area occupied by small and large units.

## 2.2: Beechings Way

Beechings Way is in Twydall. It is in what may be considered as a difficult location but has shown some evidence of new development. It is an average sized estate (within this survey). It has shown a 9% increase in area from the 1999 survey.

### *2.2.1: Size and change in size*

**Table 2.2.1: Estate size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 33278 | 36256 | |
| Percentage change | | | 9.0% |

### *2.2.2: Use and change of use*

**Table 2.2.2: Estate change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 5074 | 25988 | 508 | 1708 |
| **2006** | **Total** | 12603 | 15441 | 6804 | 1408 |
| | **Change** | 148% | -41% | 1239% | -18% |

Notes:
1. 1999 survey included uses A2, A3, A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

Beechings Way has shown a very large increase in B8 uses and a smaller increase in B1 uses whilst B2 and other uses have fallen since 1999.

### *2.2.3: Occupancy and change*

**Table 2.2.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space<br>percentage of area vacant | 20.59% | 3.03 | 17.56% |

The percentage of vacant space reduced from just under 21% to just over 3.0% in 2006

### *2.2.4: Size class of units and change*

**Table 2.2.4: Change in area (m2) related to size of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total area** | 54.72% | 22.64% | 22.64% |
| **2006** | **Total area** | 44.44% | 42.59% | 12.96% |
| | **Change** | -10.28% | 19.95% | -9.68% |

In terms of the size of units, Beechings Way has shown a decrease in total area of both small and large units since the 1999 survey, but an increase in total area of medium-sized units.

## 2.3: Bridgewood Business Park

Bridgewood Business Park is a small business park close to Rochester Airport Industrial Estate; it has shown a substantial increase in size (48%) since the last survey in 1999. This is due to an increase in the number of units.

### *2.3.1: Size and change in size*

**Table 2.3.1: Estate size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 6021 | 8916 | |
| Percentage change | | | 48.1% |

### *2.3.2: Use and change of use*

**Table 2.3.2: Estate change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 5033 | 0 | 988 | 0 |
| **2006** | **Total** | 2516 | 0 | 6400 | 0 |
| | **Change** | -50% | - | 548% | - |

Notes:
1. 1999 survey included uses A2, A3, A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The increase in space on the estate has been in the B8 use class with some decline in B1 uses.

### *2.3.3: Occupancy and change*

**Table 2.3.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 0% | 0% | 0% |

There was no vacant space in either survey.

### *2.3.4: Size class of units and change*

**Table 2.3.4: Change in area (m2) related to size of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total area** | 0 | 0 | 100% |
| **2006** | **Total area** | 20% | 0 | 80% |
| | **Change** | - | 0 | -20% |

Bridgewood is dominated by large units. The increase in size may be attributed to the increase of 20% in the total area occupied by small units compared to the 1999 survey.

## 2.4: Canal Road

Canal Road is a very small estate behind a new development at Strood Riverside, it has relatively poor access and is a cul-de-sac. Despite this, it has grown by a substantial (just over) 41% in terms of area since the last survey in 1999.

### *2.4.1 Size and change in size*

**Table 2.4.1: : Estate size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 840 | 1186 | |
| Percentage change | | | 41.2% |

### *2.4.2: Use and change of use*

**Table 2.4.2: Estate change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 90 | 140 | 210 | 400 |
| **2006** | **Total** | 116 | 292 | 778 | 0 |
| | **Change** | 29% | 109% | 271% | -100% |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

Canal road has shown increases in B8, B2 and B1 uses. Other uses are now non-existent.

### *2.4.3: Occupancy and change*

**Table 2.4.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space<br>percentage of area vacant | 0% | 0% | 0% |

There was no vacant space in Canal Road in either survey.

### *2.4.4: Size class of units and change*

**Table 2.4.4: Change in area (m2) related to size of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total area** | 83.33% | 16.67% | 0 |
| **2006** | **Total area** | 75.00% | 25.00% | 0 |
| | **Change** | -8.33% | 8.33% | 0 |

There has been a slight change in the mix of unit sizes since 1999. Some increase of small units at the expense of medium-sized units.

## 2.5: Chatham Maritime

Chatham Maritime is the largest estate in Medway; it has shown a major increase in size from the 1999 survey. It is one of the significant growth estates showing a growth rate over the period of just over 106%. Much of this may be due to the way the estate is now configured. It includes the most recent developments of the Docklands Retail outlet(s) and the very significant increase in space occupied by the "Universities at Medway".

### *2.5.1: Size and change in size*

**Table 2.5.1: Estate size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 123301 | 254441 | |
| Percentage change | | | 106.4 % |

Chatham Maritime has experienced the increase in area due to a combination of new construction at Dockside Outlet Centre, refurbishment of Historic Dockyard units and the further establishment of the various universities.

### *2.5.2: Use and change of use*

**Table 2.5.2: Estate change in area related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 56515 | 8940 | 8265 | 49581 |
| **2006** | **Total** | 97028 | 35261 | 22408 | 99744 |
| | **Change** | 72% | 294% | 171% | 101% |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

From 1999 to 2006, there was a 106% increase in space on the Chatham Maritime. Certain uses showed increases which were very large in terms of B2 (294%), and B8 (171%) and other (101%) with a smaller increase for B1 uses (72%).

### *2.5.3: Occupancy and change*

**Table 2.5.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 27.27% | 15.72% | -11.55% |

The percentage of vacant space reduced to just under 16% in 2006. This figure has little relevance (for comparison information) due to the significant increase in the estate size since 1999.

### *2.5.4: Size class of units and change*

**Table 2.5.4: Change in area (m2) related to size of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total area** | 34.67% | 26.67% | 38.67% |
| **2006** | **Total area** | 64.93% | 14.72% | 15.85% |
| | **Change** | 34.76% | -11.95% | -22.82% |

Chatham Maritime has shown a decrease in space occupied by large and medium units but a corresponding increase in space occupied by smaller units since the 1999 survey. This information is valid due to the way that the information is recorded however it should be noted that many of the small spaces may be occupied by the same (large) organisation. For example, each university operates from many smaller buildings / units but these form part of one organisation.

## 2.6: Commercial Road

Commercial Road is located in the heart of Strood; it has good local access but restricted access to the main road network. It has grown in area since the 1999 survey by 57%. This growth, while large in percentage terms reflects a very small estate.

### *2.6.1: Estate size and change in size*

**Table 2.6.1: Estate size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 3981 | 6243 | |
| Percentage change | | | 56.8% |

### *2.6.2: Use and change of use*

**Table 2.6.2: Estate change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 358 | 1618 | 1105 | 900 |
| **2006** | **Total** | 1632 | 1895 | 2390 | 326 |
| | **Change** | 356% | 17% | 116% | -64% |

Notes:
1. 1999 survey included uses A2, A3, A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

Commercial Road has shown substantial growth in B1 class use and smaller though significant growth in B8 uses. B2 use also shows some growth although this is not as significant as for the other use classes. The Other use class shows a quite significant reduction.

### *2.6.3: Occupancy and change*

**Table 2.6.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of space vacant | 0% | 0.58% | 0.58% |

The percentage of vacant space increased by a very small amount in 2006.

### *2.6.4: Size class of units and change*

**Table 2.6.4: Change in area (m2) related to size of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total area** | 50.00% | 50.00% | 0 |
| **2006** | **Total area** | 55.56% | 38.89% | 5.56% |
| | **Change** | 5.56% | -11.11% | |

There has been some increase in the space occupied by small and large units at the expense of medium-sized units since the 1999 survey.

## 2.7: Commissioners Road

Commissioners Road is adjacent to the Medway City Estate and to an extent, geographically merges with it. Generally, it has quite poor road access and has shown relatively little change (1%) in total area since the 1999 survey.

### *2.7.1: Size and change in size*

**Table 2.7.1: Estate size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 91563 | 92494 | |
| Percentage change | | | 1.0% |

### *2.7.2: Use and change of use*

**Table 2.7.2: Estate change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| 1999 | Total | 9811 | 28914 | 52463 | 375 |
| 2006 | Total | 15319 | 31164 | 43099 | 2912 |
| | Change | 56% | 8% | -18% | 677% |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

Other shows a significant increase in activity while B1 has increased though by a smaller amount. B2 has remained relatively static with growth of 8%. Over the same period B8 has shown a decline.

### *2.7.3: Occupancy and change*

**Table 2.7.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 22.78% | 7.07% | -15.71% |

The percentage of vacant space reduced to just under 16% in 2006.

### *2.7.4: Size class of units and change*

**Table 2.7.4: Change in area (m2) related to size of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| 1999 | Total area | 56.58% | 10.53% | 32.89% |
| 2006 | Total area | 61.43% | 12.86% | 25.71% |
| | Change | 4.85% | 2.33% | -7.18% |

There has been a decline in the proportion of space occupied by large units on the estate since 1999 whilst proportion of the area occupied by the other sizes show an increase.

## 2.8: Courtney Road

Courtney Road is located in Rainham, it is a large estate and has experienced a minor decrease in size since 1999. This may at least in part be due to the loss of a large block.

### *2.8.1: Size and change in size*

**Table 2.8.1: Estate size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 86671 | 85600 | |
| Percentage change | | | -1.2% |

### *2.8.2: Use and change of use*

**Table 2.8.2: Estate change in area related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 1063 | 72284 | 8047 | 5277 |
| **2006** | **Total** | 27510 | 32000 | 23720 | 2370 |
| | **Change** | 2488% | -56% | 195% | -55% |

Notes:
1. 1999 survey included uses A2, A3, A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The estate has experiences a very large increase in B1 use and a smaller increase in B8 use at the expense of B2 and Other uses.

### *2.8.3: Occupancy and change*

**Table 2.8.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 6.51% | 23.36% | 16.85% |

The percentage of vacant space increased to just over 23% in 2006.

### *2.8.4: Size class of units and change*

**Table 2.8.4: Change in area (m2) related to size of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total area** | 80.43% | 0 | 19.57% |
| **2006** | **Total area** | 10.00% | 20.00% | 70.00% |
| | **Change** | -70.43% | - | 50.43% |

The estate has shown an increase space occupied by medium and large units and a significant reduction in the area occupied by smaller-sized units since 1999.

## 2.9: Cuxton Industrial Estate

Cuxton is a small industrial estate on the riverside at Cuxton. It is rather isolated and has difficult access. It has shown a 9% decline in area since the 1999 survey.

### *2.9.1: Size and change in size*

**Table 2.9.1: Estate size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 6680 | 6090 | |
| Percentage change | | | -8.8% |

### *2.9.2: Use and change of use*

**Table 2.9.2: Estate change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| 1999 | Total | 1370 | 4340 | 470 | 0 |
| 2006 | Total | 2255 | 1715 | 2120 | 0 |
| | Change | 67% | -61% | 351% | - |

Notes:
1. 1999 survey included uses A2, A3, A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

There has been a large increase in B8 use and a smaller one in B1 use at the expense of B2 use.

### *2.9.3: Occupancy and change*

**Table 2.9.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 6.88% | 15.92% | 9.04% |

The percentage of vacant space has increased to almost 16% in 2006.

### *2.9.4: Size class of units and change*

**Table 2.9.4: Change in area (m2) related to size of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| 1999 | Total area | 52.94% | 41.18% | 5.88% |
| 2006 | Total area | 41.18% | 58.82% | 0% |
| | Change | -11.76% | 17.64% | -5.88% |

The decline in the estate is due to the reduction (disappearance) of some large units since the previous survey. The reduction in the small-sized units has added to this overall decrease. The increase in medium-sized units has not been able to offset the overall reduction in space.

## 2.10: 2-10 Cuxton Road

This is a very small area adjacent to Commercial Road, Strood. It is isolated with difficult access. The total area has decrease by almost 27% from the 1999 survey.

### *2.10.1: Size and change in size*

**Table 2.10.1: Estate size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 2395 | 1760 | |
| Percentage change | | | -26.51% |

### *2.10.2: Use and change of use*

**Table 2.10.2: Estate change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 1330 | 665 | 400 | 0 |
| **2006** | **Total** | 976 | 544 | 120 | 120 |
| | **Change** | -27% | -18% | -70% | |

Notes:
1. 1999 survey included uses A2, A3, A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The estate has shown decreases across all uses classes except for Other in the period between 1999 and 2006.

### *2.10.3: Occupancy and change*

**Table 2.10.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 33.4% | 0% | -33.4% |

The floor space vacant fell to zero by 2006.

### *2.10.4: Size class of units and change*

**Table 2.10.4: Change in area (m2) related to size of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total area** | 0.00% | 100.00% | 0.00% |
| **2006** | **Total area** | 33.33% | 66.67% | 0.00% |
| | **Change** | - | -33.33% | 0.00% |

Within the small number of units involved, the size distribution has changed such that small unit activity has increased whilst medium scale activity has decreased over the period to 2006.

## 2.11: Elm Court

Elm Court is a relatively small estate that has more than doubled in size since the 1999 survey. This may be due to some smaller units being replaced by a large joinery works. Access to the motorway system is difficult.

### *2.11.1: Size and change in size*

**Table 2.11.1: Estate size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 3175 | 7227 | |
| Percentage change | | | 127.6% |

### *2.11.2: Use and change of use*

**Table 2.11.2: Estate change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 283 | 1344 | 413 | 1135 |
| **2006** | **Total** | 1076 | 0 | 3209 | 2942 |
| | **Change** | 280% | -100% | 677% | 159% |

Notes:
1. 1999 survey included uses A2, A3, A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

Elm Court has shown a significant increase in B1 and B8 uses and a smaller increase in Other uses at the expense of B2 uses.

### *2.11.3: Occupancy and change*

**Table 2.11.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 10.61% | 8.74% | -1.87% |

The percentage of vacant space reduced to just under 9% in 2006.

### *2.11.4: Size class of units and change*

**Table 2.11.4: Change in area (m2) related to size of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total area** | 93.75% | 6.25% | 0 |
| **2006** | **Total area** | 66.67% | 22.22% | 11.11% |
| | **Change** | -27.08% | 15.97% | - |

All of the growth has been within the medium and large classifications with a reduction in the area related to small units since the 1999 survey.

## 2.12: Fenn Street

Fenn Street is located on the Isle of Grain. It has a poor location with no direct access to the A228. It is a small estate and has shown a decrease in size of almost 9% from 1999.

### *2.12.1: Size and change in size*

**Table 2.12.1: Estate size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 2315 | 2116 | |
| Percentage change | | | -8.6% |

### *2.12.2: Use and change of use*

**Table 2.12.2: Estate change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 290 | 930 | 1095 | 0 |
| **2006** | **Total** | 519 | 761 | 836 | 0 |
| | **Change** | 79% | -18% | -24% | - |

Notes:
1. 1999 survey included uses A2, A3, A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

Fenn Street has increased the amount of B1 use since the last survey in 1999 at the expense of B2 and B8 uses.

### *2.12.3: Occupancy and change*

**Table 2.12.3:: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 0% | 0% | 0% |

There was no vacant space at the time of both surveys.

### *2.12.4: Size class of units and change*

**Table 2.12.4: Change in area (m2) related to size of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total area** | 20.00% | 80.00% | 0 |
| **2006** | **Total area** | 40.00% | 60.00% | 0 |
| | **Change** | 20.00% | -20.00% | |

There has been an increase in the proportion of space occupied by small units on the estate since the last survey in 1999, this has been at the expense of medium-sized units.

## 2.13: Formby Road

Formby Road is located at Halling; the estate has remained relatively unchanged in area since the last survey in 1999. There has been some road widening here and changes to the arrangement of the cement works.

### *2.13.1: Size and change in size*

**Table 2.13.1: Estate size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 31595 | 31795 | |
| Percentage change | | | 0.6% |

### *2.13.2: Use and change of use*

**Table 2.13.2: Estate change in area(m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 2350 | 25710 | 3535 | 0 |
| **2006** | **Total** | 2150 | 26110 | 3535 | 0 |
| | **Change** | -9% | 2% | 0% | |

Notes:
1. 1999 survey included uses A2, A3, A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The 2006 survey shows only minor changes in uses in B1 and B2 uses compared to the 1999 survey.

### *2.13.3: Occupancy and change*

**Table 2.13.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 0% | 0% | 0% |

There was no vacant space in either survey.

### *2.13.4: Size class of units and change*

**Table 4: Change in area (m2) related to size of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total area** | 0 | 0 | 100% |
| **2006** | **Total area** | 0 | 0 | 100% |
| | **Change** | 0% | 0% | 0% |

All units are large and there is no change from the 1999 survey.

## 2.14:Gads Hill

Gads Hill is a small estate; the construction of a link road has resulted in a significant reduction in size. The reduction is just over 31% decrease in size from 1999.

### *2.14.1: Size and change in size*

**Table 2.14.1: Estate size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 4860 | 3340 | |
| Percentage change | | | -31.3% |

### *2.14.2: Use and change of use*

**Table2.14.2: Estate change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| 1999 | Total | 215 | 4645 | 0 | 0 |
| 2006 | Total | 240 | 3100 | 0 | 0 |
| | Change | 12% | -33% | - | - |

Notes:
1. 1999 survey included uses A2, A3, A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

There has been a small increase in a B1 uses on the estate, at the same time B2 use has fallen since the 1999 survey.

### *2.14.3: Occupancy and change*

**Table 2.14.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 0% | 0% | 0% |

There was no vacant space in either survey.

### *2.14.4: Size class of units and change*

**Table 2.14.4:: Change in area (m2) related to size of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| 1999 | Total area | 100.00% | 0 | 0 |
| 2006 | Total area | 20.00% | 60.00% | 20.00% |
| | Change | -80.00% | - | - |

There has been a significant change in this estate with a complete change from all small units in 1999 to a mixture of units (mainly medium) in the 2006 survey.

## 2.15: Gillingham Business Park

Gillingham Business Park is the third largest estate in the survey. It has shown an increase in size of just over 16% since the 1999 survey. The estate has good road access.

### *2.15.1: Size and change in size*

**Table 2.15.1: Estate size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 145803 | 169575 | |
| Percentage change | | | 16.3% |

### *2.15.2: Use and change of use*

**Table 2.15.2: Estate change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 35609 | 37969 | 55799 | 16426 |
| **2006** | **Total** | 69871 | 21524 | 65020 | 13160 |
| | **Change** | 97% | -43% | 17% | -20% |

Notes:
1. 1999 survey included uses A2, A3, A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

From 1999 to 2006 there was a 16% increase in space on the Gillingham Business Park, space classified as B2 was in decline (-43%) as well as Other uses (-20%). B1 uses showed an increase (97%) and B8 a smaller increase (17%).

### *2.15.3: Occupancy and change*

**Table 2.15.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space<br>percentage of area vacant | 13.77% | 9.62% | -4.15% |

The percentage of vacant space reduced to just under 10% in 2006.

### *2.15.4: Size class of units and change*

**Table 2.15.4: Change in area (m2) related to size of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total area** | 38.06% | 33.58% | 28.36% |
| **2006** | **Total area** | 36.09% | 39.85% | 24.06% |
| | **Change** | -1.97% | 6.27% | -4.30% |

There has been an increase in the proportion of space occupied by medium-sized units in the 2006 survey at the expense of large and small units, compared to 1999.

## 2.16: Hoo Industrial Estate

Hoo is a medium sized industrial estate that has experienced a modest increase in floor area of 8% in the period between 1999 and 2006. At the same time, the number of units fell from 31 to 23.

### *2.16.1: Size and change in size*

**Table 2.16.1: Estate size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 14935 | 16127 | |
| Percentage change | | | 8.0% |

### *2.16.2: Use and change of use*

**Table 2.16.2: Estate change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| 1999 | Total | 545 | 12190 | 2200 | 0 |
| 2006 | Total | 4500 | 4955 | 6336 | 336 |
| | Change | 726% | -59% | 188% | - |

Notes:
1. 1999 survey included uses A2, A3, A4, and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The data shows that B1 use increased quite significantly (726%) in Hoo between 1999 and 2006. There was also a significant increase in B8 uses. In contrast, the amount of general industrial activity (B2 uses) appears to have declined.

### *2.16.3: Occupancy and change*

**Table 2.16.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space<br>percentage of area vacant | 8.24% | 0.00% | -8.24% |

Vacant space reduced to zero in 2006

### *2.16.4: Size class of units and change*

**Table 2.16.4: Change in area (m2) related to size of units %**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| 1999 | Total area | 32.26% | 54.84% | 12.90% |
| 2006 | Total area | 34.78% | 43.48% | 21.74% |
| | Change | 2.52% | -11.36% | 8.84% |

In both 1999 and 2006, the majority of units are small to medium sized. The area represented by medium units fell over the period while the area of large units has grown.

## 2.17 Hopewell Drive

Hopewell Drive is a small industrial estate in which the number of units increased from 31 to 35 between 1999 and 2006. The overall floor space increased by almost 50% over the same period, indicating a period of good economic health.

### *2.17.1 Size and change in size*

**Table 2.17.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 12188 | 18211 | |
| Percentage change | | | 49.42% |

### *2.17.2: Use and change of use*

**Table 2.17.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 3389 | 6774 | 2025 | 0 |
| **2006** | **Total** | 4395 | 6030 | 5430 | 2356 |
| | **Change** | 29.7% | -11.0% | 168.1% | - |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The amount of B1 activity has grown, while light industrial activity (B2) has declined. The Other class was absent in 1999, but accounts for more than 2000 square metres of space in 2006.

### *2.17.3 Occupancy and change*

**Table 2.17.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 2.90% | 4.67% | 1.77% |

A minor change in vacant space, increasing by 1.77% over the period to 2006.

### *2.17.4 Size class of units and change*

**Table 2.17.4: Percentage of Small, Medium and Large for 1999 and 2006 and Change**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total** | 70.97% | 16.13% | 12.90% |
| **2006** | **Total** | 68.57% | 8.57% | 22.86% |
| | **Change** | -2.40% | -7.56% | 9.96% |

The majority of activity in Hopewell Drive is small scale in both 1999 and 2006. However, the area of large unit activity increased, while small and medium units decrease over the period 1999 to 2006.

## 2.18 Jenkins Dale

Jenkins Dale is a very small estate, housing seven units. The floor space area has increased by nearly 13% over the period from 1999 to 2006.

### *2.18.1: Size and change in size*

**Table 2.18.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 3473 | 3920 | |
| Percentage change | | | 12.9% |

### *2.18.2 Use and change of use*

**Table 2.18.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| 1999 | Total | 1803 | 300 | 0 | 1370 |
| 2006 | Total | 1795 | 1075 | 680 | 370 |
| | Change | -0.4% | 258.3% | 100% | -73.0% |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The B1 uses have remained comparatively stable, while the B2 class has more than doubled in area between 1999 and 2006. The B8 class has also increased while the Other class has reduced.

### *2.18.3 Occupancy and change*

**Table 2.18.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 0.00% | 20.41% | 20.41% |

The area vacant increased from zero in 1999 to just over 20% in 2006. This is a significant percentage in a small estate, but represents a small number of units.

### *2.18.4 Size class of units and change*

**Table 2.18.4: Change in area (m2) related to size class of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| 1999 | Total | 28.57% | 71.43% | 0.00% |
| 2006 | Total | 0.00% | 100.00% | 0.00% |
| | Change | -28.57% | 28.57% | 0.00% |

This estate comprises only small and medium sized units.. Over the period under consideration, the area of small units has fallen, but is replaced by an increase in medium size units.

## 2.19 Lower Twydall Lane

Lower Twydall Lane is a comparatively small estate that comprised 29 units in 1999 and now has 27 units. The overall area has grown by over 68%.

### *2.19.1 Size and change in size*

**Table 2.19.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 1056 | 1780 | |
| Percentage change | | | 68.56% |

### *2.19.2: Use and change of use*

**Table 2.19.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| 1999 | Total | 658 | 165 | 166 | 67 |
| 2006 | Total | 616 | 224 | 880 | 60 |
| | Change | -6.4% | 35.8% | 430.1% | -10.4% |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The main feature of change in the use classes is the growth in B8 accompanied by a more modest increase in B2 uses.

### *2.19.3: Occupancy and change*

**Table 2.19.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Space vacant<br>Percentage of area vacant | 9.66% | 23.15% | 13.49% |

The amount of vacant space increased from less than 10% in 1999 to just over 23% in 2006, suggesting that there may be capacity for growth in the area.

### *2.19.4: Size class of units and change*

**Table 2.19.4: Change in area (m2) related to size class of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| 1999 | Total | 100.00% | 0.00% | 0.00% |
| 2006 | Total | 100.00% | 0.00% | 0.00% |
| | Change | 0.00% | 0.00% | 0.00% |

The area has and continues to be characterised by small units.

## 2.20 Kingsnorth

Kingsnorth had 26 units in 1999 and 36 units in 2006.

### *2.20.1: Size and change in size*

**Table 2.20.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 11560 | 62940 | |
| Percentage change | | | 444.5% |

The overall floor space on the estate has grown significantly over the period between 1999 and 2006, representing a percentage change of well over 400%.

### *2.20.2 Use and change of use*

**Table 2.20.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 1260 | 5100 | 5090 | 110 |
| **2006** | **Total** | 5640 | 44470 | 4303 | 8527 |
| | **Change** | 347.6% | 772.0% | -15.5% | 7651.8% |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The B1, B2 and Other classes have grown significantly since 1999. The only category showing a decline is B8.

### *2.20.3 Occupancy and Change*

**Table 2.20.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 8.22% | 15.74% | 7.52% |

The area of vacant space has increased over the period to 2006 by over 7%.

### *2.20.4 Size class of units and change*

**Table 2.20.4: Change in area (m2) related to size class of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total** | 50.00% | 38.46% | 11.54% |
| **2006** | **Total** | 36.11% | 44.45% | 19.44% |
| | **Change** | -13.89% | 5.99% | 7.90% |

There have been increases in medium and large-scale activities, possibly reflecting the inclusion of power generation activities in the data for the first time in 2006.

## 2.21 Lordswood Industrial Estate

Lordswood Industrial Estate has undergone a period of growth between 1999 and 2006. The number of units present increased from 50 in 1999 to 61 in 2006.

### *2.21.1: Size and change in size*

**Table 2.21.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 32462 | 36584 | |
| Percentage change | | | 12.70% |

### *2.21.2: Use and change of use*

**Table 2.21.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| 1999 | Total | 9895 | 13339 | 8948 | 280 |
| 2006 | Total | 13258 | 11029 | 12260 | 37 |
| | Change | 34.0% | -17.3% | 37.0% | -86.8% |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The main sources of growth are B1 and B8 activities. B2 and Other classes have declined over the period 1999-2006.

### *2.21.3: Occupancy and change*

**Table 2.21.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Space vacant<br>Percentage of area vacant | 1.03% | 9.98% | 8.95% |

The amount of vacant space has increased by just under 9% between 1999 and 2006.

### *2.21.4: Size class of units and change*

**Table 2.21.4: Change in area (m2) related to size class of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| 1999 | Total | 58.00% | 34.00% | 8.00% |
| 2006 | Total | 49.18% | 44.26% | 6.56% |
| | Change | -8.82% | 10.26% | -1.44% |

The area represented by small units has fallen by just over 8%, while the area of medium size units has increased by more than 10%. The percentage of large units has fallen by just over 1%.

## 2.22: Medway City Estate

Medway City Estate is one of the three largest mixed industrial/business estates in Medway and in popular perception generally regarded as the busiest.

### *2.22.1: Size and change in size*

**Table 2.22.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 184454 | 179487 | |
| Percentage change | | | -2.69 |

The total floor space has not changed significantly over the period from 1999 to 2006.

### *2.22.2: Use and change of use*

**Table 2.22.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 77182 | 29734 | 71894 | 5644 |
| **2006** | **Total** | 71708 | 27135 | 66811 | 13833 |
| | **Change** | -7.1% | -8.7% | -7.1% | 145.1% |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The B1, B2 and B8 classes have all reduced. In contrast, the Other class has increased significantly. There is evidence that suggests the estate may be changing, losing industrial and specialist industrial activity and offices, while gaining some retail, such as direct sale to the public.

### *2.22.3: Occupancy and Change*

**Table 2.22.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 14.18% | 11.33% | -2.85% |

The percentage of space vacant has decreased to just over 11%.

### *2.22.4: Size class of units and change*

**Table 2.22.4: Change in area (m2) related to size class of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total** | 81.19% | 15.70% | 3.11% |
| **2006** | **Total** | 77.91% | 19.15% | 2.95% |
| | **Change** | -3.28% | 3.45% | -0.16% |

There have been only small changes in the percentages of space in small, medium and large units over the period between 1999 and 2006.

## 2.23 Medway Valley Park

Medway Valley Park has shrunk in floor space over the period between 1999 and 2006, although there remain 14 units in 2006. Anecdotal evidence suggests that access to the site may be problematic for some users.

### *2.23.1: Size and change in size*

**Table 2.23.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 32375 | 27190 | |
| Percentage change | | | -16.0% |

### *2.23.2: Use and change of use*

**Table 2.23.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 3095 | 11206 | 18074 | 0 |
| **2006** | **Total** | 10665 | 760 | 15765 | 0 |
| | **Change** | 244.6% | -93.2% | -12.8% | 0 |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The only sector of growth is in B1 activities. The B2 activities have reduced significantly over the period to 2006.

### *2.23.3: Occupancy and change*

**Table 2.23.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 0.00% | 7.36% | 7.36% |

There was an increase in area vacant from zero in 1999 to just over 7.0% in 2006.

### *2.23.4: Size class of units and change*

**Table 2.23.4: Change in area (m2) related to size class of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total** | 7.69% | 0.00% | 92.31% |
| **2006** | **Total** | 14.29% | 14.29% | 71.43% |
| | **Change** | 6.60% | 14.29% | -20.88% |

The main feature is a fall in the floor space represented by large units, while both small and medium units have increased their floor space.

## 2.24 Otterham Quay Lane 2006

Data are available only for 2006 in the case of Otterham Quay Lane. Two businesses are present; one is in the B2 category, the other is in the B8 category.

### *2.24.1: Size and change in size*

**Table 2.24.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | - | 10500 | |
| Percentage change | - | - | Not possible to comment |

### *2.24.2: Use and change of use*

**Table 2.24.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| 1999 | Total | - | - | - | - |
| 2006 | Total | 0 | 1250 | 9250 | 0 |
| | Change | | | | |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

**Table 2.24.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space<br>percentage of area vacant | - | 0.00% | |

No vacant units, but no comparison possible due to lack of 1999 data.

### *2.24.4: Size class of units and change*

**Table 4: Change in area (m2) related to size class of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| 1999 | Total | - | - | - |
| 2006 | Total | 0.00% | 0.00% | 100.00% |
| | Change | 0.00% | 0.00% | 100.00% |

The data reflect the situation in 2006, an even split between small and large units. No comparison possible.

## 2.25 Pier Road

Pier Road is comparatively small and has not changed appreciably between 1999 and 2006 in terms of overall floor space. The number of units has fallen from 31 to 30.

### *2.25.1: Size and change in size*

**Table 2.25.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 1135 | 1151 | |
| Percentage change | | | 1.4% |

### *2.25.2: Use and change of use*

**Table 2.25.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| 1999 | Total | 473 | 470 | 192 | 0 |
| 2006 | Total | 329 | 362 | 338 | 122 |
| | Change | -30.4% | -23.0% | 76.0% | 100% |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

Business offices and light industrial uses and general and specialist industry have decreased in floor space, while storage/distribution activities and the other class have increased their space by 76% and 100% respectively.

### *2.25.3: Occupancy and change*

**Table 2.25.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space<br>percentage of area vacant | 15.86% | 2.78% | -13.08% |

The area vacant fell significantly between 1999 and 2006, possibly as a result of the increase in amount of B8 and other activity over the period.

### *2.25.4: Size class of units and change*

**Table 2.25.4: Change in area (m2) related to size class of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| 1999 | Total | | | |
| 2006 | Total | 100.00% | 0.00% | 0.00% |
| | Change | 100.00% | 0.00% | 0.00% |

All of the activity in Pier Road was and remains small in scale.

## 2.26: Railway Street

Railway Street is a small industrial estate. The overall floor space has fallen modestly although this could be explained by internal remodelling of some units.

### *2.26.1 Size and change in size*

**Table 2.26.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 4005 | 3696 | |
| Percentage change | | | -7.72% |

### *2.26.2: Use and change of use*

**Table 2.26.2: Estate change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 0 | 1706 | 2299 | 0 |
| **2006** | **Total** | 1666 | 851 | 1005 | 174 |
| | **Change** | - | -50.1% | -56.3% | - |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The B1 class has emerged over the period under review, accounting for more than 1600 square metres in 2006. There has also been a small growth in the Other class. Both B2 and B8 have decreased.

### *2.26.3: Occupancy and change*

**Table 2.26.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | 0.00% | 22.81% | 22.81% |

The area vacant increased from zero in 1999 to just under 23% in 2006.

### *2.26.4: Size class of units and change*

**Table 2.26.4: Change in area (m2) related to size class of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total** | 81.25% | 18.75% | 0.00% |
| **2006** | **Total** | 100.00% | 0.00% | 0.00% |
| | **Change** | 18.75% | -18.75% | 0.00% |

The size of units appears to have decreased between 1999 and 2006. The area represented by small units becomes 100% by 2006, while the area of medium scale activity decreases to zero.

## 2.27 Rochester Airport Industrial Estate

At Rochester Airport Industrial Estate, the overall floor space has fallen by 4%. This can be regarded as a temporary situation, explained by demolition and subsequent redevelopment underway during the period of survey work in 2006.

### *2.27.1: Size and change in size*

**Table 2.27.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 101564 | 97490 | |
| Percentage change | | | -4.01% |

### *2.27.2: Use and change of use*

**Table 2.27.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| 1999 | Total | 40102 | 53519 | 4225 | 3718 |
| 2006 | Total | 37958 | 45611 | 8483 | 5438 |
| | Change | -5.3% | -14.8% | 100.8% | 46.3% |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The B1 and B2 classes both have fallen in size between 1999 and 2006. Over the same period, the B8 and Other activities have increased in floor space; the former more than doubling, the latter growing by nearly 50%.

### *2.27.3: Occupancy and change*

**Table 2.27.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space<br>percentage of space vacant | 4.22% | 1.40% | -2.82% |

The amount of vacancy has fallen over the period between 1999 and 2006.

### *2.27.4: Size class of units and change*

**Table 2.27.4: Change in area (m2) related to size class of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| 1999 | Total | 0.00% | 62.07% | 37.93% |
| 2006 | Total | 5.00% | 45.00% | 50.00% |
| | Change | 5.00% | -17.07% | 12.07% |

Rochester Airport Industrial Estate had no small units in 1999 and mostly medium and large units in 2006, although the area of medium scale activity fell by 17% over that period. At the same time, the area represented by small and large units grew by 5% and 12% respectively.

## 2.28 Rochester High Street and Bardell Terrace

The Rochester High Street and Bardell Terrace estate represents a small area located at the eastern end of historic Rochester High Street and the foot of Star Hill. The size of the floor space occupied has reduced significantly, by more than 60% as industrial/commercial activity has given way to redevelopment, including housing.

### *2.28.1: Size and change in size*

**Table 2.28.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 7837 | 2895 | |
| Percentage change | | | -63.1% |

### *2.28.2: Use and change of use*

**Table 2.28.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| 1999 | Total | 1414 | 2284 | 2324 | 1815 |
| 2006 | Total | 400 | 560 | 610 | 1325 |
| | Change | -71.7% | -75.5% | -73.8% | -27.0% |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The floor space totals for each of the use class categories have fallen significantly, suggesting that the area has been experiencing significant change.

### *2.28.3: Occupancy and change*

**Table 2.28.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space<br>Percentage of space vacant | 3.37% | 4.49% | 1.12% |

The area vacant increased by just over 1%, representing a very modest change by 2006.

### *2.28.4: Size class of units and change*

**Table 2.28.4: Change in area (m2) related to size class of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| 1999 | Total | 38.46% | 46.15% | 15.39% |
| 2006 | Total | 69.23% | 30.77% | 0.00% |
| | Change | 30.77% | -15.38% | -15.39% |

There is a shift occurring in the overall scale of activity in the area, with small unit activity increasing while medium and large scale activity has decreased. This should be considered along with the overall reduction in size of the estate.

## 2.29 Rochester Riverside

Rochester Riverside is one of the major regeneration sites within Medway. In 2006, the great majority of the area was cleared as part of the Rochester Riverside regeneration scheme. This is reflected in the shrinkage of the estate from 56 units in 1999 to 24 units in 2006. The overall area of the estate has fallen by 86%.

### *2.29.1: Size and change in size*

**Table 2.29.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 46634 | 6517 | |
| Percentage change | | | -86.03% |

### *2.29.2: Use and change of use*

**Table 2.29.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 3305 | 3642 | 39307 | 380 |
| **2006** | **Total** | 2668 | 2106 | 1713 | 30 |
| | **Change** | -19.3% | -42.2% | -95.6% | -92.1% |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The use class data confirm the changes noted above.

### *2.29.3: Occupancy and change*

**Table 2.29.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space<br>percentage of space vacant | 33.79% | 13.72% | -20.07% |

The amount of vacant space has fallen, probably reflecting the removal of structures as part of the regeneration scheme.

### *2.29.4: Size class of units and change*

**Table 2.29.4: Change in area (m2) related to size class of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total** | 69.64% | 16.07% | 14.29% |
| **2006** | **Total** | 83.33% | 12.50% | 4.17% |
| | **Change** | 13.69% | -3.57% | -10.12% |

The size data show that both medium and large units have declined. The amount of small scale activity represents the last remaining business units on the site.

## 2.30 Second Avenue

The Second Avenue industrial estate had 47 units in 1999, with the number of units then falling to 28 in 2006. Despite this, the overall area of the estate has increased by 5.2% to just over 23,000 square metres.

### *2.30.1: Size and change in size*

**Table 2.30.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 22051 | 23292 | |
| Percentage change | | | 5.63% |

### *2.30.2: Use and change of use*

**Table 2.30.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 8404 | 6072 | 6435 | 1140 |
| **2006** | **Total** | 10653 | 5373 | 7176 | 90 |
| | **Change** | 26.8% | -11.5% | 11.5% | -92.1% |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The use class categories show that B2 and Other decreased between 1999 and 2006; the latter almost disappearing entirely. At the same time, B1 and B8 uses have grown.

### *2.30.3: Occupancy and change*

**Table 2.30.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Space vacant<br>Percentage of vacant space | 12.45% | 0.97% | -11.48% |

The amount of vacant space has decreased over the period from 1999 to less than 1%,

### *2.30.4: Size class of units and change*

**Table 2.30.4: Change in area (m2) related to size class of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total** | 42.55% | 44.68% | 12.77% |
| **2006** | **Total** | 42.86% | 39.29% | 17.86% |
| | **Change** | 0.31% | -5.39% | 5.09% |

While there has been no change in the total area of small units, the medium class has decreased and the area of large-scale activity has increased by almost the same percentage. This may suggest that some businesses are expanding their operations in the area.

## 2.31 Steel Fields

Steel Fields represents a small enclave with only five units (one company) in 2006. The overall size of the floor space fell from just over 8000 square metres to 6480 in 2006, which may be explained by on-site changes.

### *2.31.1 Size and change in size*

**Table 2.31.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 8045 | 6480 | |
| Percentage change | | | -19.45% |

### *2.31.2: Use and change of use*

**Table 2.31.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 630 | 7415 | 0 | 0 |
| **2006** | **Total** | 6480 | 2240 | 4240 | 0 |
| | **Change** | 255.6% | -42.8% | - | 0 |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The balance of space use has shifted from general and specialised industrial to business office/light industrial and storage; this is the result of a reappraisal of building uses between 1999 and 2006.

### *2.31.3: Occupancy and change*

**Table 2.31.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Space vacant<br>Percentage of vacant space | 0.00% | 0.00% | 0.00% |

No vacant units

### *2.31.4: Size class of units and change*

**Table 2.31.4: Change in area (m2) related to size class of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total** | 33.33% | 33.33% | 33.34% |
| **2006** | **Total** | 20.00% | 20.00% | 60.00% |
| | **Change** | -13.33% | -13.33% | 26.66% |

The data indicate that small and medium scale space use has decreased while the large category has grown.

## 2.32 Temple Industrial Estate

Temple is a comparatively large estate. The floor space size has decreased marginally, by just over 2%. The area may be affected by issues of access given its location in Strood, bounded by Strood town centre and the River Medway.

### *2.32.1: Size and change in size*

**Table 2.32.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | 146811 | 143511 | |
| Percentage change | | | -2.25% |

### *2.32.2: Use and change of use*

**Table 2.32.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | 12047 | 71943 | 61518 | 1303 |
| **2006** | **Total** | 24648 | 10913 | 100042 | 7908 |
| | **Change** | 104.6% | -84.8% | 62.6% | 506.9% |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

The major feature of the use class changes is the decrease in B2, with increases in B1, B8 and Other activities.

### *2.32.3: Occupancy and change*

**Table 2.32.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space<br>percentage of area vacant | 1.59% | 4.04% | 2.45% |

The amount of vacant floor space has increased by just over 2% in the period to 2006.

### *2.32.4: Size class of units and change*

**Table 2.32.4: Change in area (m2) related to size class of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total** | 41.51% | 44.34% | 14.15% |
| **2006** | **Total** | 28.57% | 53.33% | 18.10% |
| | **Change** | -12.94% | 8.99% | 3.95% |

There was a decrease in the amount of small-scale activity accompanied by an increase for medium and large-scale activity over the period 1999 to 2006.

## 2.33 Isle of Grain/Thamesport 2006

Data are available only for 2006, rendering a comparison with 1999 impossible. There are 10 units, accounting for almost 94,000 square metres of floor space.

### *2.33.1: Size and change in size*

**Table 2.33.1: Size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | - | 93739 | |
| Percentage change | | | - |

### *2.33.2: Use and change of use*

**Table 2.33.2: Change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| **1999** | **Total** | - | - | - | - |
| **2006** | **Total** | 810 | 56209 | 36720 | 0 |
| | **Change** | | | | |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

B2 is the most significant presence on the estate followed by a large amount of B8 use.

### *2.33.3: Occupancy and change*

**Table 2.33.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | - | 0% | |

No vacant units, but no comparison possible due to lack of previous data.

### *2.33.4: Size class of units and change*

**Table 2.33.4: Change in area (m2) related to size class of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| **1999** | **Total** | - | - | - |
| **2006** | **Total** | 40.00% | 0.00% | 60.00% |
| | **Change** | - | - | - |

The area is characterised by a combination of small and large units.

## 2.34 Thameside Terminal 2006

Thameside Terminal consists of seven units and a total of 1250 square metres in 2006. No data were available for 1999 therefore no comparison was possible.

### *2.34.1: Size and change in size*

**Table 2.34.1: Estate size (m2 area)**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Total size | - | 1250 | - |
| Percentage change | - | - | - |

### *2.34.2: Use and change of use*

**Table 2.34.2: Estate change in area (m2) related to use class**

| Survey | Total/Change | B1[1] | B2 | B8 | Other [2] |
|---|---|---|---|---|---|
| 1999 | Total | - | - | - | - |
| 2006 | Total | 404 | 630 | 216 | 0 |
| | Change | - | - | - | - |

Notes:
1. 1999 survey included uses A2, A3 A4 and A5 in this category, so not comparable to 2006
2. 1999 survey included uses A1, D1and D2 in this category, so not comparable to 2006

There has been an increase in B8 uses at the expense of B1 and B2 uses.

The (B2) class is the single largest area at 630 square metres.

### *2.34.3: Occupancy and change*

**Table 2.34.3: Vacant/Occupied**

| Survey | 1999 | 2006 | Change 1999/2006 |
|---|---|---|---|
| Vacant space percentage of area vacant | - | 0.00% | - |

No vacant units.

### *2.34.4: Size class of units and change*

**Table 2.34.4: Change in area (m2) related to size of units**

| Survey | Total/Change | Small units | Medium units | Large units |
|---|---|---|---|---|
| 1999 | Total area | - | - | - |
| 2006 | Total area | 21.60% | 78.40% | 0.00% |
| | Change | - | - | - |

The medium floor space percentage actually represents two units, while the small category represents five. No large units are present in 2006. These data represent offices and storage or office and industrial activity for the companies present.

# Section 3: Profile of Non Industrial Estate Activities in Medway in 2006

## 3.0: Profile of Non Industrial Estate Activities in Medway in 2006

While the central focus of this project has been to compare commercial land use activities in Medway in 1999 and 2006, the opportunity for comparison is limited in the case of non industrial estate activities due to the limited amount of data available for 1999. For the purposes of this report, the 21 cases available in the 1999 data are treated as a sample (not statistically representative) and where possible a simple comparison with the 2006 data is carried out.

### 3.1: All Non Industrial Estate Activities

The occurrences of the different use classes among these units are profiled first.

**Table 3.1: Non Industrial Estate Use Class Occurrences 2006**

| | No | % all occurrences |
|---|---|---|
| **B1** | 118 | 20.9 |
| **B2** | 75 | 13.3 |
| **B8** | 49 | 8.7 |
| **A2** | 236 | 41.8 |
| **D1** | 52 | 9.2 |
| **Other** | 18 | 3.2 |
| **A1** | 10 | 1.8 |
| **D2** | 3 | 0.5 |
| **A4** | 3 | 0.5 |
| **Totals** | 564 | 100 |

**Note:** number of occurrences of floor space in use classes differs from the number of units as a unit may contain more than one use class.

The data indicate that financial and professional services (A2) along with business offices (B1) collectively account for more than 60% of the units in non industrial estate locations. This is a reflection of the kinds of business services and other office based commercial activities commonly found in town centres.

An analysis of SIC codes for the non-industrial estate activities was then carried out. The SIC codes for all of the non industrial estate units were reviewed and reclassified to represent a smaller number of coherent commercial activities than found in the standard list of SIC codes.

**Table 3.1.1: Categorised SIC Codes for Non Industrial Estate Sites**

| | Number | % |
|---|---|---|
| Agriculture (1240, 1250) | 4 | 0.8 |
| Wood Processing/manufacture (20510) | 2 | 0.4 |
| Publishing/printing (22110, 22120) | 3 | 0.6 |
| Manufacturing (28110, 26660, 28110, 29230, 36140 27350, 27450, 31620) | 10 | 2.1 |
| Energy Production and Supply (40100) | 5 | 1.4 |
| Building construction/completion (45210, 45310, 45340, 45450) | 8 | 1.7 |
| Motor vehicle repair, maintenance, parts, accessories, sales (50100, 50200, 50300, 50200a, 50200e, 50400) | 44 | 9.2 |
| Banking, finance, insurance * (65121, 65121a, 65122, 65221a, 65220, 65223, 66000) | 69 | 14.4 |
| Real estate/property * (70310, 70320, 70110, 70202) | 87 | 18.2 |
| Legal activities (74110, 74110a) | 37 | 7.7 |
| Accounting (74120) | 11 | 2.3 |
| Labour recruitment/personnel provision * (74500) | 33 | 6.9 |
| Human medical/dental (85110, 85120, 85130, 85140) | 47 | 9.8 |
| Architectural/Engineering tech consultancy * (74200) | 9 | 1.9 |
| Adult education/private training (80420, 80421, 80422) | 7 | 1.5 |
| General public services (75110, 75230) | 12 | 2.5 |
| Miscellaneous other activities (74830, 74819, 74820, 74840, 75140, 85310, 85321, 92320, 92719a, 93040, 999990 | 69 | 14.4 |
| Vacant buildings | 22 | 4.5 |
| Totals | 479 | 100 |

The SIC code data reveal five categories of significant activity. Real Estate agencies and other property related activities comprise 18.2% (87 cases) of the activities. As a group, banking, finance and insurance contribute 14.4% (69 cases) of the cases. This is matched by miscellaneous other office based activities. Human medical and dental activities also represent 9.8% (47) of cases. Maintenance and repair and provision of parts for motor vehicles appear to be more common than suggested when use class data alone are consulted at 9.2%, (44 cases).

The total amount of floor space in each of the use classes and the overall total amount of floor space were calculated. This is shown in square metres in table 3.1.2 below.

**Table 3.1.2: Floor Space Totals**

| Use Class | Sq metres | % |
|---|---|---|
| B1 | 62157 | 35.5 |
| B2 | 18420 | 10.5 |
| B8 | 10747 | 6.1 |
| A1 | 1906 | 1.1 |
| A2 | 40858 | 23.3 |
| A4 | 1650 | 1.0 |
| D1 | 19101 | 10.9 |
| D2 | 530 | 0.4 |
| Other | 14772 | 8.4 |
| Vacant | 4979 | 2.8 |
| Total | 175120 | 100 |

The data tend to confirm the pattern revealed in the SIC codes in that the B1 and A2 categories (business offices and financial and professional services), taken together, account for 58.8% (103015 sq metres) of the total floor space.

For the purposes of this report, floor space is classified into three categories:

Large >1000m$^2$
Medium 250-1000m$^2$
Small <250m$^2$

The minimum, maximum and average floor spaces for the various use classes were calculated. The data suggest that the non industrial estate activities are small to medium size enterprises, although it is acknowledged that this does not take into account numbers of employees or business turnover. The maximum floor space sizes presented in Table 3.1.3 below represent a small number of some well known companies and medical/health centres within Medway.

**Table 3.1.3: Maximum and Minimum Sizes of use Class floor spaces in square metres**

| | B1 | B2 | B8 | Other | A1 | A2 | A4 | D1 | D2 |
|---|---|---|---|---|---|---|---|---|---|
| Max | 19520 | 5320 | 1714 | 4344 | 750 | | 1250 | 3236 | 309 |
| Min | 5 | 7 | 9 | 50 | 6 | 14 | 160 | 24 | 89 |
| Ave | 590.7 | 267.7 | 220.2 | 820.7 | 190 | 196 | 550 | 367.3 | 177 |
| | Med | Med | Small | Med | Small | Small | Med | Med | Small |
| | | | | | | | | | |

### 3.2: High Streets

The overall pattern of activities in the High Streets across the Medway towns, as distinct from all non industrial estate activity, was explored by examining the 214 business activities with High Street addresses in Strood, Rochester, Chatham, Gillingham and Rainham.

The occurrence of the various use classes is shown in table 3.2. The results indicate that the combination of financial and professional services and business offices dominates on the High Streets.

**Table 3.2: Occurrence of Use Classes in High Streets**

| Use Class | No | % |
|---|---|---|
| B1 | 40 | 18.3 |
| B2 | 14 | 6.4 |
| B8 | 5 | 2.3 |
| Other | 9 | 4.1 |
| A1 | 2 | 0.9 |
| A2 | 127 | 58.0 |
| D1 | 19 | 8.7 |
| D2 | 3 | 1.4 |
| Total | 219 | 100.0 |

The SIC codes were then explored, (see table 3.2.1) further confirming the importance of financial services and professional office based activities. Taken together, banking/finance/ insurance; real estate; legal/solicitors; labour recruitment;

architectural and engineering consultancy; and, accountancy account for 138 cases (64.5%). Interestingly, labour recruitment/provision of personnel emerged from the SIC codes analysis as a distinctive activity, particularly on Chatham High Street which alone accounted for 12 of the cases.

### Table 3.2.1: SIC Codes for all High Street locations

| SIC Categories and SIC Codes | No. | % |
|---|---|---|
| **Banking, finance, insurance** (65121, 65121a, 65122, 66000, 66030, 65223, 65220) | 51 | 23.8 |
| **Real estate/property** (70310, 70320, 70110, 70202) | 46 | 21.5 |
| **Legal activities/solicitors** (74100, 74110a) | 18 | 8.4 |
| **Labour Recruitment/Prov of Personnel** (74500) | 18 | 8.4 |
| **Human medical/dental** (85120, 8513085110, 85140) | 13 | 6.1 |
| **General public services** (75110) | 11 | 5.1 |
| **Motor vehicle repair, maintenance etc** (50200, 50200a, 50200e, 50400) | 8 | 3.7 |
| **Architectural/Engineering technical consultancy** (74200) | 6 | 2.8 |
| **Accounting** (74120) | 5 | 2.3 |
| **Printing/publishing** (22110, 22120) | 2 | 0.9 |
| **Manufacturing** (20510, 36140) | 2 | 0.9 |
| **Gen mechanical engineering** (28520) | 2 | 0.9 |
| **Other** (74800, 74819, 90000, 99999, 80420, 80421, 80422, 74840, 75230, 71000, 85310, 92320, 93040, 63310, 64100a) | 32 | 14.9 |
| **Totals** | 214 | 100 |

As shown in table 3.2.2 when the use class floor spaces are considered, the B1 and A2 classes are, together, the dominant areas of activity, representing 74.1% (55,716 sq metres) of the total high street floor space. This confirms the importance of financial and professional services and business offices on the high streets.

### Table 3.2.2: Total Floor Space for Use Classes on High Streets

| | Sq metres | % |
|---|---|---|
| **B1** | 30734 | 40.9 |
| **B2** | 2952 | 3.9 |
| **B8** | 858 | 1.1 |
| **Other** | 6654 | 8.8 |
| **A1** | 1330 | 1.8 |
| **A2** | 24982 | 33.2 |
| **D1** | 7178 | 9.5 |
| **D2** | 530 | 0.7 |
| **Total** | 75218 | 100.0 |

The minimum, maximum and average sizes of the activities in High Street locations suggest that the activities are mainly small to medium sized enterprises in terms of floor space.  These are shown in table 3.2.3

**Table 3.2.3: Minimum, Maximum and Average Use Class Floor Space**

| | B1 | B2 | B8 | Other | A1 | A2 | D1 | D2 |
|---|---|---|---|---|---|---|---|---|
| **Min** | 40 | 50 | 48 | 135 | 580 | 14 | 24 | 89 |
| **Max** | 10320 | 654 | 360 | 4344 | 750 | 817 | 3236 | 309 |
| **Ave** | 768 | 211 | 172 | 739 | 665 | 197 | 378 | 177 |
| | Medium | Small | Small | Medium | Medium | Small | Medium | Small |

A comparison of the High Streets was carried out using the SIC codes in order to investigate whether there is evidence of clustering of particular activities. The data suggest that banks and other financial services are particularly important to Gillingham High Street. Estate agencies are particularly important in Rainham, Strood and Gillingham. Chatham High Street stands out for a possible cluster of businesses involved in labour recruitment and personnel activities. These are shown in table 3.2.4

**Table 3.2.4: Summary of Activities on Individual High Streets based on SIC Codes**

| | Strood | Rochester | Chatham | Gillingham | Rainham |
|---|---|---|---|---|---|
| **Banking, finance, insurance** | 8 (22.2%) | 10 (17.2%) | 14 (22.2%) | 10 (41.7%) | 9 (27.3%) |
| **Vehicle repair, maintenance etc** | 1 (2.8%) | 4 (6.9%) | | | 3 (9.1%) |
| **Real estate/property** | 11 (30.6%) | 11 (19.0%) | 7 (11.1%) | 6 (25.0%) | 11 (33.3%) |
| **Solicitors/legal activities** | 5 (13.9%) | 2 (3.4%) | 5 (7.9%) | | 6 (18.2%) |
| **Accountancy** | 1 (2.8%) | 1 (1.7%) | 2 (3.2%) | | 1 (3.0%) |
| **Architectural/Engineering tech consultancy** | | 5 (8.6%) | | 1 (4.2%) | |
| **Labour provision/personnel** | 2 (5.6%) | 1 (1.7%) | 12 (19.0%) | 3 (12.5%) | |
| **Human medical/dental** | | 5 (8.6%) | 4 (6.3%) | 3 (12.5%) | 1 (3.0%) |
| **Publishing/printing** | | 2 (3.4%) | | | |
| **Manufacturing** | 1 (2.8%) | 1 (1.7%) | | | |
| **Gen mechanical engineering** | | 1 (1.7%) | 1 (1.6%) | | |
| **Gen public service** | 4 (11.1%) | 1 (1.7%) | 5 (7.9%) | 1 (4.2%) | |
| **Other** | 3 (8.3%) | 14 (24.1%) | 13 (20.6%) | | 2 (6.1%) |
| **Totals** | 36 (100%) | 58 | 63 | 24 | 33 |

**Note** that SIC Codes used are the same as those in the table for all High Streets

## 3.3: Non High Street, Non Industrial Estate Activities

To complete the profile of non estate activities in 2006, those activities occurring outside both the industrial estates and the High Streets were examined. The uses of relevance in this section are B1, B2, B8, A2 and "other". Amongst these, the data indicate that the A2 (financial and professional services) is the single most important category (39.6%) followed by B1 business offices (24.6%). The industrial activities represented by the B2 classes are more prominent than in the High Street locations, as are the storage/distribution activities associated with the B8 class.

The SIC codes were aggregated to permit identification of coherent groups of related activity. The data tend to confirm the importance of real estate/property offices off the High Streets as well as on High Streets. Additional features of the non high street addresses include vehicle repairs, maintenance, parts and sales a single category along with the presence of medical and dental practices.

**Table 3.2.1: Non Estate/Non High Street Activities based on SIC Codes**

| | No. | % |
|---|---|---|
| Animal husbandry/farming (1420, ,1250) | 4 | 1.6 |
| Manufacturing (20510, 26660, 29230, 36140) | 4 | 1.6 |
| Printing (22220) | 1 | 0.4 |
| Production/Dist of electric (40100) | 5 | 2.0 |
| Building constr/completion (45210, 45310, 45340, 45450) | 8 | 3.1 |
| Vehicle repairs, maintenance and related (50100, 50200, 50200a, 50200e, 50300) | 35 | 13.7 |
| Banking, finance, insurance (65121a, 65236, 66000, 66030, 65122, 65122a, 65121a, 65223) | 21 | 8.2 |
| Real estate/Property (70110, 70310) | 41 | 16.1 |
| Accounting (74120) | 6 | 2.4 |
| Legal/Solicitors (74110a) | 19 | 7.5 |
| Architecture/Engineering tech consultants (74200) | 3 | 1.2 |
| Labour Procurement/Personnel (74500) | 15 | 5.9 |
| Human Medical/Dental (85120, 85130, 85140) | 31 | 12.1 |
| Sewage/refuse disposal (90000) | 6 | 2.3 |
| Storage and Warehousing (63120) | 4 | 1.6 |
| Other (52460f, 52460h, 52489l, 51700, 55100, 85310, 85321, 92710a, 99999, 93010a, 80422, 75110, 75140, 74820, 72000) | 35 | 13.7 |
| Vacant | 9 | 3.5 |
| Miscellaneous other business (74800) | 8 | 3.1 |
| | 255 | 100.0 |

The total amounts of floor space by commercial use classes are presented below, along with the minimum, maximum and average sizes of floor space across the use classes. The total amount of commercial floor space represented by the activity outside the High Streets and industrial estates is 76,184 square metres. The breakdown by use class indicates that B1 business office/ light industrial uses account for almost 31 thousand square metres. The A2 Financial and Professional Services category accounts for more than fifteen thousand square metres of such activity with non High Street addresses. General industrial and storage/distribution account for nearly 13 thousand and 9 thousand square metres respectively.

**Table 3.2.2 Non Industrial Estate, Non High Street Min, Max, Ave and Total Floor Spaces in Square Metres**

| | Floor space | Minimum | Maximum | Average |
|---|---|---|---|---|
| **B1** | 30920 | 5 | 19520 | 468.5 |
| **B2** | 12793 | 7 | 5320 | 266.5 |
| **B8** | 8945 | 18 | 1714 | 229.4 |
| **A2** | 15408 | 36 | 460 | 146.4 |
| **Other** | 8118 | 50 | 3354 | 902.0 |
| **Total** | 76184 | | | |

### 3.4: Comparison of 1999 with 2006

The small amount of data available for 1999 was examined as an unrepresentative sample. The information was recorded somewhat differently in 1999, with the A2-B1 and B2 categories representing 10 and 8 cases respectively (41.7% and 33.3%). Tentatively, this is suggestive of a similar pattern to that found in 2006, with financial and business services combined with business offices likely to have been the most commonly found activities. See table 3.4.1

**Table 3.4.1: Non Industrial Estate Use Class Occurrences 1999**

| | A2-B1 | B2 | B8 | Other | Total |
|---|---|---|---|---|---|
| No | 10 | 8 | 3 | 3 | 24 |
| % | 41.7 | 33.3 | 12.5 | 12.5 | 100.0 |

A profile of the 21 cases on the basis of SIC codes suggests that, collectively, vehicle repair, servicing and sales were equally as important in 1999 as they appear to be in 2006.

The floor space data, again, suggest that the financial and professional services, combined with business offices were in 1999, as now, the main activities outside the industrial estates. See table 3.4.2

**Table 3.4.2: Floor Space Areas for Use Classes, 1999**

| | A2-B1 | B2 | B8 | Other | Total |
|---|---|---|---|---|---|
| Sq Metres | 25775 | 9686 | 1940 | 2485 | 39886 |
| Percent | 64.6 | 24.3 | 4.9 | 6.2 | 100.0 |

Within the small sample of 1999 cases, the average floor space sizes for A2-B1 and B2 classes fall into the large category. If that was indicative of the wider pattern in 1999, it would suggest a difference with 2006, when all of the data were in the small and medium categories. Given the limitations of the 1999 data, however, caution is required when making this assertion. See table 3.4.3

**Table 3.4.3: Minimum, Maximum and Average Floor Spaces 1999**

| | A2-B1 | B2 | B8 | Other |
|---|---|---|---|---|
| **Min** | 5 | 90 | 140 | 700 |
| **Max** | 17950 | 8734 | 1000 | 1035 |
| **Ave** | 2578 | 1211 | 647 | 828 |
| | Large | Large | Medium | Medium |

## 4.0 Summary of the non-industrial estate findings

The 2006 data suggest that the High Street locations are characterised by a focus on financial and business services and real estate offices. There appears to be a cluster of labour provision and personnel activity on Chatham High Street. Vehicle maintenance and repair activities are commonly found throughout. B1, B2 and A2 uses are prominent outside the High Streets.

**Medway Council**

## Employment Land & Accommodation Study 2007

## Volume 2a: Sector groups

## Contents

# Sector Groups

## 1 Introduction

1.1.1 The Economic Development Statement 2006 provides a concise report of Medway's position, ambition, and priorities that need addressing over the next 3 years (2006-2009) if Medway is to prosper over the long term.

1.1.2 The importance of understanding the role of sectors within the local economy is key to effective diversification to create an agglomeration economy, which is essential if Medway is to create the robust economy it needs. The sectors set out below are therefore identified as key on the basis of value added to the Medway economy, anticipated levels of activity, and in providing other external benefits, rather than relying on crude employment estimates:

- Specialist manufacturing/engineering
- Construction
- Health
- Tourism, cultural and creative industries
- Higher Education
- Retail
- Marine

1.1.3 In addition the Statement identifies future growth sectors:

- Business Services
- Environmental Technologies

1.1.4 There is already a strong business services presence within Medway and it is a sector that is predicted to grow nationally. Environmental Technologies remain in development they will become increasingly important. There is already significant opportunity to build on the presence of the Universities of Medway together with the Isle of Grain being identified by the Department for Environment, Food & Rural Affairs as the only suitable site for Biomass in the South East region.

1.1.5 Within the terms of the Employment Land Study and its focus on industrial land a number of important sectors, although important to the economy, do not translate into the focus for the Study and the consideration of the sector groups. Key sectors such as retail, health and higher education do not feature within the employment land areas and therefore do not appear within the key sectors identified within this analysis. In addition the tourism, culture and creative sectors do not have a strong presence in these employment areas. Therefore the clustering of businesses in these areas is a less than complete picture of significant groupings of sectors in Medway.

1.1.6 Health is a growth sector on a global level, with expenditure forecast to grow exponentially mainly as a result of the ageing population. Medway also has the presence of all key elements to establish a very robust health industrial sector group (hospital, training facilities, large care sector, health instrumentation manufacturers and a pharmaceutical faculty). Aspects such as instrumentation have been included within the high tech manufacturing and engineering sector.

1.1.7 Cultural tourism is a key priority for Medway and hotel and cultural facilities investment will create a large number of jobs in this sector. This is an important growth sector; the Department of Culture, Media & Sport recognises that it is growing at twice the rate of the national economy and pillar of the major regeneration plans. A number of significant opportunities for new tourism and business related facilities are currently being established. Medway also has the critical conditions necessary for a successful creative industries cluster including strong links already developed with the University College for the Creative Arts.

1.1.8 The Higher Education sector expansion is well underway in Medway, and is planned to become a long-term economic driver for the local economy. There are now four Higher Education providers in Medway establishing a significant sector within the local economy that had little presence as little as 11 years ago. The development of links to the local business community will be essential to the growth of the economy in the future.

1.1.9 Further Education is a key component of the education sector, and will be vitally important in addressing Medway skills requirements.

1.1.10 Retail is key element within the regeneration of Medway and in particular in Chatham where retail floor space will be doubled. It is also a significant and flexible employer across Medway.

1.1.11 An additional consideration is the terminology. Clusters can be viewed as similar industries in a location, which may be able to have or ultimately have some form of critical mass. They should have some similarities of need in their supply chain and workforce characteristics.

1.1.12 The nature of the work undertaken in this section is not clustering in this true sense of the word. We have not drilled down with companies to consider their supply chain networks within Medway. This would be a significant piece of work and is beyond the scope of this analysis. However the mapping from this analysis does demonstrate significant groupings of businesses within a number of key sectors for Medway.

1.1.13 In assessing any groupings within the various employment sectors, SIC codes to analyse any groupings of businesses within the sectors were to be utilised. The use of SIC codes however does not always enable a full picture to be established. SIC codes tend to relate to the overall business of the company and not necessarily the activities at a particular office, the use of remote back offices is a particular issue .In particular a number of businesses that may meet a specific SIC code have little or no relevance to the core aspect being investigated. For example, the analysis wished to include a hi-tech manufacturer of healthcare products against the hi-tech manufacturing sector mapping, but could not do so as the SIC code determined the company to be healthcare related rather than hi-tech. This clearly showed that SIC codes would limit the scope of this analysis**.**

## 2 Sectors for mapping

1.2.1 The Employment Land Study determined that four principal sectors should be mapped for the purposes of the analysis. These are

- Hi-tech Manufacturing / Engineering,
- Construction,
- Marine and Finance and
- Business Services.

1.2.2 These sectors are representative of a broad and diverse cross section of wealth creating businesses located in Medway. They are also considered to be central to the council's Economic Development Statement 2006 or considered to be worthy of particular project development.

## 3 Methodology

1.3.1 The analysis used the following general parameters to ascertain a sift of companies by sector to be mapped, a number of which will interact with each other to come to a final decision on companies included for mapping purposes:

1.3.2 As a general guide, the study decided to map an approximate upper limit of 50 companies per sector. This was decided in order to be able to identify a core group of larger and medium sized employers within each sector, which it is felt would more readily help to identify trends or groupings of companies if any became apparent. Once other factors came into consideration, such as looking at employee numbers or the components of the sector to be mapped, considerably less companies than 50 per sector were recorded in some instances. This is true of the 17 companies mapped for the financial services sector for example, which concentrated on identifying the back office or call centre functions of companies operating in the financial services sector. Likewise, a core group of 35 companies was identified for the marine sector.

1.3.3 For the construction sector mapping, companies with a higher level of employee numbers were counted in to the mapping exercise, typically 15+ staff. This is due to the very high number of companies within the construction sector falling into a very small or sole trader category and the need therefore to distinguish these from the principal contractor or developer company level. This allowed both the largest companies in the region to be included and what might be considered well established smaller companies in terms of employment numbers, whilst discounting sole traders and small businesses only employing a few people.

1.3.4 The analysis attempted to exclude companies displaying a home address, or those using a registered address such as their solicitor's or accountant's address, which could be considered to distort the findings.

1.3.5 The analysis looked individually at information on each company, principally from web site sources, to ascertain the suitability of each to be included in the Study's identified sectors. For example, a finer sift of hi-tech manufacturing companies was achieved by excluding those who merely act as third party distributors of hi-tech products.

1.3.6 The analysis has also taken some broad decisions on the types of companies that it considers should be measured within each sector. For example, the marine sector list has omitted marinas and leisure marine businesses because it is felt that these fall wall within the leisure and tourism sector, while the financial and business services sector list has discounted high street banks, building societies, accountancy firms, etc, in order to limit the sector to be mapped to the back office, headquarters or call centre operations of financial services companies.

## 4 The Sector Groups

***Hi-tech manufacturing/engineering***

1.4.1 There are over 900 manufacturing and engineering businesses in Medway, which turn over £1bn per annum collectively (Office of National Statistics, 'South East in Figures', 2002, Table 3.7). It is still, therefore, a relatively high wealth-creating sector. Within this sector Medway has existing clusters of niche manufacturing, such as automotive and instrumentation together with software development.

1.4.2 The mapping of hi-tech manufacturing/engineering companies shows a particular concentration on Medway City Estate, although the map also shows three companies grouped closely on the Laker Road Industrial Estate. At least two of these are directly involved with defence and aerospace manufacturing.

1.4.3 Reasons for this principal grouping on Medway City Estate may include a preference to be on the London side of Medway to afford better access to London and the rest of the UK. Medway City Estate also became a very popular choice of location once the Medway Tunnel was opened in 1996, affording a wider and more cost effective choice of premises.

***Construction***

1.4.4 This is identified as a key sector as there are over 1,000 VAT registered construction companies in Medway. There is also a huge projected increase in demand for all trades and related disciplines in future years because of the Thames Gateway sponsored development programme.

1.4.5 The mapping of construction companies shows a predominance based at Medway City Estate and Knights Road. However, there are smaller groupings on the Hoo Peninsula and the southern Medway border. Otherwise, the mapping shows a fairly scattered pattern of results. This may indicate that companies will locate where there is available land in what can be a potentially land hungry sector.

***Marine***

1.4.6 With the opening of the British Gas terminal on the Isle of Grain, Medway will become the eleventh largest port in the country. Additional research on the commercial value of the River Medway is currently being undertaken, and marine engineering specialisms are being developed in the University of Greenwich. The Port and Logistics sector is being highlighted by the Department of Communities and Local Government as a key sector in the Thames Gateway.

1.4.7 Unsurprisingly, the groupings of marine sector companies are clearly concentrated in major docks areas or where there is available wharfage in Medway – centrally, this includes groupings around Chatham Docks, Chatham Maritime and Chatham Historic Dockyard, as well as Medway City Estate. Virtually all of the mapped companies are clearly reliant on riverside access to undertake their basic work function, which perhaps underlines a requirement to retain wharfage in Medway to sustain this sector.

1.4.8 There is a further grouping of four companies on the peninsula approximate to the Isle of Grain Terminal.

***Finance and Business Services***

1.4.9 Finance and Business Services are a key growth sector nationally, and 47% of new businesses in Medway are registered as business services. The sector includes significant employers such as Lloyds, Exchanging, Royal Bank of Scotland, Halifax and Vanquis Bank. In addition Lloyds TSB and Kent Reliance Building Society have a presence in Medway. A key issue for concern in this sector is outsourcing of activity to the southern hemisphere.

1.4.10 There appear to be 3 main groupings of back office financial services companies all centrally located, based at Medway City Estate, Chatham Maritime and Chatham Central Business District.

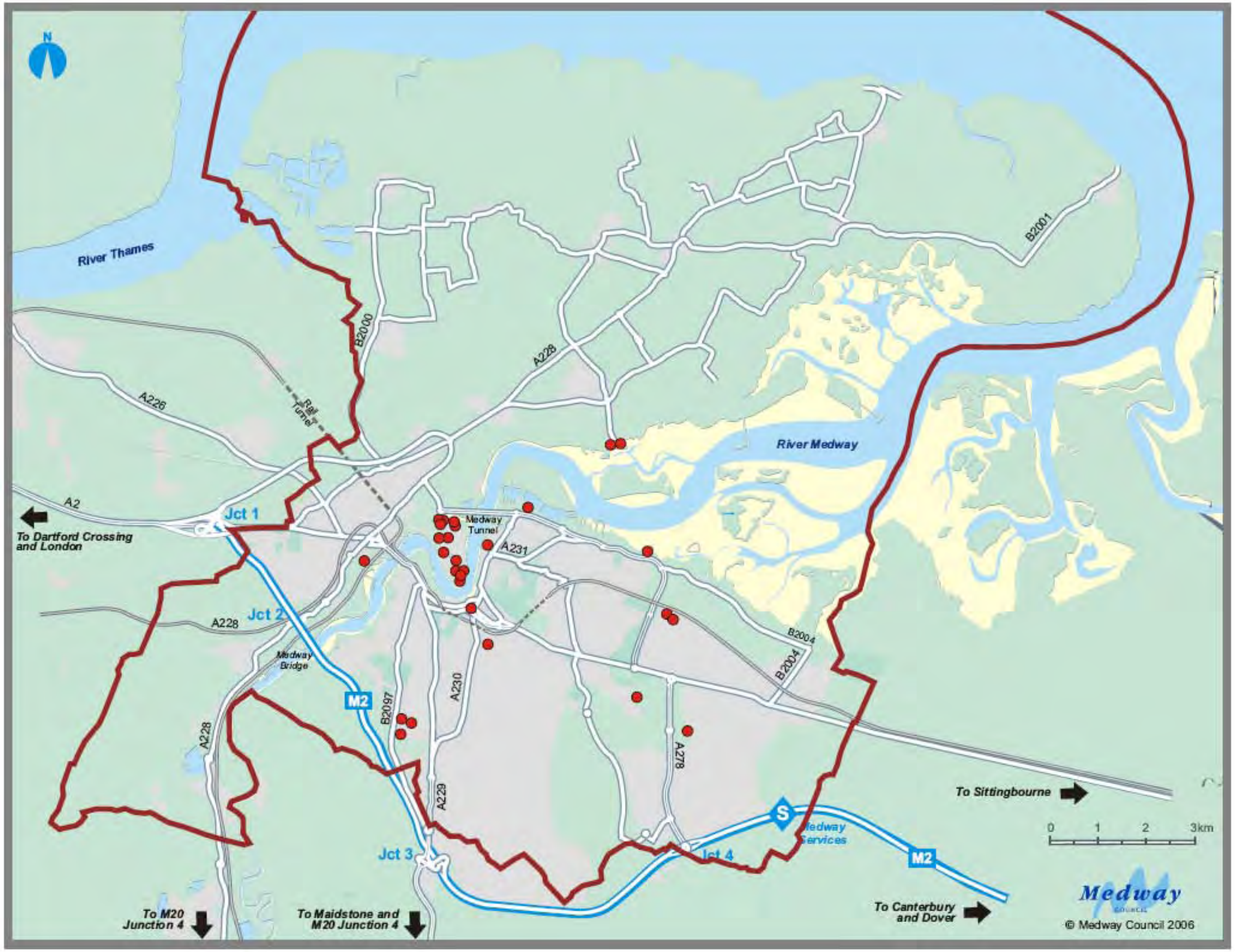
1.4.11 The confluence of companies at Chatham Maritime can also be explained by land usage classification that is attractive to this sector. It also has a modern, 'campus' style theme to its development. The location has also benefited from enterprise zone relief, and has been further enhanced by considerable BT telecommunications infrastructure that will be attractive to the financial and business services sector. The availability of large office spaces for the back office sector in Chatham Central and on Medway City Estate is also conducive to locating there.

***Environmental Technologies***

1.4.12 Currently there are no clear groupings of these businesses. However, it will become a growth sector in the future and should not be ignored as it may have a significant bearing on future prosperity for the Medway economy in the future.

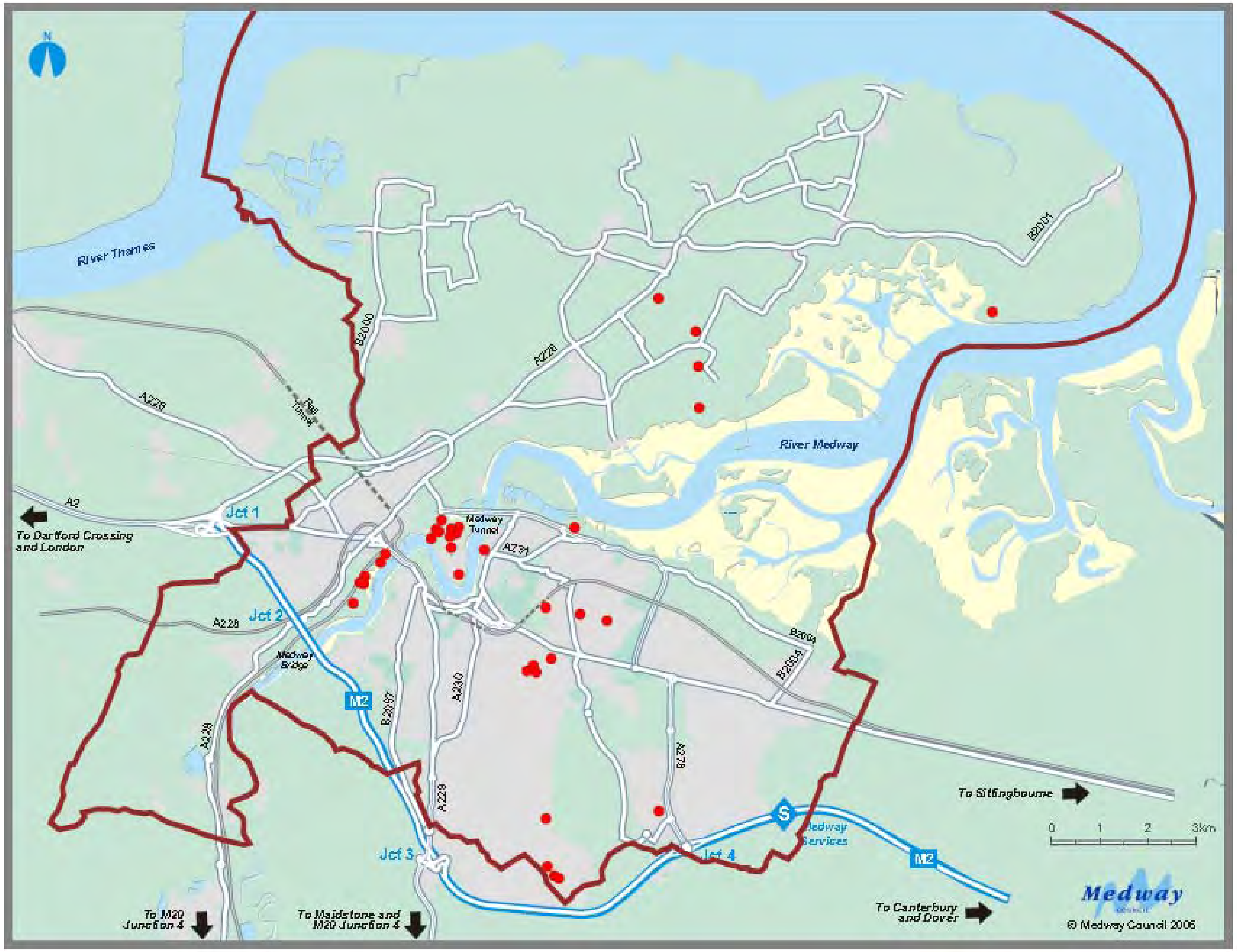
1.4.13 The fact that there are no clear groupings for this sector indicates that the sector is still in its infancy. It may also be apparent that companies do not realise their green / environmental credentials as this is not considered to be core to many of their businesses. We cannot be certain there are no clear groupings for this sector, but it is perhaps also true to say that some work needs to be done in defining what companies should be considered for inclusion in this sector

# 5 Sector mapping

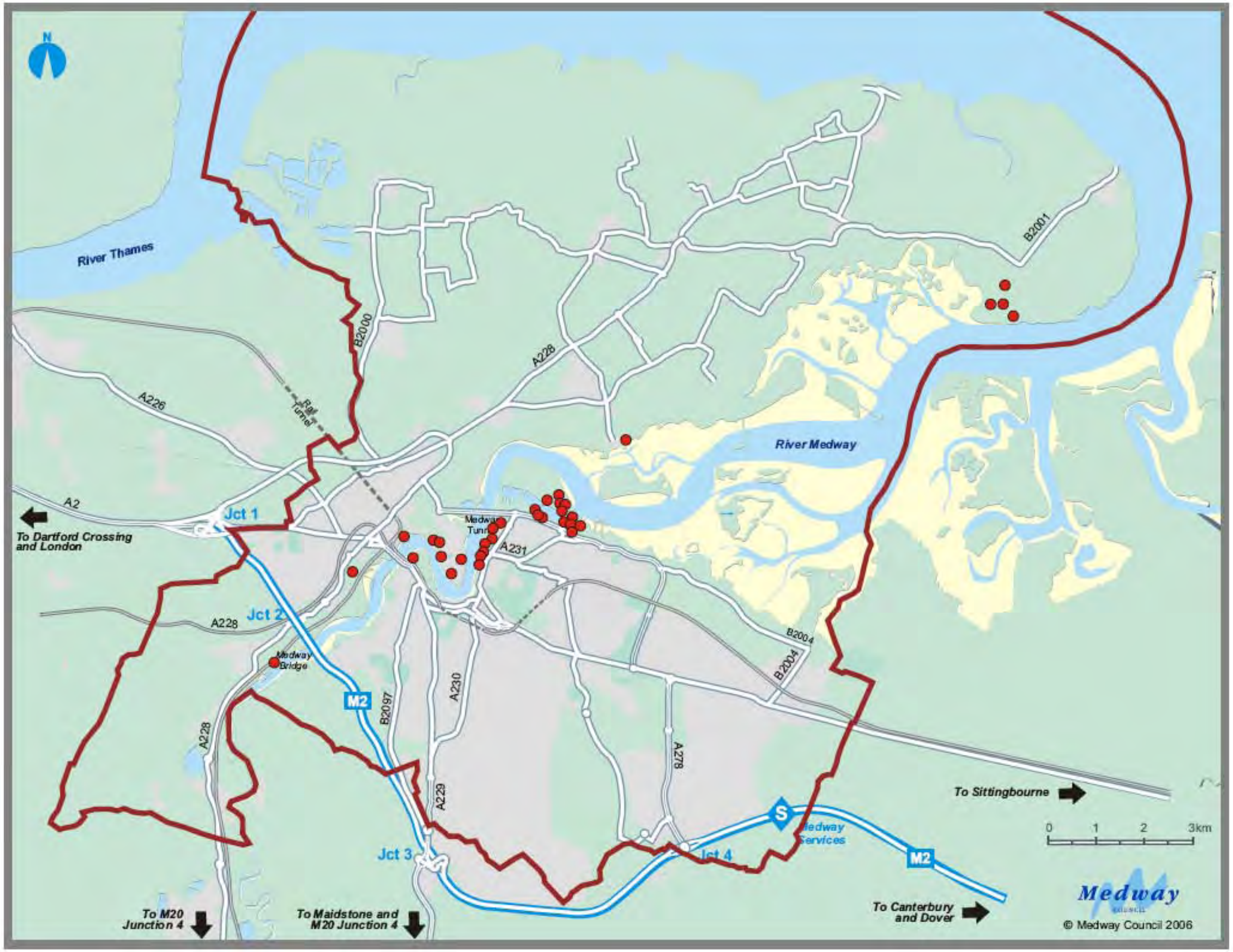


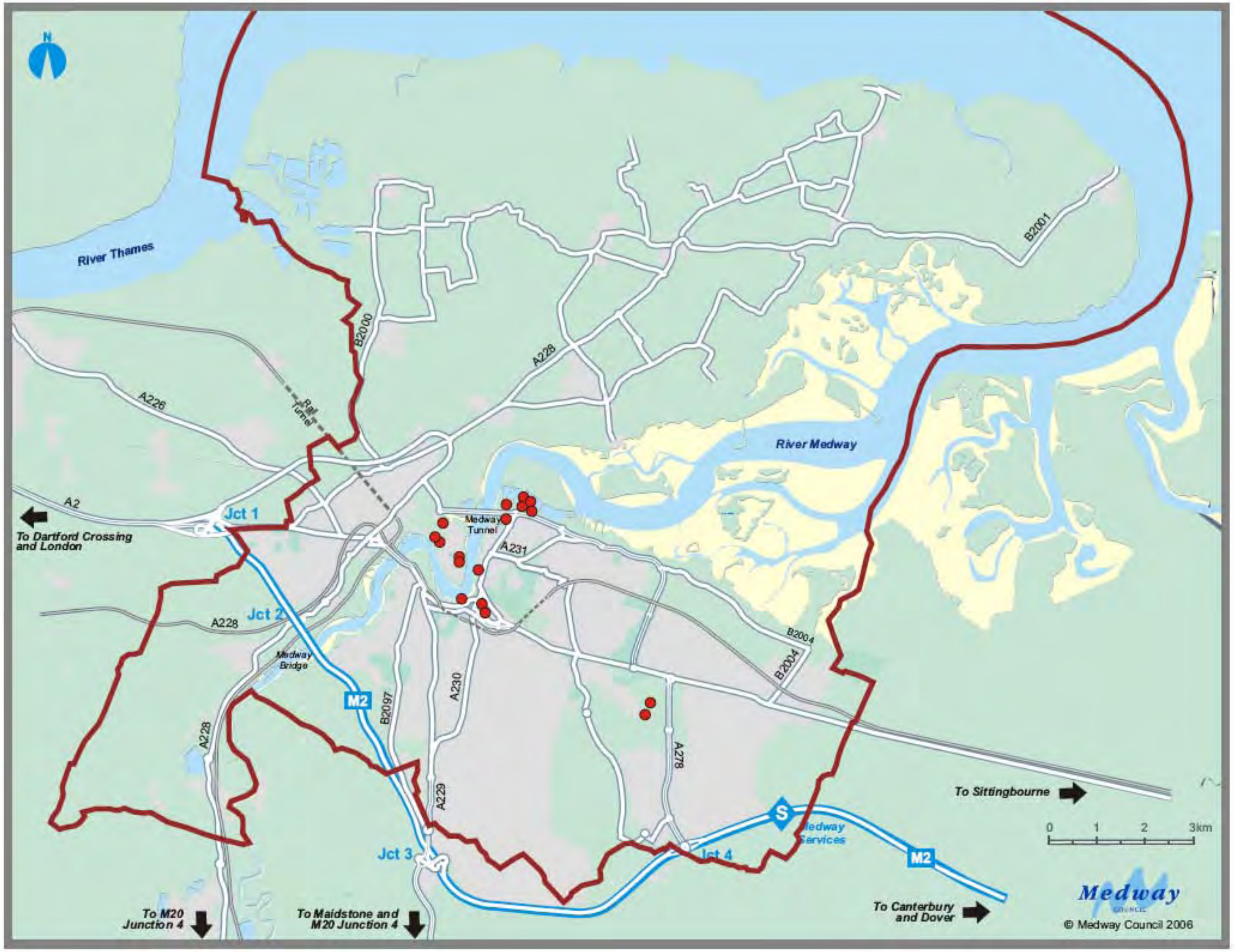

## Hi-tech manufacturing/engineering

## Construction



## Marine


River Thames
River Medway
A2
To Dartford Crossing and London
Jct 1
Jct 2
Jct 3
Jct 4
A226
A228
A231
A230
A229
A278
B2000
B2001
B2004
B2097
M2
Rail Tunnel
Medway Bridge
Medway Services
To Sittingbourne
To Canterbury and Dover
To M20 Junction 4
To Maidstone and M20 Junction 4
0 1 2 3km
Medway
© Medway Council 2006




## Finance and Business Services

**Medway Council**

# Employment Land & Accommodation Study 2007

## Volume 3: Employment Site Audit

## Contents

## 1. Introduction

2.1.1 The aim of this audit is to produce a factual description of each of the employment sites in Medway. It covers both the overall site and its surroundings. It does not include land or premises not located on a recognised employment sites. Some grouping of employment sites has occurred where the separation between the sites has blurred to the extent that separation for the purposes of this audit irrelevant, e.g. Medway City Estate and Commissioners Road. Plans showing the extent of each site, as audited, are included with the audit of the site.

2.1.2 This audit will enable a baseline position to be established as a platform on which to build comparative assessments.

2.1.3 The survey of sites covered by the audit was undertaken in 2006. All sites are reported on against a set of headings common to all. This gives a robust framework for subsequent analysis. The situation, as found, is recorded.

2.1.4 The audit tries to cover how much a site may be ‘future proofed’. To this end comments are made against the adaptability of the layout and the buildings, any restrictions potentially affecting future development and also facilities available on site or locally. The range of facilities considered includes the existence of services such as catering and leisure. There is a body of opinion that believes improving the quality of life for employees may add to productivity. They may make the site more sustainable. Other facilities noted, if they exist, are the existence of shared corporate resources.

2.1.5 As each site is judged against a common set of headings no judgement is made as to whether any heading is appropriate to that site – especially the heading connected with future proofing. Indeed it is acknowledged that not all sites would need the same level of facilities but it will be for future work to decide on appropriate levels for each site. It is anticipated that this will be undertaken as part of the creation and consultation process connected with the proposed Commercial Development Plan Document or other strategies.

2.1.6 The Local Plan policies affecting each site are quoted by policy number only. A list of these policies, with their titles, is included at Appendix 4. The wording of the policies is not included due to the amount of space required; these are readily accessible in the Local Plan documentation. During the preparation of this audit the first two Development Plan Documents connected with Medway’s Local Development Framework were submitted, these comprised the Core Strategy DPD and the Housing and Mixed Use DPD.

2.1.7 An overall average building floorspace for urban and rural sites is given in the analysis. This enables comparison to be made with the building averages given for each site in the detailed audit.

***Audit structure***

2.1.8 The audit is structured as follows:

- Part 2 identifies the abbreviations used in this audit
- Part 3 provides a summary of the findings of the audit.
- Part 4 looks at the results of a survey of agents.
- Part 5 provides a synopsis of current Local Plan and other major projects.
- Appendix 1 is a detailed audit of the employment sites.
- Appendix 2 contains the explanations of the meaning of some terms used in the detailed audit.
- Appendix 3 covers the methodology used for the audit.
- Appendix 4 lists the policies in the Medway Local Plan
- Appendix 5 is a copy of the questionnaire sent to agents.

## 2. Abbreviations

| | |
|---|---|
| ALLI | Area of Local Landscape Importance |
| AONB | Area of Outstanding Natural Beauty |
| CCTV | Closed circuit television |
| DPD | Development Plan Document |
| EZ | Enterprise Zone |
| km | Kilometre |
| kms | Kilometres |
| LDF | Local Development Framework |
| LGV | Large goods vehicles (formerly known as HGV – heavy goods vehicles) |
| LNG | Liquefied natural gas |
| LNR | Local Nature Reserve |
| lo-lo | Lift-on/lift-off (containers) |
| m | Metres |
| NHS | National Health Service |
| Ramsar | Sites designated under the RAMSAR Convention on the Conservation of Wetlands of International Importance Especially Waterfowl Habitat, ratified by the British Government in 1976. |
| ro-ro | Roll-on/roll-off (freight and/or passenger ferry transport) |
| RSPB | Royal Society for the Protection of Birds |
| SEEDA | South East England Development Agency |
| SNCI | Site of Nature Conservation Interest |
| SPA | Special Protection Area. Areas designated under European Community Directive 79/409 on the Conservation of Wild Birds, to conserve the habitat of rare or vulnerable birds and all regularly occurring migratory birds |
| sq.m. | Square metres |
| SSSI | Site of Special Scientific Interest |
| TEU | Twenty-foot equivalent unit (standard measure of container volume; forty-foot containers (2 TEU) are increasingly prevalent) |
| Unitised cargoes | Items, usually manufactured goods, consolidated in sea-going containers, lorries or other such receptacles.<br>Non-unitised cargoes are all other types, principally bulk items. |

## 3. Use Classes guide

2.3.1 Classes of land and building use as categorised by the Town and Country Planning (Use Classes) Order 1987 as amended. The various classes and categories appropriate to that class are as follows:

**A1** Shops for the sale, display or provision of goods and services (except hot food) to visiting members of the public - includes hairdresser, funeral director, post office, dress or DIY hire shop, ticket and travel agency, internet cafe, sandwich bar, dry cleaner and pet shop.

**A2** Financial or professional services (other than health or medical services) - includes betting shop, building society office, estate agent and bank.

**A3** Restaurant and cafe.

**A4** Drinking establishment – includes public house and wine bar.

**A5** Hot food takeaway

**B1** Business - includes office (a), research and development premise (b) and light industry which can be carried out in a residential area (c).

**B2** General industry - any industrial use not covered by B1.

**B8** Storage and distribution – includes wholesale warehouse (but not retail warehousing), distribution centre and repository.

**C1** Hotel – includes boarding house and guesthouse.

**C2** Residential institution – includes residential school and college and training centre, hospital and convalescent/nursing home.

**C2a** Secure residential accommodation – includes prison, young offenders institution, detention centre, custody centre, secure hospital and military barracks

**C3** Dwelling house, communal housing of the elderly and handicapped.

**D1** Non-residential institution - includes place of worship, law court, church hall, clinic, health centre, crèche, day nursery, consulting room, museum, public hall, library, art gallery, exhibition hall, non-residential education and training centre.

**D2** Assembly and leisure –includes cinema, music and concert hall, dance hall, bingo hall, sports hall, swimming bath, skating rink, gymnasium and other indoor and outdoor sport or recreation.

**Sui Generis (SG)** Uses not falling within any of the above classes - includes theatre, night club, casino, sale of motor vehicles, sale of motor fuel, taxi service, launderette, hostel, live/work unit and motor sport or firearm activities.

*Correct as at June 2006*

## 4. Overall analysis of sites surveyed

***Enterprise Zones***

2.4.1 The North West Kent Enterprise Zone covered some of the sites in Medway. This was created in 1983 but designation of one site did not take place until sometime later. All or parts of the following sites were covered (their designation dates are shown in brackets):

1. Temple Industrial Estate (EZ 3 - designated 1983)
2. Medway City Estate (EZ 4 – designated 1983)
3. Gillingham Business Park (EZ 5 – designated 1983)
4. Chatham Maritime (EZ 6 and EZ 7 – designated 1986)

2.4.2 It is acknowledged that the Enterprise Zone designation was the enabling device both to focus attention on the sites and to create sufficient development on the sites for them to progress and be viable. However, while there was success in generating new development, there were mixed results in respect of layout and design.

***Summary of findings***

2.4.3 Many of the sites within the urban area had limited scope for expansion as most were fully developed. Conversely, at the remote sites of Kingsnorth and Grain, there was considerable spare land. This lack of space may impede improvements or expansion on the urban sites due to the lack of flexibility that comes with full development.

2.4.4 Quite a few premises are in working order for an industrial process building but their external appearance is more controlled by utility or economics rather than overall appearance. This may not necessarily project the right image to prospective customers. Some external improvements, even if only cosmetic, are needed to raise the apparent quality of the image of the company.

2.4.5 A proactive approach towards adapting or altering sites to widen the offer or to provide a newer or higher tech offer did not seem visible during this survey. Whether this is due to lack of space to redevelop, economic factors or lack of foresight cannot be determined.

2.4.6 The theme of image can be taken further; many sites are 'unwelcoming' in their overall appearance. Again the site may function perfectly well at present but appearance or image can have a number of potential benefits and drawbacks. A site with a pleasant aspect may encourage or attract new occupiers. It may also have an effect on the workforce. Research is starting to indicate that the effect could lead to more productive staff, especially if the site also caters for lunchtime needs. Finally, it can reflect on the whole area, does Medway want to be characterised as the area with cheerless and uninspiring industrial areas? This may reflect upon the overall perception of the borough. Some illustrative photographs of these aspects are included at the end of this section.

2.4.7 However, this must be weighed against the potential increase in overheads these improvements could cause. If the improvements do not lead to at least the equivalent savings in efficiency or unit output costs then they will be potentially damaging and counter-productive. The other side of this argument is the need to keep industrial estates viable and fully let, which will entail attracting more businesses. This may require different priorities for building maintenance and condition as well as facilities on site.

2.4.8 This is not to say that all is poor on the employment sites in Medway. Some good designs and layouts exist but these are quite limited.

2.4.9 It is felt that some companies are located in that position because the rent is at an appropriate, or attractive, level. This was noticeable at some sites where companies operating nationally were in some very modest premises. This may not help their external image to any visitors but there is the question of how many visitors they have. However, this probably helps control overheads to assist competitiveness. Rising energy prices and commodity costs are factors that are affecting business at present and companies have only limited control over these. Whereas building and workforce costs are factors over which businesses have more control.

2.4.10 Flexibility was looked at mainly in terms of ability to merge two adjoining units to enable larger accommodation. Modular units are fairly flexible in this respect but the smaller units tend to have only sufficient frontage to provide space for a small window, a door and a roller shutter. Thus subdivision could raise issues of being unable effectively to divide the unit into 2 whilst still providing this level of amenity for the two units so formed. This is perhaps becoming a greater issue with more modern units where smaller frontages create buildings with more depth than width. Additionally, the general situation for expansion with modular units is to take over the adjoining unit. However this will effectively double the floorspace occupied. It is possible that many businesses wishing to expand do not need to double their floorspace. Such a large increase in floorspace may be too much of an overhead for the business to carry for the few years it may take for business expand sufficiently to justify this amount of floorspace.

2.4.11 Flexibility also requires some flexibility in tenancy terms where sites are not owned freehold. The terms of some tenancies or leases tend to be restrictive, meaning that subdivision is restricted or the options to change are limited to review dates. A new approach may be needed within the industry as a whole.

2.4.12 No comment can be made on the level of IT services available to individual sites (telephony, broadband and other communication channels), as this could not be verified as part of the survey.

2.4.13 Facilities are noted at each site. This gives an idea of the support services available to businesses and staff, especially to meet lunchtime needs and to illustrate whether the site has any diversification. It should be noted that even though a number of sites are recorded as having no facilities there are sandwich companies in Medway who visit many of the urban sites during the morning with chilled vans in order to supply sandwiches etc. This may add to the 'food miles', as the vans serve more than one site, but does provide a measure of facilities on many sites that are otherwise lacking permanent facilities or which may be too small to make a even a small enterprise viable.

2.4.14 The combination of flexibility, facilities and image provides an indication of the extent to which sites are 'future proofed'. In most instances the overall levels of these elements are quite low. The audit shows that more work is needed on sites to ensure their future viability in a changing economic environment.

2.4.15 The results of the accommodation survey indicate reasonable levels of occupation (see vacancy rates), which would indicate that provision is currently meeting requirements. However, it would seem from the survey and the general responses of the agents that unless change happens the current stock will increasingly be seen as unsuitable and companies may relocate to new premises that meet the changing needs of business.

***Total floorspace on estates***

2.4.16 The following data has been taken from the Accommodation survey undertaken by the University of Greenwich and at the same time as this audit. It provides a measure of the size of the floorspace in Medway, which now amounts to 1,535,528 sq.m. on employment sites and a further 82,284 sq.m. in stand alone employment units. This produces a total floorspace of 1,617,812 sq.m.

**Floorspace 1, Employment sites**

| | **Occupied** | **Vacant** | **Total** | **Units** |
|---|---|---|---|---|
| | Sq.m. | Sq.m. | Sq.m. | Number |
| Town Centre | 144911 | 7036 | 151947 | 149 |
| Urban | 979310 | 115232 | 1094542 | 1393 |
| Urban Periphery | 78266 | 4101 | 82367 | 131 |
| Village | 20881 | 976 | 21857 | 39 |
| Village Periphery | 119759 | 0 | 119759 | 11 |
| Other Rural | 55149 | 9907 | 65056 | 41 |
| **TOTAL** | **1398276** | **137252** | **1535528** | **1764** |

2.4.17 Kingsnorth and Isle of Grain both have power stations and other substantial buildings. These influence the total floor area in the 'rural' areas and also the average size of unit.

**Floorspace 2, Non-employment sites**

| | Occupied | Vacant | Total | Units |
|---|---|---|---|---|
| | Sq.m. | Sq.m. | Sq.m. | Number |
| Town Centre | 7557 | 1022 | 8579 | 27 |
| Urban | 55275 | 1320 | 56595 | 94 |
| Urban Periphery | 6750 | 150 | 6900 | 17 |
| Village | 2968 | 0 | 2968 | 18 |
| Village Periphery | 460 | 0 | 460 | 3 |
| Other Rural | 6782 | 0 | 6782 | 9 |
| **TOTAL** | **79792** | **2492** | **82284** | **168** |

2.4.18 Only 5% of the total employment floorspace is not on employment sites. Yet 8% of the total number of units is not on employment estates. The average size of units not on employment sites is smaller than the size of those on employment sites. Additionally the rural non-employment site units are considerably smaller than those on the rural employment sites.

**Average size of units 1, Employment sites**

| | Total | Units | Average size of unit |
|---|---|---|---|
| | Sq.m. | Number | Sq.m. |
| Urban/urban fringe | 1328856 | 1673 | 794 |
| Villages and rural | 206672 | 91 | 2271 |
| **TOTAL** | **1535528** | **1764** | **870** |

2.4.19 As mentioned in the analysis of the sites above it can be seen that the overall size of the units on the sites outside the urban area is considerably greater.

**Average size of units 2, Non-employment sites**

| | Total | Units | Average size of unit |
|---|---|---|---|
| | Sq.m. | Number | Sq.m. |
| Urban/urban fringe | 72074 | 138 | 522 |
| Villages and rural | 10210 | 30 | 340 |
| **TOTAL** | **82284** | **168** | **490** |

### *Vacancy rates*

2.4.20 The results of the accommodation survey indicate reasonable levels of occupation, but with some variations by locality.

**Vacancy rates 1, by general locality**

| | **Employment sites** | **Non-employment sites** |
|---|---|---|
| Town Centre | 4.6% | 11.9% |
| Urban | 10.5% | 2.3% |
| Urban Periphery | 5.0% | 2.2% |
| Village | 4.5% | 0.0% |
| Village Periphery | 0.0% | 0.0% |
| Other Rural | 15.2% | 0.0% |
| **Overall** | **8.9%** | **3.0%** |

*Based upon floorspace*

2.4.21 Vacancy rates are generally lower overall for the non-employment sites. This is possibly to be expected with the current high land values for residential land. Planning permission for change of use is likely to be sought for any premises no longer considered economically viable. However, the town centre vacancy levels are significantly higher and this may be connected either with issues over change of use being either not possible or restricted or surrounding the suitability of the premises. This scope of this audit does not cover further investigation on this point. There are potentially also issues around the availability of car parking facilities.

2.4.22 This is not an option for employment sites and some higher level of vacancy is to be expected. There are some extreme differences between various localities with the highest vacancy rates showing for the rural sites. However, this figure is influenced by a current large vacancy at Kingsnorth, which accounts for 77% of the total rural vacant floorspace on employment sites.

**Vacancy rates 2, by broad locality**

| | **Employment sites** | **Non-employment sites** |
|---|---|---|
| Urban/urban fringe | 9.5% | 3.5% |
| Villages and rural | 5.3% | 0.0% |
| **Overall** | **8.9%** | **3.0%** |

*Based upon floorspace*

2.4.23 Grouping the vacancy rate by urban/non-urban smoothes the overall picture and shows significantly lower overall vacancy rate outside the urban area for both employment and non-employment sites.

## *Case study – 5 sites*

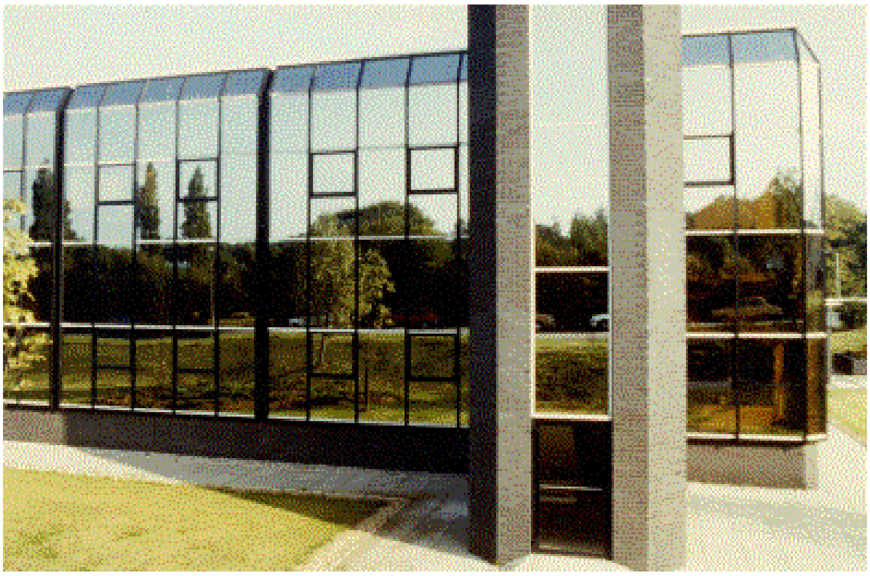
| | Gillingham Business Park | Hopewell Drive | Kingsnorth | Medway City Estate | Temple |
|---|---|---|---|---|---|
| Location | Edge of urban | Urban | Freestanding rural | Edge of urban | Urban - edge of town centre |
| Built | 1980 on | 1950-1980 | 1950 on | 1980 on | Pre-war to 1980 |
| Area (Ha) | 56.18 | 3.83 | 243.7 | 99.02 | 37.18 |
| in use (Ha) | 52.43 | 3.83 | 151.7 | 93.26 | 37.18 |
| un-used (Ha) | 3.75 | 0 | 92 | 5.76 | 0 |
| Floorspace (sq.m.) | 170775 | 18211 | 62940 | 282291 | 143973 |
| Average size of units (sq.m.) | 1284 | 520 | 1748 | 375 | 1384 |
| Percentage distribution of floorspace | | | | | |
| A1 | 17 | 1 | 0 | 2 | 5 |
| A2 | 3 | 0 | 0 | 1 | 0 |
| A3 | 1 | 0 | 0 | 1 | 0 |
| A4 | 0 | 0 | 0 | 0 | 0 |
| A5 | 0 | 0 | 0 | 0 | 0 |
| B1 | 23 | 24 | 9 | 30 | 17 |
| B2 | 13 | 33 | 71 | 21 | 7 |
| B8 | 38 | 30 | 7 | 42 | 70 |
| D1 | 1 | 12 | 0 | 2 | 1 |
| D2 | 1 | 0 | 0 | 1 | 0 |
| Other | 1 | 0 | 13 | 0 | 0 |
| Connections | | | | | |
| Roads - number | 3 | 1 | 1 | 1 | 1 |
| Motorway distance (kms to junction) | 3 | 12 | 14 | 8 | 3 |
| Buses | | | | | |
| Number serving site | 10 | 0 | 1 | 4 | 6 |
| Frequency | 10 mins | n/a | 4 trips - mornings only | Hourly | 1-2 hours |
| Rail connection | No | No | Abuts | No | Abuts |
| Nearest station (kms) | 4 | 4 | 11 | 2 | 2 |
| River frontage | No | No | Yes | Yes | Yes |
| Population - 800m | 15194 | 12190 | 1289 | 15104 | 15386 |
| Population - 8kms | 236791 | 236791 | 12789 | 249488 | 235412 |
| Parking | Mainly sufficient | Near capacity, extensive parking in road | In compounds and on internal roads. Some parking spaces underused. | Well used. Parking of cars also on the roads as is LGV parking. | Parking in compounds and near to capacity. Yellow lines on roads. |
| Description | Former military land and EZ. Relatively level. | Linear and cul-de-sac. Rising ground to rear of units each side. | In open countryside. Low lying and in tidal flood plain | Single spine road, not circular. Relatively level. Partially reclaimed land. Former EZ. | Relatively level. Split by railway line on embankment. One of four sites making a continuous employment zone from Strood centre. |

- The isolated nature of Kingsnorth is identifiable from the connections.
- Medway City Estate has as surprisingly low average unit size – possibly reflecting the large number of smaller units
- The lack of A1/A3 at some larger sites indicates a lack of facilities.
- There are issues over parking at some locations.

### *Illustrative photographs*

2.4.24 These photographs are intended to be illustrative only, they are not necessarily intended to be the best or the worst but to convey an idea of the issues and the potential. The site audit (Appendix 1) covers issues with individual sites, both good and bad, in detail.

***A) Pleasant appearance***



## *B) Unwelcoming*

Main entrance of a site – parking

Edge of town centre site

## *C) Visible clutter*

## 5. External view

***General***

2.5.1 As part of the audit it was the intention to obtain an external view. This was to be based upon a survey of agents working, or representing clients, in Medway.

2.5.2 To achieve this 70 questionnaires were sent out yet only 5 were received back completed. There may be a number of reasons from low priority/pressure of fee earning work to the large number of consultations having been undertaken recently in connection with other Plans and strategies. However, some significant agents, who have detailed knowledge of the Medway market and sites, did respond and, therefore, the response, even if slightly limited, is of relevance. A copy of the agent questionnaire form is at Appendix 5 to this audit.

2.5.3 The perception of Medway employment sites overall gained from the responses can be summarised as:

> "The sites and provision could be improved".

2.5.4 While this assessment may reflect the current situation, it is fair to comment that most sites have been in existence for some time. Given this, it is to be expected that many sites would not meet modern standards of service provision and for quality of buildings.

***Responses to the specific questions***

2.5.5 The questionnaire was divided into themed sections. A summary of the responses to each section is given below. The relevant question numbers are shown at the end of each summary.

- Buildings –scored generally below average in all aspects (questions 1 – 5)
- Car parking - provision was deemed average (question 7)
- Estates - opinions varied but only suitability and infrastructure received any scores above average. Most responses indicated a general feeling that estates were average to just below average (questions 9 – 13)
- Access - road freight was average to good while car and public transport scored below average. Rail access was rated poor for freight but scored a mixed response for public access, this latter score may be related to location within Medway of the respondent (questions 15 -20)
- The links and synergies responses showed a perceived lack of hi-tech trained workforce but general acceptance that overall there existed a sufficient pool of labour. No clusters were acknowledged and no-one answered the supply chain question (questions 22 -24)

- The perceived general situation showed that council support and level of business rates was seen as average, while there was general acknowledgment that conflicts existed with the surrounding locality. Whether sites were in the right location produced a varied response from good to poor, this would indicate that this potentially depended upon location (questions 26 -29)
- No conclusive results could be drawn from the perceived business situation (questions 31 - 35)
- Going green - no agent was aware of any company planning to go green, however, most reported conflicts of use with the surrounding locality (question 37)
- Commercial facilities – most of the items identified in the questionnaire were felt to be needed (questions 41 - 44)
- Infrastructure - support was shown for improvements to all aspects infrastructure (social, commercial and IT), (questions 46 -58)

2.5.6 The following additional observations could be drawn from the comments made:

- There is a perceived need for more small industrial units.
- Flexible accommodation would be useful.
- Lack of high tech clusters.
- Need to replace lost employment land; this must be located close to the main road network.
- Kingsnorth and Grain seen as too far away.
- Road congestion at Medway City Estate.
- Existing stock is ageing and not seen to be as attractive as estates elsewhere, examples given were Sittingbourne, Ashford, Kings Hill and Hersden near Canterbury.
- Poor pedestrian and public transport access to existing sites.
- Provision of more social facilities on sites was supported.

2.5.7 Other issues that were raised included:

- River access - this was considered to be good but it was felt that it was under-utilised by the public.
- Connection to London - there is a good travel time to the capital but this was undersold to potential investors.
- The main road access to Medway was good especially the M2.
- It was felt that more attention should be paid to the provision of industrial units; office accommodation was thought to be better provided.
- One reported that London agents were looking for depots (connected with the decanting of the Olympic site) but that no suitable land was immediately available in Medway to suit.

## 6. Plan proposals

***Brief description of major proposals.***

2.6.1 The regeneration area of **Rochester Riverside** is a major proposal covering some 34 Ha and includes some 1,900 dwellings, commercial, tourism and leisure uses. Work is currently underway on decontamination of the site and flood mitigation works including creation of a new river wall and some raising of the overall site level.

2.6.2 The **Chatham Centre and Waterfront Framework** outlines the improvements for Chatham. These include the extension to the Pentagon Shopping Centre and other revised retailing arrangements including relocation of a supermarket, additional cultural facilities with the waterfront improved to increase the tourism and leisure facilities, a new bus station, revised traffic arrangements along roads around the centre and some 1,350 new dwellings. Masterplanning exercises are currently underway for parts of the framework.

2.6.3 **Major housing developments sites** included in the Local Plan include the following:

1. Some 550 dwellings at Hoo St Werburgh with planning permission
2. Some 700 dwellings on St Mary's Island being the residue not built yet from the original consent for 1,700 dwellings
3. A further 300+ dwellings in Chatham Maritime
4. Some 325+ dwellings at Grange Farm, Gillingham with planning permission
5. Some 280+ dwellings at Wainscott
6. A potential 5,000 dwellings as part of a new settlement on the MoD land at Chattenden

2.6.4 Additionally the following **major windfalls** have permission:

1. The former Akzo Nobel site at Pier Road Gillingham has been acquired for redevelopment by Berkeley Homes and their proposals has consent for some 800 dwellings plus commercial and leisure uses, site clearance is underway
2. Cuxton Pit No 2 has planning permission for 450 dwellings; site works connected with landscaping are underway.

2.6.5 **Transport** related proposals include:

1. Improvements to the A228 to Grain and also to the freight line facility
2. Medway is to have services connected to the Channel Tunnel Rail Link fast services to St Pancras.

2.6.6 **Other significant developments** include:

1. Expansion of Universities at Medway at Chatham Maritime, this should increase the total student above the current 6,000 to 7,000,
2. Consolidation of the Mid Kent College complexes onto a single site adjoining the Universities and
3. Potential redevelopment of the former college sites.

**Medway Council**

# Employment Land & Accommodation Study 2007

## Volume 3a: Employment Site Audit Appendices

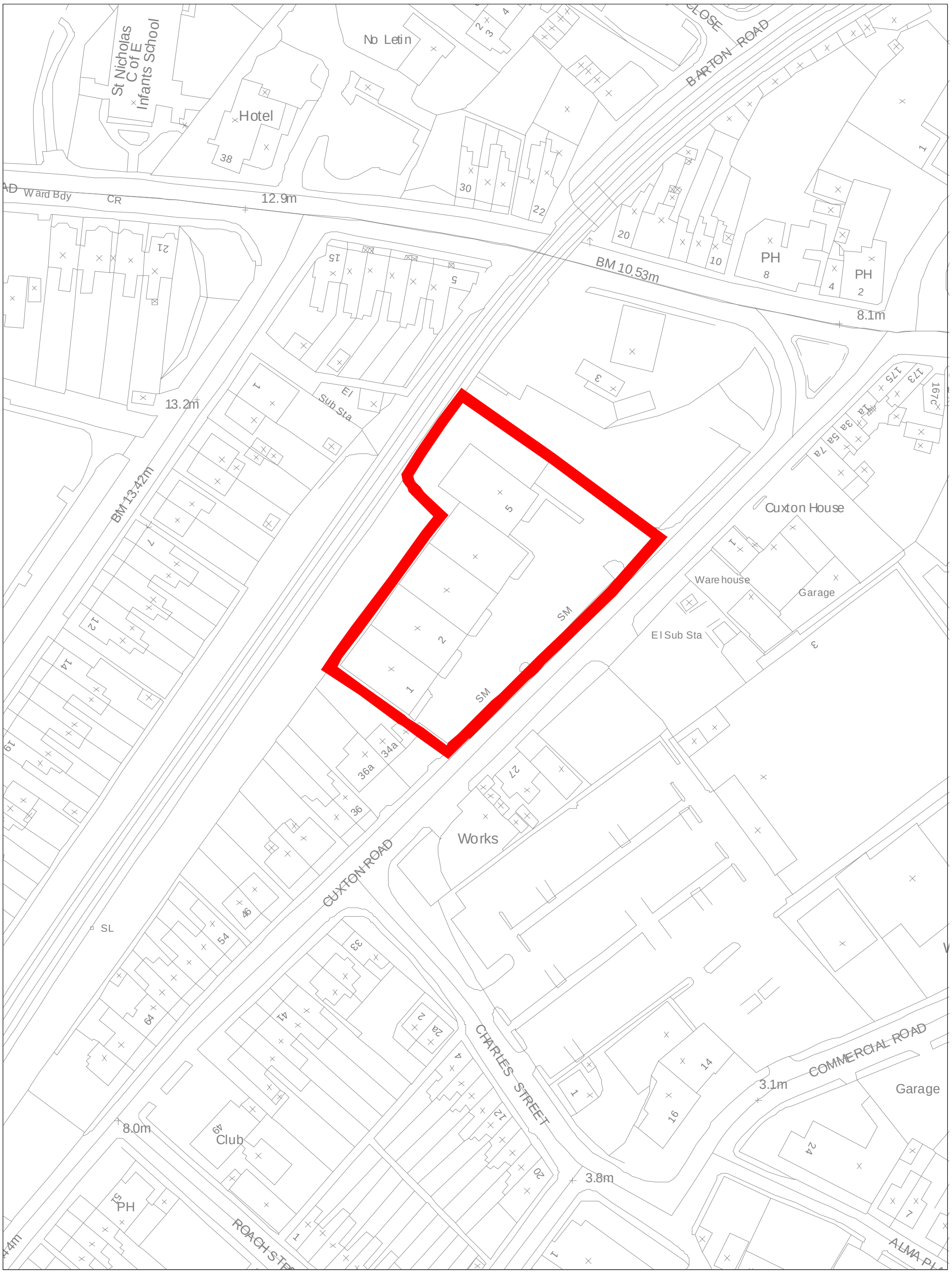
## Contents

## Appendix 1. Detailed site audit

| | |
|---|---|
| **Site name** | **Appendix 1. 1: 2-10 Cuxton Road, Strood** |
| **Date of visit** | 16 September 2006 |
| **Brief description of site** | Situated on the edge of Strood town centre, this site comprises a single terrace of units with a shared front forecourt facing directly onto the A228 Cuxton Road, one of the two main roads through Strood centre. Strood has a substantial industrial area situated just south of its centre but this site is separated from the main industrial area by a Tesco supermarket.<br><br>The terrace is two storey, of mixed construction walling and with a shallow pitched roof. The site is at a slightly higher level than the adjoining road and takes a single access off the road at one end of the site.<br><br>No gateway signage exists but the fascias on the front of the units are clearly visible from the road. No security fencing exists at the front and the forecourt takes borrowed light from the street lighting. No CCTV was visible. |
| **Approx date built** | 1970-1980 |
| **Location** | Edge of town centre site. To the south east is the A228 Cuxton Road and the other side of the road forms the side frontage of a Tesco supermarket bounded by some car repair units. Beyond is the Commercial Road industrial estate site. To the southwest is a mixed residential area. To the northwest and immediately adjoining the rear of the site is the main London to Kent coast railway line and beyond is residential. There are car sales and repair units in the arches under the railway. To the northeast are car sales lots and beyond is the A2. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>0.32 Ha<br>0 Ha |
| **Average size of unit occupied** | 273 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | B1: 60%, B2: 33%, B8: 7% |
| **Amount of floorspace** | 1640 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 11391 - age 16-74; 8064<br>235412 |
| **Local Plan designation of site** | White Land<br>ED3, T15 |
| **Access into site** | There is a single access into the site at the northeast corner of the site. Site levels prevent any further accesses. The access is concrete and is readily negotiable by an LGV.<br><br>This access leads directly onto the shared concrete forecourt between the units and the A228. The access and the forecourt are in good condition.<br><br>Parking for customers/staff etc seems to be along the roadside edge of the forecourt in marked bays. Some spare capacity was noticed but 2 units are currently vacant. |

| | |
|---|---|
| **Buildings**<br><br><br>***General height*** | The buildings form a single terrace of identical units of modular construction. Their overall condition is good.<br><br>Buildings are 2 storey double height units with a mezzanine office accommodation across the front. The mezzanines take natural light from windows across the upper level of the units. Walls are a mixture of cladding and brick and each unit has a double height roller shutter. |
| **Layout** | With only a single terrace of units and a fully open forecourt, legibility and permeability are good. Some levels of orderliness are needed from the occupants; access/delivery to the unit furthest from the access has to be achieved across the entire forecourt area. |
| **Locality** | The car repair businesses in the area tend to be operated from older premises generally open to the adjoining road and with buildings also close or abutting the road. Whilst there is no intention to impugn the quality of the businesses this does give the impression of 'back street repairers', which is not ideal for an edge of centre locality. The residential area to the southeast and southwest is of mixed age and quality mainly private housing and in generally fair condition.<br>Immediately to the northeast is the outer edge of the town centre, these properties are old and would benefit from redevelopment. Beyond is the main centre of Strood. |
| **Car parking arrangements** | Car parking takes place along the road frontage of the forecourt; this area caters for staff and visitor parking.<br>Parking was not fully utilised but this may be a result of not all premises being occupied. No parking is possible in the adjoining Cuxton Road as this has parking restrictions. |
| **Landmarks** | There are no landmarks on this site. |
| **Adaptability**<br>*Buildings*<br><br>*Layout* | The buildings are modular and could merge to larger units (two units are already merged) but subdivision would not be realistic.<br>The layout is relatively simplistic but limited as the site is wholly utilised for its current purposes.<br>Deliveries need to be made from the forecourt; most units have no rear access. |
| **Connections** | The site is served by Cuxton Road A228 (single, main road), which has lighting and double yellow lines. It is also one way only.<br>The motorway J2 is 3 kms.<br>6 buses serve the site; maximum frequency is 10 minutes.<br>There is no cycleway on the A228.<br>No rain access, the nearest railway station is Strood (1 km).<br>The site has no river frontage. |
| **Restrictions** | The left in – left out required by the one-way street means that on leaving the site, access to the nearest motorway junction requires passing through the town centre High Street. |
| **Environment** | Some noise was noticed but no odours. However, road noise from the A228 was very noticeable and drowned any noise from the site when the road was busy. There was also noise from the nearby car repair premises.<br>Additionally there is a main line railway on a substantial embankment immediately to the rear of the site. |
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | No facilities or non B1-B8 uses were noted on the site. However, some facilities for staff may exist within the premises and the town centre is close by. |
| **Planning consents (sq.m.)** | None |

| | |
|---|---|
| **Potential future uses** | Given the site's location, the uses currently on site and its layout are compatible with town centre associated activities. This site appears of benefit to the town centre and should be retained for local employment. |
| **Any conditions required for future development** | The High Street already carries a substantial amount of LGV traffic and so restricting the size of vehicle using this site would be of almost no benefit. |
| **General comments** | The units are set back from main building line providing a relatively open aspect to the site but this is marred slightly by the forward location of the parking. However, the site, overall, appeared uncluttered.<br>No litter or graffiti was noticed |




## 1: Cuxton Road, Strood

10 0 10 20 30 40 50 60 70 80 90 100

Metres



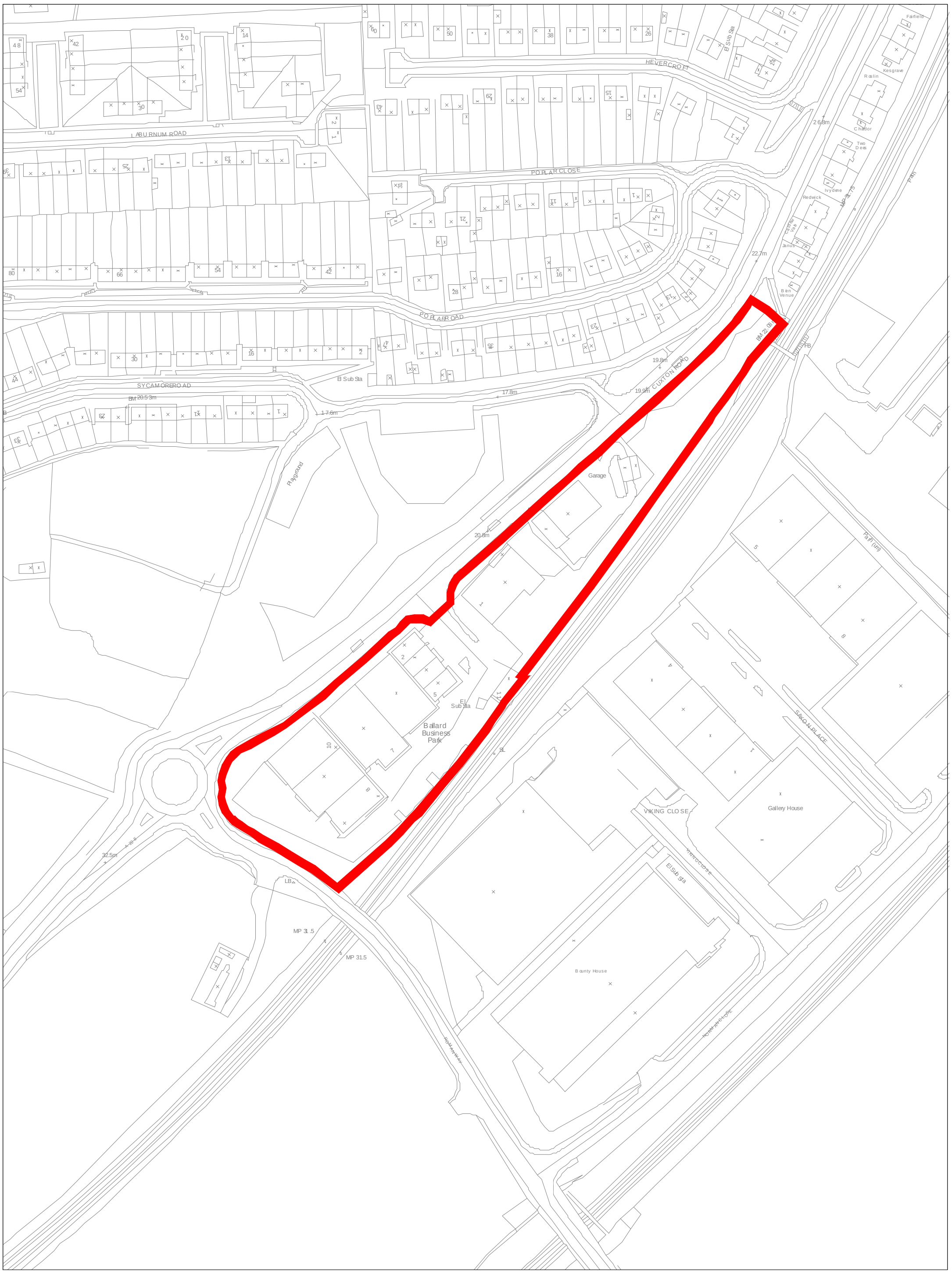
Medway Council

22/11/06

| | |
|---|---|
| **Site name** | **Appendix 1. 2: Ballard Business Park, Strood** |
| **Date of visit** | 24 October 2006 |
| **Brief description of site** | Situated on the edge of the urban area this site is triangular in shape with a frontage onto a main road and a relatively limited depth. The site is mainly flat but rises in the deepest part of the site. The levels of the adjoining roads at this point are considerably higher. The main line railway passes along the rear of the site.<br><br>The site is a development of terraces of buildings of similar design with walls of brick at lower level and clad at upper level; most of the units are visible from the main road. There is a wide single access into the site, which narrows to serve a few units set in the deepest part of the site. There is also a petrol filling station and shop at the ‘narrow’ end of the site.<br><br>Only a few units have security fencing around their compounds but almost all had floodlighting and CCTV. There is no main signage for the site but, as most units are visible from the main road and their fascias are clear, substantial and visible from the road, the site is clearly identifiable.<br><br>The site is close to J2 on the M2 motorway.<br><br>This site is one of four separately detailed sites (Ballard Business Park, Commercial Road, Temple Industrial Estate and Medway Valley Park Industrial Estate), which make up an almost continuous employment zone southwest of Strood centre. |
| **Approx date built** | 1970 - 1980 |
| **Location** | The site is situated on the edge of the urban area. The urban area boundary runs along the southwestern and northwestern sides of the site.<br>To the northwest the site fronts onto the A228 road and beyond is a disused chalk pit which now has consent for residential development. To the southwest is a local road, Roman Way, serving a further industrial estate, a leisure park complex and a theme park. Beyond is land designated as ALLI but a section of this land has a theme park operation on it. To the southeast is the London to Kent coast railway line and beyond is an industrial estate. North of the site, and extending westward, is the residential area of Strood. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>1.67 Ha<br>0 Ha |
| **Average size of unit occupied** | 427 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 44%, B1: 10%, B2: 38%, B8: 3%, Other: 5% |
| **Amount of floorspace** | 5551 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 11391 - age 16-74; 8064<br>235412 |
| **Local Plan designation of site** | Employment land<br>ED1 |

| | |
|---|---|
| **Access into site** | The petrol filling station at the northern end of the site takes its own access of the A228 while the remainder of the site is served from a single access also off the A228. The single access has a wide entrance swing and is also of sufficient width near the front of the site to facilitate LGVs to pass each other. No footways exist within the site but the forecourts to the units extend to the access road carriageway. There appears to be no LGV turning facility in the site.<br><br>Towards the rear of the site the access turns to serve some units located in the deepest corner of the site. This section of access is narrower and suffers from parking of vehicles, reducing available width to one car wide, many of these vehicles have the appearance of being new and awaiting preparation.<br><br>The single access is block paved, the petrol filling station has a concrete access and both are in good condition. |
| **Buildings**<br><br>***General height*** | Overall condition of the buildings is good.<br>Buildings are generally modular with brick lower and clad upper walling with pitched roofs.<br>General height of the buildings is two storey double height but some have partial mezzanine floors. |
| **Layout** | The majority of the site faces inward onto the access road with the forecourts to the units adjoining this road. This makes the site appear open and legibility, for most units, is good.<br>Permeability is also good as there are no physical divisions to the forecourt areas.<br>The layout permits some flexibility though the open and visible nature of the forecourts may restrict some uses that may need extra security. |
| **Locality** | The residential area to the northwest is mainly a social housing estate, though some is now in private ownership under right to buy. The disused chalk pit has planning consent for some 450 dwellings plus a small retail offer and some employment. The whole of this development will be set on the floor of the pit.<br>The ALLI to the southwest is mainly open land with a marked slope. Part of this ALLI is used as a theme park known as ‘Diggerland’. Medway Valley Leisure Park, almost south of the site, has a multiplex cinema, a fitness and leisure centre and a number of restaurants and clubs. The Medway Valley Park industrial estate situated southeast of the site is detailed elsewhere but is within the strategy area for Strood defined on the Medway Local Plan, as is the Temple Industrial estate situated northeast of the site. |
| **Car parking arrangements** | Car parking seemed to exist on parts of the forecourts but otherwise the forecourts were used quite extensively for display, particularly by the units near the A228.<br>Parking/storage occurred along the access road leading to the units at the rear causing some restrictions to traffic movement.<br>Visitor parking facilities existed. |
| **Landmarks** | The site has no landmarks but is highly visible from the main road. |

| | |
|---|---|
| **Adaptability**<br>*Buildings*<br><br><br><br>*Layout* | Buildings are all modular and capable of some adaptation. It is noticeable that there are very different activities taking place on the site, indicating a level of flexibility in the units. Additionally, a single occupier operates from a number of units in one block.<br>The layout of the units at the front has some flexibility but the access and positioning of the units at the rear is constrained. |
| **Connections** | The site is served by A228 Cuxton Road (wide single carriageway main road), which has one lane each way and central hatching with right turn facilities into the site. Cuxton Road has street lighting and footways.<br>The motorway J2 is 1 km.<br>6 buses serve the site; maximum frequency is every 10 minutes.<br>There are no cycleways.<br>The nearest railway station is Strood (3 kms) but Strood station is not served direct by the adjoining railway line.<br>The site has no river frontage. |
| **Restrictions** | The site is long and narrow. The current layout makes quite efficient use of the space but there are still effectively 5 units that are relatively hidden. |
| **Environment** | Some noise was noticed during the survey but there were no odours. |
| ***Air quality*** | Air quality was clear |
| **Facilities and non B1-B8 uses** | The only facility that was noticed on the site was effectively the shop connected with the petrol filling station. However, some staff facilities may exist within individual units and a leisure park was quite close by with both leisure facilities and some catering outlets.<br>Non B1-B8 facilities included a car main dealership, petrol filling station with shop and carpet sales. |
| **Planning consents (sq.m.)** | None |
| **Potential future uses** | This site appeared fully occupied and so can be accepted as viable. Additionally, its narrow width and being situated between a railway line and a main road renders it most suitable for continued employment use. It already has a wide range of uses on site and this diversification should ensure reasonable resilience to economic change. |
| **Any conditions required for future development** | Any use involving visits from members of the public should be restricted to the front units due to potential conflict over access and operational working in the units at the rear. |
| **General comments** | The general appearance of the site from the main road is open and ‘friendly’. However, the parking/car storage around the rear units appeared chaotic, untidy and caused restrictions of movement.<br>No litter or graffiti was noticed. |




## 2: Ballard Business Park, Strood, Rochester

10 0 10 20 30 40 50 60 70 80 90 100
Metres



Medway Council

22/11/06

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| **Site name** | **Appendix 1. 3: Beechings Way Industrial Estate, Gillingham** |
| **Date of visit** | 16 August 2006 |
| **Brief description of site** | Situated adjoining a main road this site has recently undergone a major redevelopment affecting almost half the site including its main access off Beechings Way. The site has developed as a number of small 'parks' and whilst this has led to full utilisation, it is not very coherent. The majority of the site is accessed from a single entrance off Beechings Way, while 3 units have their own accesses; 2 off Beechings Way and the other off Eastcourt Lane, which leads off Beechings Way. Some traffic conflicts exist with the use of the single access. Some internal roadways have footways while others do not. General building height is two storey double height buildings; one notable peripheral building is of 3 storeys. There is a mix of detached and terraced units. The buildings along the northern boundary of the site are now starting to age.<br><br>The site slopes down to the north but internally appears flat, as there is a step change in the level halfway through the site.<br><br>Some individual properties are fenced and the newer 'parks' are separately fenced. CCTV exists on some units.<br>The site has signage off the A289 and at its entrance. |
| **Approx date built** | 1950s on. |
| **Location** | The site is located on the edge of the urban area. Immediately to the north is the London to Kent coast railway line and beyond is open fields. To the east and south is residential. To the southwest there is a golf course. To the west is an apparent open space which is designated in the Local Plan as reserved for an extension to the cemetery situated immediately west of this land and to the northeast is a sports complex. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>9.22 Ha<br>0 Ha |
| **Average size of unit occupied** | 734 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 3%, A3: 1%, B1: 32%, B2: 39%, B8: 17%, D1: 8% |
| **Amount of floorspace** | 39646 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 12330 - age 16-74; 8534<br>229488 (236791) |
| **Local Plan designation of site** | Employment land<br>ED1 (B1/B2/B8 uses; loss to other uses will not be permitted - excluding mixed use areas). |

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| **Access into site** | The majority of the site is accessed by a 1 lane single road off Beechings Way. This access is one way only and serves all but 3 units. There are 2 accesses leading off this access, one is a right turn off the access into approximately half the site and the other one is essentially an extension of the initial access and becomes two-way to feed the northern part of the site. The width of the access to the northern part of the site is quite restricting.<br>Due to the one-way restriction on the first part of the access, egress from the first (right turn) roadway is right turn out and causes some conflict.<br>All sections of the access roads would take LGV vehicles but the right in – right out junction appears not to be capable of permitting an LGV to manoeuvre around one waiting to exit and sections of the northern road would require vehicle to yield to the LGV to allow passing.<br>There are no footways on the northern access road.<br>The initial northern access road is concrete and in fair condition, within the newer 'parks', the surface is block paved while the remainder is tarmac. The block paving and tarmac are all relatively new and in good condition.<br>The Kings Ferry coach depot has a separate access of Eastcourt Lane. This access is essentially left in, right out as Eastcourt Lane north of the site becomes a narrow country lane. |
| **Buildings**<br><br><br><br>***General height*** | Buildings are of mixed ages ranging from 1950s to 1960s buildings, with some in need of maintenance, to just built and in good condition. Within the new park areas buildings are mainly terraced. Most buildings are clad but a few are brick.<br>General height is 2 storey double height with pitched roofs. |
| **Layout** | The arrangement of the internal access roads is poor being basically two culs-de-sac with limited or no turning facilities at their ends. Some congestion was noticed at certain points. There is no signage to the individual 'parks' making legibility difficult. Permeability is also very limited as there are no connections, either pedestrian or vehicular. The site appears cluttered in the southern section.<br>The redevelopment of the site does not appear to have been carried out to an overall plan to achieve a coherent site. |
| **Locality** | The residential areas to the east and south are fair quality and a mix of social and private housing. Within the residential area and some 500 m to the southeast of the site is a local shopping centre.<br>To the north beyond the main line railway line is open fields designated as ALLI. The fields are relatively small and mainly seem to be paddocks or other non main-stream agricultural uses. |
| **Car parking arrangements** | Some units, e.g. McDonalds, the children's nursery and the NHS centre have their own parking. Others have a small amount of dedicated customer parking while some have none. Some parking was noticed in the road - mainly in the northern section. The site is not fully occupied so the ultimate situation cannot be assessed. |
| **Landmarks** | The McDonalds sign, which is close to the main entrance, forms a landmark, as does the NHS building due to its size, height (3 storey building) and peripheral location. |

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| **Adaptability**<br>*Buildings*<br><br><br><br>*Layout* | The newer units are modular leading to some flexibility. The NHS building was originally built as a leisure centre but the operator withdrew, however, in this case the new tenant was also sole occupier. Other buildings may require substantial work or renovation for alternative uses.<br>The layout now seems fixed with little capability of adaptation. |
| **Connections** | While the site faces onto a main road it only has an exit onto this road. The site access is off Beechings Way (2 lane dual local road at the entrance reducing to 1 lane single after).<br>The main entrance is less than 100 m from the roundabout junction of Beechings Way and the A289 dual carriageway.<br>One unit, the Kings Ferry coach depot, takes its access of Eastcourt Lane (I lane single local road). Eastcourt Lane has a junction with Beechings Way some 300 m east of the main entrance to the site.<br>The motorway J4 is 6 kms.<br>7 bus routes serve the site; maximum frequency is every 10 minutes.<br>There is a cycleway along the A289 and a pedestrian link to the site.<br>A traffic light crossing on Beechings Way is in front of the site.<br>The railway abuts the site but has no connection. The nearest station is Gillingham (3 kms.).<br>The site has no river frontage. |
| **Restrictions** | The majority of the site has a complex access arrangement where it is left in off Beechings Way and then right into the southern section of the site. However, the egress from this section is right turn only, due to the one-way arrangement, which leads to conflict of traffic movement. Exiting traffic then needs to turn left onto the A289 to return to the Beechings Way roundabout before it is possible to set off in the intended direction of travel.<br>Additionally, if there was an intention to visit one unit in the northern section followed by one in the southern section, it would be necessary to leave the site completely and re-enter to access the southern section.<br>Once all the new units are fully occupied it will be possible to see if the current road system is able to cope without periods of congestion.<br>The current fully developed layout leaves no possibility for improving the internal access arrangements nor does the sloping terrain as the site is effectively built on two levels. |
| **Environment** | No noise or odours were noticed at the time of survey |
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | The site has a mixed-use area; hence a wider range of uses is to be expected.<br>The following non-B1 to B8 uses were noted:<br>Catering trailer/kiosk on the northern access road,<br>Will Adams NHS treatment centre,<br>McDonalds restaurant and drive through,<br>Car sales,<br>Petrol filing station with Somerfield foodstore,<br>Depot for a coach operator,<br>Motorcycle training,<br>Children’s nursery,<br>Carpet sales,<br>Plumbing and heating sales. |
| **Planning consents (sq.m.)** | None |

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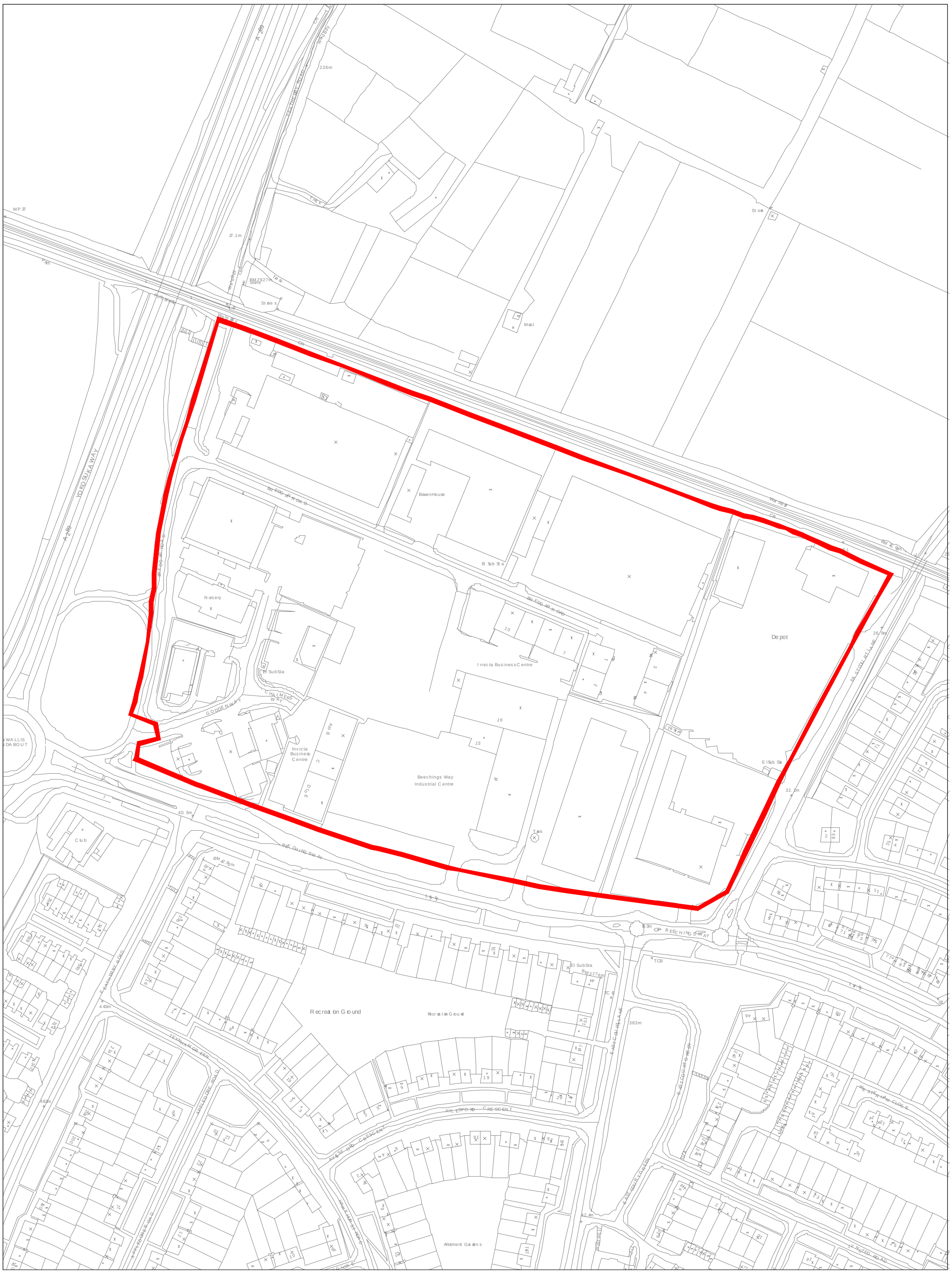
| **Potential future uses** | The site is potentially a valuable source for local employment and, based on the amount of recent development, seems viable and thriving. However, some doubt must remain over the capacity of the road system to handle the traffic, particularly if many more 'trade outlets' are introduced onto the site. Traffic issues may ultimately affect the viability of the site in its current form. |
| **Any conditions required for future development** | The internal access arrangement is poor but re-engineering the access roads would require substantial works, which would probably be uneconomic. |
| **General comments** | No litter or graffiti was noticeable. However, the general layout of the site is cluttered and confusing. |



## 3: Beechings Way Industrial Estate, Gillingham

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Metres



Medway Council

22/11/06

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| **Site name** | **Appendix 1. 4: Bridgewood Business Park, Rochester** |
| **Date of visit** | 19 July 2006 |
| **Brief description of site** | Situated on the top edge of the scarp slope of the North Downs, this is a recently built development contains 4 detached large units. One of the units is shared. The site is served by a single short spur access road feeding directly into the entrance yards to the units.<br>Buildings are two storey double height with cladding. Roofs are of a shallow pitch.<br><br>Each unit is within its own fenced and gated compound. Most compounds are floodlit and have CCTV.<br><br>No gateway signage exists but each occupant has its own name boards. |
| **Approx date built** | 1990s |
| **Location** | The site is located on the edge of the urban area; the boundary of the urban area runs around the southern and western boundaries of the site.<br>To the west and south is open, almost flat land forming the top of the scarp face of the North Downs. This land is AONB and Strategic Gap. At the bottom of the scarp is the M2 motorway. To the north is East Cookham Wood and training centre, part of the HM Prison and Youth Custody Centre, Borstal. To the east is Maidstone Road and immediately beyond is a leisure centre. Around the leisure centre on the east side of Maidstone Road is residential to the north, playing fields to the east and Rochester Airfield Industrial Estate to the south. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>3.74 Ha<br>0 Ha |
| **Average size of unit occupied** | 1783 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | B1: 28%, B8: 72% |
| **Amount of floorspace** | 8916 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 5215 - age 16-74; 3804<br>224699 (within Medway) |
| **Local Plan designation of site** | Employment land<br>ED1 (B1/B2/B8 uses). |
| **Access into site** | The site is served by a wide single carriageway spur road with lighting only at its junction with Maidstone Road. The access road has full LGV capacity and its junction radius also appears to be wide. There are no footways or cycleways on the spur road.<br>The spur road is tarmac and in fair condition.<br>No parking was noticed on the spur road. |
| **Buildings**<br><br>***General height*** | All buildings are quite new and are in good condition. They are clad and have shallow pitched roofs.<br>Buildings are two storey double height with some mezzanine areas. |

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| **Layout** | The site was developed as individual compounds off a short spur road. All units are clearly seen from the entrance to the spur.<br>There are no links between each compound so permeability is limited. |
| **Locality** | It is very open around the site, with the land to the west, south and northwest forming the flat, top of the scarp slope and which appears to be farmed. This land is ALLI and Strategic Gap. The scarp face of the slope is traversed by the M2 and beyond the M2 the ALLI becomes AONB. To the north is HM Prison land forming part of the Borstal complex of detention centres. The residential land to the northeast of the leisure centre is fair quality. Rochester Airfield Industrial Estate to the southeast is described elsewhere in this Audit. |
| **Car parking arrangements** | All car parking is within the individual compounds. Spaces seemed available.<br>There is no separate, defined visitor parking. |
| **Landmarks** | There are no landmarks. However, the colour of one of the occupant's buildings (Royal Mail) is visible for some distance from the southeast when travelling along Maidstone Road. Some of the buildings are sufficiently close to the scarp edge to be visible on the skyline from the M2and parts of the Nashenden Valley at the bottom of the slope. |
| **Adaptability**<br>*Buildings* | The buildings are modern modular buildings and are therefore quite flexible. However, being industrial accommodation conversion would be quite expensive. One occupier uses the unit as a cold store. |
| *Layout* | There is limited flexibility in the layout as the original design maximised the amount of useable land on the site. |
| **Connections** | The site is served by one access road, the B2097 Maidstone Road (single carriageway road). This road is unlit except at junctions and has a 40 mph speed limit.<br>No footway or cycleway exist along this section of the road.<br>The motorway J3 is 3 kms.<br>1 bus route serves the site; maximum frequency is 2 hourly.<br>No rail access, the nearest station is Rochester (4 kms).<br>The site is near a small private airfield adjoining.<br>The site has no river frontage. |
| **Restrictions** | The site is in a prominent position being at the top of a scarp slope, which is designated ALLI and Strategic Gap, and is widely visible from the surrounding AONB to the west and southwest.<br>One of the flight paths of Rochester Airfield is close to the site and this may also affect height of buildings |
| **Environment** | No noise or odours were noticeable. |
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | No facilities exist on site except those provided within each unit for employees. |
| **Planning consents (sq.m.)** | None |
| **Potential future uses** | Some of the buildings appear to be to a higher design standard than is sometimes normal for industrial units.<br>The site is fully occupied and so would seem viable for industrial use.<br><br>Given its position sensitive use of this site is necessary. |

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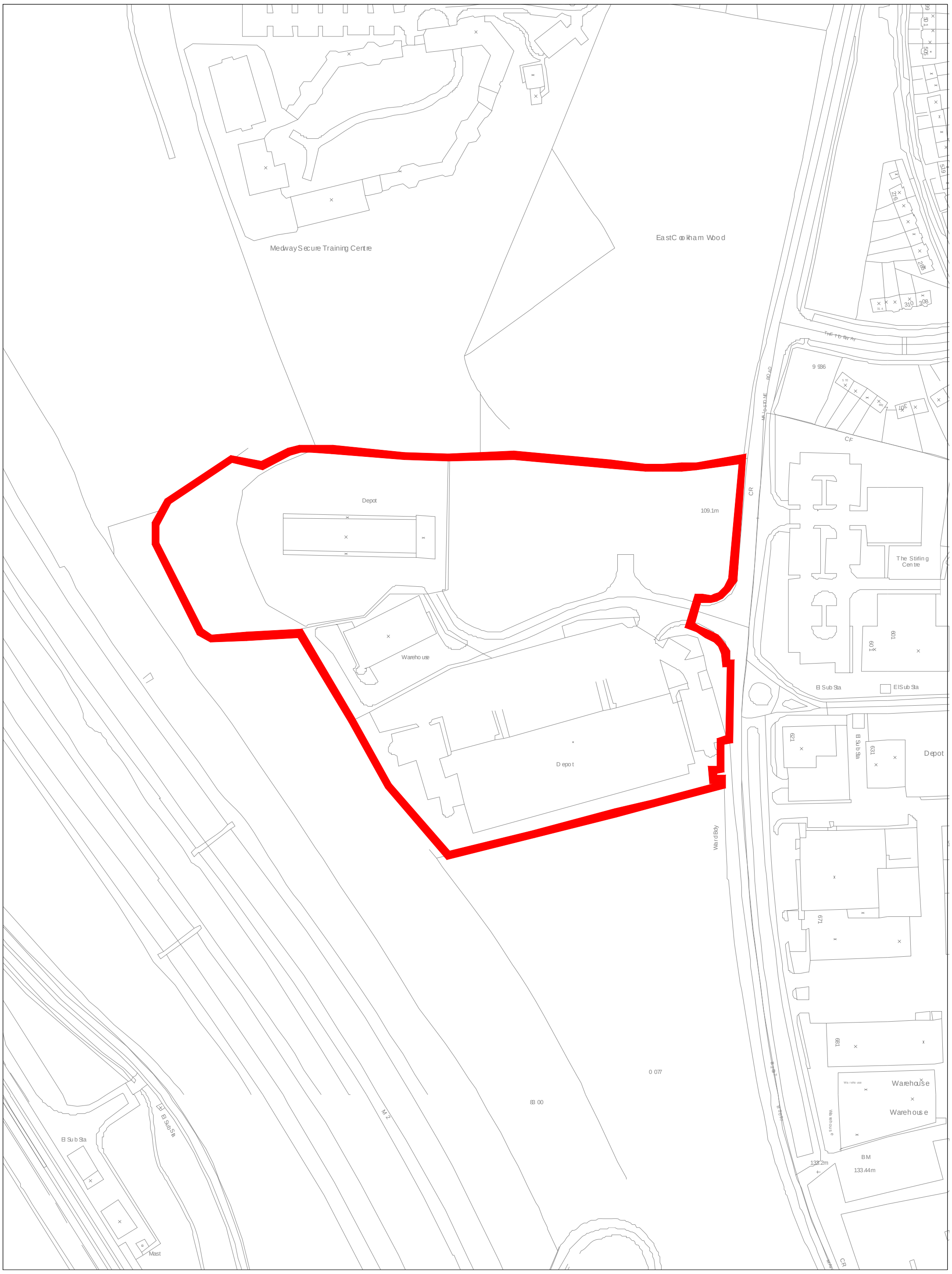
| **Any conditions required for future development** | Improved bus services and non-car related access provision, i.e. footway and cycleway as well as better lighting.<br><br>Maidstone Road is of limited width given the commercial vehicle traffic, has a 40 mph limit and lighting restricted to junctions. |
| **General comments** | No litter or graffiti was visible. |




## 4: Bridgewood Business Park, Rochester

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Metres



22/11/06

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| **Site name** | **Appendix 1. 5: Castle View, Rochester** |
| **Date of visit** | 5 September 2006 |
| **Brief description of site** | Once a small estate in the middle of a larger employment area this is now a small site within the major building works of the Rochester Riverside regeneration area. The site consists of an open central area which serves as parking, storage, loading and access and two terraces of 2 storey sheds, one along each side of the site.<br><br>The access road leading into the site is narrow and further narrowed by cars parked at the side of the road and overhanging the carriageway.<br><br>No signage exists at the entrance to the site but the site is signed of the A2 Corporation Street some 100 m southwest of the site.<br><br>Individual units have their own lighting and some have CCTV. Most have opening steel-barred security fittings over their ground floor doors and windows. The site is fenced off from the adjoining construction site but has no entrance gate or fencing to any unit. |
| **Approx date built** | 1970-1980 |
| **Location** | The site is located within the urban area and is some 200 m from Rochester High Street and town centre. To the southeast is a coach park and beyond is the London to Kent coast railway line, which is on an embankment. Southeast of the railway is the A2 and beyond the town centre of Rochester. Around the other 3 sides is the regeneration area construction site. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>0.71 Ha<br>0 Ha |
| **Average size of unit occupied** | 182 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 1%, B1: 432%, B2: 30%, B8: 27% |
| **Amount of floorspace** | 3831 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 5805 - age 16-74; 4359<br>249488 |
| **Local Plan designation of site** | Part of Action Area – mixed use:<br>ED2 (B1/B2 uses), S7, ED12, D13, R9, CF6, L13, H1, H3 |

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| **Access into site** | Access into the site is by means of a narrow road with no footways and a verge on one side only. This verge is almost wide enough to permit car parking at right angles to the carriageway. The resultant parking overhangs the carriageway effectively reducing the road to a single lane.<br>LGV access along this road and into the site as a result of this and the alignment of the access road from Gas House Lane is difficult. The road has no lighting. Additionally the access requires further quite tight manoeuvring to reach the central route through the site.<br>The access road is tarmac and in fair condition.<br>The hardstanding area between the two rows of units is all block paved and in good condition. Parking bays are painted on the hardstanding. |
| **Buildings**<br>***General height*** | Buildings are all modular with brick lower level and clad upper with pitched roofs. They appear in good order.<br>All are 2 storey double height units. |
| **Layout** | The overall layout is cluttered due to the parking on the access road and within the hardstanding area. However, from the entrance, all units are visible even if their fascias are not legible.<br>The central through-route is not immediately or clearly visible. However there are no barriers or fencing between units. |
| **Locality** | The immediate locality is undergoing major changes and its current situation does not reflect the intended final state of development. The coach park nearby to the south is for tourist coaches visiting Rochester, which is also a tourist destination. Rochester town centre is a niche market centre catering for both tourists and local needs. It has, therefore, mainly smaller, non-chain store retailers. Rochester is also a conservation area. |
| **Car parking arrangements** | Car parking and storage takes place in front of the units in marked bays. Levels of use appear high. |
| **Landmarks** | There are no landmarks within the site. |
| **Adaptability**<br>*Buildings*<br>*Layout* | The buildings appear modular allowing merging of units if necessary but the units will not subdivide easily.<br>The layout of the hardstanding is flexible, given the lack of physical barriers. |
| **Connections** | The site is served from the A2 (2 lane dual main road) by Gas House Lane (wide single carriageway local road), which passes under the railway line via a bridge with a maximum vehicle height of 4.4 m. Gas House Lane is tarmac and in fair condition. It also has footways. The Gas House Lane junction with the A2 is full movement and is traffic light controlled.<br>The motorway J2 is 5 kms.<br>No buses pass the site but there are 18 services within 200 m.<br>There are cycleways on the A2 but not on any other road.<br>No rail access, the nearest station is Rochester (1km).<br>The site has no river frontage. |
| **Restrictions** | Potential restrictions on this site cannot yet be determined. The site is almost the sole remaining feature in this area as it sits within the Rochester Riverside redevelopment and regeneration area. Some 1,900 dwellings are proposed on this development as well as leisure facilities. |
| **Environment** | Some noise was noticeable at the time of survey. |
| ***Air quality*** | Air quality was clear but a monumental mason occupied one unit and there was a considerable deposit of dust over the hardstanding in front of this unit. |

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| **Facilities and non B1-B8 uses** | The only facilities are those provided within the units. However, the town centre is close by. |
| **Planning consents (sq.m.)** | None on Castle View<br>The wider area of Rochester Riverside has the following floor areas with planning consent but not yet started:<br>A1: 1560, A2: 1560, A3: 1560, A4: 1560, A5: 1560, B1: 9670, B2:-1600, B8: -37800, D1: 9000 SG: 3600 (all figures are based upon the net gain from the consent after taking account of the losses of the previous uses on Rochester Riverside. |
| **Potential future uses** | The site has the potential to be a sustainable location for employment as part of the Rochester Riverside redevelopment. However, its modest size means it has a limited job creation potential. Moreover, there may not necessarily be a skills match between the new occupants of the surrounding redevelopment and the needs of the businesses. |
| **Any conditions required for future development** | There is a need to improve the alignment and quality of the access road into the site. This may happen as result of the adjoining redevelopment but it is too early to be certain on this point.<br>Issues over amenity may arise given the type of activities currently being undertaken on site once the adjoining new development is completed. |
| **General comments** | The site had a number of car repair and bodywork companies. These had damaged and cars in various states of bodywork repairs both in front of their units and in the parking along the access road. This does not help the image of the site as, particularly with the damaged cars, it initially gives the impression of car dumping.<br>No litter or graffiti was noticed but the general clutter of the parking/storage arrangements makes the site appear very untidy.<br>The site currently has good views to the southeast over central Rochester including the castle. |


## 5: Castle View Rochester

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Metres



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| **Site name** | **Appendix 1. 6: Chatham Maritime, Chatham** |
| **Date of visit** | 5 July 2006 |
| **Brief description of site** | Originally part of the Royal Naval Dockyard at Chatham and bounded on the west by the River Medway, Chatham Maritime is a mixed-use regeneration area divided, essentially, into 4 quarter by two intersecting roads, which also serve as accesses to the site. Part of this division is only apparent on maps as the western arm of the A289 is underground yielding an almost continuous area west of Dock Road. There are differences to the character of the area either side of Dock Road, which passes through the site in a north-south direction. To the east the buildings are generally 3 storey brick with white block detailing and pitched roofs. To the west the buildings are of similar height but are mainly clad. This is explained partly by the fact that the eastern land formed HMS Pembroke, a Royal Naval land station, and the western land formed part of the operational dockyard.<br><br>Uses within the site are extremely mixed ranging from a new police headquarters, a university complex and Factory Outlet Centre apart from the more normal commercial uses.<br><br>The main access roads, all off Dock Road, are wide with planted verges and some trees. There is no gateway entrance to the site<br><br>There is a substantial scarp face immediately south of the southeast quarter of the site.<br><br>Most buildings are detached and of a substantial size. A number of the buildings are listed and a recently constructed building has received a design award.<br><br>Most of the site is relatively level but there are significant level differences in the southeast quarter.<br><br>CCTV exists throughout the site and there is also a security patrol. Some occupiers also have their own supplementary security.<br>Signage exists to some of the facilities rather than the whole site except for banner welcome signs attached to the railings of the roundabout junction over the A289 and banners further south on Dock Road. The Factory Outlet Centre has direction signs along approach roads to the area. |
| **Approx date built** | It is believed that the majority of the original buildings on the site were built around the 1870 - 1900 |

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| **Location** | Urban location but the river forms the western boundary of the urban area.<br><br>Along the entire northern boundary are the middle and western basins of the original dockyard. Beyond this is the new residential area of St Mary's Island. The principal access to the Island development is through the site via Dock Road and a lifting bridge over the connection between the two basins. Waterborne access to the middle basin is primarily through Chatham Port immediately to the east of the northeast quarter of the site. The western basin contains a marina. To the west is the River Medway with an almost complete riverside walk inland of the river wall.<br>To the southwest the site abuts Chatham Historic Dockyard, a tourist attraction that also has commercial tenants.<br><br>Due to the shape of the site the southeast quarter is considerably wider than the northeast quarter, the southeast quarter also tapers considerably towards its eastern end. The southeast quarter is bounded on the north by the A289 and beyond is partly the northwest quarter and partly Chatham Docks. To the south is a scarp face on the top of which is situated a military barracks. To the southeast (and east of the military barracks) is a residential area.<br>The northeast quarter is bounded by Chatham Docks to the east and the A289 to the south. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | 58.02 Ha<br>54.72 Ha<br>3.2 Ha |
| **Average size of unit occupied** | 1146 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 6%, A2: 10%, A3, A4 & A5: 1%, B1: 41%, B8: 1%, D1: 28%, Other: 13% |
| **Amount of floorspace** | 163921 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 11708 - age 16-74; 8532<br>249488 |
| **Local Plan designation of site** | Mixed use zone<br>ED2 (B1(a)), S8, ED12, ED13, BNE12, H1, L11, L13, CF3, CF6, CF7 |

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| **Access into site** | Dock Road is a north-south road (2 lane dual local road) passing through the site. This road passes over, via a roundabout, the A289 (2 lane dual main road). The roundabout connects to the A289 by slip roads. Main access into the site are by two further roundabout connections on Dock Road. The main access roads are wide single carriageway roads with verges and footways. Some also have cycleways. The access road to the west has two connections to Dock Road but one is for public transport only so making the access into the western area a cul-de-sac for cars. Accesses to the northeast and southeast quarters are both culs-de-sac. All roads have street lighting.<br>The A289 to the west the road crosses the river by means of a tunnel and this has a pedestrian and cyclist ban in operation.<br>Road surfacing is a mix of tarmac and block paving with most footways being block paved. All surfaces are in good condition and speed ramps exist on all roads.<br>There is a completely separate entrance at the eastern extremity to the southeast quarter serving the police headquarters, which is sited in its own secure compound. |
| **Buildings**<br>***General height*** | Overall condition of the occupied buildings is good. However, there are some former naval buildings at the eastern end of the site that are awaiting renovation. The original brick buildings are predominantly of substantial size and construction. Most buildings are detached.<br>The general height is three storeys. |
| **Layout** | Signage exists to some individual units but is patchy and legibility overall suffers as a result. However, the Universities at Medway have their own boards with maps identifying their buildings by name which is very good. Some general maps of the site exist but cannot be read from a vehicle. Dock Road through the centre of the site does not aid legibility.<br>Permeability is generally good with a number of pedestrian controlled light crossings on Dock Road and connecting paths through the site. However, the A289 east of Dock Road is a substantial barrier as is also the former dockyard wall which runs along the entire north side of this section of road. |
| **Locality** | The residential area of St Mary's Island is of fair to good quality housing with a marina in the adjoining western basin and leisure activities in the middle basin. These are all recent uses occurring after the closure of the naval dockyard.<br>To the southwest is the historic dockyard, a major tourist attraction, and to the southeast is a major military barracks. The scarp face forms an effective barrier and any connections up the face of the slope are sealed. The residential area east of the barracks is of mixed quality<br>Dock Road connects Chatham Maritime to Chatham town centre, which is 2 kms south.<br>To the northeast and separated by the A289 is Chatham Port. |
| **Car parking arrangements** | All units have their own parking. Parking is not permitted in the roads and none was seen. Some car parks were extensively used. |

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| **Landmarks** | There is an overall uniformity of height to Chatham Maritime. Given its history this may not be surprising as prominent landmarks would render the site more easily targeted by hostile forces.<br>Some of the buildings are listed, mainly Grade II.<br><br>Notable buildings include the former Boiler House (now a Factory Outlet Centre) with its clock tower, the former Engine Shop, a cast iron unclad skeleton framework building, the Bell Mast, the new Police Headquarters and the Medway Building, a new brass clad building. |
| **Adaptability**<br>*Buildings* | Many of the buildings are of substantial construction, hence alteration is more complicated. Listed building planning consent would also be needed. This is not insurmountable as changes of use are occurring. |
| *Layout* | The layout is more organic and change is occurring both in the far eastern area of the site and west of Dock Road. West of Dock Road also has most of the un-used land. |
| **Connections** | The site is served by two roads; A289 (2 lane dual carriageway) and Dock Road (2 lane dual carriageway through the site but 1 lane single south of the site)<br>The motorway J1 is 8 kms.<br>9 bus routes serve the site; maximum frequency is every 15 minutes. There isI also a shuttle bus service to Chatham.<br>There are cycleways along Dock Road and the A289 east of Dock Road.<br>The A289 west of Dock Road is restricted to certain classes of traffic as it immediately enters a tunnel to pass under the river.<br>There is a riverside walk along the west of the site which connects over lock gates to St Mary's Island but does not connect with any land to the south.<br>The nearest rail station is Chatham (2 kms).<br>The site has a tidal river frontage but no mooring or wharfs. However, the western basin has a lock gated river connection and the middle basin has a similar connection through Chatham Port to a dredged river channel permitting access to larger ships. |
| **Restrictions** | Much of the site is close to water level for high tides. A river wall exists but it is a consideration for any groundwork needed.<br>The existence of a number of listed buildings and the need to respect the setting of the site also will be a factor.<br>Despite being almost opposite Strood the direct approach to the site from the this area, the Medway Tunnel, does not permit cyclists or pedestrians; this is a potentially significant deficiency in sustainability terms and restricts the feasibility of Strood as a pool of employment or potential location for student accommodation. |
| **Environment** | No noise or odour issue were noticed at the time of visit except from the extractor vents to the food area of the Factory Outlet Centre. |
| ***Air quality*** | Air quality appeared clear. |

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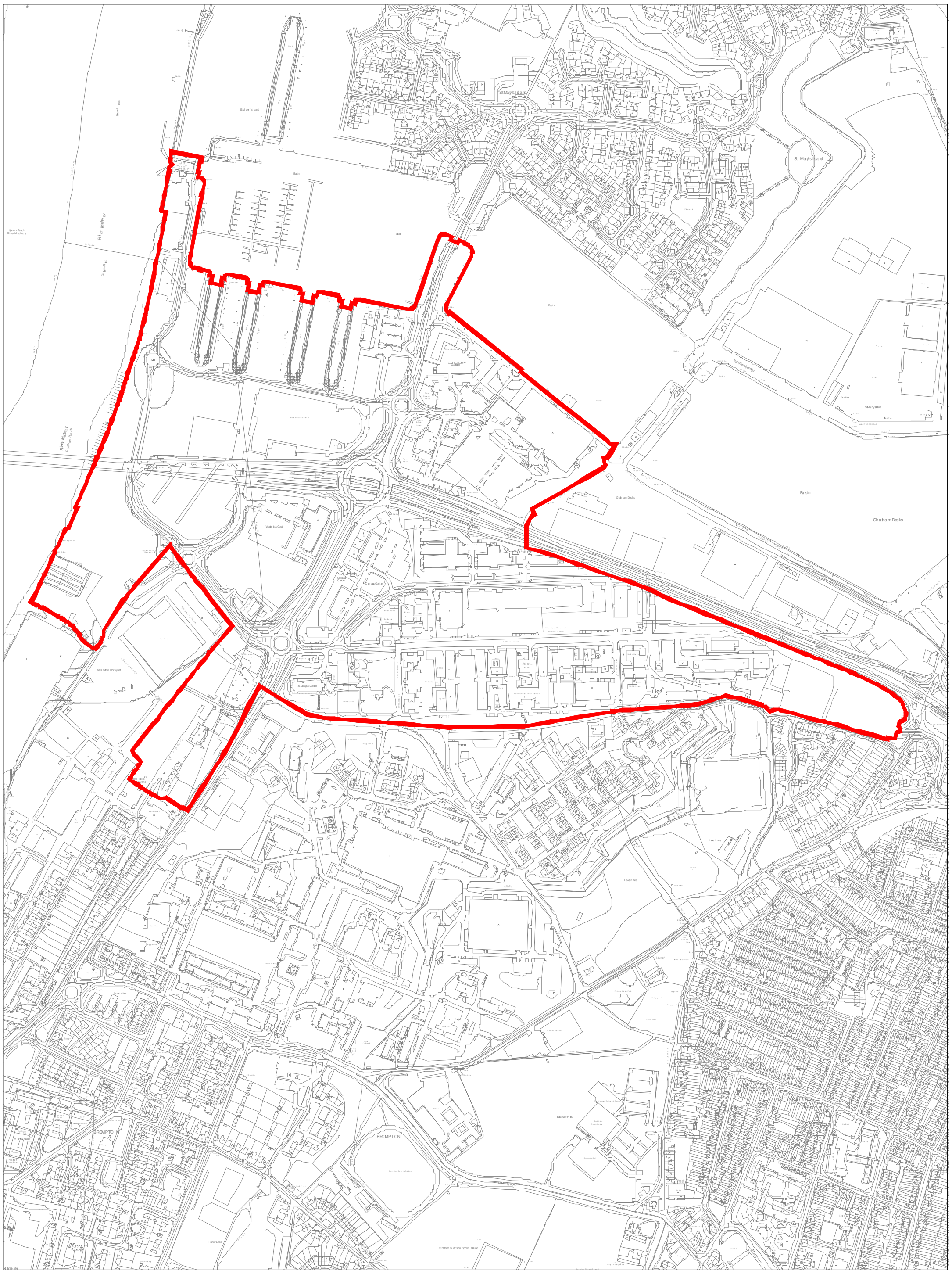
| **Facilities and non B1-B8 uses** | The site is a mixed-use area and many non-B1 to B8 uses exist. These include;<br>Factory Outlet Centre with catering<br>University complex<br>Public House with catering and hotel accommodation<br>Marina facilities<br>Convenience store, which also serves St Mary's Island<br>Day nursery<br>St George's Centre (former naval church now available for hire as a venue)<br>A 'Dickens World' themed attraction and adjoining cinema are under construction. |
| **Planning consents (sq.m.)** | Not started: A1: 400, A3: 2900, D2: 3250<br>Under construction: A3: 2220, B1: 6745, D1: 7000, D2: 10127, Other: 11022 |
| **Potential future uses** | By being designated a mixed-use site the potential for various uses already exist. A masterplan for the site exists. |
| **Any conditions required for future development** | Given the historic setting of the site and the listed buildings, development need to respect this, however, the Local Plan already identifies this and other requirements.<br>The proximity of Chatham town centre should be considered and uses need to be complementary to enhance the overall quality of the area, the offer and also assist leisure and tourism. |
| **General comments** | The majority of the site, that is those parts where construction works are not taking place, generally appeared tidy and well maintained with no litter or other untidiness visible. |



## 6: Chatham Maritime, Chatham



22/11/06

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| **Site name** | **Appendix 1. 6a: Historic Dockyard, Chatham Maritime** |
| **Date of visit** | 7 July 2006 |
| **Brief description of site** | Originally part of the Royal Naval Dockyard at Chatham this is the historic 'heart' of the former dockyard and is now a major tourist attraction. The site, which is relatively long and thin, also has a number of its buildings occupied for commercial use as well as a residential element. The residences are partly within original buildings and partly new build.<br>The site has a substantial wall, the original security wall, all along its eastern side with an entrance gate towards the southern end. The western side fronts onto the River Medway.<br><br>The main public entrance is from the north off Dock Road. It is wide with planted verges and some trees this access also serves as the main access into the western part of Chatham Maritime. A secondary controlled entrance exists towards the southern end of the site through an archway; this entrance is mainly for people living/working on the site. The land rises west to east away from the river. Building styles are mixed, mainly split between whether they were originally connected with the wooden structure of the ships (sheds with cladding) or were either stores or administrative or other support activities (mainly brick) and generally all are 4 storeys in height near the river and 3 storeys on the rising ground; all have pitched roofs. Many buildings are substantial structures and most are detached.<br><br>The site is secured by fencing and barriers with a guard at the northern end and by a barrier and guard at the secondary southern entrance. CCTV exists throughout the site.<br><br>The site is a tourist destination and has brown tourist signs. Other signs/banners exist in Dock Road and at the entrance to the site. |
| **Approx date built** | The original dockyard dates back to the 17$^{th}$ century, however, many of the current buildings date back to the 19$^{th}$ century. |
| **Location** | Urban location but the river forms the western boundary of the urban area.<br>The Dockyard is bounded on the west by the River Medway, with Medway City Estate the other side of the river. To the east is Dock Road with Barracks and housing the other side.<br>To the north is Chatham Maritime.<br>To the south there is an office complex. Beyond is the edge of Chatham town centre. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>26.37 Ha<br>0 Ha |
| **Average size of unit occupied** | 752 sq.m. (this includes the buildings forming the Historic Dockyard visitor attraction) |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 1%, A2: 1%, B1: 12%, B2: 38%, B8: 23%, D1: 22%, D2: 2%, Other 1% |
| **Amount of floorspace** | 92500 sq.m. |

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| **Population** within - <br> *800m (½ mile)* <br> *8 kms (5 miles)* | <br> Total; 7452 - age 16-74; 5760 <br> 249488 |
| **Local Plan designation of site** | Action Area <br> ED12 (Tourist attractions & facilities), S9, BNE12, BNE20, CF7, L11, |
| **Access into site** | The nature of the site seems to militate against LGV access except by special arrangement at the northern end. Smaller goods vehicle access is possible from both entrances. Car access is also possible at both entrances. <br> Access roads are tarmac, in fair condition and 1 lane single carriageway. The roads within the site are all private. <br> There is also a short rail line within the site (no connection to the rail network) <br> The extreme southeast corner of the site comprises a separately enclosed new housing development that has a gated access off the road New Stairs. <br> All internal roads have street lighting. There are some speed ramps and a sign-posted 10 mph speed limit throughout the site. |
| **Buildings** <br> <br> <br> <br> <br> <br> <br> <br> ***General height*** | The site is acknowledged to have the largest concentration of listed buildings in Kent. The oldest building on site was built in 1723. Many are substantial structures in both size, one is ¼ mile long, and construction, with walls over 1 metre thick. Many buildings appear in good order but some renovation works are under way. <br> The roofscape of the site is relatively level except for some newer residential properties along the western edge. The site slopes up away from the river with the building along the river being generally 4 storeys high and those on the higher ground 3 storeys. All have pitched roofs. |
| **Layout** | The layout is essentially controlled by the many buildings. However the site, once inside, is very permeable. Legibility is aided by signs within the site but the signs are only for the tourists, there are virtually no signs to the business occupiers. |
| **Locality** | On the west of the Dockyard is the River Medway, with Medway City Estate being the main feature the other side of the river. To the east is Dock Road with a Barracks and some housing, mainly military or former military, the other side. Within the Barracks complex is the Royal Engineers Museum. To the north is Chatham Maritime with the Factory Outlet Centre and the forthcoming 'Dickens World' and a cinema being close. <br> To the south the office complex is subject to possible change; the original owner (Lloyds of London) has sold the property and is moving out. Beyond is the edge of Chatham town centre. <br> The site has good views along the river to both the southwest and the northwest. |
| **Car parking arrangements** | All parking within the site is by permit. Parking for business users seems to be around the buildings. The residential properties have garages but some on-street parking exists. Visitor parking to the attraction (coach and car) exists at the northern entrance to the site. <br> There appeared to be sufficient car parking capacity. |

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| **Landmarks** | There is, essentially, an overall uniformity of height to the Dockyard. Given its history this may not be surprising; prominent landmarks would render the site more easily targeted by hostile forces. The Bell Mast and the chimney to the forge are prominent features.<br>Many of the buildings are listed; mainly Grade II and notable buildings are the covered slips (shipbuilding sheds) and the Commissioners House. |
| **Adaptability**<br>*Buildings*<br><br><br><br>*Layout* | Due to the number of listed buildings the layout of the site is constrained. This also applies to both the external and some internal features of the buildings. However, a number of buildings have seen successful changes of use within their original structures.<br>However, as this is a tourist attraction, the original features of the site need to be retained in order for the site to have continued relevance for this purpose. |
| **Connections** | The site is served by Dock Road, which is part 1 lane dual carriageway and part 1 lane wide single carriageway. The designation of the road also varies along its length, with part being A231 and part a local road.<br>The motorway J1 is 8 kms<br>A cycleway exists along Dock Road.<br>15 bus routes serve the site with a maximum frequency of 10 minutes.<br>No rail access, the nearest railway station is Chatham (2 kms)<br>The site has a tidal river frontage with a floating pontoon extending out into non-tidal waters. This serves a day trip steamer and has a number of private yachts moored alongside. There are also some tidal moorings alongside the river wall with access by metal cat-ladders down the wall. |
| **Restrictions** | The situation is somewhat unusual as there are not many employment related sites where visitors are to wander freely around the outside of commercial premises. This limits the type of employment use that can be accommodated, for example, it would not be possible to have a use that required permanent forklift truck loading/unloading activity outside a building.<br>The fact that many of the buildings are either listed buildings or scheduled ancient monuments has a restricting effect as does, in employment terms, the need to keep the site as a viable and improving tourist destination.<br>The ability to create viable sub-division of some of the larger buildings may also create problems. |
| **Environment** | No noise or odours were noticeable except for a small amount of noise from around a boat repair business in one of the covered slips.<br>However, this could be different on special event days such a steam events. |
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | Commissioners House is now licensed for weddings<br>Licensed restaurant, tearoom, picnic area exist within the visitor facilities.<br>Around 400 residential units (per the Historic Dockyard) exist on site.<br>There is also a University of Kent presence on the site |
| **Planning consents (sq.m.)** | None |

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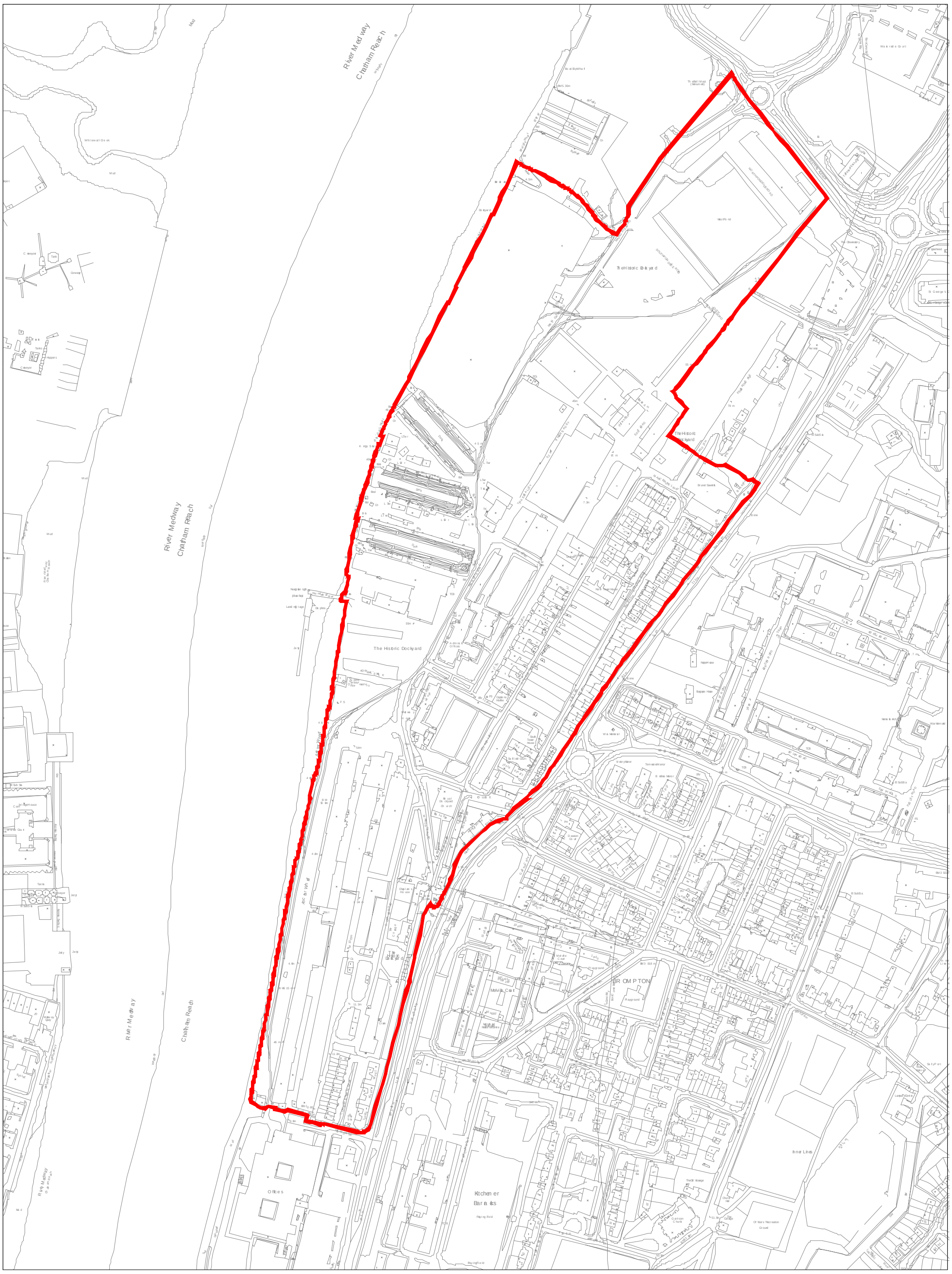
| **Potential future uses** | This is a major tourist attraction, which has potential to develop its offer further. It has some features, especially when taken in conjunction with some parts of Chatham Maritime, which do not seem to be widely promoted. The historical significance of some aspects of the collection is almost unique, as other naval dockyards have already lost some features that remain in the Dockyard.<br>There is also potential for use of some more buildings for employment. However, conflict between the visitor and business needs will require careful handling.<br>The potential for further residential use may be limited as the risk of conflict is higher once a critical mass of residential development is reached. |
| **Any conditions required for future development** | If promotion of attractions includes sites outside the Dockyard then stronger links may be needed with SEEDA and some common goals agreed. |
| **General comments** | Segregation of paying visitors from other people on site is achieved by issuing paying visitors with a lapel badge and then by restricting admission to many of the attractions only to persons with lapel badges.<br>No graffiti or litter was visible but in some areas there is some clutter from waste/old materials, some rusting, being left around some buildings. This material appears to be scrap rather than pieces awaiting restoration. |




# 6a: Chatham Historic Dockyard

Medway
COUNCIL



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| **Site name** | **Appendix 1. 7: Chatham Port, Chatham** |
| **Date of visit** | 5 July 2006 |
| **Brief description of site** | Originally part of the Royal Naval Dockyard at Chatham, Chatham Port is a bonded port based around one basin. The basin has a lock-gated connection to a dredged channel in the River Medway and there are further lock gates at the opposite end of the basin serving as access to another basin located outside the port but inside Chatham Maritime. Buildings are mainly separate with pitched roofs, 2 storey double height with external cladding. Some considerable open storage also exists. Internal circulation is by a route defined on the hardstanding around the basin and over lock gates to reach the north side of the basin.<br><br>As the port is bonded there is a security gate with guard at the entrance. There appeared to be CCTV within the site but limited security between the locations of the tenants, this is possibly due to the fact that loading bays to the buildings seem shared and the basic overall security for the site. The site has floodlighting towers.<br><br>The port is signed off the A289, which passes by the entrance and from the A2. |
| **Approx date built** | The naval dockyard has had a long presence at this location but the basin was built in the 1870s. The naval dockyard closed in 1984. |
| **Location** | Urban location but the river forms the northern boundary of the urban area.<br><br>The site is relatively shielded on its landside with a high wall along its frontage with the A289. To the north is the River Medway with the tidal mudflats along most of the river frontage designated as SSSI. To the east is Pier Road Industrial Estate. Immediately to the south is the A289 dual carriageway and beyond that for most of the site is the University complex of Chatham Maritime. To the west (south of the basin) is also Chatham Maritime with offices, while north of the basin is a substantial shielding bund with planting on top and beyond the new residential area of St Mary's Island.<br><br>The port basin forms the western basin of a complex of three basins each linked. The other two basins are sited within Chatham Maritime and the middle basin is used for docking of visiting large vessels, e.g. tall ships or naval visits. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>55.36 Ha (including area covered by the basin)<br>0 Ha |
| **Average size of unit occupied** | 1502 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | B1: 4%, B2: 17%, B8: 69%, Other: 10% |
| **Amount of floorspace** | 87111 sq.m. |

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| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 10518 - age 16-74; 7773<br>249488 |
| **Local Plan designation of site** | Employment land<br>ED1 (B2/B8 uses), ED9, T7 |
| **Access into site** | There is a single gated access to the site off a roundabout on A289.  This is tarmac and good condition.<br><br>There is also a single track freight railway line into the site<br><br>Internal access is via a circulatory route (1 lane single) marked on the concrete hardstanding area around the basin. The hardstanding is in fair to good condition.  This route is for all traffic and has no parking possible along it.  The route passes over lock gates at either end of the basin.  Cargo being loaded or unloaded from ships has to cross the circulatory route.<br><br>There are parking/marshalling areas between buildings.<br><br>The basin also provides the only access route for large ships to gain access to the central basin immediately west of the site. |
| **Buildings**<br><br><br>***General height*** | Condition of the buildings varies from almost new and good to some in need of maintenance.  Condition seems to be related to age.<br>Units are generally 2 storey double height, mainly of modular construction with pitched roofs and clad exteriors.  Most are not of a very large size but a substantial new modular warehouse is under construction by one tenant (Nordic). |
| **Layout** | Whilst having only a single circulatory route legibility is not easy.  However, this is not a site open to the general public and directions can be obtained from the security guard at the entrance.<br><br>Internal permeability around the basin is fair but again this is only for persons permitted access to the site.<br><br>The layout is limited by needing to be centred on a basin.  No berths exist along the river frontage. |
| **Locality** | The adjoining residential area of St Mary's Island is all new housing with some award winning housing designs in it. Chatham Maritime is designated a mixed-use regeneration area f being promoted by SEEDA and Medway Council. |
| **Car parking arrangements** | All units seem to have car-parking areas marked out on the hardstanding areas between buildings. |
| **Landmarks** | Overall the site is relatively uniform in height and the cranes are not sufficiently tall to dominate.<br><br>However, at times when a substantial cargo ship is in port this is clearly visible above the buildings and from a considerable distance outside the port. |
| **Adaptability**<br>*Buildings*<br><br>*Layout* | Almost all buildings are modular warehouses and therefore lend themselves to adaptation, as do the open marshalling areas between the buildings.<br>The overall layout is of limited flexibility as it is based around a single basin   Unloading/loading of vessels requires the cargo to cross the internal circulatory route. |

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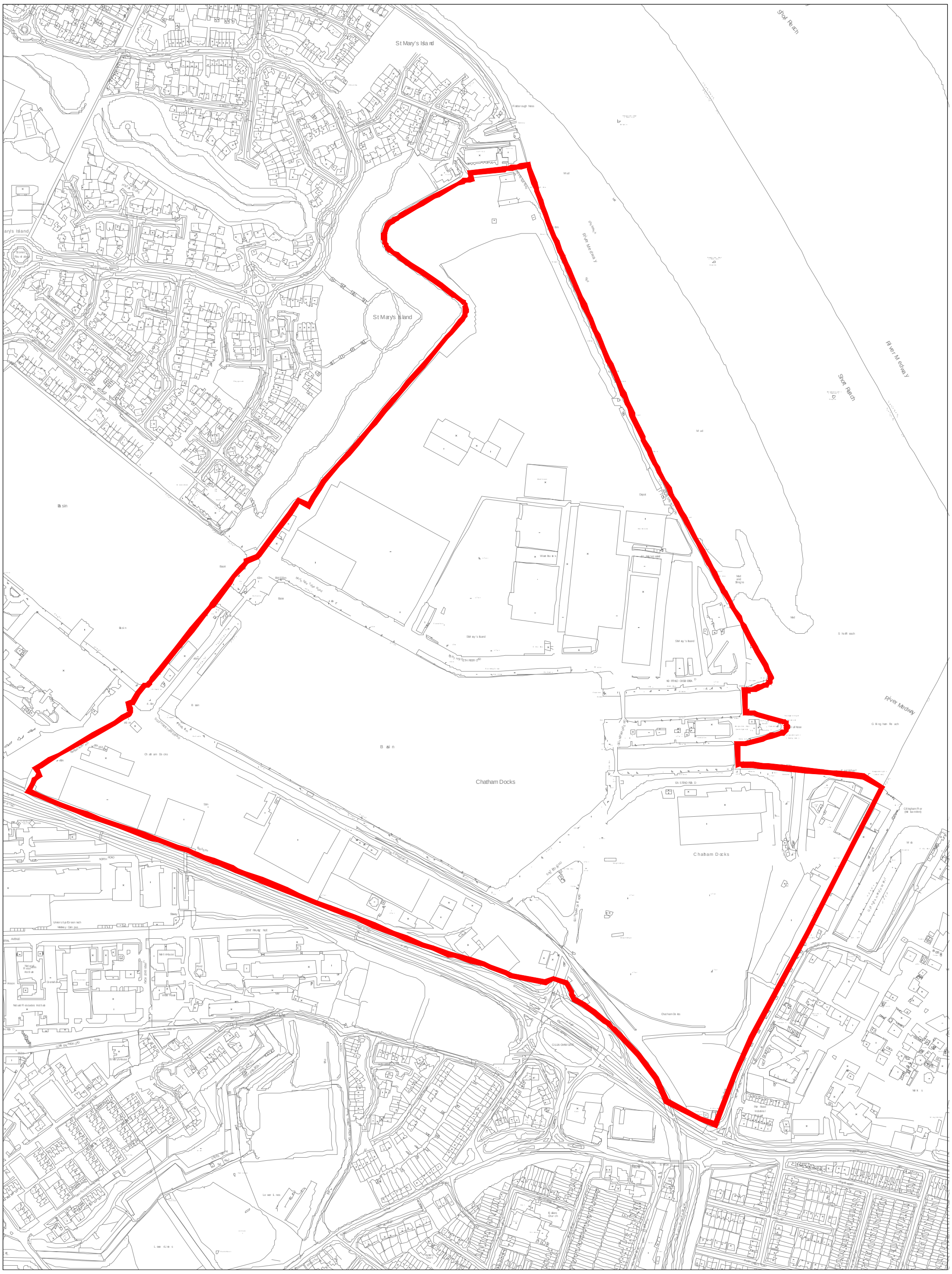
| **Connections** | The site takes access directly off the A289 (2 lane dual main road).<br>The motorway J1 is 10 kms.<br>3 bus routes pass near the site, maximum frequency is 15 minutes.<br>There is a cycleway along the A289.<br>A single-track freight line serves the site; this track joins the London to Kent coast railway line at Gillingham.<br>The site abuts the River Medway and has a dredged channel to the lock gates. This access appears to remain dependent upon tides for vessels of deeper draft. |
| **Restrictions** | As the basin provides the prime access to the middle basin in Chatham Maritime this could prove potentially restrictive.<br>The bund to the west is an effective barrier to most visual intrusion but some of the residential properties have floors at a higher level than the bund (the bund itself is approximately 2 storeys high). The bund and planting does soften the noise from the port operation but the potential still exists for noise intrusion. |
| **Environment** | This is an operational port therefore some general mechanical noise from loading/unloading and general vehicular traffic is apparent.<br>There were no odours noticeable at the time of visit. |
| ***Air quality*** | Air quality was clear |
| **Facilities and non B1-B8 uses** | The site is entirely warehousing with associated management. However, some facilities exist for port operatives within the buildings. |
| **Planning consents (sq.m.)** | Not started: B1: 328, B2: 784, B8: 3748 |
| **Potential future uses** | This is the only non-tidal port facility in Medway. It is not known whether the site is currently profitable but it appears to be well utilised.<br>There is a proposal from the owners of the port to close the operation and redevelop for other uses including housing. |
| **Any conditions required for future development** | Any re-use should ensure that the middle basin, in Chatham Maritime, remains accessible to visiting large ships to prevent losing the potential tourism benefits of visiting ships, e.g. tall ships or naval ships.<br><br>The port is essentially at sea level but land to the south rises steadily making parts of the port very visible. As a working port its appearance is acceptable but the significance of its potential impact on the outlook from the south needs consideration. The facades of the buildings are currently more workmanlike than is usual and are unlikely to have been designed to attract passing trade. Any re-use will probably need total site clearance. |
| **General comments** | This is a working port not open to the general public and some industrial clutter is to be expected but other litter was not noticeable. |




## 7: Chatham Port, Chatham



22/11/06

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| **Site name** | **Appendix 1. 8: Commercial Road, Strood** |
| **Date of visit** | 16 September 2006 |
| **Brief description of site** | Situated immediately adjoining the town centre of Strood this site comprises a mix of unit styles, ages and heights. The general appearance is of a number of independent business premises that happen to be grouped together. Additionally a small block of houses exists within the site.<br><br>The site has essentially two aspects; one being its frontage onto Knight Road and the other being the remaining frontages. The aspect onto Knight Road is mixed but overall is only fair. The aspect on all other frontages is poor.<br><br>Except for its southern boundary, roads bound the site and there is a further narrow road passing through the site. Most property takes its own access off the highway.<br><br>The site has no signage other than fascias on the premises. Some premises have secure fencing. Additionally, some sites have forecourt floodlighting. CCTV was noticed on one building.<br><br>This site is one of four separately detailed sites (Ballard Business Park, Commercial Road, Temple Industrial Estate and Medway Valley Park Industrial Estate), which make up an almost continuous employment zone southwest of Strood centre. |
| **Approx date built** | 1950 to 1980 |
| **Location** | The site is situated adjoining the primary retail core of Strood town centre. This site could be classified as a town centre location.<br><br>The retail centre is situated immediately north of the site and the site is visible from the town centre. Facing the site is a McDonalds drive through restaurant. To the east of the site is Knight Road and on the opposite side of the road are a retail park and a new Morrisons supermarket. To the south is the extensive Temple industrial estate. To the west is Commercial Road and beyond is the service entrance to a Tesco supermarket and some older premises mainly used for car repairs. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>1.12 Ha<br>0 Ha |
| **Average size of unit occupied** | 347 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 5%, B1: 26%, B2: 30%, B8: 38%, Other: 1% |
| **Amount of floorspace** | 6247 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 12398 - age 16-74; 8789<br>249488 |
| **Local Plan designation of site of site** | Part of an Action Area<br>ED2 (B1/B2/B8), S10, H1, H3, T15 |

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| **Access into site** | The north and west boundaries of the site front onto Commercial Road, this road is one way. The east of the site fronts onto Knight Road, which is two way. Additionally Alma Place, which is also two way, passes through the southern section of the site and connects Knight Road with Commercial Road. With the exception of a small terrace of 4 units in the north of the site all units take their own access from the surrounding roads. Some accesses will permit delivery vehicles to enter the property's compound while others do not and deliveries/collections need to be made from the adjoining road.<br><br>Most compounds and accesses are concrete.<br><br>It was noticed that one unit had an opening onto the road but that no dropped kerb existed; entry/exit was facilitated by a plank of wood in the road to act as a ramp.<br><br>Alma Place is of narrow width, which means that 2 cars need to slow to be able to pass. This road also has a narrow footway on one side only but has street lighting. Parking restrictions exist on this road. The residential properties front this road. |
| **Buildings**<br><br><br><br>***General height*** | Buildings are or mixed ages ranging from 1950 to 1980. Most are detached units but a small terrace exists at the northern end of the site. Condition varies between fair to in need of maintenance. Construction also varies.<br>Almost all buildings have pitched roofs but heights vary between one and two storey. |
| **Layout** | The layout is based upon the fact that each compound takes direct access of one of the surrounding roads. However, legibility is not good, as there is no signage, nor is permeability.<br>This style of layout has no flexibility and any expansion would need to take place within the current extent of the property. |
| **Locality** | The primary retail core area of Strood tends to be inward looking towards the High Street. This gives a mainly 'back of premises' aspect to Commercial Road to the north of the site. The main exception to this is the McDonalds drive through immediately opposite the site. The retail park to the east, and on the other side of Knight Road, is similar in that it faces in to its central parking area meaning there is the rear of a substantial shed facing the site.<br>South of the retail park is a large Morrisons hypermarket and this is orientated to face Knight Road with parking between the building and the road. This creates a more open feel to this part of Knight Road.<br>Temple industrial estate immediately south of the site is a substantial area of mixed uses (see item 29).<br>The land to the west comprising the Tesco supermarket service yard and car repair premises appears very untidy. At the time of survey, the car repair premises, in particular those sited at the southern end of Commercial Road (building numbers 14-16 Commercial Road on the site plan) were working outside their buildings with cars overlapping the footway. There also appeared to be some leakage of oil or similar fluid. |
| **Car parking arrangements** | Car parking takes place within the individual compounds but there was also continuous parking on one side of the section of Commercial Road adjoining the west side of the site. |

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| **Landmarks** | None |
| **Adaptability**<br>*Buildings*<br><br><br>*Layout* | With the exception of one or two buildings, most are relatively lacking in adaptability. Some are also nearing the end of their useful life. However, it should be noted that most of the older buildings are probably not in their original use.<br>The layout is controlled by the road layout and the fact that each property is separate. Radical action would most likely be needed to improve the internal layout of the site. |
| **Connections** | Commercial Road adjoins both the northern and western boundaries of the site but the status of the road varies. Along the northern side of the site the road is part of the A2 main road and forms part of the gyratory serving the town centre. It is one way with 2 lanes of traffic, has street lighting and has a tarmac road surface in good order. Parking restrictions exist.<br>Along the western side of the site the road is also one way of two lanes but is a local road with parking restrictions on one side only. It too has street lighting and a tarmac road surface but is in need of some repair. It appears to have a surface covering of vehicle droppings. This section of the road serves as the main entrance road to the Tesco supermarket car park. Parking takes place along one side this road.<br>Knight Road is a two way road, part of the A228 and is 1 lane single carriageway. It has street lighting and parking restrictions. The road surface is tarmac and is in fair condition. 'Keep clear' and yellow boxes are marked on this road to facilitate access/egress from both the retail park and parts of the site. This road suffers from congestion at certain times.<br>The motorway J2 is 3 kms.<br>20 bus routes serve the site; maximum frequency is every 10 minutes.<br>No cycleway exist.<br>No rail access, the nearest station is Strood (1 km)<br>The site has no river frontage. |
| **Restrictions** | The traffic conditions in Knight Road and conflict with retail park entrance opposite can affect the site. 'Keep clear' boxes exist but are not always observed.<br>Some units have no facilities for customer parking.<br>The width of Alma Place is an issue as it serves some units. During the site inspection a Transit van delivered to a unit on Alma Place, this required the van to park completely obstructing the footway in order to leave a single lane available to traffic. Vehicles had to wait to negotiate the van and pedestrians had to wait until the traffic cleared to walk into the roadway to pass the van.<br>Additionally, in the local road part of Commercial Road vehicle deliveries for the car repair centres needed to be unloaded from the road, again the delivery transporter mounted the pavement to allow cars to continue to pass; this section of road had a reasonable level of traffic probably mainly accessing the supermarket. |
| **Environment** | Some noise was noticed from the premises during the survey but no odours were discernable. Traffic noise on Knight Road is also noticeable. |
| ***Air quality*** | Air quality was clear |

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| **Facilities and non B1-B8 uses** | No facilities were found but some units may have their own for staff. However, this is a town centre site and facilities are near. In addition there was a small café in Commercial Road, which seemed well used, and a public house adjoining the site in Knight Road.<br>Non B1-B8 uses included a van sales and the residential units in Alma Place. |
| **Planning consents (sq.m.)** | Not started: B2: -730 (indicating a loss) |
| **Potential future uses** | This is a valuable town centre locality and is ideally positioned to provide appropriate local and town centre employment in accordance with PPS6. However, many of its current uses are not those connected to town centre activity and the overall appearance of the site does little to enhance the town centre. The site has much potential being both a town centre locality, well served by public transport and relatively close to the motorway. |
| **Any conditions required for future development** | Environmental improvements are needed, as is action to improve the appearance of the site. |
| **General comments** | Litter and graffiti were noticed at the site, as were some broken boundary walls and dumped supermarket trolleys.<br>The site lacks any coherence or attractiveness – it is purely functional. The frontage of the site onto the local road section of Commercial Road comprises the rear of a substantial warehouse and some older properties specialising in car repairs combining with the car repairs on the opposite side of the road (referred to above) to give a 'back street' feeling to area. However, this is not a comment on the quality of the work from these premises merely on appearance.<br>Loading and unloading in Alma Place and the local road section of Commercial Road is problematical and causes a hazard.<br>One unit in the site is currently operating as a hand car wash but does not seem to have sufficient drainage, as water from the operation was flowing across the footway and into the road. |


## 8: Commercial Road, Strood

10 0 10 20 30 40 50 60 70 80 90 100

Metres



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| **Site name** | **Appendix 1. 9: Courteney Road, Gillingham** |
|---|---|
| **Date of visit** | 21 June 2006 |
| **Brief description of site** | A linear site situated along one side of Courteney Road with 5 individual small complexes and one substantial complex each taking separate accesses off Courteney Road. The site is relatively shielded from the surrounding area by trees.<br><br>Buildings are mostly flat roofed with a mix of finishes. Part of the site is behind hoardings with existing buildings awaiting redevelopment.<br><br>Floodlighting exists in the individual complexes. Each site is gated but only some have security gates. CCTV exists in some compounds.<br><br>No signage exists to the site nor is there any gateway signage. The only internal signage is that of company name boards at entrances. |
| **Approx date built** | 1950 – 1960s |
| **Location** | Urban location.<br>To east beyond the trees are residential properties. To the north the site immediately adjoins a food superstore. To the south is protected woodland with residential beyond. A dual carriageway link to the M2 lies immediately to the west. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>22.09 Ha<br>0 Ha |
| **Average size of unit occupied** | 8560 sq.m. (influenced by a large occupier) |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 3%, B1: 32%, B2: 37%, B8: 28% |
| **Amount of floorspace** | 85600 sq.m |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 16126 - age 16-74; 11758<br>249488 (236791) |
| **Local Plan designation of site of site** | Employment land<br>ED1 (B1/B2/B8 uses)<br>Scope for selective redevelopment with some environmental improvements desirable. |
| **Access into site** | Each complex takes a separate access. Each access is single carriageway but many of the entrance radii appear not to be to LGV standard. Accesses are in fair condition.<br><br>Courteney Road is a concrete road and has street lighting. There is a footway along the front of the complexes but not on the other side of the Courteney Road.<br><br>Extensive car parking exists along Courteney Road substantially reducing the width. Parking is of both cars and commercial vehicles. |
| **Buildings** | Building ages are mixed. |

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| ***General height*** | Overall the condition of the buildings is mixed ranging from good at the southern end to fair. At the northern end the complex is in need of maintenance.<br>Buildings vary but the average is the equivalent to 2 storeys in height. |
| **Layout** | As each small complex is separate legibility is good but each complex has its own perimeter fencing and most have relatively intensive use of land.<br>There is no common theme linking the individual complexes. |
| **Locality** | The surrounding residential area is of fair to good quality housing. The main road/motorway link to west is strategically important with a substantial good quality business park the other side of the motorway link. |
| **Car parking arrangements** | No apparent or very limited on-site car parking for some complexes. One has adequate controlled parking. The extent of parking along Courteney Road is indicative of insufficient car parking availability. |
| **Landmarks** | The Delphi complex at the southern gateway contains substantial darkened glass buildings.<br>There is also a 'balloon' type water tower within the foodstore site at the northern end that is a notable local landmark. |
| **Adaptability**<br>*Buildings*<br>*Layout* | There is limited scope for adaptation to the buildings of complexes without re-development.<br>All complexes are separate and most are relatively small and intensively developed |
| **Connections** | The site is served by Courteney Road (1 lane single, local road) which is linked to A278 (2 lane dual main road with no street lighting and a 50 mph speed limit)<br>The motorway J4 is 3 kms.<br>5 bus routes serve the site; maximum frequency is hourly but nearby is a service every 10 minutes.<br>No cycleways along Courteney Road but one exists on the A278.<br>No rail access, the nearest railway station is Rainham (3 kms)<br>The site has no river frontage. |
| **Restrictions** | The physical capacity of Courteney Road to handle added volumes of traffic, given the amount of on-street parking and the fact that it also serves the food superstore could become a consideration on any intensification.<br>The proximity of the residential area to the east may influence the type of uses on the site. |
| **Environment** | No noise or odour issues were noted at the time of survey other than general traffic fumes. |
| ***Air quality*** | Air quality appeared clear |
| **Facilities and non B1-B8 uses** | Catering exist by means of a mobile kiosk sited in the roadway of Courteney Road. No other facilities were found.<br>Jewsons, a builders merchant, is a non-B1-B8 use in one of the complexes. |
| **Planning consents (sq.m.)** | Not started: B1: 766, B2: 850, B8: 1113 |
| **Potential future uses** | This site is ideally suited to employment use, with good access and extensive screening. With some redevelopment to modern units and a more cohesive appearance this site is capable of providing a sustainable employment site.<br><br>Noise from major roads or traffic serving the superstore would not cause conflict to continued employment use as it would if some alternative uses were considered. |

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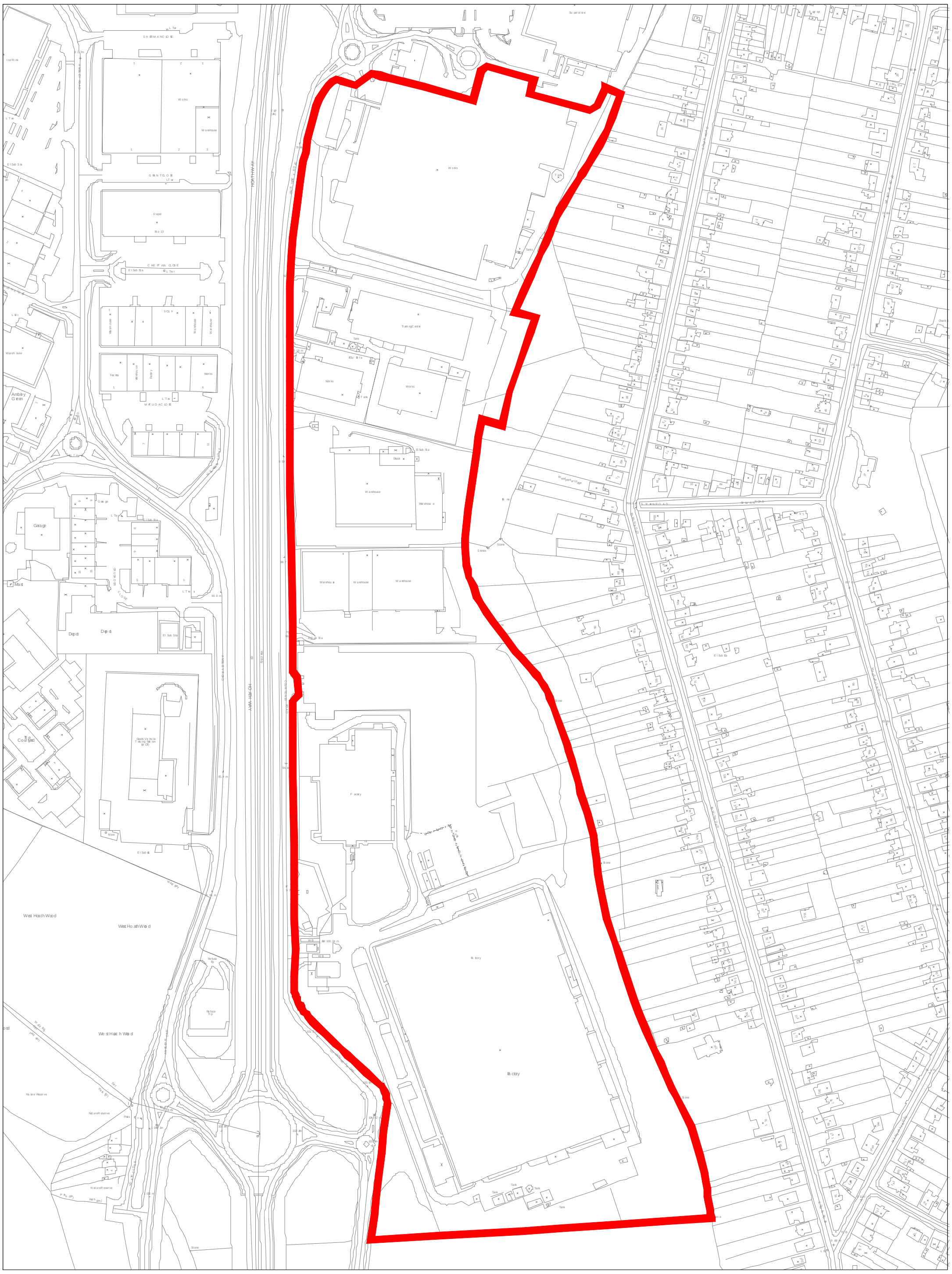
| **Any conditions required for future development** | N/a |
| **General comments** | Litter was limited as was graffiti.<br>The extensive road parking creates an image of clutter. |



## 9: Courteney Road, Gillingham



Medway Council

22/11/06

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| **Site name** | **Appendix 1. 10: Cuxton Industrial Estate, Cuxton** |
| **Date of visit** | 24 October 2006 |
| **Brief description of site** | A relatively secluded small site situated between the Strood – Maidstone railway line and the River Medway. The major building has grown organically into a large irregular block housing a number of tenants undertaking different activities and with access all round the building. The remaining 1/3$^{rd}$ of the site is a predominantly open compound.<br><br>The site has a river frontage, which is not used and appears to have a flood defence wall along the river frontage.<br><br>The site is signed off the nearby A228. Except for the open compound no fencing exists. No lighting or CCTV was noticed. |
| **Approx date built** | Pre-war to post war |
| **Location** | The site is situated outside the urban area of Cuxton.<br>The site abuts the river along its southeast boundary. The river at this point is designated as Strategic Gap. To the southwest is a marina, which shares its access from the A228 with the site. To the northwest is the Strood – Maidstone railway line and beyond is residential. To the northeast is open land and beyond is a boatyard also sharing the access. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>0.9 Ha<br>0 Ha |
| **Average size of unit occupied** | 358 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | B1: 39%, B2: 24%, B8: 37%, |
| **Amount of floorspace** | 5730 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 2876 - age 16-74; 2127<br>249488 (236791) |
| **Local Plan designation of site of site** | White land within tidal flood plain<br>ED3, CF13, BNE31 |
| **Access into site** | The site abuts a private concrete road that serves the adjoining marina and the site itself. A concrete area forming the forecourt and circulation area extends all round the major building; this serves as access, parking area and forecourt. The concrete is in good condition.<br><br>Parking takes place in an apparently disorderly manner such that it was not possible to drive a vehicle around the entire outside of the major building. As there seemed to be no noticeable conflict among tenants, it is assumed that some form of working compromise has been reached with this arrangement.<br><br>The separate compound also takes access from this concrete area but its access immediately becomes broken tarmac and the compound is of mixed surfacing. |

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| **Buildings**<br><br><br><br><br><br><br>***General height*** | The major building appears to be in fair condition. It seems to have extended from a brick building and a shed structure into a sizeable single irregular block. The majority of the walls are clad. A smaller separate building exists near the beginning of the site and this is modular with panel and glass walling.<br>There are also some single storey cabins in the open compound.<br>Buildings, apart from the cabins, are 2 storey. |
| **Layout** | Signage is limited to the direction sign on the A228. Fascias exist for each tenant but most are small and not visible when first entering the site. Thus legibility is difficult.<br>Circulation is also limited to around the outside of the main block and vehicles obstruct this route.<br>The layout has developed in such a way that flexibility is now limited. |
| **Locality** | The river to the southeast is open with vistas of the mooring associated with the marina and of the open countryside on the other side of the river. The river and the land the other side are part of the Strategic Gap. The Marina appears to be a viable operation, as does the boatyard to the north. The boatyard is designated as SNCI/LNR and ALLI in the Local Plan.<br>The residential development the other side of the railway appeared to be mainly private housing forming a linear development of older housing on one side of the road only with a newer cul-de-sac leading off on the same side near the A228. |
| **Car parking arrangements** | There appeared to be very marked parking bays; most parking appeared to take place where a space could be found. Parking appeared to be near capacity at the time of survey.<br>Some customer parking was available in connection with one occupier. |
| **Landmarks** | There are no landmarks. |
| **Adaptability**<br>*Buildings*<br><br>*Layout* | It could not be determined whether the main building had any flexibility in terms of internal layout but it is likely that it is limited.<br>Given the fact that one unit has a large open storage area that gives an appearance of openness this site is otherwise quite intensely developed and the layout is dictated by the major building. |

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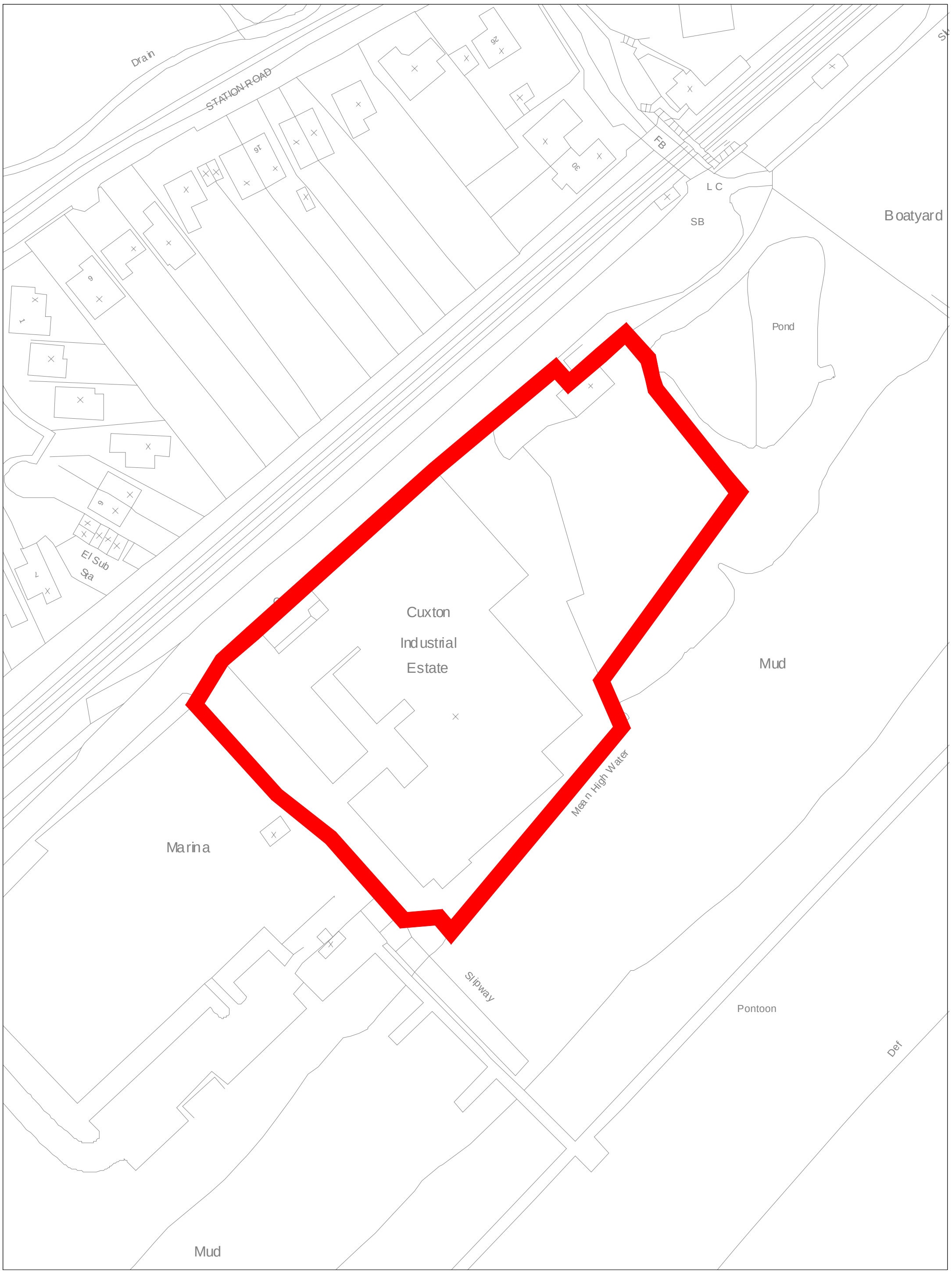
| **Connections** | The site is served by a link from the A228. The A228 at this point is 1 lane single main road with street lighting and a 40 mph speed limit. Station Road (1 lane single local road) leads off the A228 serving the residential properties, the railway station and the access to the site. This road has street lighting and a footway on one side only. The residential properties are on one side of the road only and the other is open land part of the Strategic Gap and ALLI. Residents' cars appear to be parked in this road. Both Station Road and the A228 are tarmac and in fair condition.<br><br>At the end of Station Road the road turns and passes over the railway by means of a level crossing with manual gates but only a single vehicle wide. Beyond the level crossing towards the site the road is concrete and in mainly good condition. This roadway appears to be private and has no footways and no lighting. The level crossing and roadway beyond forms the access to the industrial estate, the marina and the boatyard.<br>The motorway J2 is 2 kms.<br>No buses serve the site but there are 3 nearby; maximum frequency is 1-2 hourly.<br>No cycleway serves the site.<br>The Strood to Maidstone railway line is next to the site, the nearest station is Cuxton (100 metres).<br>The site has a tidal river frontage but it is not active. |
| **Restrictions** | The width of the level crossing plus the need to access the site through a residential road raises issues over the capability of the site to take increased numbers of large vehicles.<br>Much of the surrounding area is open. Therefore the impact of the site on surrounding area will need careful consideration. |
| **Environment** | Some noise was noticed at the time of survey but no odours. |
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | No facilities were noticed on the site. However, some occupiers may provide staff facilities.<br>There were no non B1-B8 uses on site. |
| **Planning consents (sq.m.)** | None |
| **Potential future uses** | This site appears viable and occupation levels appear high indicating a demand for such property/location.<br>Despite it being a relatively secluded site, some companies that operate nationally are located here, which seems to indicate the site has particular benefits. |
| **Any conditions required for future development** | The impact of the site on its surroundings will needs due care when considering future development.<br>There may be the need to consider the potential restriction caused by the level crossing arrangements. |
| **General comments** | There was some considerable industrial clutter to be seen around the site but no general litter or graffiti was noticed.<br><br>The site had some excellent views over the river to the open countryside the other side. |




## 10: Cuxton Industrial Estate, Cuxton

10 0 10 20 30 40 50 60 70 80 90 100

Metres



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22/11/06

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| **Site name** | **Appendix 1. 11: Elm Court Industrial Estate, Gillingham** |
| **Date of visit** | 11 August 2006 |
| **Brief description of site** | Situated within open countryside of the Capstone Valley, the site consists of an industrial estate and a substantial Wyevale garden centre. Roads within the site form an "H" pattern with most of the buildings being single storey with pitched roofs but some newer buildings are higher.<br><br>The site is accessed by a private road off Capstone Road, a country lane. The access road is gated at its junction with Capstone Road and has an additional barrier, which controls the entrance to the remainder of the site, at the side of the garden centre. The road also has substantial humps on it.<br><br>Signage exists at the junction with Capstone Road and a further banner sign over the access road at the side of the garden centre.<br><br>The garden centre has floodlights on its building and there is a lighting tower near the entrance, otherwise the site appears unlit. No CCTV was noticed. |
| **Approx date built** | The site appears to have existed for some time but the garden centre is newer and there are some recent re-developments. |
| **Location** | The site is a freestanding site located in open countryside shown on the Local Plan as ALLI. The surrounding land appears to be mainly arable except for a compound immediately north of the industrial estate and apparently accessible from the estate but the gates were locked. This was a former outdoor activity area but currently appears to have piles of spoil on it. The fields to the north and south are extensive. Further to the east and west are the residential areas of Hempstead and Lordswood respectively. Hempstead Valley shopping centre is within the Hempstead residential area. Open countryside to the south extends to Maidstone. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | 3.53 Ha<br>3.15 Ha<br>0.37 Ha |
| **Average size of unit occupied** | 438 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 40%, A3: 1%, B1: 10%, B2: 10%, B8: 20%, D1: 10%, D2: 9% |
| **Amount of floorspace** | 7886 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 5305 - age 16-74; 3873<br>249488 (236791) |
| **Local Plan designation of site of site** | Employment land<br>ED3 (B1 uses), ED4 |

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| **Access into site** | A 1 lane single carriageway private access road leads off Capstone Road into the site. This road has grass verges but no footways or lighting. A further entrance gate exists on the southern boundary of the site but this gateway seems blocked with tipped rubbish. The current access has two massive speed ramps on it, these ramps and the carriageway around them appear scarred, so it is assumed that the ramps are large enough to be damaging. Other smaller humps are to be found on the roads within the industrial area.<br><br>The circulation route within the industrial estate is based on an "H" pattern yielding 4 culs-de-sac. At the junctions within the estate together with the junction with the access road are situated mini-roundabouts. These roundabouts are not drive-over but consist of a circle of kerbstones and seem to be an obstruction in the road that would appear to prevent LGV use of the internal roads. Additionally, there appears to be no turning space provision for LGV vehicles within the industrial estate. LGV use of the private access road appears possible as far as the garden centre entrance.<br>All roadways are tarmac and are generally in fair condition.<br><br>Parking in the industrial area is partly within marked parking bays (around the children's nursery and the 'Fun Drum' children's activity centre)but in the remainder it appears haphazard and causes narrowing of the access ways. |
| **Buildings**<br>***General height*** | The industrial estate has essentially four different character areas but most buildings are detached. In the northwest of the site the buildings appear to be generally relatively new single storey, single height pitched roof sheds with green cladding. These appear in good condition. In the northeast is a mix of brick built buildings with the appearance of converted bungalows and some single storey green clad pitched roof sheds. This area too appears well maintained. In the southeast the buildings are older and consist of some single storey wooden sheds and some other buildings with the appearance of large old domestic garages. Also in this area is a residential bungalow at the southern extremity of the site. The industrial buildings are in relatively poor condition. In the southwest there are two similar quite new buildings of two storey double height with brick lower, dark coloured clad upper sections and pitched roofs. They appear in good condition. These buildings also have marked parking bays fronting them. At the centre lie two new buildings in the final stages of construction. These are two storey, double height buildings with brick lower, buff coloured clad upper sections and pitched roofs. |
| **Layout** | The site is not readily legible.<br>It is only possible to move around the site by means of the internal roads making the site restricted in permeability.<br>The layout appears relatively fixed given the density of some of the units |
| **Locality** | The open countryside around the site is shown on the Local Plan as the ALLI of Capstone, Darland and Elm Court, a substantial tract of undeveloped land. The fields immediately north and south are extensive and much of the surrounding land appears to be arable land. Further to the east and west are the good mainly private housing areas of Hempstead and Lordswood respectively. Further to the north is Capstone Country Park, a dry ski slope and near the country park is a |

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| | household recycling centre. Open countryside to the south extends to Maidstone, some 15 kms away and includes the Kent Downs AONB. |
| **Car parking arrangements** | Parking seems to be generally around units. Special parking bays are marked out in front of the Fun Drum and the children's nursery. The Wyevale garden centre has it own large car park for customers directly off the access road.<br>In the northeast part of the site car parking appears congested, otherwise car parking does not seem at capacity.. |
| **Landmarks** | The most dominant buildings on the site are the new buff clad buildings. These are also visible from a considerable distance over the open countryside due to their colour. |
| **Adaptability**<br>*Buildings*<br>*Layout* | Many of the buildings are individual units and are relatively small. Flexibility is therefore limited.<br>The layout is constrained and quite dense. The only area where flexibility is possible is in the southeast where some redevelopment appears to be imminent. |
| **Connections** | Capstone Road (1 lane single country lane) is the only road serving the site. It is unrestricted and has no street lighting and no footways.<br>The motorway J4 is 3 kms.<br>No buses serve the site.<br>There are no cycleways.<br>No rail access, the nearest railway station is Rainham (9 kms.)<br>The site has no river frontage |
| **Restrictions** | This is a site in open countryside and is visible from a considerable distance from some directions. Access to the site is by relatively narrow country lanes even though the road immediately outside the entrance has been widened.<br>The speed ramps in the access road are large and marks indicate grounding of vehicles. The mini-roundabouts within the site impede circulation and appear to prevent LGV access.<br>Elm Court is apparently quite close to the two adjoining residential areas but due the road layout actual distances to residential areas is greater; Hempstead is 600 m direct and 2 kms by road while Lordswood is 400 m direct and 3.5 kms by road |
| **Environment** | Some noise was apparent from a sawmill connected with manufacture of wooden buildings. No noise was apparent at the time of survey from the units connected with motor vehicles work or double-glazing unit manufacture. |
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | A catering portakabin was located at the entrance to the industrial estate.<br>Non B1-B8 uses include within the industrial area include:<br>Picture framing and art material sales<br>Insurance agency<br>Children's activity centre<br>Children's nursery<br>Party products hire<br>Residential bungalow<br>Those use outside the industrial area include:<br>Garden Centre, with café and pet shop<br>Equestrian Tack shop |
| **Planning consents (sq.m.)** | Under construction: B1: 937, B2: 310 |

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| **Potential future uses** | This is an isolated site in open rolling countryside with limited accessibility. It currently seems to be viable as an industrial estate and garden centre but its location gives rise to sustainability issues. |
| **Any conditions required for future development** | Improved connectivity to the nearby urban areas including a public transport service would make the site more sustainable. Any direct public transport link between Lordswood and Hempstead is lacking.<br>However, neither of these options would appear to be commercially viable given the limited public destinations at either the site or the surrounding farmland. |
| **General comments** | Extensive litter was seen in verges on the country lanes around the entrance this might be wind blown from the household recycling centre situated 2 kms to the northwest of the site. No litter was noticed in the site nor was any graffiti noticeable.<br><br>Parking in the northwest part of the industrial estate caused some restrictions and created visual clutter. There was also some activity outside some units rather than all commercial operations taking place within the buildings.<br><br>There was a considerable amount of rubbish tipped within the industrial estate at the southern end of the site. |


## 11: Elm Court Industrial Estate, Gillingham

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Metres



Medway
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| **Site name** | **Appendix 1. 12: Fenn Street Industrial Estate, Hoo, Rochester** |
| **Date of visit** | 3 November 2006 |
| **Brief description of site** | A small site situated in a rural area on the Hoo Peninsula. The site has only a short road frontage but widens to the rear of other properties along the road. The site is relatively under-developed which minimises its impact on the surrounding area. The site has a short access road leading in with most of the buildings, mainly two storey, located near the entrance. These buildings are on one side of the access only as the access is set to one side of the road frontage. Land at the rear tends to be predominantly open compounds.<br><br>The site is signed off the Ratcliffe Highway at its junction with the site access. The site is fenced and some compounds have additional fencing. No signage exists on approach roads. Some CCTV exists in individual compounds.. |
| **Approx date built** | 1950 – 1980 |
| **Location** | The site is located within the rural area.<br><br>The site is flat but the surrounding area is slightly rolling in nature. To the northwest is the Ratcliffe Highway and beyond are open arable fields designated as Special Landscape Area on the Local Plan. Between the rear of the site and the Ratcliffe Highway are a public house and a small Caravan Club caravan site. To the northeast is open land with some wooded areas and orchards. Southeast of the site is partly open land, again with some orchards, and partly a small residential development comprising 8 detached houses each in substantial grounds. To the southwest is open arable land. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>1.78 Ha<br>0 Ha |
| **Average size of unit occupied** | 423 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | B1: 24%, B2: 36%, B8: 40% |
| **Amount of floorspace** | 2116 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 1152 - age 16-74; 860<br>105866 (24789) |
| **Local Plan designation of site** | White Land<br>ED3 (B1 uses) |
| **Access into site** | The site has a narrow frontage to the Ratcliffe Highway and the single access into the site is a short spur off this road. The access road is in fair condition but has no footways or lighting and is a narrow single carriageway. All vehicles need to use the access.<br><br>Parking takes place on land either side of the carriageway along the access road.<br><br>Visibility to the right, at the junction of the access road with the Ratcliffe Highway, is not good for cars leaving the site. |

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| **Buildings**<br><br><br><br><br><br>***General height*** | Overall condition of the buildings on site appears to be fair to good. However, the site has relatively few buildings for its overall size. Construction of the buildings and their ages is varied but most are brick or brick with cladding. Some are modular and one is a purpose built warehouse. Most have pitched roofs. The two main compounds are loose surfaced.<br>General height is 2 storey. |
| **Layout** | The site is small and most units are visible from very near the entrance making legibility good.<br><br>The access road occupies only a small part of one side of the site with compounds adjoining. Permeability is limited to the access road only.<br><br>The layout is quite simplistic with most of the northeast section of the site forming the open compound of a logistics company. Nearer the entrance to the site is more intensively developed with limited space between the first two buildings. The access road is of limited width and would need improvement and potential re-alignment if more intensive use is undertaken. |
| **Locality** | The whole of this area of the Hoo peninsula is very open. Some areas are quite low and flat while others have a more rolling aspect to the landscape. The area around Fenn Street is nearer the latter, with a gently rolling character.<br>The SLA to the northwest is part of a substantial North Kent Marshes Special Landscape Area and SSSI along the entire northern shoreline of the peninsula.<br>Short distances each way from the site along the Ratcliffe Highway are some isolated residential properties, these front onto the Highway and therefore already have a level of traffic noise. The housing development to the southeast is a very low-density private estate with large detached properties. |
| **Car parking arrangements** | Car parking occurs on ground either side of the entrance road and within the rear compounds. Parking appears at capacity near the front of the site but it cannot be judged within the compounds at the rear due to their size and the loose surfacing preventing any demarcation of parking or operational areas. |
| **Landmarks** | There are no landmarks on the site. |
| **Adaptability**<br>*Buildings*<br><br>*Layout* | Some buildings may have a measure of flexibility or adaptability but others would require substantial modification to adapt to other uses.<br>A measure of flexibility is available from the two larger compounds. Nearer the entrance to the site the buildings are much closer and would limit any flexibility. The access road is of limited width and would benefit from some re-alignment; this may affect the amount of available operational land. |

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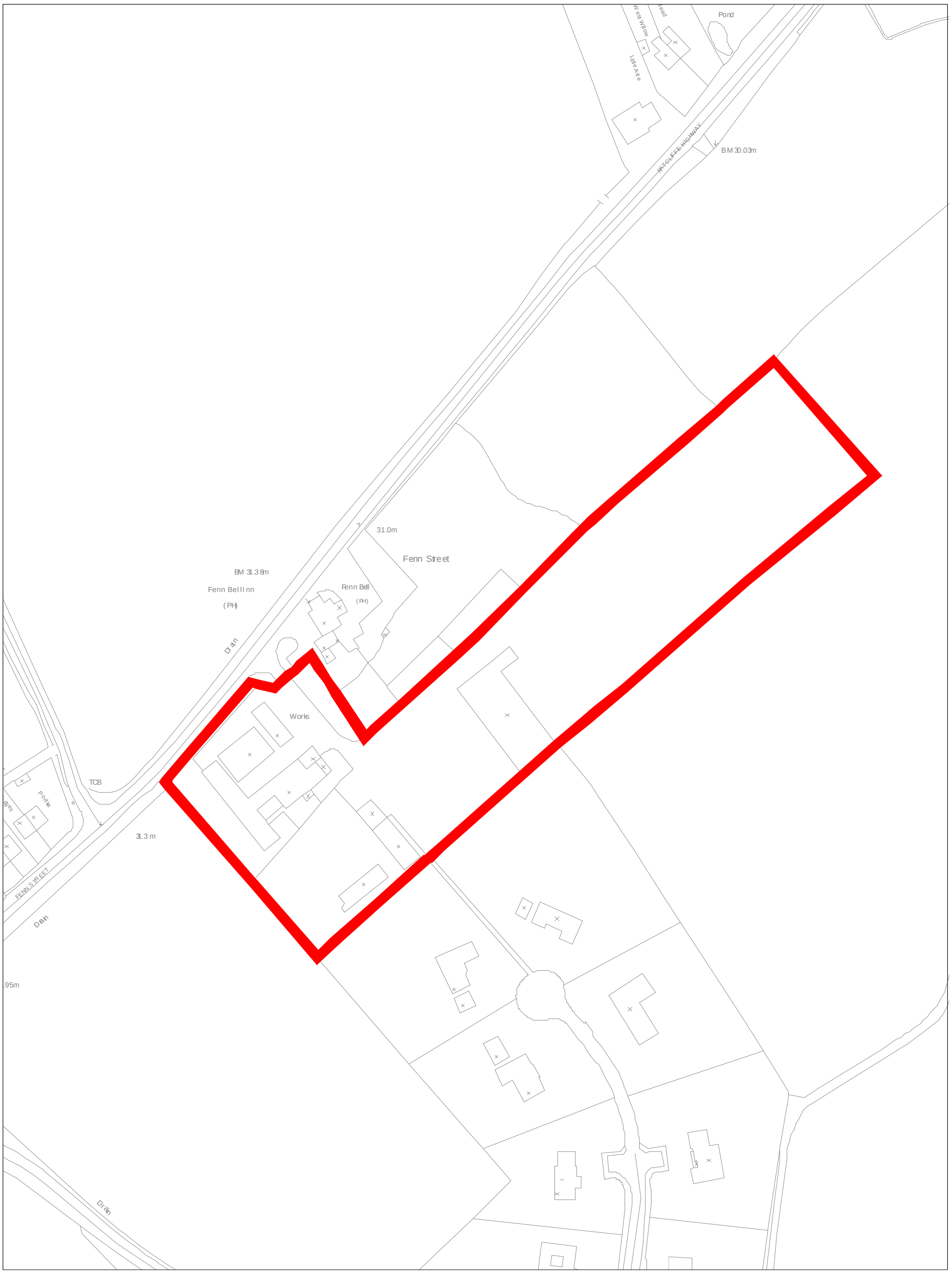
| **Connections** | The site is accessed from the Ratcliffe Highway (1 lane single local road). This road, which connects to the A228 some 200 m southwest of the site entrance, provides one of the two accesses to the northern settlement of Allhallows on the Thames estuary shoreline. This settlement has a substantial holiday home and caravan site and is a summertime destination for a number of people. The Ratcliffe Highway in the vicinity of the site has no street lighting, no footways and no grass verges. Drainage ditches are apparent at the side of the road.<br>The motorway J1 is 16 kms.<br>6 bus routes serve the site; maximum frequency is every 10 minutes – mornings only.<br>No cycleways serve the site.<br>No rail access, the nearest station is Strood (14 kms).<br>The site has no river frontage. |
| **Restrictions** | The internal access road is of limited width and seemingly works for a rural site and the level of current usage. It was noticed, at the time of survey, that an LGV delivering to one unit protruded into the common area causing an obstruction. Visibility to the right is problematical for car drivers. It could not be ascertained whether this also affected the higher viewpoint of LGV drivers. |
| **Environment** | Some noise was noticeable but no odours |
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | No facilities were noted on the site but individual units may have some staff facilities. A public house adjoins the site.<br>No non B1-B8 uses were noted. |
| **Planning consents (sq.m.)** | Not started: B2: 115 |
| **Potential future uses** | This site provides relatively low impact employment within the rural area. The level of occupancy would indicate that a demand exists for such a site but more intensive development may have sustainability issue as there are few settlements that are close and may affect the amenity of the adjoining residential area and the surrounding countryside. |
| **Any conditions required for future development** | Elements of the site can be seen from the surrounding area and better screening of these aspects would be beneficial. |
| **General comments** | Some industrial clutter was noted on the site but no litter or graffiti was seen.<br><br>This is a working site, which seems to place functionality before appearance. The car parking arrangement at the entrance is unsightly and could benefit from some cosmetic improvements, as could other aspects visible from the surrounding area. |




## 12: Fenn Street Industrial Estate, Rochester

10 0 10 20 30 40 50 60 70 80 90 100
Metres



22/11/06

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| **Site name** | **Appendix 1. 13: Formby Road, Halling** |
| **Date of visit** | 7 July 2006 |
| **Brief description of site** | This is a substantial single occupancy site connected with cement processing and bagging. It is split by both an A road and a railway line which effectively creates three separate areas. Each area undertakes a different aspect of the operation. The western area contains a dense development of substantial 3 storey pitched roof industrial sheds which contain plant and heavy machinery. The central area contains a 2 storey flat roofed administration building with a terrace of houses. The eastern area is predominantly open with 2 substantial monolithic concrete structures connected with a bagging operation. This area also has a rail siding and a wharf.<br>Perimeter fencing and gates secure the site, except for the entrance to the visitor car park.<br>A tree belt to the north helps screen the plant from the north.<br>Signage consists of a company sign at the entrance to the works. |
| **Approx date built** | Current works - 1970s but site was in use for quarrying and producing cement before this time. |
| **Location** | The site is located near northern edge of Halling village but separate from the village envelope as defined on the Local Plan. To the east of the site is the River Medway, which is also the borough boundary with open countryside the other side of the river. The river is designated SNCI. North of the eastern area is open fields, designated as Strategic Gap, as is also the land to the south of this area.<br>To the west and southwest of the western area are worked land and a water filled pit, all of which is within the designated green belt. The green belt boundary passes along the southwestern, western and northern boundary of the western area of the site. The land north of the western area consists of a wooded belt and an open field.<br>Most of the central and eastern areas are designated as subject to tidal flooding. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>28.7 Ha<br>0 Ha |
| **Average size of unit occupied** | N/A |
| **Composition of current use** *(only those classes with floorspace shown)* | B1: 7%, B2: 82%, B8: 11% |
| **Amount of floorspace** | 31795 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 3728 - age 16-74; 2734<br>107253 |
| **Local Plan designation of site** | Employment land, part of the site within the tidal flood plain.<br>ED1 (B1/B2/B8 uses), CF13, T10, BNE36 |

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| **Access into site** | Vehicular access into the site is via accesses off the A228. There is a single access to the western area with LGV capability. 2 accesses lead off the A228 to the central and eastern areas, one of these accesses has LGV capability and the other is car only leading to a visitor car park. Accesses are in fair condition but the route into the eastern area needs to pass under the railway causing a low point in the road where water gathers.<br>The A228 does not have street lighting where it passes through the site. Internal lighting exists within the site.<br>There is also a rail siding into the eastern area.<br>The site also has a wharf on the river. |
| **Buildings**<br>***General height*** | The three areas have different uses and different building styles; all buildings are 1970s, except for the residential block.<br>Western area:<br>Densely distributed industrial sheds of 3 storeys in height with cladding pitched roofs with many of considerable size. Heavy machinery is contained in many of the buildings. General condition appears fair to in need of maintenance.<br>Central area:<br>2 storey brick built office block with flat roof and a 2 storey terrace of houses with rendering and pitched roofs.<br>Eastern area:<br>Mainly open with 2 substantial concrete structures forming the bagging plant. |
| **Layout** | The layout seems fit for purpose for the current single occupier. No public access is possible and so legibility is not a consideration. The site appears fully permeable to operatives.<br>The current buildings and layout would be of little use for any other purpose. |
| **Locality** | To the south of the site lies the northern edge of Halling village, a predominantly linear village originally along the former A road but now bypassed by the new A road. Halling, as a village, has some facilities and is generally fair to good.<br>Also to the south but east of Halling lies a substantial area of salt marsh.<br>To the southwest and west lies worked land connected with quarrying but within the green belt beyond which to the west lies the AONB of the North Downs. |
| **Car parking arrangements** | Staff parking seems to be mainly located in the eastern area. There appears to be sufficient capacity for the current level of activity.<br>No parking is permissible on the A228.<br>Visitor parking exists separate from other parking. |
| **Landmarks** | A tall chimney in the western area of the site connected with the processing plant is highly visible. The monolithic concrete structures in the eastern area are also visible from the north.<br>Adjoining the western area is a water filled lake which has a distinctive blue colour. This colour is due to deposits in the water and is distinctive even from satellite imagery. |
| **Adaptability**<br>*Buildings*<br>*Layout* | Most buildings and structures appear purpose built. Buildings in the western area contain heavy plant.<br>There would appear to be very limited scope for adaptation of any building or structure. The western area is intensively developed, while the eastern area is quite open. |

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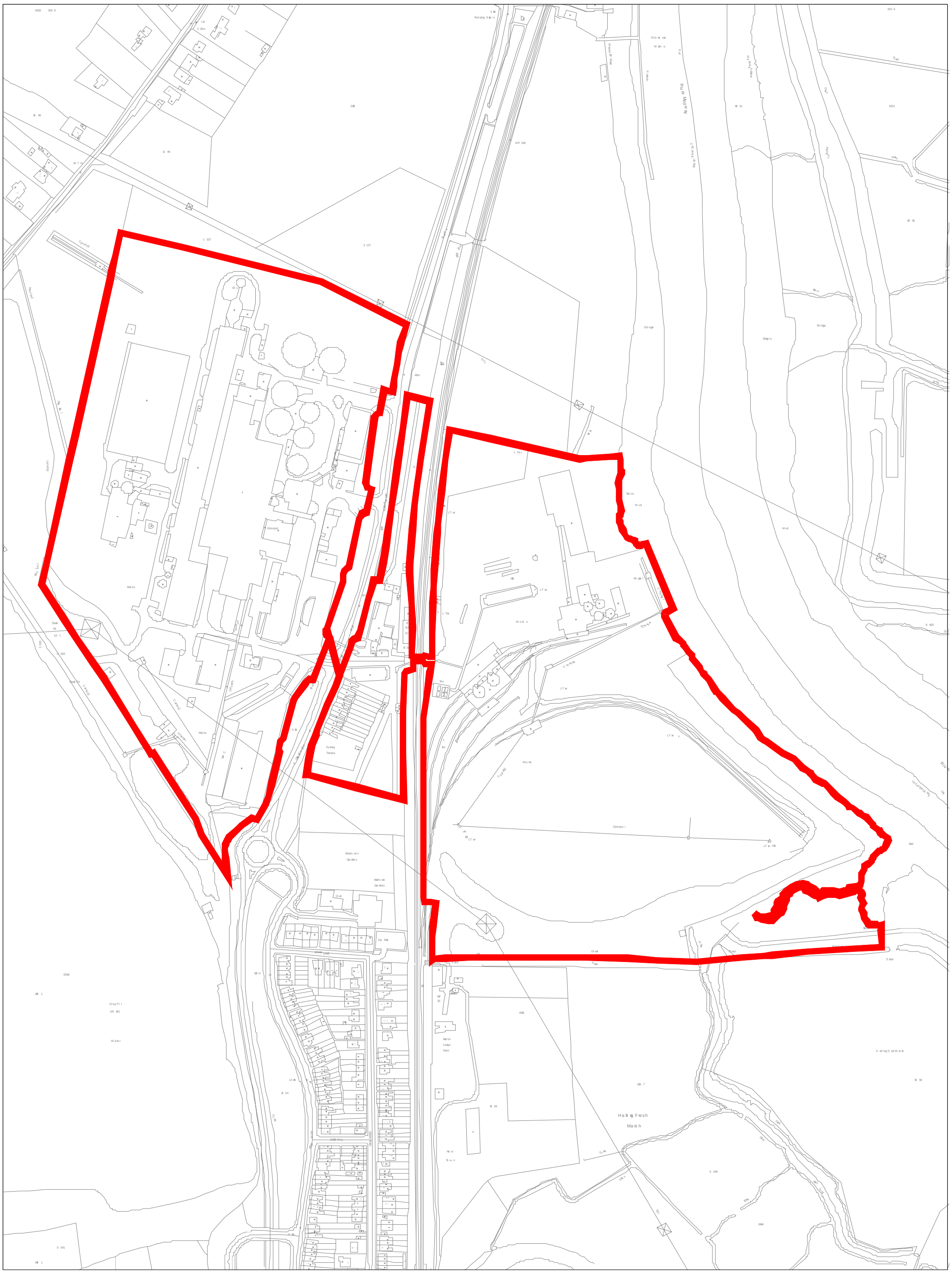
| **Connections** | The site is served by accesses of the A228 wide single carriageway road.<br>The motorway J2 is 4 kms.<br>3 bus routes pass the site; maximum frequency is hourly.<br>No cycleways serve the site.<br>The Maidstone to Strood rail line passes through the site with a siding into the site.<br>The site has a tidal frontage onto the River Medway with a wharf. |
| **Restrictions** | The site is surrounded by environmental protection designations (green belt, strategic gap, SNCI etc.). The site is neither the urban area nor within a village envelope. Parts are also liable to tidal flooding. |
| **Environment** | Limited noise from the plant was noticed at the time of survey, the most noise being from the traffic on the A road. No odours were noticeable. |
| ***Air quality*** | Air quality appeared clear. |
| **Facilities and non B1-B8 uses** | None |
| **Planning consents (sq.m.)** | None |
| **Potential future uses** | This is an operational cement processing plant. The works were stopped some time ago but have been re-activated. It is not known how long the plant will remain in operation, as the owners of the site are proposing redevelopment of the site. |
| **Any conditions required for future development** | The site has good accessibility and linkages to M2, however, exiting the site onto a main road is potentially hazardous and may need improved access arrangements for higher vehicular usage. |
| **General comments** | The frontage of the site appears to be tended.<br>Only very limited litter was noticeable on the roadside verges and no graffiti.<br>This is a single owner industrial complex and some industrial decay and debris is noticeable. |



## 13: Formby Road, Halling



22/11/06

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| **Site name** | **Appendix 1. 14: Fort Horsted, Chatham** |
| **Date of visit** | 5 September 2006 |
| **Brief description of site** | This site is a scheduled ancient monument that has had some of its features used for commercial purposes. The site is currently under major reconstruction, however, the current configuration consists of accommodation set into the embankments within the former fort. Some are accessible direct from the entrance road and others are through an entrance cut through the embankment.<br><br>The site is gated at its entrance from a residential cul-de-sac and further security exists at the gated entrance to the tunnel through the embankment. Additionally CCTV and motion sensors were noticed.<br><br>The site has a poor quality sign at its entrance but otherwise is anonymous. Some floodlighting exists on the site but it is not known how much of this is connected with the contractors. |
| **Approx date built** | Not known |
| **Location** | The site is located within the urban area. To the southwest is a Mid Kent College campus. To the southeast and east is an open valley, part of the Horsted Valley ALLI. This land is also designated as existing/proposed SNCI or LNR and proposed Country Park. To the north and northwest is a small estate mainly of bungalows between the site and the A229. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>5.43 Ha<br>0 Ha |
| **Average size of unit occupied** | N/A |
| **Composition of current use** *(only those classes with floorspace shown)* | N/A |
| **Amount of floorspace** | N/A |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 10512 - age 16-74; 7430<br>249488 |
| **Local Plan designation of site** | Scheduled Ancient Monument<br>ED3 (B1 uses), BNE20 |
| **Access into site** | A single narrow access slopes down into the site. This access is sufficient in width for 1 LGV only.<br>No footways exist on this access and there are raw earth banks leading up from both sides of the carriageway.<br>The access is rough concrete in poor condition with a speed hump halfway along. |
| **Buildings**<br><br><br><br><br><br><br>***General height*** | Due to the nature of the works on the site the entire site appears very untidy and it is not possible to differentiate between parts under renovation and parts in potentially poor condition. The current buildings appear to be brick/concrete faced and created inside embankments.<br>The current planning consent covers a new internal access road and new buildings not within the embankments.<br>Height appears to be single storey but determining the precise height of each unit inside the embankment was not possible. |
| **Layout** | The layout at present is highly restrictive due to construction works and material storage. |

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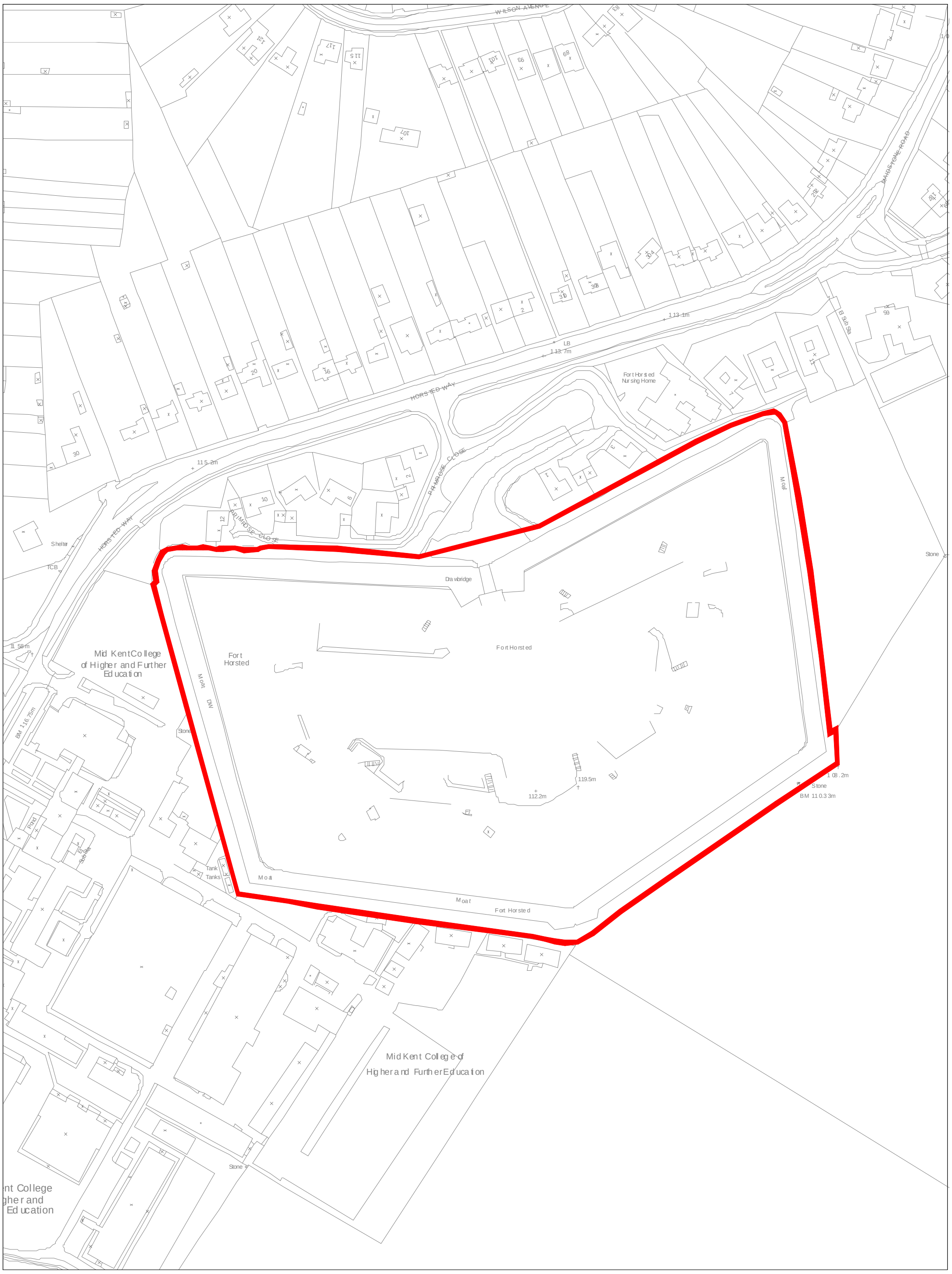
| **Locality** | The adjoining residential area comprises a mix of privately owned bungalows and houses and includes a nursing home. Quality of all the buildings appears good. The college to the southwest is proposing to relocate to a new site in Chatham Maritime. A planning application has been made for the current site. |
| **Car parking arrangements** | This could not be determined. |
| **Landmarks** | There are no landmarks. |
| **Adaptability**<br>*Buildings*<br><br>*Layout* | The current buildings, being built into an embankment, probably lack flexibility and their relatively fixed position also affects the layout.<br>No comment cannot be made on the planned layout as it was insufficiently advanced at the time of survey. |
| **Connections** | One residential cul-de-sac, Primrose Close, serves the site. This road is 1 lane single, has a footway on one side only and requires two 180-degree hairpin bends to be negotiated to enter the site's access road. Primrose Close has street lighting and a sign indicating a ban on lorries over 5 tons except for loading.<br>Primrose Close leads directly onto the A229 and this road has a right turn lane for entry into the Close. The junction also has a wide radius to assist LGV movements. |
| **Restrictions** | Access is through a quiet residential cul-de-sac. Additionally the site itself is a Scheduled Ancient Monument, which can affect development and use. |
| **Environment** | Some noise was noticeable from the construction works |
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | No facilities were noticed nor were any non B1-B8 uses. |
| **Planning consents (sq.m.)** | Under construction: B1: 4465, B2: 5637, B8: 130 |
| **Potential future uses** | Any future use needs to protect the fabric of this site as a Scheduled Ancient Monument. There is also a need to ensure that any use does not affect the amenity of the adjoining ALLI as the site influences the skyline visible from the ALLI. |
| **Any conditions required for future development** | Primrose Close has a difficult alignment for larger vehicles. There may be a need to consider restrictions on vehicles able to use the site. |
| **General comments** | The whole site is undergoing change, which makes commenting very difficult. |




# 14: Fort Horsted, Chatham

10 0 10 20 30 40 50 60 70 80 90 100
Metres



Medway COUNCIL

22/11/06

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| **Site name** | **Appendix 1. 15: Gads Hill, Gillingham** |
| **Date of visit** | 16 August 2006 |
| **Brief description of site** | This is a small riverside site consisting of two companies and some spare land. Both were engineering companies but one had closed down production by the time of the audit survey.<br>A short cul-de-sac leading off the A289 provides direct access to both companies. Very little is visible from the road of the operational company as it uses obscure fencing around the site for security purposes. Buildings heights vary from single storey to 3 storey with a mix of brick and clad facings. Some buildings appear to be quite old. One company fronts directly onto the cul-de-sac, while the other has separate entrances into its complex for deliveries and visitors.<br>A small open area of land exists at the junction of the A289 and the cul-de-sac, this is currently unused land designated for employment use.<br>CCTV exists and both companies are full gated.<br>A riverside public footpath runs approximately east-west through the site |
| **Approx date built** | Original buildings c1960 |
| **Location** | The site is located on the edge of the urban area and on the bank of the River Medway.<br>To the east is Riverside Country Park. To the south is the A289 dual carriageway and beyond is an existing residential area. To the west is also residential but new development following the closure of other industrial premises. To the north, the River Medway is tidal and the site abuts extensive mudflats at low tide. These mudflats are designated SSSI and the area is internationally important for wading birds. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | 3.8 Ha<br>3.5 Ha<br>0.3 Ha |
| **Average size of unit occupied** | 4910 sq.m. sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | B1: 25%, B2: 75% |
| **Amount of floorspace** | 9820 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 7094 - age 16-74; 4762<br>249488 (224699) |
| **Local Plan designation of site** | Employment land<br>ED1 (B1/B2/B8 uses) |
| **Access into site** | Access into the site is by a short cul-de-sac, Owens Way, off the A289 dual carriageway. Each site then takes direct access off Owens Way, which is capable of accommodating LGV vehicles. As the A289 is dual carriageway, access via Owens Way is left in and left out. A roundabout on the A289 exists some 500m east of Owens Way.<br>Owens Way is tarmac and in good condition. Internal access areas and hardstanding within Steelfields are mainly concrete and in fair condition. There are no internal access ways within the other premises.<br>The footpath, which crosses the site, is part of a long distance coastal path. |

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| **Buildings**<br><br>***General height*** | The closed factory, W H Overton, has buildings ranging from single storey near the river to two storey at the southern end. The buildings are a mix of brick built premises and a newer modular building which has its upper level clad. Despite the age of some of the buildings they appear to be well maintained. Steelfields has a brick built two storey administration building with production buildings to the rear rising to 3 storey. Condition ranges from good to fair working order. |
| **Layout** | With just two premises of a short cul-de-sac and substantial company names on each premises. legibility is good. Both sites are secure so there is effectively no permeability through each business area.<br>There is no flexibility within the W H Overton site as it is fully developed. The Steelfields premises may have some flexibility but it is believed that the buildings are purpose built to house the specialist machinery. |
| **Locality** | The country park is a linear park on the edge of the river of some 3 kms in length; most of the park is land in its natural state.<br>The residential land to the south is of fair quality and that to the west is new housing.<br>The river, to the north, has started to widen and is taking on a more rural and open character. There are extensive mudflats on the north bank of the river at this point and at high tide the river is 2.5 kms wide. |
| **Car parking arrangements** | Both premises have their own dedicated car parks. At the time of car parking was virtually non-existent as Steelfields were on annual holiday and W H Overton had closed. |
| **Landmarks** | There are no landmarks on the site |
| **Adaptability**<br>*Buildings*<br><br><br>*Layout* | The buildings appear to have been constructed to meet production requirements of each company. Some buildings appear also to have been constructed some time ago. Adaptability may therefore be limited.<br>The layout is relatively fixed given the access road and the public footpath. The internal configuration of the premises also has limited ability to adapt without redevelopment. |
| **Connections** | The site is accessed via Owens Way (single lane cul-de-sac local road) off the A289 (2 lane dual main road). The A289 has a 40 mph speed limit. Both roads have LGV capability, footways and street lighting.<br>The motorway J4 is 8 kms.<br>One bus route passes the site; maximum frequency is hourly in the summer.<br>A cycleway exists along the A289.<br>No rail access, the nearest railway station is Gillingham (3 kms)<br>A public footpath, part of the Saxon Shore Way, passes through the site.<br>The site has a tidal river frontage; Steelfields has a small jetty, which appears to be used. |
| **Restrictions** | The left in/left out access due to the connection with the dual carriageway could raise problems. However, the site is relatively close to a roundabout (0.5 kms) where u-turns can be made |
| **Environment** | No noise was noticed at the time of survey nor was any odour. However, road noise from the A289 was noticeable. |
| ***Air quality*** | The air quality was clear. |
| **Facilities and non B1-B8 uses** | No facilities other than those provided by the companies exist. No non B1–B8 uses exist. |

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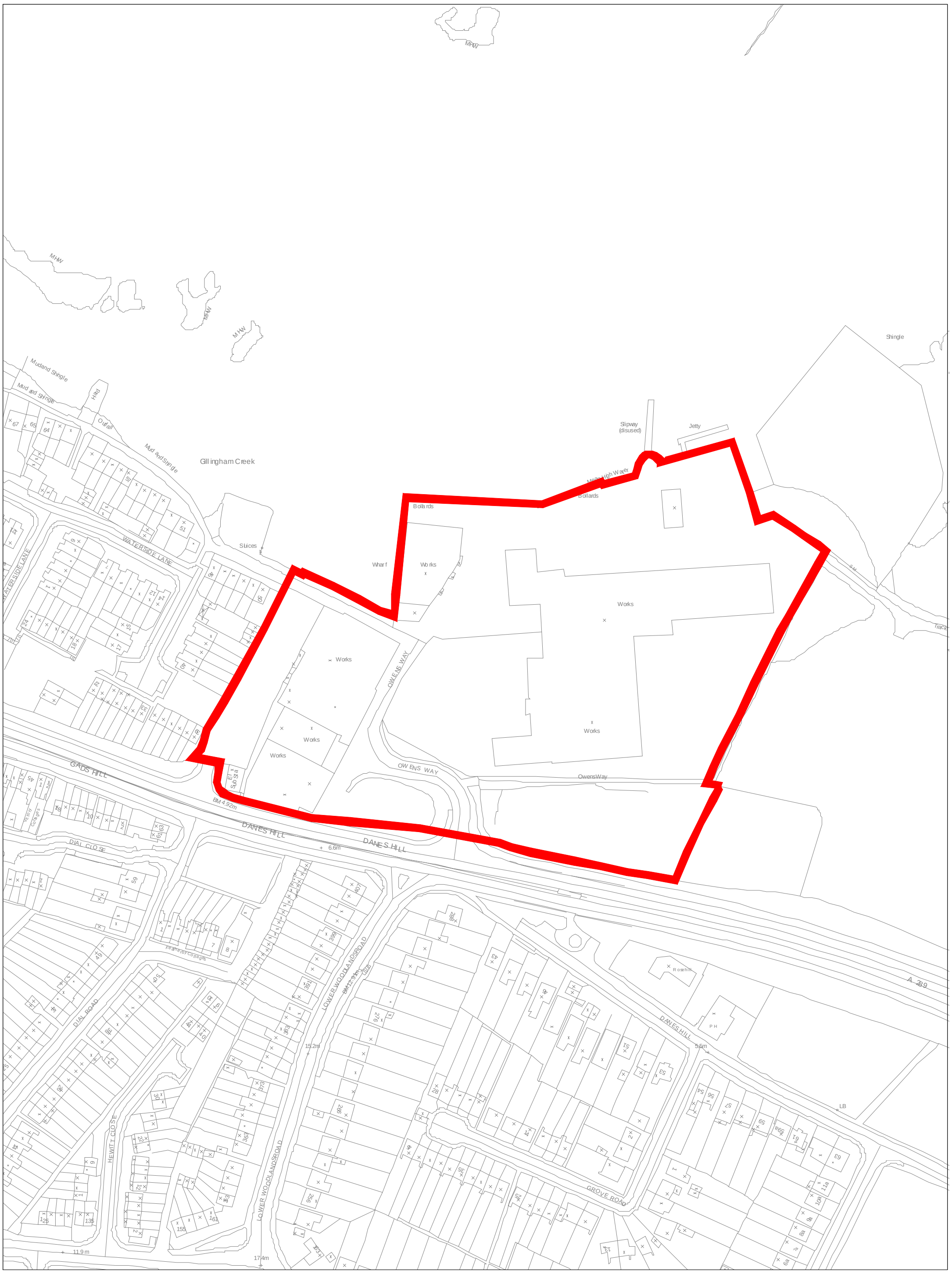
| **Planning consents (sq.m.)** | Under construction: B8: 690 |
| **Potential future uses** | The closure of one company, whilst regrettable, offers an opportunity to re-assess the site. The closed premises abut a new residential area, which was built on former employment land. The potential may exist, in the future, for conflict between the amenity of the residential area and the business demands of the new occupier. However, this former company and Steelfields are in relatively hi-tech manufacturing and this is a sector that has future potential. |
| **Any conditions required for future development** | The interface between the adjoining new residential area and this site needs addressing to ensure future problems of amenity are avoided. |
| **General comments** | Some graffiti and litter was noticed.<br>The mudflats suffer from some rubbish dumping that becomes visible at low tide. |




## 15: Gads Hill, Gillingham

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Metres



Scale:1:2500 22/11/06

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| **Site name** | **Appendix 1. 16: Gillingham Business Park, Gillingham** |
| **Date of visit** | 29 June 2006 |
| **Brief description of site** | Former military land (Gordon Barracks) situated at the junction of the A2 and A278. The site has a wide single carriageway internal circular service road, with grass verges and planting, and culs-de-sac leading off. All roads have footways. Buildings are generally in short terraces mainly with pitched roof and walls of either brick, for offices, or cladding for industrial buildings. There appears to be CCTV on the site. Some units are fenced and gated and some also have CCTV.<br><br>An area of land in the southeast corner of the site has an access road built leading into it but is otherwise undeveloped.<br><br>There is a substantial B&Q warehouse being built in the northwest corner of the site. A retail park adjoins the northeast corner of the site.<br><br>The managing agent has an office suite on site.<br><br>The site has prominent gateway signs at each entry point and signage at each junction on the circulatory road that includes occupant names. No signage exists on approach roads to the site except for the ice rink, which has brown tourist signs from the M2 J4. |
| **Approx date built** | Approx 1980 to today |
| **Location** | The site is located on the edge of the urban area; the boundary of the urban area, as defined on the Local Plan, runs along the southern boundary of the site.<br>To the west, relatively new housing extends up the site boundary. To the north is a sports centre and retail park facing onto the A2 dual carriageway. Residential land lies to the north of the A2. To the east is the A278 dual carriageway, which links direct to the M2, and beyond the A278 is Courteney Road industrial estate. To the south is mainly woodland (Ambley Wood - SNCI) which forms part of the Darland Bank/Capstone Valley open space and ALLI. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | 56.18 Ha<br>52.43 Ha<br>3.75 Ha (includes 2.88 Ha Health Authority land) |
| **Average size of unit occupied** | 1284 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 17%, A2: 3%, A3: 1%, B1: 23%, B2: 13%, B8: 38%, D1: 1%, D2: 1%, Other: 3% |
| **Amount of floorspace** | 170775 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 15194 - age 16-74; 10946<br>249488 (236791) |
| **Local Plan designation of site** | Employment land<br>ED1 (B1/B2/B8 uses), ED5 (B1 uses) for undeveloped Health Authority land |

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| **Access into site** | There are 3 accesses into the site and all are wide single carriageway. All 3 accesses are suitable for LGV or car use. One access onto the A2 is left in and left out<br><br>All roads are tarmac and in good condition. Some parking exists on the circulatory road and it was noticed that car deliveries from the back of a transporter took place on one of the main circulatory roads.. All major internal roads have street lighting.<br><br>A landscaped footpath exists through the middle of the site and this also has lighting. |
| **Buildings**<br><br><br>***General height*** | Overall condition of the buildings is good. Brick seems the more common facing for office units and cladding for industrial units<br>The general impression is that the buildings are two storey pitched roof buildings with some as double height units. Some buildings are now being constructed higher e.g. RHM and Fuji Seal's new high bay warehouse. |
| **Layout** | With a main circulatory route and signage at each cul-de-sac legibility is good. Additionally, a footpath exists through the centre of the site, aids permeability.<br>The layout generally appears uncluttered and open. |
| **Locality** | The adjoining residential area to the west is relatively new private housing. The residential area to the north of the A2 is of fair to good quality.<br>The main road/motorway link to the east is strategically important.<br>Darland Bank and Capstone Valley to the south are deemed important open space. |
| **Car parking arrangements** | All units have some parking. It seems that one or two occupiers do not have sufficient off road parking.<br><br>There is an LGV testing station at the southwest corner of the site and some LGVs are parked in the road. LGV driver training also seems to take place from this location with associated lorry parking in the road. |
| **Landmarks** | Within the site there is a static display of a military caterpillar vehicle, which acts as a landmark and, just outside the site, the Honourable Pilot Travel Inn at the A2/A289 roundabout is used as a locational landmark.<br><br>Landmark employers include two European headquarters (Hochiki and Fuji Seal). |
| **Adaptability**<br>*Buildings*<br><br>*Layout* | Most buildings are of relatively modern modular form and therefore quite flexible in their use and ability to subdivide or merge.<br>The site is, in most parts, almost fully developed but there is some flexibility |

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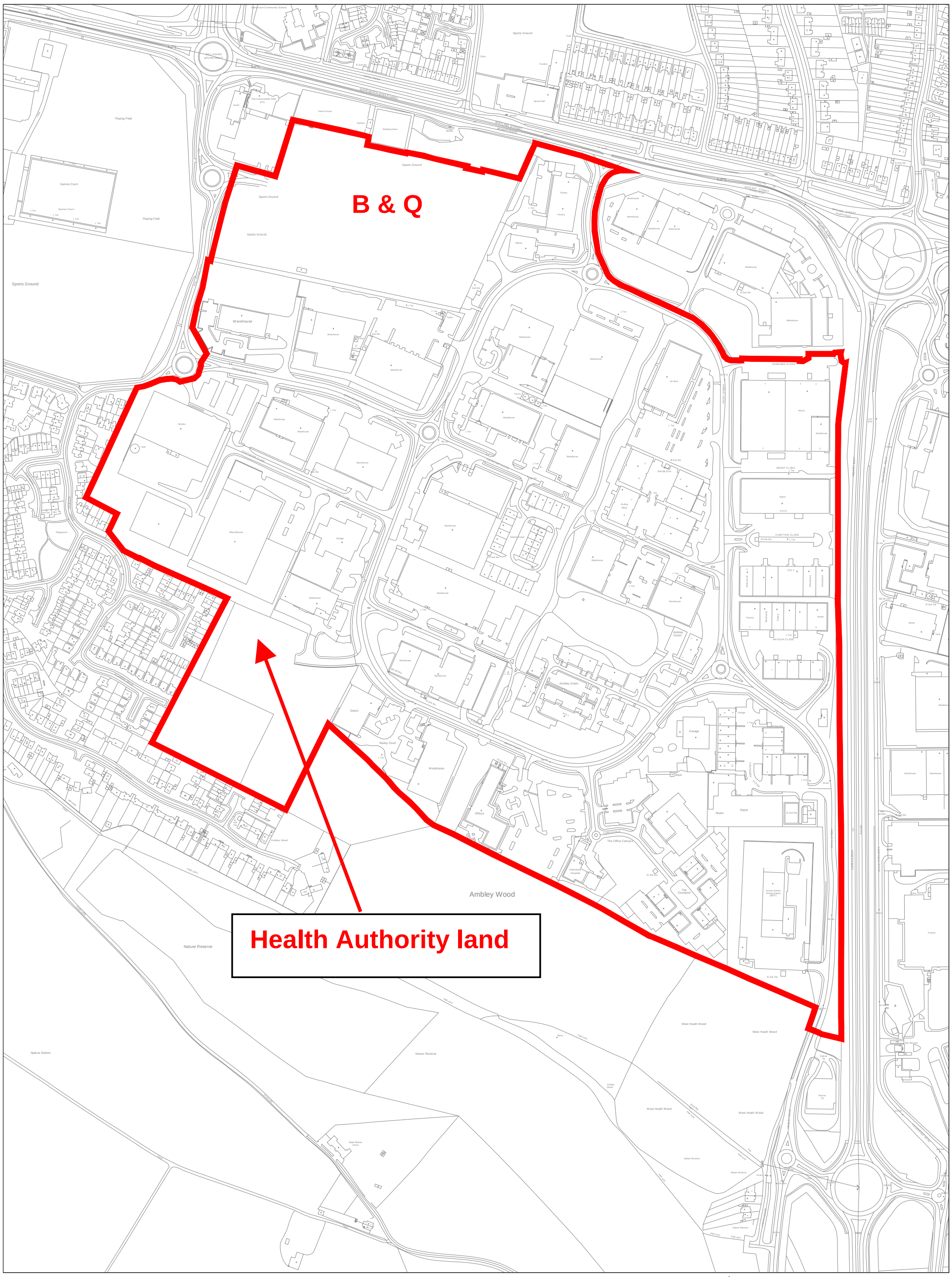
| **Connections** | The site is served by 3 accesses; one leads off the A278 (2 lane dual main road with no street lighting and a 50 mph speed limit) and two off the A2 (2 lane dual main road with street lighting and a 40 mph speed limit) one of these at the roundabout junction of A2/A289 (A289 also 2 lane dual main road)<br>The motorway J4 is 3 kms.<br>10 bus routes serve the site; maximum frequency is every 10 minutes.<br>There are cycleways along all three A roads and traffic light controlled pedestrian crossings on the A2.<br>No rail access, the nearest railway station is Rainham (4 kms).<br>The site has no river frontage |
| **Restrictions** | The close proximity of the residential development to the west may raise conflicts over use or pollution (noise, light or air).<br><br>The roads appear to have sufficient capacity to handle higher volumes of traffic. However, the site is used as a rat run mornings and evenings by traffic trying to avoid the delays on the A2 between the A289 and the A278 junction.<br><br>It has yet to be seen what additional volume of traffic the new B&Q warehouse will place on the road layout. |
| **Environment** | No noise issues were noticeable at the time of survey but some odour and traffic fumes were apparent in parts of the site |
| ***Air quality*** | Air quality appeared clear. |
| **Facilities and non B1-B8 uses** | No catering exists on site, however, immediately northwest of the site on the A2/A289 roundabout is a Premier Travel Inn with Brewers Fayre licensed restaurant.<br>An ice-skating rink, hand car wash and PDSA veterinary centre are within the business park.<br>A ‘Roko’ sports club is part of the sports facilities on the north side with licensed premises and catering.<br>Gillingham Golf Course is nearby.<br>Within the Capstone Valley to the south are a country park and dry ski slope |
| **Planning consents (sq.m.)** | Not started: B8: 1050<br>Under construction: A1: 15751, B1: 11425 |
| **Potential future uses** | This is an apparently thriving business park. It is well positioned for transport connections and both assists economic prosperity and provides a source of employment for the population. |
| **Any conditions required for future development** | There appears to be a number of trade centres operating from the park, these may cause conflict especially with commercial vehicles and non-commercial persons using the centres. There may also be added pressure on parking availability as a result.<br><br>A building height and design policy may need to be considered to ensure sustainable and suitable future growth without restricting enterprise and efficiency or diminishing the pleasant aspect of the site. |
| **General comments** | There appears to be a private maintenance crew tending the site; all grass and planted areas are well tended and no litter was visible. |




## 16: Gillingham Business Park, Gillingham



Medway COUNCIL

08/09/06

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| **Site name** | **Appendix 1. 17: Hoo Industrial Estate, Hoo, Rochester** |
| **Date of visit** | 14 September 2006 |
| **Brief description of site** | A complex of units situated in open countryside on the tidal estuary on the River Medway and adjoining a marina and residential park. Buildings are mainly two storey with pitched roofs and located in individual compounds. Their overall condition is serviceable but mixed materials are used for the perimeter fencing to each compound.<br><br>The site has a number of heavy engineering premises with marine or vehicle related associations. Activities along the river frontage vary from mixed open storage to marine activities.<br><br>No footways exist along the internal roadways and some roadways are only one vehicle wide.<br><br>The site is signed off the M2 and the A228 but has no main gateway signage, however, some occupiers have signs at the entrance to the site.<br><br>CCTV exists in some compounds only. Compounds have their own lighting arrangements but the roadways are unlit. |
| **Approx date built** | Not known |
| **Location** | The site is freestanding within the rural area and entirely within the tidal flood plain. The terrain of the area is all relatively flat and quite low lying.<br><br>To the southeast the site has total river frontage to the tidal estuary of the River Medway. The mudflats, exposed between high and low tides, are designated as SSSI and a Ramsar site. To the southwest is Hoo Marina, a tidal marina with some repair facilities. To the west is Hoo Marina Park, a residential park with mobile homes. To the northwest is open land designated as the Cockham Farm Ridge ALLI. To the north and northeast are open arable fields. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>7.5 Ha<br>0 Ha |
| **Average size of unit occupied** | 701 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | B1: 28%, B2: 31%, B8: 39%, D1: 2% |
| **Amount of floorspace** | 16127 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 3747 - age 16-74; 2865<br>249488 (59274) |
| **Local Plan designation of site** | Employment land within the tidal flood plain.<br>ED1 (B1 use), CF13, BNE46 |

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| **Access into site** | The access roadways into the site radiate outwards from the site entrance to serve the various units. All are culs-de-sac and, except for one, have no roadway turning facilities. All roads are private and narrow, one is only 1 car wide. There are neither footways nor lighting on the roadways. There are also some unmarked speed humps.<br><br>The roadways are a mix of concrete and tarmac and their surfaces vary between fair condition and in need of maintenance.<br><br>Only very little parking was seen on the roadways but this may be a feature of their narrowness. |
| **Buildings** | Buildings are of mixed ages and seem to have been built individually to suit need. Overall the condition varies between fair working order and in need of maintenance<br><br>The compounds have varying surfaces but generally comprise grass, cinder or broken concrete. Fencing to the compounds is also mixed and can vary around a single unit. The fencing varied between wire mesh, paling, corrugated iron and block walling. |
| ***General height*** | Height is mainly 2 storey double height with pitched roofs. Walls are a mixture of cladding and brick. |
| **Layout** | The layout essentially comprises individual units in their own compounds taking access off a series of roadways radiating out from the site entrance. Some companies have direction signs at the entrance and units near the entrance are visible otherwise legibility is poor and prior knowledge of the layout is needed to locate a particular unit.<br>Permeability is restricted to the roadways only.<br>The site appears relatively confined and, in parts, crowded whereas in other areas, particularly where heavy marine engineering took place there were some substantial open areas within the compounds but this seemed to be to allow moving of fabricated items. |
| **Locality** | The open land to the northwest is designated as part of the Cockham Farm Ridge ALLI. The open fields to the north and northeast are classified as grade 1 agricultural land. All of the land to the north is in mainly agricultural use as arable land. This surrounding area is quite flat and much of it is within the tidal flood plan.<br><br>The adjoining marina has the air of a working marina rather than a pure leisure one with many boats hauled out on stands on a large concrete hardstanding adjoining the river. The majority of these boats are yachts and, hence, have keels meaning their stands have to be quite tall to accommodate the keel. Mobile cranes also operate in this area. To the back of the marina is the residential park; the majority of the homes in this park appear to be chalet type dwellings.<br><br>The river adjoining is tidal and extensive mudflats with a small creek exist at low tide. Some small islands also exist in the mudflats – some of these appear to be damaged land. Mooring pontoons extend into the river and are in use. The site enjoys amazing views across the river to main the urban area and beyond. |

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| **Car parking arrangements** | Very few defined parking bays were noticed during the survey of the site. The roadways are too narrow to permit parking but the general appearance is that parking takes place within the compounds wherever space exists beyond the operational areas. |
| **Landmarks** | There are no landmarks on this site. |
| **Adaptability** | This is a site that has the appearance of something which has grown organically in response to need with very little overall planning of layout. |
| *Buildings* | Some buildings are modular but others appear to be purpose built. Almost all would seem to need substantial work and improvement to provide flexible space but are apparently fit for current purpose. |
| *Layout* | The roadways are narrow and any widening would impinge severely on adjoining compounds. |
| **Connections** | The site is served by Vicarage Lane (1 lane single country road). The road has lighting and footways. There is also a large turning circle at the end of the road (at the entrance to both the site and the residential park) that enables buses to turn round. This road is tarmac and in fair condition.<br>The motorway J1 is 13 kms<br>2 bus routes serve the site; maximum frequency is every 12 minutes.<br>No cycleways serve the site.<br>No rail access, the nearest railway station is Strood (10 kms)<br>The site has a tidal river frontage, which is active. |
| **Restrictions** | The mudflats are listed as an SSSI, which restricts the uses that they can be put to.<br>Access from the site to the nearest main road (A228) is 2.5 kms. This is along a country road (Vicarage Lane) and then through Hoo St Werburgh. The 'T' junction on Vicarage Lane at its end in the Hoo St Werburgh is of poor alignment and while LGVs negotiate the junction it is only with some difficulty. Additionally, one of the two road links to the A228 from Vicarage Lane has speed humps for a distance of more than 1 km.<br>The internal roads are too narrow and restricted to be able to raise the quality of internal circulation. |
| **Environment** | Some noise was noticeable but no odours |
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | No catering facilities were noticed. Some may be provided by some of the employers within their premises.<br>There is a sailing club on the site. |
| **Planning consents (sq.m.)** | Not started: B1: 52, B2: 254, B8: 364 |
| **Potential future uses** | The site has the potential to widen its marine based activities. However, image may be an element that needs improvement. Some heavy engineering could continue at the site but there may be amenity issues with the adjoining residential park. This may also raise problems with access through Hoo St Werburgh. |
| **Any conditions required for future development** | The junction at the end of Vicarage Lane in Hoo St Werburgh has a difficult and constrained alignment that can cause problems for large vehicles. Whether there is scope to improve the junction needs to be considered.<br>General improvements to the site and its internal roadways would be beneficial but issues of ownership have not been investigated in this respect. |

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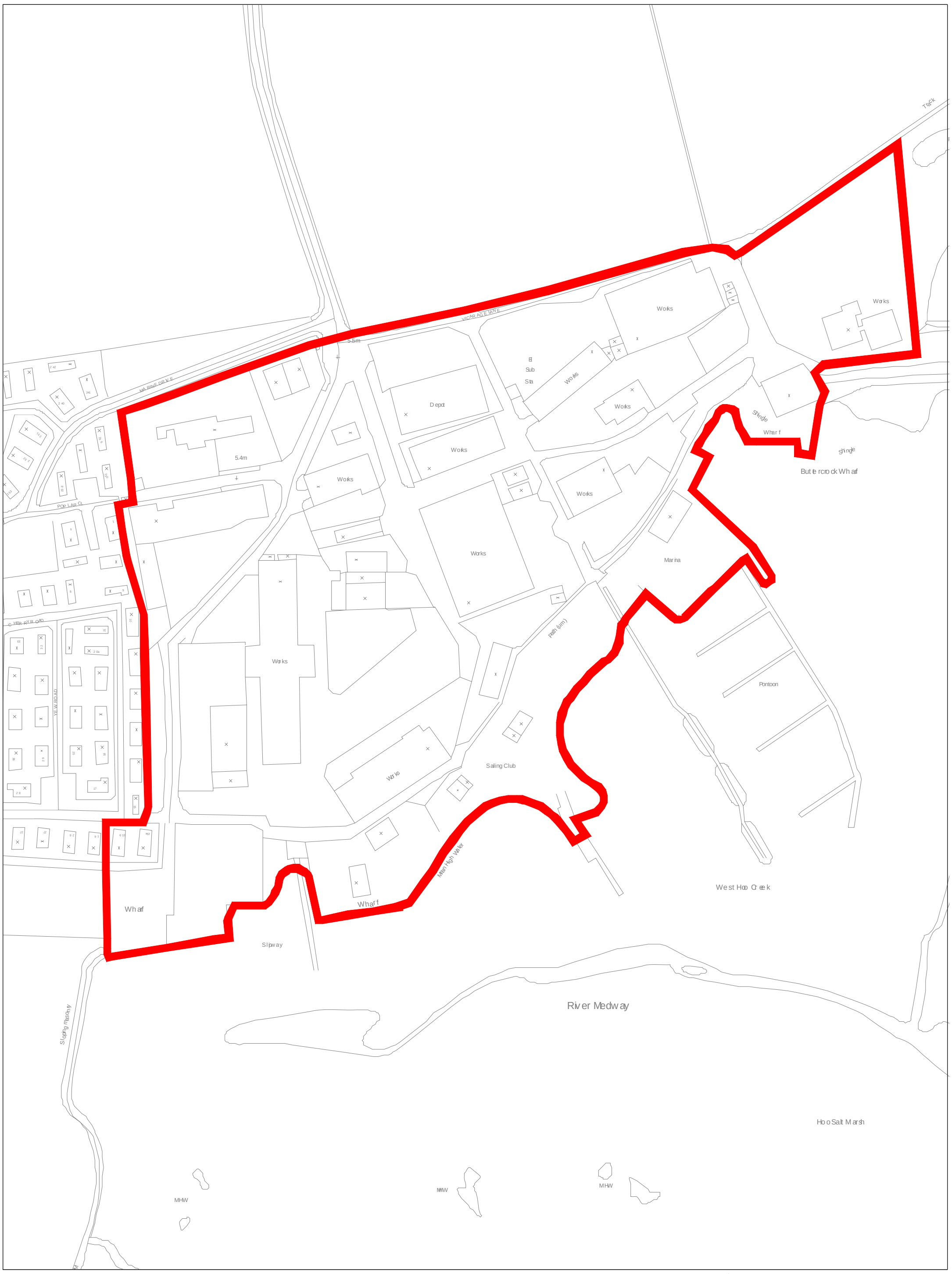
| **General comments** | No litter or graffiti was noticed on the site but there was a general untidiness within compounds and in some general areas.  This gives rise to a poorer image than perhaps the site warrants given its position in open countryside and the views across the River Medway.<br>At the time of survey the river was at mid-tide meaning that the mudflats had a small covering of water, therefore no comment can be made on their condition. |




## 17: Hoo Industrial Estate, Hoo, Rochester

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Metres



22/11/06

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| **Site name** | **Appendix 1. 18: Hopewell Drive, Chatham** |
| **Date of visit** | 5 September 2006 |
| **Brief description of site** | A linear site located along a cul-de-sac forming an extension of a residential road. Units are located either side of the road. The road and approximately half the depth of the units each side is relatively level but then the ground rises to the back of the units.<br>Units are of mixed construction and ages but are generally 2 storey and are positioned relatively closely to the road. Most are separate buildings.<br><br>No signage exists to the site or at the entrance of the site but each unit has its own signs. CCTV exists on some individual units. Each unit has its own fencing and gating. Floodlighting exists on some units. |
| **Approx date built** | 1950s – 1980s |
| **Location** | The site is located in the urban area and approximately 2 kms from Chatham town centre. The site is located within a valley with the ground rising to both sides. On most sides of the site are residential areas. However, there is a limited amount of residential properties to the east before the open ground of the Capstone Valley ALLI is reached. To the southeast, and with a minimal frontage to the site, is the open space of Princes Park |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>3.83 Ha<br>0 Ha |
| **Average size of unit occupied** | 520 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 1%, B1: 24%, B2: 33%, B8: 30%, D1: 12% |
| **Amount of floorspace** | 18211 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; - 12190 - age 16-74 – 8522<br>249488 (236791) |
| **Local Plan designation of site** | Employment land<br>ED1 (B1/B2/B8 uses) however reasoned justification states, to safeguard residential amenity only B1 uses will be permitted. |
| **Access into site** | The vehicular access into the site is through a residential area. The road is wide single carriageway and terminates at the southern end of the site but has no turning head. The road has footways both sides but no cycleway provision. There is a separate footpath access from the south.<br>The access road has street lighting and is tarmac in fair condition.<br>Parking occurs on both sides of the road both within the site and along the residential section of the road. Two-way traffic for cars is just possible between the parked cars. |

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| **Buildings** | The age of the buildings varies from 1950s to 1980s and condition tends to reflect age but overall they are in fair working order with the Hopewell Business Centre appearing well maintained.<br>Construction is a mix of brick and clad buildings with pitched roofs.<br>The hardstandings around the buildings are mainly concrete and vary in condition from fair to in need of maintenance. |
| ***General height*** | Most buildings are 2 storey double height but one, which contains mainly starter units, has 2 floors. |
| **Layout** | The layout is linear and the wide road makes legibility reasonable. Permeability is limited to the access road due to the fencing around each unit.<br>The single road with no turning head, and with most units close to the road, limits the flexibility of the layout as does the relatively ‘narrow’ nature of the site. |
| **Locality** | To the north the residential area is all social housing in good condition. The remaining residential areas are almost entirely private housing with much of post 1960 construction.<br>At the southern end of the site is a road (Heron Way), which is built at a higher level, connecting with the development on either side of the valley. The footpath from the southern end of the site passes under this road. |
| **Car parking arrangements** | Limited car parking spaces exist around each unit and the available space in many units appears to be used to near capacity. This is supported by the amount of car parking in the access road. |
| **Landmarks** | There are no landmarks. |
| **Adaptability**<br>*Buildings* | One unit, the Hopewell Business Centre, offers flexible start up space but otherwise most units seem to be relatively limited in their flexibility and would only really be suited to industrial processes requiring buildings of around that size. There is limited opportunity for expansion. |
| *Layout* | The ‘narrow’ width of the site combined with the central access road limit the ability of the layout to adapt. |
| **Connections** | The access road, Hopewell Drive, is served from Capstone Road (1 lane single local road). Capstone Road has street lighting and a cycleway.<br>The motorway J3 is 12 kms. J4 is also accessible from this site but needs the use of a country lane or a long route through further residential areas.<br>No buses serve the site direct but 2 services are nearby; maximum frequency is 10 minutes.<br>No rail access, the nearest railway station is Chatham (4 kms)<br>The site has no river frontage. |

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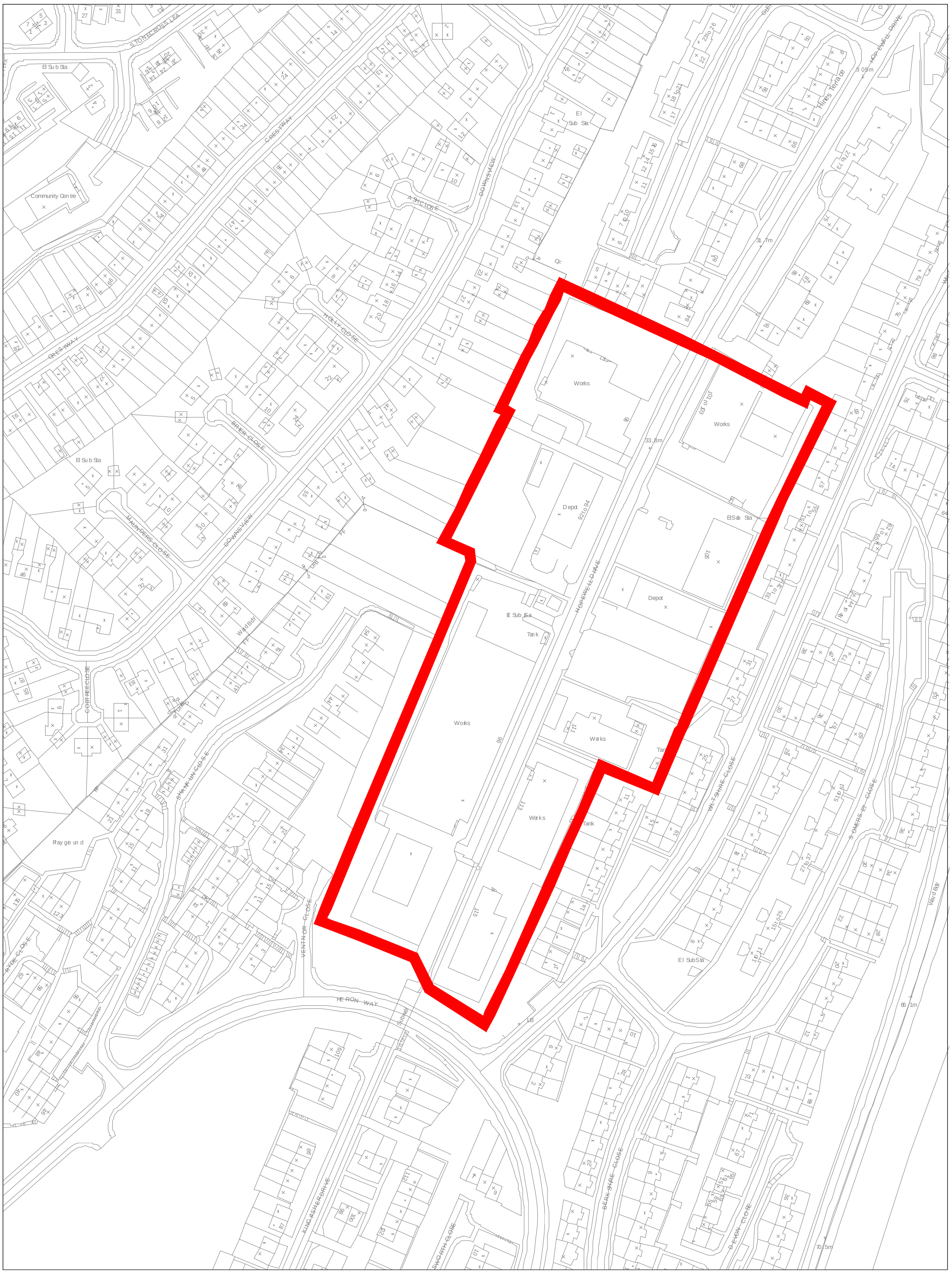
| **Restrictions** | The close proximity of the surrounding residential area will restrict the type of uses, this is recognised in the reasoned justification in the Local Plan. Access and egress is also along a residential road (250 m from site boundary to Capstone Road) with car parking in the road.<br><br>The road lacks any turning facilities for either cars or LGVs at its end.<br><br>Hopewell Drive has a ban on lorries over 5 tons between 9 pm and 7 am.<br><br>Capstone Road leads towards Luton and Chatham centre in one direction and the other to the open countryside of Capstone Valley thus the site is not readily accessed from the major road network. |
| **Environment** | No noise was noticeable at the time of survey. |
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | No facilities existed except those provided within the units. No non B1-B8 uses were identified. |
| **Planning consents (sq.m.)** | Not started: B8: 647 |
| **Potential future uses** | This is a site capable of continuing to provide a sustainable employment location. It also has an important starter unit facility, which seems to have a high occupancy level.<br><br>The site's relatively narrow width and residential area location would not create problems with appropriate low-impact occupants. |
| **Any conditions required for future development** | Given an appropriate level of car parking and control, Hopewell Drive could be narrowed to a more usual 5.5 m carriageway. This would release a useful strip of land, which, if properly utilised, could yield a small but beneficial extra depth to the compounds on one side.<br><br>Some buildings would not be suited to B1 only use being more in the nature of manufacturing premises and so some redevelopment would be necessary. |
| **General comments** | Some litter and graffiti was noticed on site. There was also a cluttered appearance from both the on-street parking and industrial clutter in some compounds.<br>The site also appeared slightly unwelcoming when approaching it. |




## 18 Hopewell Drive, Chatham

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Metres



Medway Council

22/11/06

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| **Site name** | **Appendix 1. 19: Isle of Grain, Grain, Rochester** |
| **Date of visit** | 3 November 2006 |
| **Brief description of site** | Situated at the southeast extremity of the Hoo Peninsula and with an extensive river frontage, this is the site of the former BP Kent Oil Refinery, which was commissioned in 1953. Most of the oil related structures have been cleared and the site has some major occupants/operations connected with port related activities, energy – including LNG facilities and a power station – and aggregates. Due to the large size of the site and the fact that is a re-development of a former use, there are some substantial areas that currently remain unused.<br><br>The river frontage is tidal but a dredged channel enables unrestricted access to the jetties.<br><br>The site is relatively flat and low lying with drainage channels visible around the site and some through the site. Most of the site is within the tidal flood plain. The structures and buildings on site are mainly detached and some are very large meaning they are visible from a considerable distance.<br><br>A single main road and a single-track freight railway serve the site. The main road passes through the site and continues on to the village of Grain some 1 km to the north.<br><br>Signage exists to the site from the M2 and A2 roads but there is no gateway signage, just direction signs on the road at the turnings to the various occupants. The site is almost entirely fenced, with the container port being bonded. Floodlighting and CCTV exist. |
| **Approx date built** | 1950 on |
| **Location** | The site is a freestanding site within the rural area.<br><br>To the west is open low-lying land mainly used for pasture and with substantial drainage channels. This land is designated as a special landscape area, SSSI and Ramsar/SPA. To the north is also open land but this is slightly rising and is arable land; Grain village is north of the site. Further north is open land also designated as special landscape area, SSSI and Ramsar/SPA. To the east is the River Medway, this frontage is tidal with extensive mudflats; the mudflats are also designated as special landscape are, SSSI and Ramsar/SPA. The special landscape area, SSSI and Ramsar/SPA designations around this site are not separate areas but a single large designation that forms a collar around the three sides of the site.<br>To the south the site also front onto the River Medway but the mudflats are very limited at this point and a channel is dredged to ensure 24-hour access to the site from the main river channel. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | 595.52 Ha<br>316.52 Ha<br>279 Ha |
| **Average size of unit occupied** | N/A |

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| **Composition of current use** *(only those classes with floorspace shown)* | B1: 1%, B2: 55%, B8: 44% |
| **Amount of floorspace** | 87964 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 1994 - age 16-74; 1420<br>21374 (12697) |
| **Local Plan designation of site** | Employment land, most of the site within the tidal flood plain. ED1 (B1/B2/B8 uses - B1 development restricted to B1(c)), S13, ED5 (B1/B2/B8 uses - B1 development restricted to B1(c)), ED7, ED8, CF13, T10, BNE2, BNE3, BNE23, BNE24, BNE46, L3 |
| **Access into site** | The A228 main road passes through the site and acts as a central distributor road. Most of the current occupiers are sufficiently large to have either their own dedicated accesses off this road or share a junction and then branch out into separate accesses. Surfaces of most accesses are in fair to good condition. Widths vary but they are mainly 1 lane single roads and are shared by LGVs and cars. The A228 is separately detailed below in ‘Connections’. Accesses off the southern side of the A228 have to cross the railway line and sidings; most of these crossings are signal controlled with no gates.<br><br>Some lighting or floodlighting exists on the accesses. No parking was noticed on any access. |
| **Buildings** | Due to the widely varying activities of the current large occupiers buildings vary between occupants. General condition of most buildings/structures seem fair to good but some of the remaining tanks appear to need some maintenance (visible rusting) and there are some corrugated sheds to the rear of the power station which appear to be in need of maintenance. |
| ***General height*** | Most buildings are generally two storey with the exception of the power station which has a huge monolithic building forming the main generator housing.<br>The appearance of height across the site is also affected by the LNG tanks, which are substantial, as well as the stacking of containers in the port. The containers are stacked up to 6 high, which is approximately the equivalent of a 5 storey structure. The overhead gantries used to move and stack these containers are higher than this, as are the cranes for unloading ships. |
| **Layout** | The layout is still developing. Some operators within the site occupy some substantial areas of land; this then requires reliance on the direction signs rather than the ability to ‘read’ the layout. Navigating around the site requires a careful approach by first time visitors.<br>The nature of some of the operations and the fact that much of the unused land is rough surfaced means that permeability is limited almost entirely to the access roads.<br>The amount of un-used land aids the potential layout of the site in that there is some flexibility available, but the useable waterfront of the site, that is the section not fronting onto SSSI is almost fully developed. The railway is a huge benefit to the site but is much more costly to re-arrange if changes were needed to its layout thus some elements of the site may be fixed for economic reasons. |

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| **Locality** | The character of the open area around the site changes with location. The low-lying land to the west is mainly grazing with the appearance in places of scrubland. Drainage ditches and ponds are in evidence. While to the north, on the slightly higher ground, it is arable and appears more intensively farmed. There is also a small area of land to the northeast of the site that is low-lying and this reverts back to grazing with a similar character to that of the land to the west.<br>Grain village is a relatively small settlement of around 1700 people.<br>The site is on the River Medway estuary, thus there is a considerable extent of open water to the south and east of the site. The opposite side of the estuary is marshes north of Iwade and Lower Halstow. The Port of Sheerness is visible from the site.<br>As the area is quite low lying and flat, the sky is an important feature and it is best described as 'big sky' country. |
| **Car parking arrangements** | Each occupant provides their own car parking. Overall, parking provision appeared to be adequate for the level of parking at the time of survey for most occupants.<br>Separate LGV parking existed in some places. |
| **Landmarks** | The larger structures on the site are visible for a considerable distance. The power station and its chimney are clearly visible from 9 kms away on the peninsula as are the LNG tanks; ground undulations prevent visibility from a greater distance.<br>Additionally from south of the river, in Rainham, the power station chimney as well as the cranes on the jetties can be easily seen.<br><br>There are also some significant employers on the site: E.ON UK, Hutchison Port Holdings Group (Thamesport), Foster Yeoman and Grain LNG Ltd. |
| **Adaptability**<br>*Buildings*<br><br>*Layout* | Most buildings would appear to be purpose built. Some would have a measure of flexibility, as they are essentially sheds, while others would have limited adaptability.<br>The layout, at present, has sufficiently un-used land to allow considerable flexibility. However, available river frontage appears to be almost fully utilised. It may be able to be used more intensively but this would require investigation beyond the scope of this audit. |

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| **Connections** | The site is connects to the A228 Grain Road (1 lane single main road), which has no footways and no street lighting. It is also subject to a 40 mph limit for a considerable distance from the site and has level crossings. This road continues beyond the site to serve the village of Grain. At the junction with the access road leading to the Thamesport and Foster Yeoman terminals, Grain Road has an additional central lane to permit right turning. Grain Road is tarmac and in good condition.<br>A narrow road, Port Victoria Road, (one car wide country lane with hedges) leads from Grain village into the eastern extremity of the site. This cul-de-sac road is tarmac and in very poor condition in parts. It provides access to the rear of the power station but all entrances are gated and padlocked. The road is used by the public to reach the coastline east of the power station.<br>The motorway J1 is 20 kms.<br>4 buses serve the site; maximum frequency is hourly.<br>There are no cycleways serving the site.<br>The site has a freight rail access, this seems to be used primarily for the transport of containers and aggregates. The nearest passenger station is Strood (17 kms).<br>The site has a tidal river frontage with a dredged channel to permit permanent access to the jetties. |
| **Restrictions** | The site is essentially at the end of a very long cul-de-sac. This in itself need not be restricting but, at present, the quality of the road access is limited in places and the road has a high crash rate (see also ‘comments’).<br><br>The site is also remote from centres of population. However, while this adds to workforce travel movements it can be beneficial in that uses which might otherwise be unacceptable in other less remote locations may take place here with less constraints.<br><br>The LNG facility has a safeguarding zone around the storage area.<br><br>The majority of the site is within the tidal flood plain, which may restrict the uses that could be accommodated due to risk of environmental damage in the event of a flood. Part of the site is above the flood plain and this may have a wider scope if it is possible to utilise the land effectively.<br><br>Any new developments have the potential to be seen from great distances; this may impact on the nature of the surrounding sensitive areas and must be a consideration in connection with future development. |
| **Environment** | Some noise was apparent at the time of survey. There was also a considerable cloud of steam or other vapours being released from the roof of the power station. |
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | No separate catering or leisure facilities were noticed. Large occupiers are likely to have their own staff facilities. Thamesport provides facilities for visiting LGV drivers. |
| **Planning consents (sq.m.)** | Not started: A2: 9600, B8: 6572 |

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| **Potential future uses** | This site has the capability of accommodating space hungry uses. Additionally, uses not acceptable in less remote areas might be accommodated subject to possible environmental constraints.<br><br>The area situated above the tidal flood plain should be investigated to determine whether it has greater potential.<br><br>A proposal exists for a substantial new settlement at Chattenden, some 9 kms west of the site, which would increase the potential local labour supply.<br><br>The Department for Transport, in its Ports Policy Review May 2006 consultation, considers that “The forecasts show a sustained trend of significant overall growth in the lo-lo and ro-ro unitised sectors, and this will have capacity implications both for port terminals (and associated dredging) and inland haulage” |
| **Any conditions required for future development** | Improvements to parts of the A228 are needed (see also ‘comments’).<br><br>The railway line could usefully be upgraded to allow more bulk goods to move by rail.<br><br>The site’s impact on the surrounding countryside needs consideration; this may entail landscaping to soften the effect of new structures.<br><br>Some of the unused land on the site would be needed for landscaping, to avoid impact on the surrounding area, and to maintain land drainage through the site with associated wildlife habitats.<br><br>This is a remote site, the need for facilities on site, both in terms of staff needs and leisure as well as shared corporate resources, should be investigated. This study should also look to anticipate the requirements of any future occupants of the site. |

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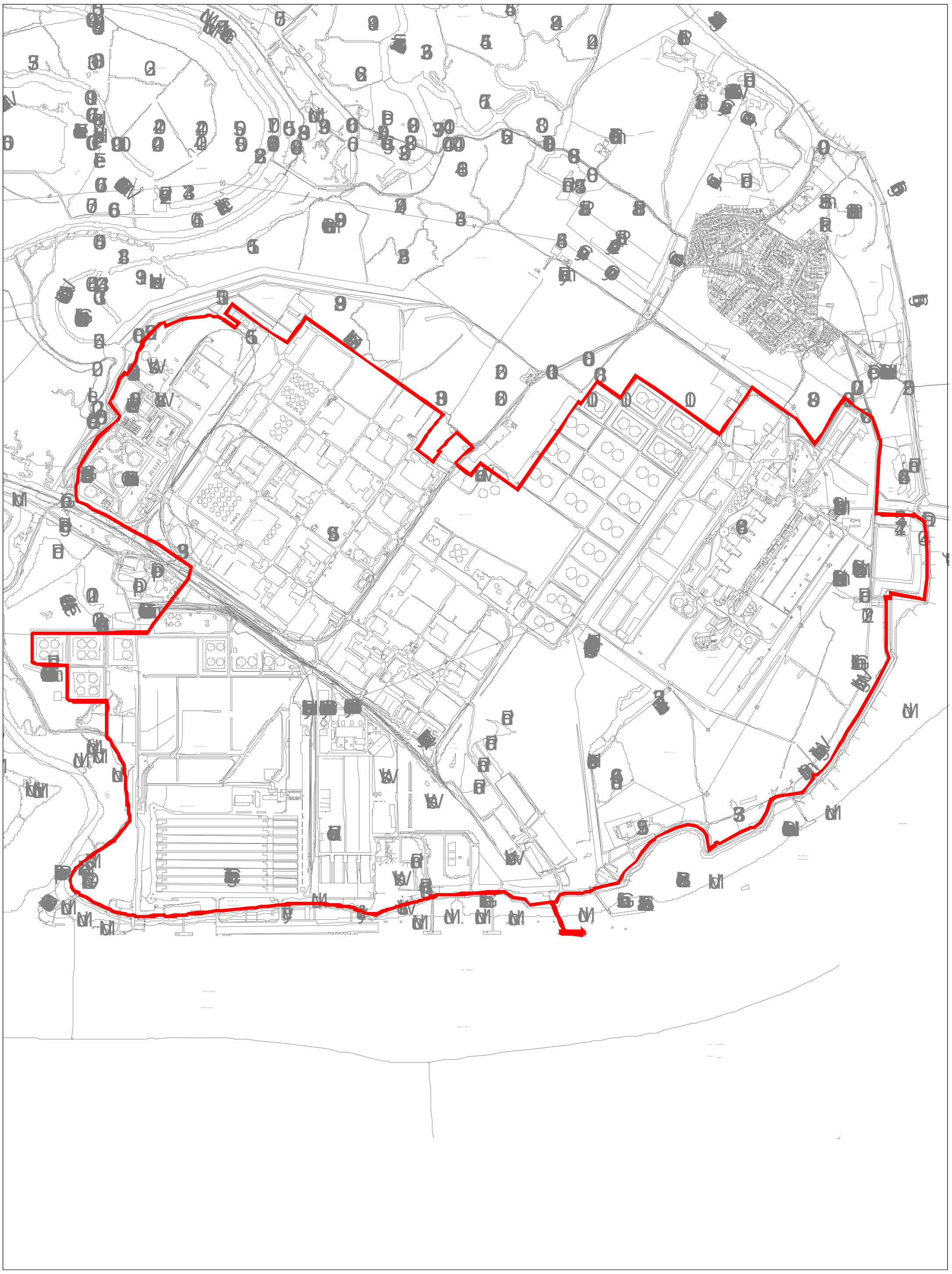
| **General comments** | No litter or graffiti was noticed on the site.<br><br>The site has no gateway entrance, signage or architectural statement that you have entered the site. On approaching from the west the first part of any development encountered is the LNG storage tanks set well back from the road immediately followed by some un-used land. Thus it does not seem that you enter the site, more that it forms around you as you drive along.<br><br>There are general issues with the A228 from the site towards the motorway. The road is a 1 lane single carriageway and at some times of the day is not very busy. It has, however, a 40 mph speed limit on it for some 8 kms from the site. The limit has been imposed due to the high crash rate on it but at quiet times the road appears very open and travelling that distance at 40 mph seems very slow. It should be borne in mind that to many hauliers time is important factor for maximum efficiency of operation; therefore, there could be a big temptation on drivers to exceed the limit. The road needs improvements to enable a safe and quick connection to the motorway network.<br><br>It is not normally appropriate to discuss individual companies but Grain has some of special significance. The following information has all been collated from the websites of the various companies.<br>The Thamesport lo-lo operation has the capability to handle 8,073 TEU ships, some of the largest container ships in the world. It is also one of the UK's busiest container ports.<br>Foster Yeoman uses the site as a 'virtual quarry' where two million tonnes of unprocessed and part processed materials are imported from Glensanda each year and are washed and screened, before being sold.<br>E.ON UK Ltd has an oil-fired power station on the site; it is due to close by 2015. The company is proposing a replacement gas-fired power station at the site.<br>Grain LNG Limited, a wholly owned subsidiary of National Grid, has a liquefied natural gas importation and regasification terminal at the site. The Isle of Grain terminal is the first of the country's new LNG-import facilities. |



## 19: Isle of Grain



22/11/06

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| **Site name** | **Appendix 1. 20: Kingsnorth Industrial Estate, Hoo, Rochester** |
| **Date of visit** | 3 November 2006 |
| **Brief description of site** | The site is situated in open countryside on the southern side of the Hoo peninsula and has a tidal river frontage. It is relatively flat and low lying. The site is a mix of uses and sizes of buildings and includes two power stations and some petro-chemical type works. The southern part of the site mainly consists of the power stations with the main industrial works situated just to the north of these. The majority of the northern part of the site is open and un-used. The power station structures are large while the remainder of the buildings tend to be detached units of varying ages. Some units rely on portable buildings for part of their accommodation.<br><br>Most occupations are separately fenced compounds and the compounds are of varying sizes depending upon the operation involved. Some internal roads have street lighting and most compounds have either floodlighting columns or towers. CCTV also exists.<br><br>The site is approached via open countryside with three separate, but close, accesses into the site. Each access serves a different part of the site; good signage exists at each access. Signage to the site also exists from the M2 and along the A228. |
| **Approx date built** | 1950s (or possibly earlier) on |
| **Location** | The site is a freestanding employment site located in the rural area. The entire site is located within the tidal flood plain. The site has tidal river frontage on it eastern and southern sides. This frontage has extensive mudflats all designated as SSSI and Ramsar/SPA. The land to the east is also designated as a Special Landscape Area. To the southwest is an area of marshland also designated SSSI and Ramsar/SPA. To the west and north is open countryside mainly arable in character. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | 243.7 Ha<br>151.7 Ha<br>92 Ha |
| **Average size of unit occupied** | 1748 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | B1: 9%, B2: 71%, B8: 7%, Other: 13% |
| **Amount of floorspace** | 62940 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 1289 - age 16-74; 979<br>244220 (12789) |
| **Local Plan designation of site** | Employment land within the tidal flood plain and Strategy Area.<br>ED1 (B1/B2/B8 uses- B1 development restricted to B1(c)) except where the development makes provision for increased accessibility by means other than the private car), S12 (as ED1), ED5 (as ED1), ED7, ED8, CF13, T10, BNE2, BNE3, BNE23, BNE24, BNE46 |

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| **Access into site** | The site has 3 accesses leading into it, each serve a separate part of the site and do not interlink. These accesses are for both LGV and cars. The surfaces of these accesses vary from tarmac to concrete and from good to poor. The wide tarmac road within the site leading to the Damhead Creek power station has street lighting and footways. Most other accesses have neither footways nor street lighting. One of the accesses leads only to the southerly power station and has speed humps.<br><br>Some of the internal roadways are also narrow. Parking was noticed on some, including both cars and lorry trailers. |
| **Buildings**<br><br><br><br><br><br><br><br><br><br>***General height*** | The buildings are of mixed ages and condition ranging from good decorative order to in need of maintenance. The Damhead Creek power station is new. There are also a number of tanks on the site connected with some activities. Almost all the buildings have pitched roofs and are a mixture of cladding or brick with cladding. Most buildings are detached units within compounds, though some compounds have a number of buildings. Compounds are mainly fenced with wire mesh an have a mix of surfaces ranging from unsurfaced to tarmac.<br><br>With the exception of the power station buildings, which are very large, most buildings are 2 storey. |
| **Layout** | The layout seems to have come about organically; the non-power station development appears to have developed alongside the original station. The layout gives the impression that it grew to meet the needs of the time more than to any overall plan. However, due to the good signage at the entrances there is fair legibility to the site particularly to those areas that are signed. The three separately signed entrances add slightly to the difficulty in understanding the layout. There are almost no internal direction signs. Permeability is limited to access roads and is considered to be poor.<br>The access to the southerly coal-fired power station appears to have been landscaped and is very pleasant. It was not possible to determine whether some of the landscaping comprised lagoon area to accommodate excess surface water or flooding.<br>The site has considerable areas of unused land mainly at its northern end. Within the built up parts space is limited. The three accesses also tend to create areas divorced from each other. |
| **Locality** | The River Medway is starting to widen significantly at this point and on the southern side of the river are the further extensive mudflats at Rainham, also designated Special Landscape Area, SSSI and Ramsar/SPA.<br><br>The open countryside to the north is high quality arable land and rises slightly form the site. This makes the site quite visible from it surrounding area.<br>Some 2 kms to the west of the site is the settlement of Hoo St Werburgh with a population of some 5,850 people. However the direct route is by country lane.<br><br>Also noticeable are the power lines and pylons from the site. As the area is quite low lying and flat, the sky is an important feature and the area is best described as 'big sky' country. |

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| **Car parking arrangements** | Car parking takes place in the compounds and on some internal roads. Much is orderly but some has the appearance of being disorganised.<br><br>There is a substantial, and underused, unsurfaced car park within the site. The combination of very limited permeability of the site and the park' location at the southern end of the non-power station estate would restrict the desirability of this park. |
| **Landmarks** | As the site is quite flat, large structures are visible from a considerable distance. The original coal fired power station, and in particular its chimney, is visible from a considerable distance including from many areas south side of the river. The Damhead Creek power station is also visible but not from as far as it is on a different scale to the original power station. Additionally, the power lines and pylons leading from the site are prominent. |
| **Adaptability**<br>*Buildings*<br><br><br><br><br>*Layout* | The power stations contain huge purpose built buildings, which may have limited capability of alterative use. Some of the older buildings in the rest of the site may have limited flexibility but many of the newer buildings are modular and have a measure of adaptability.<br><br>The development of the current buildings and layout would seem to be organic rather than to a long established masterplan. Parts of the site are quite intensively developed, which would restrict adaptability, but the large areas of un-used land give the site some considerable flexibility. |
| **Connections** | The site has essentially 1 connection (Ropers Lane/Stoke Road), which is 1 lane single country road, leading from the A228. This road is tarmac and generally in good condition but has neither footways nor street lighting. It also does not have a posted speed limit. Part of this route is designated a Rural Lane on the Local Plan and is subject to policy BNE47.<br>An alternative connection, the continuation of Stoke Road, leads into the settlement of Hoo St Werburgh and this continuation is not of the same quality. Hoo St Werburgh also has substantial traffic calming measures.<br>The motorway J1 is 14 kms.<br>1 bus route serves the site; there are only 4 trips, mornings only.<br>No cycleways serve the site.<br>A rail fright line abuts the site but there are no connections. The nearest railway station is Strood (11 kms).<br>The site has a tidal river frontage. A jetty extends out into non-tidal waters to serve the power station. |

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| **Restrictions** | The Local Plan notes that this site has poor immediate access once traffic has turned off the A228. Improved access is required. Improvements to Ropers Lane would potentially be in conflict with the rural lanes policy, BNE47, however, this road is the best connection to the recently dualled section of the A228 and has its own roundabout on the new road.<br><br>The foreshore to the south and east is salt marsh designated SSSI and Ramsar/SPA.<br><br>The entire site is designated as being within the tidal flood plain. This may be a consideration for risk assessments to certain potential operations due to the possibility of environmental damage in the event of a flood.<br><br>Any new developments will potentially be seen from great distances, this may impact on the nature of the adjoining areas and will need to be a consideration in connection with future development. |
| **Environment** | Some noise was noticed on site. No odours were apparent. |
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | A small café building was noticed but it did not seem to be in use.<br>The Deangate golf course is relatively near, being situated adjoining the A228. Other facilities also exist at Deangate. Non B1-B8 uses included the KML driver training facility. |
| **Planning consents (sq.m.)** | Not started: B1: -141, B2: 2565, B8: 1360<br>Under construction: B2: 285 |
| **Potential future uses** | This site is situated close to the main highway network than the Isle of Grain site and the un-used land is smaller but still substantial. This gives the site a potential for some land hungry uses or additional power generation (see also ‘comments’ below). However, as noted the connection needs improving.<br><br>The proximity to the proposed substantial new settlement at Chattenden, at its nearest point only some 4 kms west of the site, has the potential to increase the potential local labour supply and stimulate interest in the site. It may also have the potential to change the manner in which the site is viewed. |
| **Any conditions required for future development** | The site requires an improved access route from the A228. Intensive use of the current connection may lead to conflict and a higher crash rate. Additionally, it is quite a distance, 2½ kms, to the A228.<br><br>The current site layout is considered to be poor. The site would benefit from some master planning to create a conceptual layout for the whole site. This need not necessarily mean immediate redevelopment but would permit any area, as and when it becomes available, to be redeveloped to fit in with an overall layout and plan. At present newer development seems to be perpetuating the current layout.<br><br>Some of the unused land on the site is needed for landscaping to avoid impact on the surrounding area. It was noted that a tree screen had been planted along one side of the Damhead Creek power station. Landscaping, screening or other methods of reducing visual and noise impact would also benefit any connecting road improvements. |

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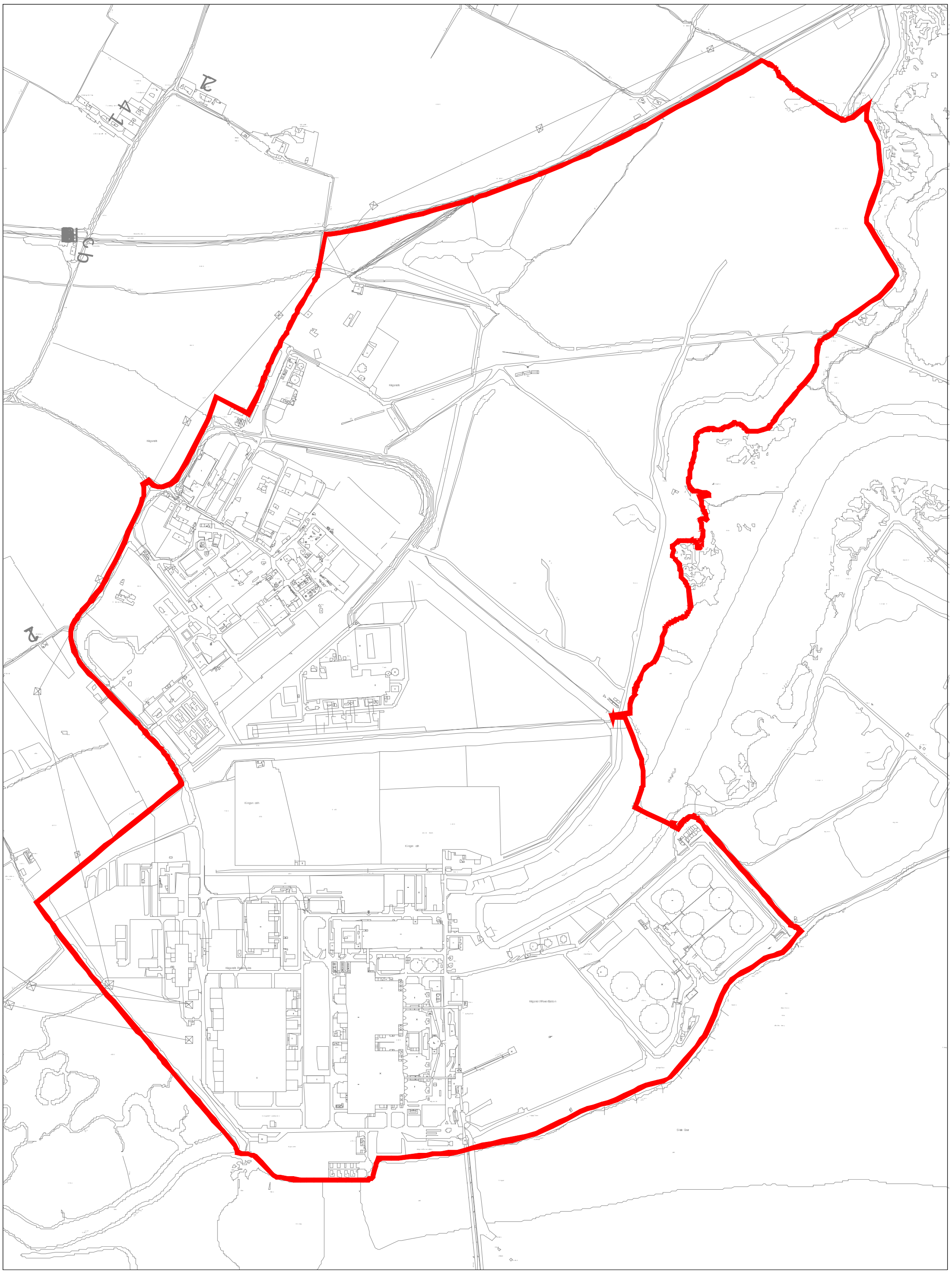
| **General comments** | This is the nearest large area of unused land to the main urban area.<br><br>Additionally, some areas of the existing industrial estate area would benefit from improvement or re-development.<br><br>There was only limited litter and no graffiti on site. Parts of the industrial area have considerable industrial clutter presenting an untidy appearance in places.<br><br>The following information has collated and adapted from the websites of the two companies and provides information on the potential of the two power stations:<br>Kingsnorth coal-fired power station, 1,970-megawatt, will close by 2015E. E.ON UK, its owner, has submitted a scoping statement to statutory consultees over its plans to build two new 800-megawatt supercritical units at this plant. If approved, Kingsnorth could be home to the UK's first highly efficient "supercritical" coal-fired units and see a reduction in carbon emissions compared to the existing power station<br>Damhead Creek, owned by Scottish Power, is an 800-megawatt combined cycle gas turbine (CCGT) power station that uses two gas turbines and a steam turbine generator. This station burns natural gas, which is supplied via a three-kilometre underground pipeline from Transco's national transmission system. |



## 20: Kingsnorth Industrial Estate, Hoo, Rochester



23/11/06

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| **Site name** | **Appendix 1. 21: Lordswood Industrial Estate, Chatham** |
| **Date of visit** | 7 July 2006 |
| **Brief description of site** | This site is part of a larger industrial site that straddles the borough boundary between Medway and Maidstone. The site consists of a number of small estates, each generally comprising a short spur road of Revenge Road and a terrace of units, and a large operator at the northern end of the site.<br><br>Most buildings consist of two storey, double height, and clad modular buildings with pitched roofs. The exception being 'The Oaks' estate which is brick, 2 storey with pitched roofs.<br><br>No overall CCTV was apparent but CCTV exists on many units. No other security measures were visible.<br>No signage exist to the site nor are there gateway entrance signs. However, some of the complexes have their own signs. For outgoing vehicles there are signs indicating the goods vehicles should leave the site in a southerly direction towards the peripheral road, Walderslade Woods. This road joins to the M2 at J3 and the A229. |
| **Approx date built** | Mainly 1970 – 1980 |
| **Location** | Situated at the southern edge of Medway and also the edge of the urban area, the site has woodland to the south with the M2 and open countryside beyond. To the west is a tree belt with some residential properties beyond along Boxley Road. To the north and east is Badger Road and on the other side is relatively new residential development and a playing field. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>8.76 Ha<br>0 Ha |
| **Average size of unit occupied** | 610 sq.m. (in Medway) |
| **Composition of current use** *(only those classes with floorspace shown)* | B1: 36%, B2: 30%, B8: 33%, D1: 1% |
| **Amount of floorspace** | 37202 sq.m. (in Medway) |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 5714 - age 16-74; 4197<br>211407 |
| **Local Plan designation of site** | Employment land<br>ED1 (B1/B2/B8 uses) |
| **Access into site** | 1 wide single carriageway local road (Revenge Road) passes through the centre of the site. A second wide single carriageway road local road (Badger Road) bounds the northern side of the site. Each complex takes its access off Revenge Road. The single large occupier also has access off Badger Road. Both roads are suitable for LGV or car use. Revenge Road and Badger Road are tarmac, have street lighting and are in fair condition. Only Revenge Road has footways. Separate lighting exists in the complexes. Accesses into the various complexes is either tarmac or concrete with the exception of 'The Oaks' which is block paved.<br>Some parking exists on Revenge Road. |

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| **Buildings**<br><br><br><br><br><br><br>***General height*** | Overall the condition of the buildings is fair to good but there are some buildings in the large single occupier area at the northern end, which are in need of maintenance and renovation. Whilst the appearance of most units and complexes are that of industrial units those of The Oaks have more the appearance of buildings intended for office use. All have pitched roofs.<br>General height is 2 storeys with all except The Oaks are double height. |
| **Layout** | A central through-route and signs at the entrance of individual complexes aid legibility and permeability. The central through-route also controls the layout to some extent, as the road is a fixed element and the depth of land to the southwest of it is limited. |
| **Locality** | The residential area to the north and east are part of the large Walderslade and Lordswood housing developments built since the 1970s. It is mainly privately owned housing with some social housing and of fair quality though some social problems exist in the area.<br>The open land to the south is part of the strategic gap between the Medway Towns and Maidstone.<br>The site is quite elevated; being on the top of the North Downs close to the highest point on the Downs. |
| **Car parking arrangements** | All units have their own parking and occupation levels are quite high. There is also vehicle parking along Revenge Road.<br>No identified visitor parking was visible. |
| **Landmarks** | No landmarks. |
| **Adaptability**<br>*Buildings*<br><br><br>*Layout* | Except for The Oaks most blocks if buildings are modular and would be reasonably flexible in their use and ability to merge or divide but they would are more suited to industrial or warehousing uses.<br>The site is fully developed. Any major change of layout would involve moving the central through-road, would probably entail closure of the whole site to achieve, or redevelopment of the major single occupier area. |
| **Connections** | Revenge Road connects at each end to 1 lane single carriageway local roads. The connecting road at the southern end is not in Medway. The preferred commercial vehicle access route is through the roads to the south and not the north end to avoid passing through a residential area.<br>The motorway J3 is 4 kms.<br>5 bus routes serve the site; maximum frequency is every 10 minutes.<br>The nearest railway station is Chatham (8 kms)<br>No cycleway serves the site.<br>The site has no river access. |
| **Restrictions** | The proximity of residential development to the north and east may require restrictions on use but the site is remote in that there is an intervening roadway which will reduce the impact of any potential intrusion. |
| **Environment** | Only a general noise from active industrial areas was noticeable at the time of survey. |
| ***Air quality*** | Air quality appeared clear. |
| **Facilities and non B1-B8 uses** | There is a small permanent kiosk serving teas and snacks. Within The Oaks there are a veterinary practice and also training facilities. |
| **Planning consents (sq.m.)** | Not started: Mixed B uses: 200<br>Under construction: B2: 1537 |

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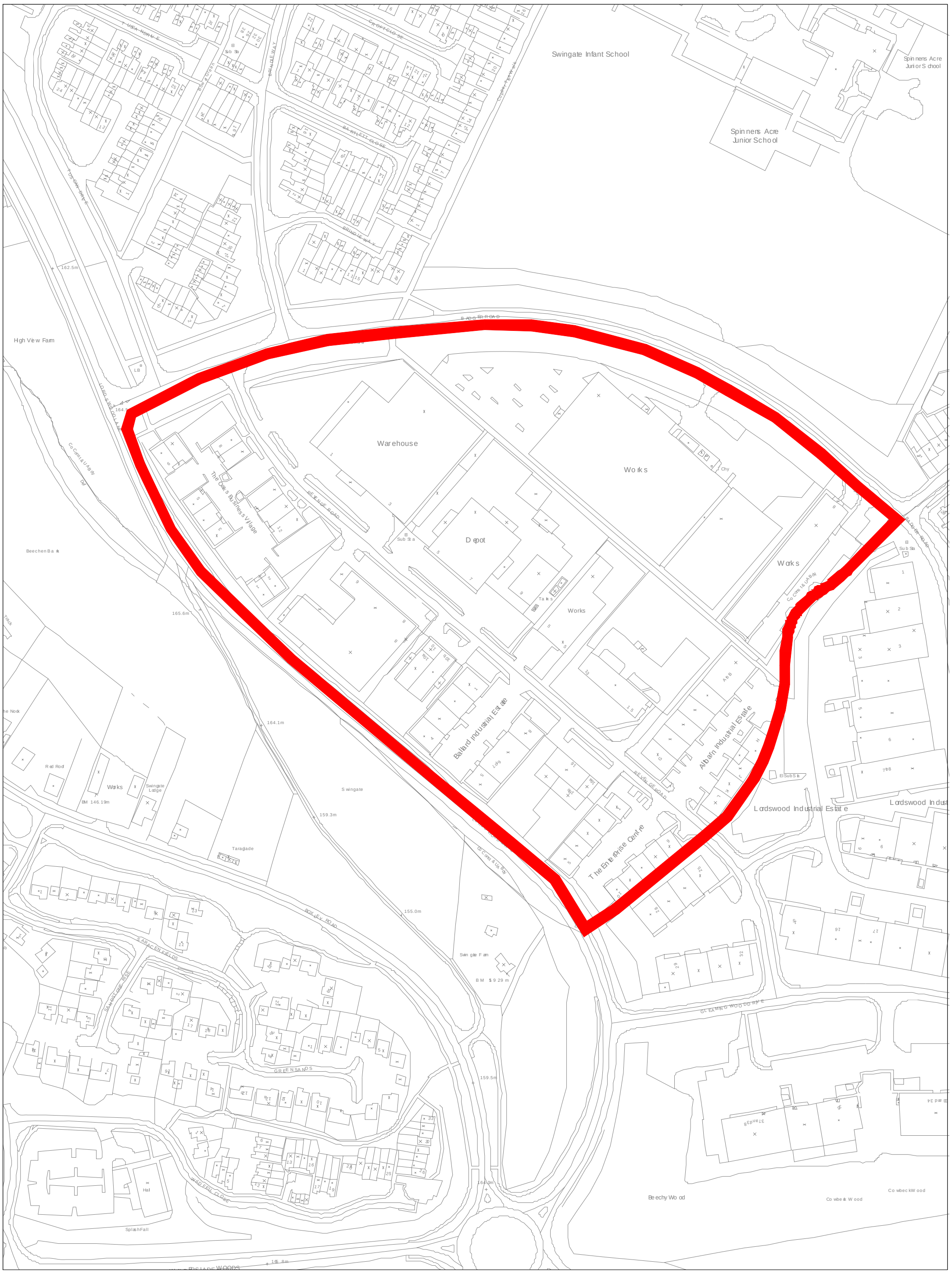
| **Potential future uses** | This is an apparently viable business estate. Redevelopment of one part to new modular units is almost complete.<br>There is limited scope for expansion due to the protected nature of the adjoining undeveloped land. However, without this employment site the Lordswood area would have no local employment opportunities. |
| **Any conditions required for future development** | The site is fortunate that its location is not prominent. However, some cosmetic works to Revenge Road and the general gateways to the site would be beneficial |
| **General comments** | Whilst the site is in fair condition some litter, graffiti, parking and the general appearance of the roadway tends towards making the site appear slightly unkempt. |




## 21: Lordswood Industrial Estate, Chatham

10 0 10 20 30 40 50 60 70 80 90 100
Metres



23/11/06

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| **Site name** | **Appendix 1. 22: Lower Twydall Lane, Gillingham** |
| **Date of visit** | 16 August 2006 |
| **Brief description of site** | Situated at the end of a residential cul-de-sac and adjoining the railway line, this site is a narrow, linear development comprising a terrace of single storey starter units facing onto a service road.<br>The site is fenced and gated but no CCTV was visible. The site is also signed off Beechings Way approximately 250 m south of the site and there is a sign at the entrance that also lists the occupiers. |
| **Approx date built** | Believed to be 1960s |
| **Location** | The site is located on the edge of the urban area. Immediately to the north is the London – Kent coast railway line and beyond are open fields. All other sides have residential land adjoining. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>0.48 Ha<br>0 Ha |
| **Average size of unit occupied** | 66 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 3%, B1: 35%, B2: 13%, B8: 49% |
| **Amount of floorspace** | 1780 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 8198 - age 16-74; 5645<br>249488 (236791) |
| **Local Plan designation of site** | Employment land<br>ED1 (B1 use) |
| **Access into site** | A single access leads off the end of a residential cul-de-sac into the site. The access is a narrow 1 lane single carriageway and is capable of taking an LGV. This access is tarmac and in need of some maintenance. The units are close to the access meaning that deliveries have to take place from the access; any substantial vehicle trying to deliver would cause a considerable obstruction.<br>A turning head is located at the far end of the road but it is essentially only suitable for cars and small vans.<br>The access is lighted and has speed ramps. |
| **Buildings**<br>***General height*** | The terrace of units is single storey brick built with a sloping roof. In the centre of the block is a small two storey section that, presumably, contains services. The units are more in the nature of lock-ups and are small.<br>Services in units appear limited as a toilet block is provided. Externally the buildings appear in need of maintenance. |
| **Layout** | The linear and narrow nature of the site makes it readily legible. However, this is also a constraining feature as there is no flexibility in the layout. The rear of the terrace of units backs directly onto the railway line. |
| **Locality** | The residential areas are fair quality and a mix of social and private housing. Within the residential area and some 500 m to the southeast of the site is a local shopping centre.<br>To the north, beyond the main London – Dover railway line, are open fields that are part of an ALLI. Within this area, and close by, is a new private housing development of high specification houses. |

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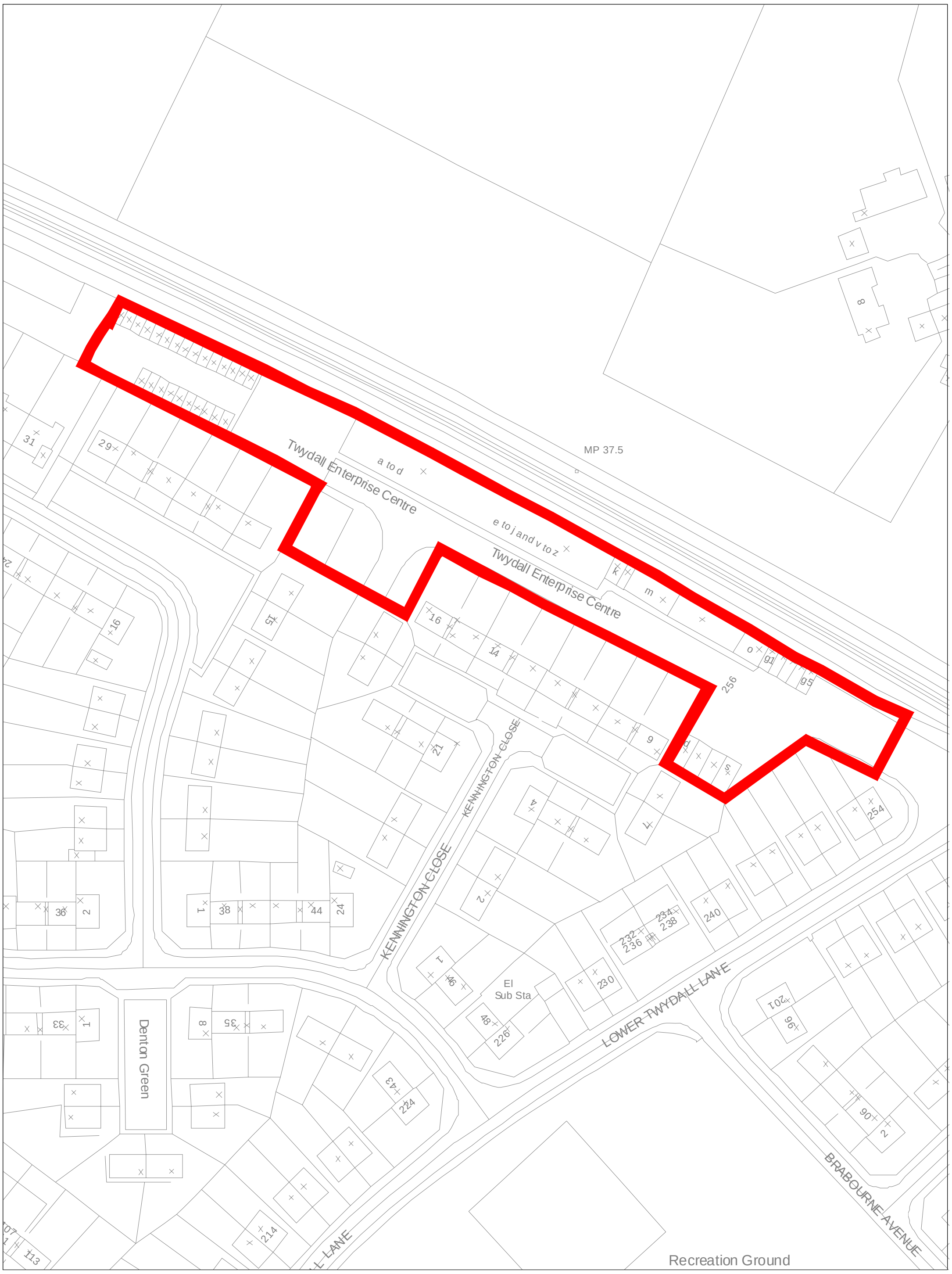
| **Car parking arrangements** | Parking bays exist at both ends of the site and utilisation was quite high at the time of survey. There is also a hard standing outside the entrance gate capable of taking a few cars – this too was at capacity. |
| **Landmarks** | There are no landmarks. |
| **Adaptability**<br>*Buildings*<br>*Layout* | The buildings and layout are essentially constrained by the shape of the site, which restricts flexibility. |
| **Connections** | The site is served by a residential cul-de-sac (1 lane single local road) that has street lighting and footways. The cul-de-sac leads off Beechings Way, which is a bus route, but which is some 250 m away.<br>The motorway J4 is 6 kms.<br>No bus routes serve the site.<br>There are no cycleways.<br>The site abuts the railway but has no connection. The nearest railway station is Gillingham (4 kms).<br>The site has no river frontage. |
| **Restrictions** | The site shape and layout are constrained.<br>The site is overlooked from the surrounding residential area and noise or odours from the site may affect the amenity of the adjoining area. |
| **Environment** | No noise or odours were noticeable from the site but there is some railway noise from passing trains. |
| ***Air quality*** | Air quality was clear |
| **Facilities and non B1-B8 uses** | There were no non B1-B8 facilities on site |
| **Planning consents (sq.m.)** | None |
| **Potential future uses** | This site meets a need for small starter units with lower rents to enable businesses to get started. However, the type of start-up business that could now be accommodated in the units is potentially reducing as more businesses need units with improved facilities to meet today's higher tech nature of most business activities – see below. Nevertheless the site appears to have reasonable occupation levels despite its potential shortcomings. |
| **Any conditions required for future development** | The units are beginning to appear somewhat dated. There is also a need for some maintenance and, possibly, some general improvements to layout and facilities. These improvements could also include changes to the facades of the units. However, such improvements will need to be costed to ensure the potentially conflicting aims of financial viability and retaining and attracting new tenants by not making rents unaffordable. |
| **General comments** | There was some litter within the site and evidence of some dumping at the end of the site (an abandoned 3 piece suite). Graffiti was also noticed. |




## 22: Lower Twydall Lane, Gillingham

10 0 10 20 30 40 50 60 70 80 90 100

Metres



Medway Council

24/11/06

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| **Site name** | **Appendix 1. 23: Medway City Estate, Rochester** |
| **Date of visit** | 31 August 2006 |
| **Brief description of site** | The largest industrial estate in the urban area, Medway City Estate was built mainly with the benefit of the government's enterprise zone initiatives. The original layout of a single spine road forming a very large cul-de-sac remains with smaller 'parks' or complexes leading off, sometimes from spurs off the spine. The site mainly comprises sheds of 2 storey with cladding and pitched roofs but in the south are some office campus developments of mainly 3 storey brick.<br><br>The site is almost triangular in shape and two sides have tidal river frontage. Some of the units have wharfs. A lot of the land is reclaimed.<br><br>There is no overall security or CCTV apparent but may compounds or whole parks are fenced and gated and some occupiers have CCTV.<br><br>The site is signed from the M2 but has little in the way of gateway signage. However, a 'map' of the road layout exists at the entrance but it cannot be easily read when driving by, mainly due to the amount of information it contains. Signage exists at the entrance to most parks. |
| **Approx date built** | Mainly 1980 to today. |
| **Location** | The site is located on the edge of the urban area. To the north the site is partly bounded by a tidal creek and the partly by open land. Beyond the creek is the A289, a sewage works and open land.<br>There is an area of rough land at the entrance to the site in the north, which is not part of the site; this land is identified on the Local Plan as a proposed park and ride site.<br>The site has a small interface with a residential area at its extreme western edge. The remainder of the site, a length of approximately 3 kms, is bounded by the River Medway and enjoys good views over a large length of river. This also means the site is visible from a substantial extent of the other riverbank, which includes the regeneration areas of Chatham Centre and Rochester Riverside, the Historic Dockyard and the Star Hill to Sun Pier Townscape Heritage Initiative area. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | 99.02 Ha<br>93.26 Ha<br>5.76 Ha |
| **Average size of unit occupied** | 375 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 2%, A2: 1%, A3: 1%, B1: 30%, B2: 21%, B8: 42%, D1: 2%, D2:1% |
| **Amount of floorspace** | 282291 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 15104 - age 16-74; 11306<br>249488 |
| **Local Plan designation of site** | Employment land<br>ED1 (B1/B2/B8 uses), T10, R10 |

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| **Access into site** | The site has two accesses. One at the western extremity that leads from the residential area. It has a substantial width restriction barrier on it permitting only vehicular access to cars and vans up to 'Transit' size. This access is 1 lane single carriageway tarmac and is in fair condition. This access has street lighting and footways on one side.<br>The other access, the main spine road, leads direct off a roundabout on the A289; initially the access is 2 lane dual but soon changes to 1 lane wide single. It is tarmac, in fair condition and has street lighting. Internal roads leading off the main spine are a mixture of concrete, tarmac and block paving and are overall in fair condition. Most do not have street lighting. Footways either do not exist on many of the roads or are only provided on one side.<br>Parking, including LGV parking, takes place on all roads including the main spine road and causes some impedance to traffic flows. |
| **Buildings**<br>***General height*** | Buildings mainly date from 1980 onwards. The overall condition of the fabric of the buildings appears good.<br>The majority of the buildings are sheds of 2 storey double height with pitched roofs. The office campus areas to the south have buildings between 2 and 4 storey with brick facings and pitched roofs. |
| **Layout** | The development occurred park by park and this is obvious. Each park has no relationship with its immediate neighbours. This leads to a confusing appearance to the site and some difficulty in navigation, even though individual parks have signage at their entrance.<br>Each park is separately fenced and with the limitations of the access road system, permeability is limited.<br>The single main entrance/exit to the site is restricting and at peak times there are substantial queues trying to leave the site, particularly in the evening. This does not help operators running to tight timetables. The fact that the main spine road is a cul-de-sac means that there is not true circulatory system within the site. This can lead to potential difficulties if any visitor misses the entrance to their park, they either have to leave the site and re-enter or, if inbound, try to find somewhere to turn round. There do not appear to be any LGV turning facilities at the end of the spine road or the ends of the spurs, there seems to be an assumption that all LGVs will turn directly into their destination to carry out any manoeuvres. |
| **Locality** | The residential area to the west is private housing and is in fair condition.<br>At low tide the creek is mainly mudflats with a small central permanent flow, some litter was visible in the mud. The open land to the north is sloping and includes the Hogmarsh Valley, which is subject to tidal flooding. It also contains a conservation area (Frindsbury and Manor Farm) and an SSSI.<br>The River Medway is tidal but the extent of mudflats along the edge of the site is quite limited. The views over the river take in most of the major riverside attractions in the urban area.<br>At the entrance to the site, but not within it, is a petrol filling station, an associated Somerfield store and a McDonalds. |
| **Car parking arrangements** | Car parking is provided within each park and seems to be well used. However, as noted above, parking of cars also takes place on the roads. Many parks do not seem to have provision for LGV parking. |

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| **Landmarks** | The McDonalds' "M" sign acts as a landmark for the site and the Silos connected with the rice importers (VeeTee) are clearly visible.<br>Seaplane House has the potential to be a landmark building, in design terms, but is hidden from most positions on the estate and outside. |
| **Adaptability**<br>*Buildings* | Many buildings are modular sheds, which lend themselves to changes of use within the industrial or sometimes leisure types of use. The fact that many buildings no longer have their original occupants shows some flexibility exists. |
| *Layout* | The layout is more problematical; the original development could be classed as having been piecemeal and the opportunity does not currently exist to improve internal circulation and legibility. For this site to continue to be successful this matter needs addressing.<br>LGV access into some units requires vehicles to swing out onto the opposite side of the road and sometimes the vehicles need to reverse in, causing temporary obstructions. |
| **Connections** | The main connection is the A289 (2 lane dual main road). Entry into the site from this road is by a single access off a roundabout. To the west of this roundabout, this road has the ability to take pedestrians and cycles even though no footways or crossings exist. To the east the road crosses the river by means of a tunnel and this has a pedestrian and cyclist ban in operation. The secondary connection is a residential road (1 lane single local) with a physical width restriction.<br>The motorway J1 is 8 kms.<br>4 buses serve the site with a maximum frequency of hourly.<br>No rail access, the nearest station is Strood (2 kms).<br>The site has a tidal river frontage with a number of active wharfs. |
| **Restrictions** | The site has only one LGV access, which is also the main access. The access leads off a roundabout on a main road and which does not have traffic light controls. This allows priority to traffic already on the main road and at peak times causes traffic trying to leave the site to build up. The site also does not posses a complete internal circulatory route.<br><br>Delays also occur during vehicle manoeuvres on the roads. These have the ability to affect the efficiency of operators on the site especially those relying on free vehicular movement.<br><br>Despite being opposite Chatham centre there is no direct link and the direct approach to the site from the east (Medway Tunnel) does not permit cyclists or pedestrians, this is a potentially significant deficiency in sustainability terms for such a large concentration of employment. |
| **Environment** | Some noise was noticeable from industrial manoeuvring and loading/unloading as well a traffic noise. Towards the south of the site noise was also noticeable from the works taking place on Rochester Riverside on the opposite side of the river. |
| ***Air quality*** | Air quality was clear |

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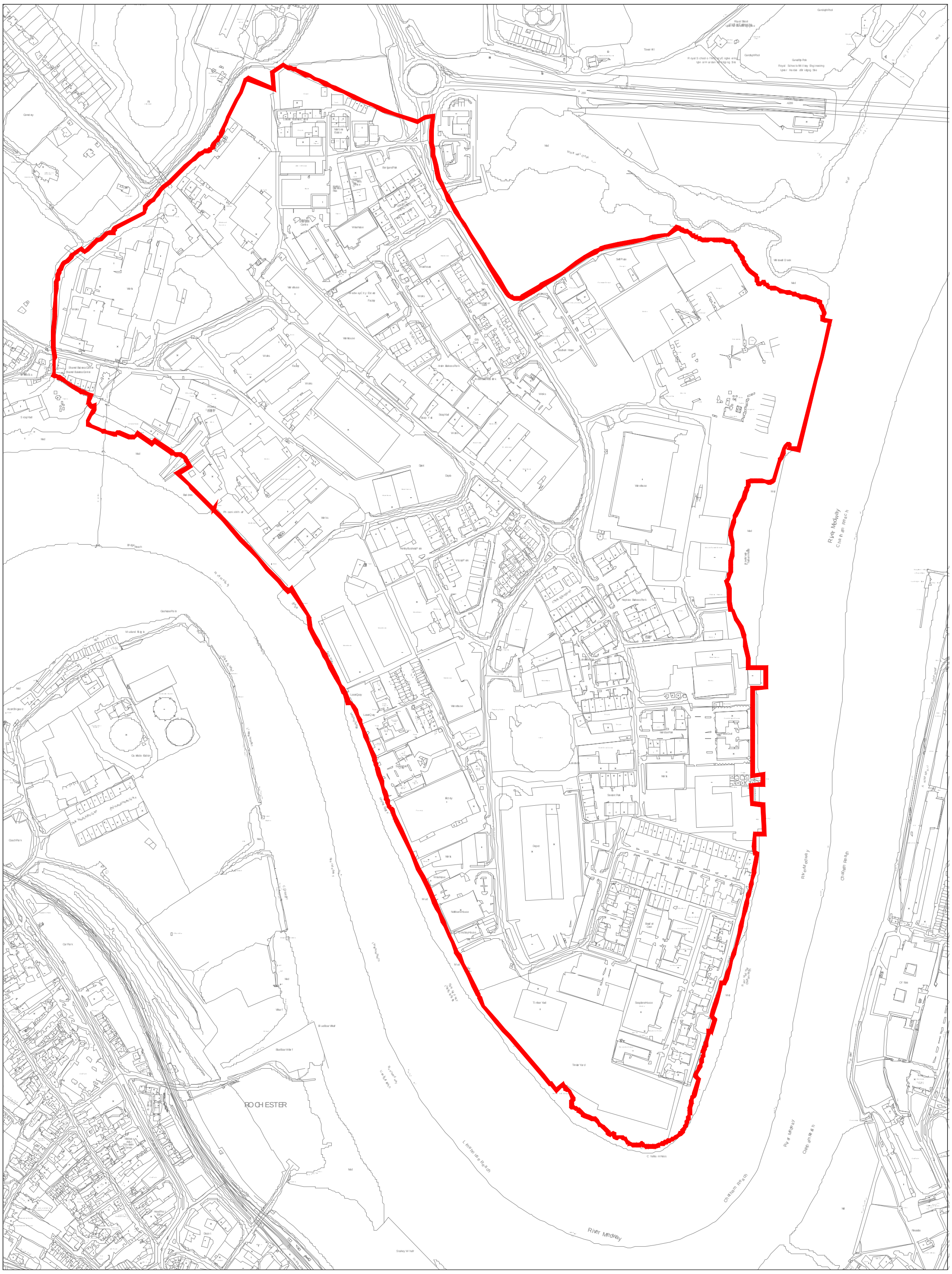
| **Facilities and non B1-B8 uses** | Two areas of mixed use exist on the site (Rochester Court and Centre Court), these contain retail uses including a café and sandwich bar.  A catering kiosk also exists and this has plastic tables set out beside it.<br>Other uses around the site include car sales, veterinary centre, children's activity centre, children's nursery, motorcycle training and 'Diggerland' theme park.  The office of the managing agent for the estate also exists on site.<br><br>As mentioned above, a petrol filling station, small Somerfield shop and McDonalds are located just outside the site. |
| **Planning consents (sq.m.)** | Not started: A1: 14430,  B1: 1871,  B2: 20545,  B8: -4173, Other: 185<br>Under construction: B1: -777,  B2: 2170,  B8: 3374 |
| **Potential future uses** | This is an important industrial area within Medway and seems to be successful.  This site is also very close to Chatham centre but has no direct link due to the river.  It is likely that both the site and the centre could benefit from improved sustainable linkages.<br>The eastern river frontage, particularly at is southern end and to the rear of Beaufort Court has very good views over the river but has made almost no attempt to exploit this attribute; a substantial part of this frontage only has car parking along the water's edge.  This asset needs maximising. |
| **Any conditions required for future development** | Opportunities should be grasped for the improvement of the appearance of the site and the circulatory routes.  However, it is acknowledged that ownership and other issues may make this a complex procedure. |
| **General comments** | Some litter was noticed but very little graffiti.  The undeveloped sites were not tended and had the appearance of overgrown waste ground.<br><br>The overall appearance of this site is that of an industrial estate.  Its appearance is also slightly untidy and not very welcoming, despite the fact that most buildings are in fair to good condition.  A lack of gateway signage does not help.<br><br>Much of the undeveloped ground faces onto Anthony's Way, the main access road, and this road also has the majority of road parking which adds to the visual clutter and detracts from the overall appearance of the site. |




## 23: Medway City Estate, Rochester



Scale:1:8000 24/11/06

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| **Site name** | **Appendix 1. 24a: Otterham Quay Lane, Rainham** |
| **Date of visit** | 16 August 2006 |
| **Brief description of site** | This site is part of an industrial area and consists of the 'back part' of the site. The remainder of the site is in the adjoining borough, Swale.<br>The site is set in open countryside and adjoining an inlet off the River Medway. Buildings are individual substantial sheds and most are relatively new 2 and 3 storey structures. There is limited industrial activity on the whole area and the site in Medway has just two occupants, one of whom occupies most of the site. The land occupied by the largest occupant is fully secure with fencing, gates, CCTV and security guards.<br><br>Access to the site is by a road leading off a country lane.<br><br>No signage exists at the entrance to the site. The main occupier does not have any signs at their entrance but the smaller occupant has signs on its building. |
| **Approx date built** | Most of the buildings would appear to be relatively recent, i.e. after 1980. |
| **Location** | This is a freestanding rural site on the edge of the borough. To the northeast and northwest is Otterham Creek, a tidal inlet off the River Medway. The southwest boundary of the site is the borough boundary and beyond is the remainder of the estate. To the southwest are orchards. To the west is Riverside Country Park. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>4.46 Ha<br>0 Ha |
| **Average size of unit occupied** | 5250 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | B2: 12%, B8: 88% |
| **Amount of floorspace** | 10500 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 4619 - age 16-74; 3510<br>249488 (236791) |
| **Local Plan designation of site** | White land within the tidal flood plain<br>ED3, CF13, BNE45 |
| **Access into site** | Access into the site is off a country lane. The access has a large radius entrance before narrowing to I lane single carriageway. The access is suitable for LGV or car use but has no footway.<br>The access is concrete and is in generally fair condition but some patches are in need of maintenance.<br>Some car parking exists at the end of the road but the road has widened considerably at this point to accommodate the parking.<br>The access passes by the front of a terrace of cottages, which are situated quite close to the roadway. After these cottages orchards adjoin the southern side of the road. |
| **Buildings** | Overall condition of the buildings is good. |

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| ***General height*** | Buildings are mainly a mix of 3 storey full height. Most are clad upper levels and brick at ground floor. Most roofs are pitched. The 3 storey buildings use a metal sheet cladding and are uniform in appearance. The other buildings are a mix wit some having corrugated upper sections. |
| **Layout** | The layout appears legible but with no public admission to most of the site this aspect is almost irrelevant as is permeability for the public.<br>The layout involves a quite high site utilisation but full manoeuvring space appears to exist between buildings. |
| **Locality** | The adjoining Otterham Creek is designated as SSSI and is part of the wider mudflats of international importance for wildlife. On the opposite side of the creek is a boatyard with associated industries and a caravan park with residential chalets. The buildings on the site are clearly visible across the creek from the caravan park.<br>The remainder of the industrial estate in Swale Borough consists of open storage (lorries and parts) on one side and the cottages and a 2 storey brick office block (currently vacant) near the entrance. Beyond the estate and on the other side of the country lane is agricultural land. Land to the southwest comprises working orchards in the immediate vicinity; beyond is a hamlet with further open land, some of which is used as paddocks and forms part of the eastern end of the Riverside Country Park. All of the open land to the south and west is also designated as ALLI. |
| **Car parking arrangements** | Car parking takes place at the widened end of the access road. The parking spaces tend to be mainly on gravel or broken concrete. |
| **Landmarks** | The 3 storey buildings are visible over quite a distance from the surrounding area, mainly due to the flat nature of the land. |
| **Adaptability**<br>*Buildings*<br><br>*Layout* | The buildings appear mainly to be shell structure so could adapt to many uses requiring large structures. However, most have very little fenestration.<br>The layout has quite high utilisation and is probably only viable for a single occupant as there is limited loading/parking around individual buildings. |
| **Connections** | The estate is served by a country lane (1 lane single local road), which has a footway and footway lighting only. It has no speed limit.<br>The motorway J4 is 11 km.<br>1 bus route serves the site; maximum frequency is hourly.<br>No cycleway provision exists.<br>No rail access, the nearest station is Rainham (3 kms)<br>The site has a flank river frontage, the frontage is tidal and no access appears to be taken from the river. |
| **Restrictions** | The site is situated in the tidal flood plain. It is also adjoining an SSSI, protected undeveloped coast to the north and an ALLI to the south. |
| **Environment** | No noise or odours were noticed at the time of survey. |
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | No facilities exist except those provided within the premises. |
| **Planning consents (sq.m.)** | None |
| **Potential future uses** | The site is essentially dependent upon the main occupier for viability. However, the options for alternative use are very limited given its rural location and the sensitive nature of the adjoining land. |

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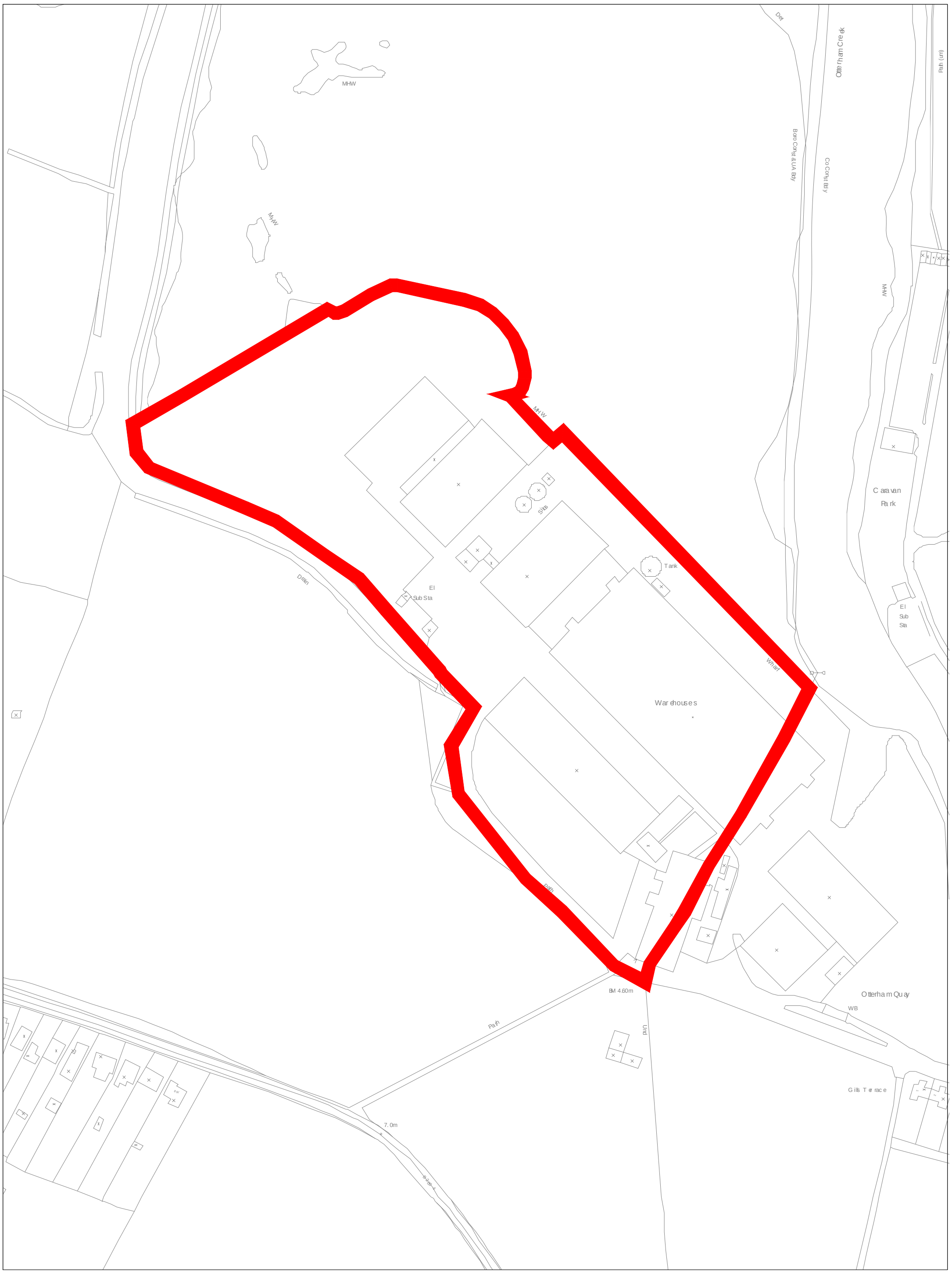
| **Any conditions required for future development** | None |
| **General comments** | No litter or graffiti was noticed at the time of survey. Car parking does not appear to be organised but is not intrusive and the width of the access road at this point is such that there is still plenty of space for turning. |




## 24a: Otterham Quay Lane, Rainham

10 0 10 20 30 40 50 60 70 80 90 100
Metres



Medway Council

24/11/06

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| **Site name** | **Appendix 1. 24b: Otterham Quay Lane, Canterbury Lane, Rainham** |
| **Date of visit** | 16 August 2006 |
| **Brief description of site** | This is a newly constructed 'L' shaped site situated adjoining the edge of the urban area. There are two separate parts to the site; a single brick built 2 storey building within its own compound occupies the Otterham Quay Lane frontage of the site and the Cloverlay Estate, served from a single access road, leads into the site off Canterbury Lane - a country lane. The buildings in the Cloverlay Estate are all to the same design and colouring and comprise two terraces of 2 storey double height with clad upper facings and pitched roofs. The buildings are set back against the boundaries of this area and all face inward onto the access road giving this area an open feel at the time of survey. The loading bays/hardstanding areas, which are between the access road and the buildings, were little used. Construction has not started on the remainder of this area.<br>The access has street lighting.<br>Both areas are fenced and gated but no CCTV was noticed. Signage exists at the entrance gate of the Cloverlay Estate, with tenant names, and also at the junction of Canterbury Lane with Otterham Quay Lane some 150 m west of the entrance. The other compound relies solely upon a visible fascia on the building. |
| **Approx date built** | 1990s and new build |
| **Location** | The site is situated adjoining, but not inside, the urban boundary and its northern boundary abuts the borough boundary. To the west is a recent private housing development. To the south and east is open land, designated as ALLI on the Local Plan, some of which is reclaimed from previous brick working. To the north is Canterbury Lane and beyond is a row of cottages (Kent Terrace) with their own service road. To the rear of the cottages is open land. The site is set around two sides of a Brethren's Meeting Hall, which is situated at the junction of Otterham Quay Lane and Canterbury Lane. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | 1.68 Ha<br>1.28 Ha<br>0.4 Ha (on the Cloverlay Estate and with planning consent for further units) |
| **Average size of unit occupied** | -- sq.m. awaited |
| **Composition of current use** *(only those classes with floorspace shown)* | B1: --%, B2: --%, B8: --% |
| **Amount of floorspace** | -- sq.m awaited |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 4338 - age 16-74; 3150<br>249488 (236791) |
| **Local Plan designation of site** | Employment land<br>ED1 (B1/B2 use), ED5 |

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| **Access into site** | Traffic approaching the Cloverlay Estate is expected to arrive by turning off Otterham Quay Lane into Canterbury Lane and then right into the site. Egress is the reverse. To restrict movements in any other direction, the entrance off Canterbury Lane is curved and creates an angled access. This access is block paved and new. Whilst Canterbury Lane is quite narrow, the access is capable of taking cars and LGVs.<br>The smaller, single unit, compound takes direct access from Otterham Quay Lane. |
| **Buildings**<br><br><br><br><br>***General height*** | Overall condition of almost all buildings is new. The remaining building appears in good condition. The unit facing Otterham Quay Lane is constructed of brick and is in fair to good condition. The Cloverlay Estate is brick lower and clad upper walling and has just been constructed.<br>All buildings are 2 storey with pitched roofs. |
| **Layout** | The central access road to the Cloverlay Estate means that most units can currently be seen from the entrance, thus legibility if high. Within this estate, with parking/hardstanding at the front of the buildings, permeability is good. |
| **Locality** | The residential area to the west is relatively new build private family housing in fair to good condition. Beyond Canterbury Lane to the north is a small service road leading off the lane to Kent Terrace, a secluded terrace of small, older cottages. Land immediately east appears open but is fenced and is a small landfill site from a former brickworks. South is orchards leading down to the railway line some 500 m south. Land to the east and south is part of an ALLI, which also acts as a buffer zone to counteract outward pressure from urban sprawl. |
| **Car parking arrangements** | Most parking is at the front of buildings. As the site is not yet fully developed, parking capacity cannot be commented on. However, some parking was noticed on the access road. |
| **Landmarks** | There are no landmarks within the site. |
| **Adaptability**<br>*Buildings*<br>*Layout* | The Cloverlay Estate buildings are modular and would be adaptable. Additionally they appear to be able to be suitable for any B1 to B8 use without major external works. The unit fronting Otterham Quay Lane is brick built and may need more work to adapt internally.<br>The central service area and access in the Cloverlay Estate allows some flexibility but this may be at the expense of parking capacity or access restrictions. |
| **Connections** | The site is served by Canterbury Lane (1 lane single country lane). This road has no footways and no street lighting. The remainder of the site is served from Otterham Quay Lane (1 lane single local road) that has footways and street lighting.<br>The motorway J4 is 10 kms.<br>No bus routes pass along Canterbury Lane but Otterham Quay Lane has 1 bus route; maximum frequency is hourly.<br>There are no cycleways on Canterbury Lane.<br>No rail access, the nearest railway station is Rainham (2 kms).<br>The site has no river frontage. |
| **Restrictions** | The close proximity of the residential area to the west may influence potential future uses of the units or hours of operation. Some conflict of interests may also arise with the Brethren's Hall if there is a need for relative quiet during services or meetings.<br>The width of Canterbury Lane may also become a controlling factor on use. |
| **Environment** | No noise or odours were noticed at the time of survey. |

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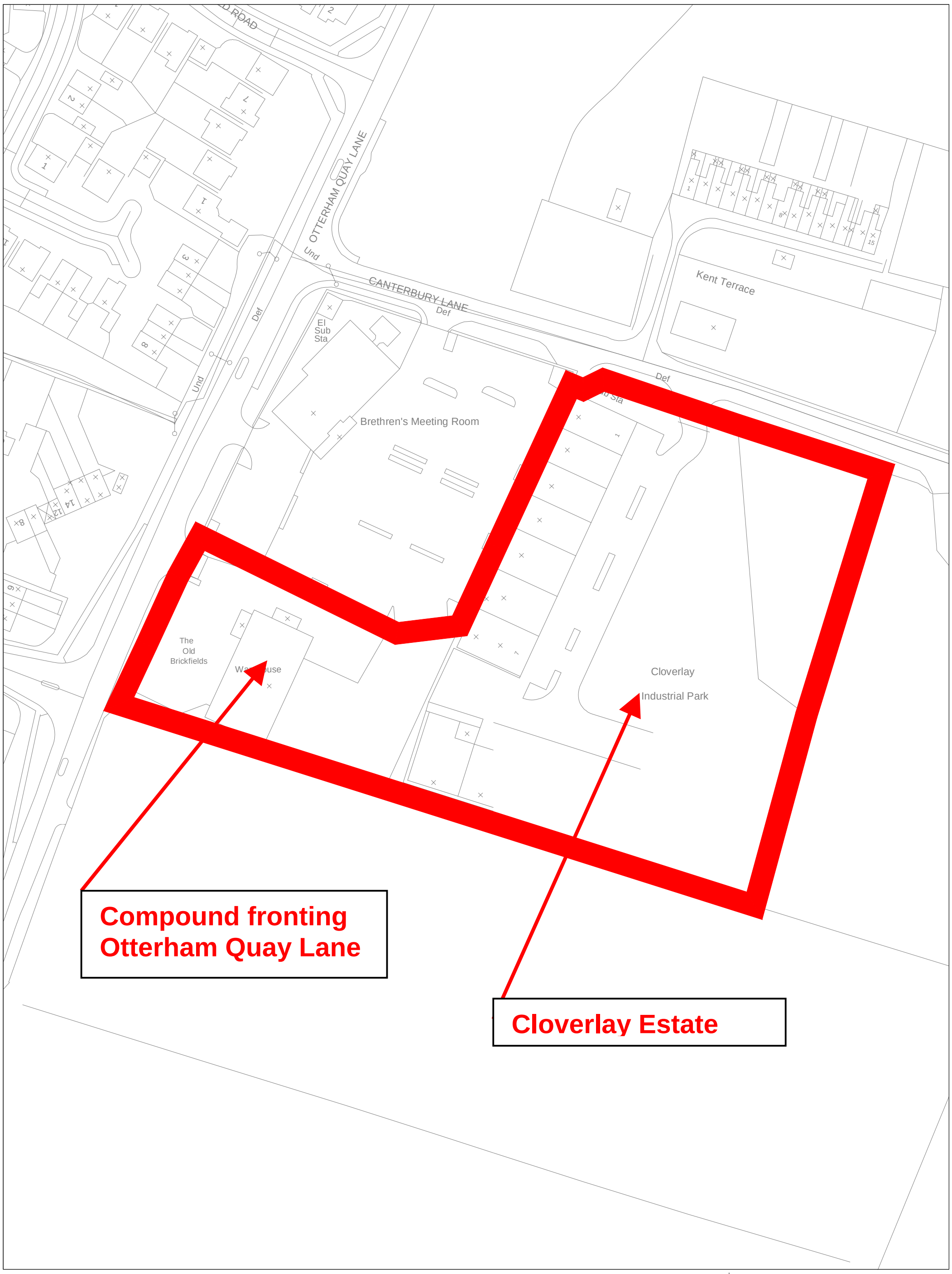
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | No facilities exist except those provided within the units. |
| **Planning consents (sq.m.)** | Under construction: B1: 500, B2: 200, B8: 200 (these figures include the amount already constructed and occupied) |
| **Potential future uses** | The site is not yet fully developed but take up of the available units seems good. The buildings appear, on the whole, to be relatively flexible for a variety of commercial purposes. |
| **Any conditions required for future development** | The amenity of the nearby residential area and adjoining Brethren's Hall may need consideration with respect to uses or hours of operation.<br><br>Canterbury Lane is quite narrow and the potential for traffic conflict exists on this road. |
| **General comments** | No noise or litter was noticeable at the time of survey. The parking of cars at the front of the units can lead to a cluttered appearance if it is not orderly. This is something that may stabilise in time but at the time of survey some visual clutter from parking was noticed. |




## 24b: Otterham Quay Lane, Rainham

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Metres



Medway Council

24/08/06

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| **Site name** | **Appendix 1. 25: Pier Road, Gillingham** |
| **Date of visit** | 15 August 2006 |
| **Brief description of site** | Situated adjoining the main A289 this site appears on the Local Plan to be part of a larger employment area that includes Chatham Port. However, the port is walled and bonded and so is essentially discrete. The Pier Road site was formerly one large site with a mix of industrial and other commercial uses but with the sale and demolition of the large Akzo Nobel chemical works for housing and mixed use, the site has now lost some of its apparent cohesion. The site now has essentially 5 different sections of differing character:<br>1. Small industrial estate of terraces of small single storey units of brick or concrete with sloping roofs and in fair condition, forming a compact unit with its own internal road and lighting. The site is lighted, fenced and gated but CCTV was not visible. Signage to the estate exists at its entrance and at the junction with the A289.<br>2. Waste transfer station with some open sided two storey double height sheds for basic waste transfer and extensive open concrete areas where other waste was treated. The site appeared to be untidy and in need of general maintenance. The site is walled and gated. Adjoining the station is a row of cottages believed to be formerly part of the waste transfer station when it was a municipal site.<br>3. Pier with separate public slipway and private mooring for cabin cruisers and boats. There is one waterside building with corrugated cladding. The water area in this section is tidal. CCTV and floodlighting exist on the pier.<br>4. The extensive area forming the former Akzo Nobel chemical works. The structures on this site have all been razed and currently their building materials are being crushed on site. The site has consent for residential and mixed commercial and leisure use. At the time of survey the site was sealed off from the surrounding premises either by hoardings, secure fencing or existing walls.<br>5. Commercial area formed by a car main dealer showroom and repair areas and the road frontage section of a marina comprising a chandlery and some boat repair buildings. The main dealer premises and chandlery have the appearance of single storey units. To the rear of the chandlery are some boat repair sheds, which vary in height but rise to three storeys and are fully open internally to accommodate the height of a boat's superstructure. The main dealer premise are fully gated and fenced. The chandlery is open to the road in front but the boat repair sheds are within the marina complex, which is gated and has a gatekeeper.<br>Section 1,2 and 3 all take access off Pier Approach Road, a private road. Sections 4 and 5 take access direct off Pier Road (A289). The site also has a frontage onto the River Medway. |
| **Approx date built** | The industrial estate is pre-1974. Only the commercial area |

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| | would appear to have newer buildings. |
| **Location** | The site is located on the edge of the urban area; the river defines the urban boundary at this location. To the west is Chatham Port. Mainly to the north is the River Medway. To the northeast is the remainder of the marina complex. To the east is a gasholder site and depot. To the south is the A289 and beyond is a residential area. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | The total site area is 12.67 Ha. Given the amount of redevelopment currently underway it is neither feasible nor relevant to identify unused land. Sections 1,2 and 5 are fully utilised. |
| **Average size of unit occupied** | 187 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 1%, B1: 5%, B2: 6%, B8: 6%, Other: 82% |
| **Amount of floorspace** | 6156 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 10230 - age 16-74; 7198<br>249488 (236791) |
| **Local Plan designation of site** | Employment land<br>ED1 (B1/B2/B8 uses), ED9, T7 |
| **Access into site** | Pier Approach Road (one lane single private road) has a tarmac surface in fair condition. Its traffic light controlled junction with the A289 permits left in but left and right out.<br>The road within the industrial estate (1) is block paved and in generally good condition except for some subsidence around a foul sewer manhole. The internal road is capable of taking LGV vehicles and there is a sufficient turning area but unloading areas to the front of the individual units are limited or non-existent.<br>Access into the Waste transfer station is tarmac and in need of maintenance. This takes dustcarts and is LGV capable.<br>Pier Approach Road extends along the pier area (3) and is in need of some maintenance in this section.<br>The former Akzo Nobel premises (4) has some gated, but now locked, accesses off Pier Approach Road that were once used for deliveries but has a main access direct off the A289, this direct access is left in and left out only.<br>The commercial area (5) has 3 accesses direct of the A289; 1 to the car dealer, one to the chandlery and the other to the marina itself. All are fair to good condition and all are left in and left out. The main dealer has concrete roads while the marina uses block paving for the chandlery access and concrete into the marina itself. Unloading of deliveries of cars to the main dealer takes place from the carriageway of the A289 as the internal roads within the main dealer are not capable of taking LGV vehicles. |

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| **Buildings**<br>*General height* | Area 1 – Single storey brick or concrete strip buildings with sloping roofs creating small units not much larger than domestic double garages. Services in units appear limited as a toilet block is provided. Externally the buildings appear in fair condition.<br>Area 2 – limited number of open sided sheds of two storey double height with cladding to upper level and pitched roof. Buildings appear in need of maintenance.<br>Area 3 – has only one two storey double height shed with corrugated cladding and similar cladding to the pitched roof. Building appears in need of maintenance.<br>Area 5 – buildings facing onto the A289 and all of the main dealer premises appear to be single storey buildings, however, the main dealer buildings all have open car parking on the roof. Buildings to the rear of the chandlery rise to 3 storey clad sheds, fully open internally. Attached to the rear or these taller sheds are single storey units which form the machine shop areas to the sheds. |
| **Layout** | Each area is discrete and signage only exists at entrances. This combined with the loss of the Akzo Nobel development makes the legibility of this site difficult. There is no permeability between areas and some areas are permanently gated or otherwise not open to the public.<br>The layout of areas 1,2,3 and 5 are relatively fixed with little opportunity for flexibility. |
| **Locality** | The adjoining area to the east of the site is a gas depot with gasholder and LNG torpedoes. Beyond that is the Strand leisure area.<br>To the south the residential area the other side of the A289 dual carriageway is fair but has some issues with deprivation.<br>To the west is Chatham Port.<br>To the north and northeast is the River Medway and the remainder of the marina. There are good views across the river to the mudflats (SSSI) on the opposite shore. At low tide the river is 500 m wide at this point. The marina is members only and has two standards of mooring available plus boat repair facilities and other supporting services including an extensive leisure centre, with pool. The marina has been awarded Five Gold Anchors by the Yacht Harbour Association, which is the highest ranking. |
| **Car parking arrangements** | Car parking takes place within each area's boundaries. In area 1 parking is in front of the units but is of limited capacity and it seemed to be near maximum capacity. In the waste transfer station car parking appeared to be random over whatever space was not in use for other purposes. Area 3 had a defined public parking area at the end of the pier.<br>The main car dealer had customer parking within its site, space appeared to be utilised to near capacity but the additional roof parking was not accessible to visitors; the spaces appeared to be available for the dealer's use for storage etc. The marina had parking for its members around the moorings.<br>Public parking was also possible along Pier Approach Road in designated bays – these bays had a height barrier. |
| **Landmarks** | None from the landside within the site. However, the adjoining gasholder acts as a locational marker but given the limitations of the road past the site this is of limited relevance. The adjoining marina leisure building is a landmark building when viewed from the river side of the site. |

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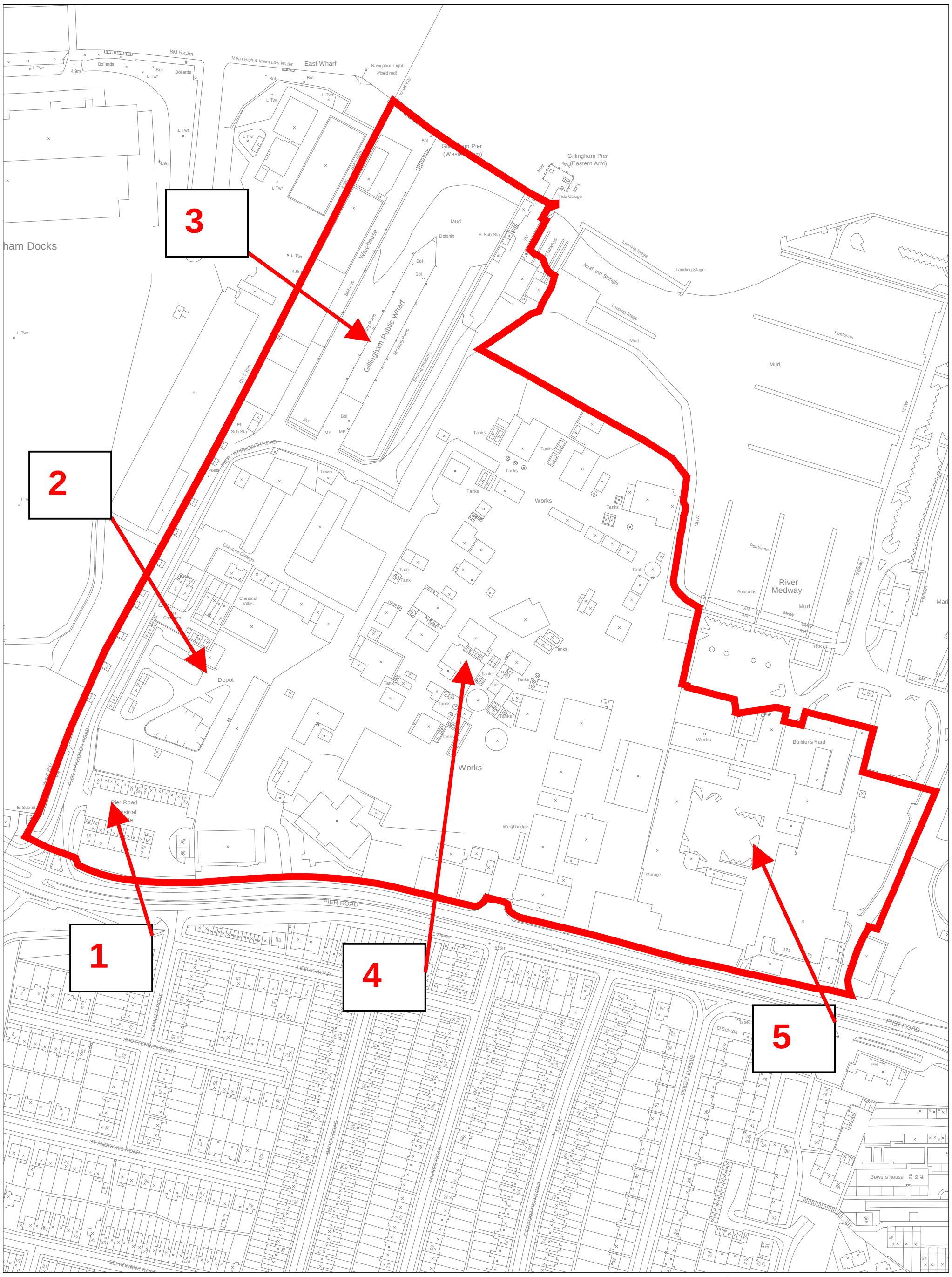
| **Adaptability**<br><br>*Buildings*<br><br><br>*Layout* | The construction of the A289 dual carriageway past the site restricted movement into and out of the site.<br>There is little flexibility in the buildings as many are almost purpose built, though the workshops in the marina may have some flexibility.<br>The layout does not lend itself to any adaptability in its current form. |
| **Connections** | The site connects to the A289 (2 lane dual main road) which has street lighting, footways and a 40 mph speed limit.<br>The motorway J4 is 11 km.<br>3 bus routes serve the site; maximum frequency is every 15 minutes.<br>There are cycleways on the A289 and two traffic light controlled pedestrian crossings directly serving the site with a further one nearby to the east.<br>No rail access, the nearest railway station is Gillingham (2 kms).<br>The site has a tidal river frontage with mooring, public slipway and pier. |
| **Restrictions** | The gas depot to the east has a safeguarding area due to the LNG torpedoes.<br>The gates to the industrial estate (area 1) are locked each evening at 18:30 hrs, which may restrict potential activity within the estate. |
| **Environment** | Noise and odour was noticed from the waste transfer station. There is currently some noise from the crushing operation on the Akzo Nobel site.<br>There may also be some noise from the industrial estate but the potentially noisiest use (a wrought iron works) was closed on the day of survey.<br>Traffic noise from the A289 was apparent along the entire road frontage of the site. |
| ***Air quality*** | Air quality was clear |
| **Facilities and non B1-B8 uses** | There is a catering kiosk in Pier Approach Road.<br>The following activities are also found on this site:<br>Ford cars main dealership, chandlery, waste transfer station, public slipway and moorings for private boats. |
| **Planning consents (sq.m.)** | None |
| **Potential future uses** | The planning consent for the Akzo Nobel area has already defined the future use for a major part of the whole site. This development, when completed may result in other changes or improvements as a result of perceptions of the area having changed.<br>Residential amenity connected with the redevelopment of the Akzo Nobel land may, in time, restrict the uses of the other areas. |
| **Any conditions required for future development** | The pier and slipway are visually poor but would be acceptable in a purely commercial environment. The redevelopment of Akzo Nobel may significantly alter perceptions, as it will introduce greater public awareness of the area. |
| **General comments** | There was both litter and graffiti in the area of the pier and some litter along Pier Approach Road. Areas 1 and 5 were clear and tidy. |




## 25: Pier Road Industrial Estate, Gillingham

10 0 10 20 30 40 50 60 70 80 90 100
Metres



Medway COUNCIL

15/08/06

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| **Site name** | **Appendix 1. 26: Railway Street Industrial Estate, Gillingham** |
| **Date of visit** | 27 July 2006 |
| **Brief description of site** | The site as shown on the Local Plan and also as shown on the attached plan includes a public car park. The industrial estate is triangular in shape accessed off a short, spur road that also acts as the car park access. The site has two terraces of 2 storey double height buildings with pitched roofs facing in towards a central shared hardstanding. All the buildings appear the same and built to a single design. The central hardstanding acts as a parking area, delivery bay and central access route.<br>The site is situated 300 metres from the edge of the retail core of Gillingham town centre and has a railway station opposite. The site is fenced and gated. There is a sign at the entrance with the list of tenants shown.<br>Lighting units on the front of the buildings light the site and these comprise a mix of mainly low wattage lamps and some floodlights. No CCTV was noticed. |
| **Approx date built** | Current buildings: 1970 - 1980 |
| **Location** | The site is within the main urban area and in an edge of town centre position.<br>To the west is a residential area. To the east is the single-track railway leading to Chatham Docks with two schools beyond. Beyond the schools is a residential area. To the south is a disused petrol filling station now used as a car wash and car sales and Railway Street. On the opposite side of Railway Street is the Gillingham Station complex. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>1.46 Ha<br>0 Ha |
| **Average size of unit occupied** | 231 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 5%, B1: 45%, B2: 23%, B8: 27% |
| **Amount of floorspace** | 3696 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 14363 - age 16-74; 9961<br>249488 (236791) |
| **Local Plan designation of site** | Employment land<br>ED1 (B1/B2/B8 uses), however the reasoned justification refers only to B1 |
| **Access into site** | A shared single carriageway spur road off Station Road serves both the industrial estate and the adjoining car park. The access leading off the spur has LGV capacity but entering through the site gateway may require a vehicle to swing across the other side of the road.<br>The access and the hardstanding are concrete and in fair condition. |
| **Buildings**<br><br><br><br><br>***General height*** | Buildings are in good condition. All units are basically the same and appear to have all been built at the same time by a single developer and to a modular design. Internally the tenants have tailored the units for their own business. Some have small mezzanine floors. All have pitched roofs.<br>All are two storey units, with brick base and the upper level clad, forming two terraces of units. |

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| **Layout** | Whilst the site appears quite open and permeable there is some difficulty in legibility as unit numbers and some names are not easily seen until a long way into the site. |
| **Locality** | The site itself appears in good condition and to be thriving. The tenants seem to have actively ensured the whole site is, for a working industrial estate, tidy. However, there is an air of decline about the immediate surroundings; the station premises, which have a flank frontage onto Railway Street, are in need of maintenance, the former filling station building is boarded up and the car wash and car sales activities work around it on the original forecourt and grassed areas in a seeming cluttered manner. The railway premises also have within their yard area, and nearly opposite the site, a passenger car park, a car sales lot and a small unit of poor appearance shared by a car bodywork repairs and a part worn tyre sales unit.<br>The surrounding residential areas are mixed with some areas being identified as potentially deprived.<br>Gillingham town centre has experienced some decline in recent years but the council has recently undertaken work in connection with a framework for its regeneration. |
| **Car parking arrangements** | There are traces of marking for the car-parking layout on the hardstanding but it is vestigial. However, car parking is arranged in neat ranks in front of each unit with sufficient space remaining for access for deliveries and the central through route. Parking in some areas seems close to capacity. |
| **Landmarks** | None. |
| **Adaptability**<br>*Buildings*<br><br><br><br>*Layout* | There is no space for any unit to extend at front or back. There may be a small capability at the end of the terrace of units but this would not be a large amount space and may not be financially viable. It would also cause the loss of parking space for cars and business vehicles. Units could be merged to create greater space for a single occupier but the general layout is relatively inflexible.<br>The hardstanding forms a flexible space but provision for an access route to the far units needs to be retained through it. |
| **Connections** | The site is served by Railway Street (1 lane single local road), which has street lighting and footways.<br>The motorway J4 is 12 kms.<br>2 bus routes serve the site; maximum frequency is 2-3 hourly at school times.<br>There are no cycleways along Railway Street.<br>No direct rail access, Gillingham Station entrance is 300 metres.<br>A taxi rank is very nearby.<br>The site has no river frontage. |
| **Restrictions** | Noise or fumes could cause problems given the proximity of the surrounding residential area and schools. However, this needs to be balanced against the noise created from schools at certain times of the day and the ambient noise levels from the continuous action of pressure washers in the adjoining car-wash and noise from the railway station, which has sidings for passenger trains as well as three platforms and acts as a terminus for some services. |
| **Environment** | Some noise from work in the premises was noticeable. No odours were present. Some units had flues out the roof that seem also to be filters. |
| ***Air quality*** | Air quality was clear. |

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| **Facilities and non B1-B8 uses** | None other than that available within the individual premises. However, the town centre is nearby. |
| **Planning consents (sq.m.)** | None |
| **Potential future uses** | Has potential to continue to provide valuable employment. Uses could change to more B1, which would be in keeping with its edge of centre location, but the current units do not have the appearance of office units, therefore to fulfil this role redevelopment would be required, possibly to a greater height. There would also be a need to ensure that the current B2 uses, which include a nationally recognised specialist company, were provided with appropriate alternative accommodation. |
| **Any conditions required for future development** | Railway Street passes through residential areas either side of the site. It also has a poor alignment at its junction at each end. |
| **General comments** | No graffiti was seen on the site and litter was very limited. A small amount industrial clutter at the side of one bank of units was noticed. Car parking was neat and the whole site appeared tidy and organised.<br>Litter and graffiti was noticeable in the surrounding area. |


## 26: Railway Street Industrial Estate, Gillingham

10 0 10 20 30 40 50 60 70 80 90 100

Metres



Medway Council

Scale:1:1250 24/11/06

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| **Site name** | **Appendix 1. 27: Rochester Airfield Estate, Rochester** |
| **Date of visit** | 19 July 2006 |
| **Brief description of site** | This is an almost linear but "L" shaped site with a further part of the site in the adjoining borough. One arm of the "L" is almost entirely occupied by a single secure operator. The other is narrower and between two roads but only the rearmost of the two roads (Laker Road) serves the units. These units tend to be single operator from a single building. The site is level, having formerly formed part of the adjoining airfield. Being adjoined by an airfield on one side and open land to the opposite side, the site has the feel of still being part of an airport but no direct connection now exists.<br><br>Buildings are generally 2 storey with pitched roofs and a mixture of cladding and brick walling.<br><br>There is no overall security for the site but some units have their own CCTV or are fully fenced. The single secure operator (BAe Systems) has a full security system.<br><br>There is one entrance to the site within Medway and this has entrance signage that also contains the names of the occupants. |
| **Approx date built** | Some new buildings but mainly mixed post war |
| **Location** | The site is located on the edge of the urban area; the boundary of the urban area, as defined on the Local Plan, runs along the southwest boundary of the site.<br>To the east is a private, grass-surfaced airfield with 2 runways, one runway of which runs parallel to the boundary of the site. The airfield is fenced off from the site. To the southeast is the continuation of the estate. To the west is open land forming the top of the scarp face of the North Downs. This land is AONB and Strategic Gap. At the bottom of the scarp is the M2 motorway. To the north is some open space and a leisure centre and beyond is residential. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>18.61<br>0 Ha |
| **Average size of unit occupied** | 4875 sq.m. (this figure is heavily influenced by the amount occupied by BAe Systems |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 1%, A5: 3%, B1: 39%, B2: 47%, B8: 8%, D1: 1%, D2: 1% |
| **Amount of floorspace** | 97490 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 7956 - age 16-74; 5811<br>249488 (236791) |
| **Local Plan designation of site** | Employment land but part also designated Action Area<br>ED1 (B1/B2/B8 uses), S11 (high quality business, science technology development B1/B2/B8) |

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| **Access into site** | There are 2 entrances into the main site off Maidstone Road. There is a further one at the southern end of the site, in the adjoining borough, also off Maidstone Road. BAe Systems also have a separate entrance off A229. All entrances are in fair condition. A further, poor quality, entrance also exists off Maidstone Road exists serving one occupier at the very northern end of the site.<br>The non-B1 to B8 block of uses (see below) has its own tarmac slip road in front.<br>The majority of the internal roadways are concrete with no lighting and no footways. There is some parking on the road. |
| **Buildings**<br><br><br>***General height*** | Overall condition of the existing buildings is fair. However, some of the buildings are quite new and there are some redevelopments still underway.<br>General height is 2 storey with pitched roofs but there are some higher buildings within the BAe Systems area. |
| **Layout** | The majority of the layout is by single units facing directly onto the road serving the site. Some new development near the northern end has a complex of smaller units facing onto a shared hardstanding. BAe Systems has its own secure internal circulation roads.<br>The layout gives the impression that the original buildings served the airfield and were part of it. Except for the block of non-B1 to B8 uses, all buildings back onto Maidstone Road.<br>Legibility is good as most units face onto Laker Road, the internal road. However, permeability is restricted as the ability to pass between adjoining buildings is not possible. |
| **Locality** | It is very open around the site, with ALLI and Strategic Gap to the west. The land on the opposite side of the road forming the flat, top of the scarp slope appeared to be farmed. The residential area to the north comprises some fair housing and some relatively new development.<br>Immediately north is a leisure centre and playing fields and BAe Systems' car park which also acts as a park and ride site at weekends.<br>The airfield to the west is almost solely private flying from small aircraft using the grass runways. The site is owned by the Council and leased to the operator. Beyond the airfield is a retail park and on the other side of the A229 is a college and fair to good residential area.<br>The airfield and ALLI/Strategic Gap continue to border that part of the whole development in the adjoining borough. |
| **Car parking arrangements** | All units currently in use seem to have just about enough car parking within their own compound. The new units still under construction or recently completed appear to have parking located in front of the buildings on the hardstanding areas.<br>The non-B1-B8 has parking along its service road but Comet has customer parking.<br>No visitor parking was noted. |
| **Landmarks** | Being located around an airfield tends to restrict heights so no landmarks exist within the site.<br>A landmark occupant is BAe Systems. |
| **Adaptability**<br>*Buildings*<br><br><br>*Layout* | Internally some buildings may have some flexibility but as the site, except for BAe Systems, is a linear development, just one unit deep, flexibility is very limited. Many BAe System buildings appear purpose built to meet need.<br>The linear layout and relatively narrow width restricts layout flexibility. |

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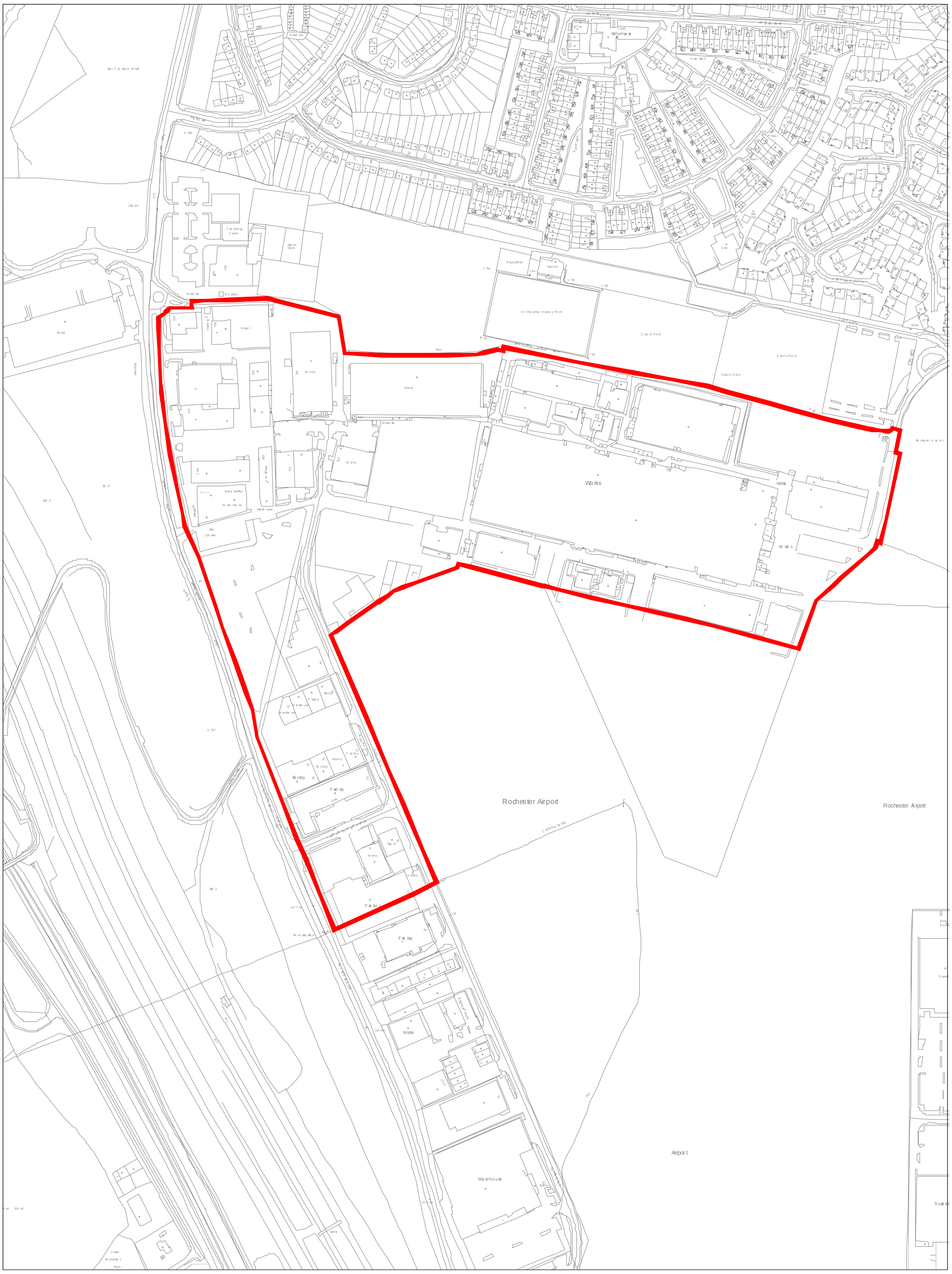
| **Connections** | The site is served by one access road, the B2097 Maidstone Road (single carriageway road). This road is only has street lighting at junctions and has a 40 mph speed limit. No footway or cycleway exist along this section of the road.<br>The motorway J3 is 3 kms.<br>1 bus route serves the site; maximum frequency is 2 hourly. However, BAe Systems can be reached from the east from the A229 and this has additional bus routes.<br>No rail access, the nearest station is Rochester (5 kms).<br>The site has a small private airfield adjoining.<br>The site has no river frontage. |
| **Restrictions** | Height may be an issue due to both the airfield and also taller buildings being visible on the top (skyline) of the scarp slope. The relative narrow width of the site and a need for access from a road other than the Maidstone Road act as natural restrictions. |
| **Environment** | No noise or odour was noticeable from the site at the time of survey. |
| ***Air quality*** | Air quality was clear |
| **Facilities and non B1-B8 uses** | No facilities were noticed during the survey.<br>There are a number of non-industrial uses on the site blocked together and facing Maidstone Road. These include Kidzone, Health club, Hairdressers and beauty salon and Comet. Except for Comet these are in a single block facing outward onto Maidstone Road. |
| **Planning consents (sq.m.)** | Not started: B1: -326, B2: 142, B8: -523, Other: 1391<br>Under construction: B1: 2763, B2: -2655, B8: 8039 |
| **Potential future uses** | This site appears to be a viable industrial site – the new construction work would tend to support this.<br>The adjoining airfield is unsurfaced and too small to be considered suitable for widening its scope for cargo flights or extensive business flights especially given the extent of immediate residential areas to the north and east. |
| **Any conditions required for future development** | Improved bus services and non-car related access provision, i.e. footway and cycleway as well as better lighting. Maidstone Road is of limited width given the commercial vehicle traffic, has a 40 mph limit and lighting restricted to junctions. |
| **General comments** | Some litter was noticeable at the time of survey including some industrial clutter and untidiness from the construction work. No graffiti was apparent. |




## 27: Rochester Airfield



Medway Council

24/11/06

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| **Site name** | **Appendix 1. 28: Second Avenue, Chatham** |
| **Date of visit** | 5 September 2006 |
| **Brief description of site** | Set at one end of the Horsted Valley and on the edge of Luton, the site comprises a mix of uses served from a 'tee' shaped access road with its main length along the valley floor. The access road descends into the site from its junction with a residential road. Most units are within their own fenced compounds and are a mix of heights. Construction is of brick or cladding.<br><br>There is limited depth to the compounds either side of the access road.<br><br>The site has a number of car-orientated activities and appears messy and cluttered.<br><br>No CCTV was noticeable and no official signage exists except for building fascias and some of these are limited. However, some impromptu signage exists at the entrance to the site – this consist of some sign boards attached to the back fence of adjoining houses and a crude, hand written sign painted directly onto the fence. |
| **Approx date built** | 1950 – 1980s |
| **Location** | The site is located within the urban area; however, the southwest and most of the northwest boundaries of the site adjoin the open land of the Horsted Valley ALLI, SNCI or LNR and allotment. The remainder of the northwest boundary adjoins residential land. The very northeast part of the boundary adjoins a car sales and servicing premises with a 'Renault Minute' franchise. Beyond is residential. The southwest facing section of the site adjoins residential areas. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>5.31 Ha<br>0 Ha |
| **Average size of unit occupied** | 836 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | A1 & D2: 1%, B1: 45%, B2: 23%, B8: 30% |
| **Amount of floorspace** | 23400 sq.m |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 17053 - age 16-74; 11881<br>249488 (236791) |
| **Local Plan designation of site** | Employment land<br>ED1 (B1 use) |
| **Access into site** | The access road into the site is Second Avenue, which is single carriageway and has a considerable slope on it. This requires exits to be made uphill. Second Avenue is tarmac and in fair condition. However, there are no turning heads at either end of the 'tee'.<br>Second Avenue also serves as the access for a sheltered homes development.<br><br>Second Avenue has footways and lighting but no cycleway. It also has considerable on-street parking including damaged vehicles awaiting repair. |

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| **Buildings**<br><br><br><br><br><br><br><br>***General height*** | Overall condition of the buildings varies between fair working order and in apparent need of maintenance. Many of the buildings appear purpose built and many are also single buildings within the compound.<br>Construction varies between brick built and cladding but all have pitched roofs. Most are double height units.<br>The hardstandings within the compounds are concrete and vary from fair condition to in need of maintenance.<br>General height is mainly 2 storey but some are lower. |
| **Layout** | With no official entrance signage or location map legibility is difficult. If a large vehicle made a wrong turn at the 'tee', the only option is to enter a compound to turn round.<br>Permeability is restricted to Second Avenue; it is not possible to pass around the site by any other route. |
| **Locality** | The housing at the entrance to the estate is sheltered accommodation run by mhs homes. The residential area to the northwest is older housing and there are some potential social issues in this area. Immediately northeast of the site is new social housing. Beyond is a further residential area, including local retail centre some 250 m north west of the site. To the southeast are extensive residential areas, which also have had some anti-social behaviour problems recently. Immediately southwest is the start of the open land. Adjoining the site is an allotment that appears well used and is visible from the site. Beyond is a golf driving range before it becomes open valley. The open space of the valley also adjoins part of the northwest of the site but this is not noticeable from the site. |
| **Car parking arrangements** | Car parking occurs within the compounds but with some compounds being connected with the motor trade it is difficult to determine whether the parking is cars under repair or staff parking. However, the compounds all appear to have a substantial number of vehicles parked.<br>Parking also occurs on the road including of vehicles awaiting repair. |
| **Landmarks** | There are no landmarks on the site.<br>The site is in a valley and the adjoining road, Street End Road, is at a considerably higher level and, southwest of its junction with Second Avenue, most of the site is visible from this road. |
| **Adaptability**<br>*Buildings*<br><br>*Layout* | Most buildings appear almost purpose built and subdivision may be difficult. A small block of newer modular units exists and these would have some additional flexibility.<br>The layout is quite fixed due to the central position of the access road and the relatively limited depth of the compounds either side. |
| **Connections** | Second Avenue connects to Street End Road (1 lane single local road), which serves a major residential area. This road has street lighting and footways.<br>The motorway J3 is 11 km (J4 is closer – 5 kms – but accessible mainly via country lanes)<br>5 bus routes serve the site; maximum frequency is every 15 minutes.<br>No cycleway serves the site.<br>No rail access, the nearest station is Chatham (3 kms)<br>The site has no river frontage. |

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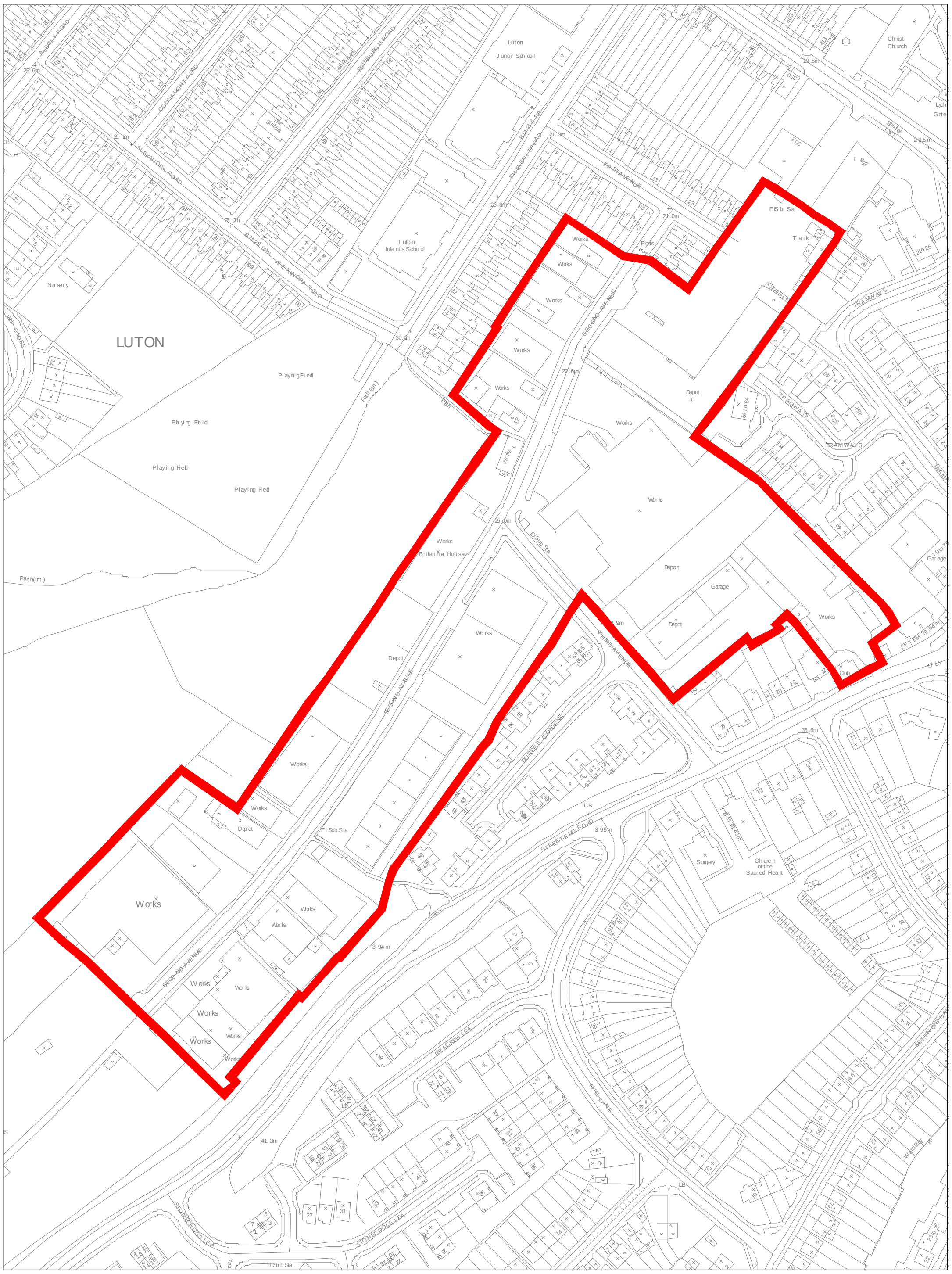
| **Restrictions** | Being set in a residential area and also being overlooked due to the nature of the terrain, could affect the future uses of the site. However, the site seems to be functioning quite well at present with motor vehicle repairs being undertaken including bodywork.<br><br>The rising exit from the site could cause problems especially at time of bad weather.<br><br>Access to the site, when approaching from the north, is either via country lanes or through Luton and Chatham or, when approaching from the south, through extensive residential areas. The routes from the north already carry quite high volumes of traffic.<br><br>At the northern end of the 'tee' the road used to continue direct into the residential area, this may have caused problems in the past as it is now severed by bollards at the edge of the site. |
| **Environment** | Some noise was noticeable including that of loud radios in workshops |
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | No facilities were noticed, even though a snack bar was advertised by handwritten lettering on the fence by the entrance.<br>There are a bathroom and plumbing shop and a cash and carry warehouse on the site. |
| **Planning consents (sq.m.)** | None |
| **Potential future uses** | This site has the potential to continue providing a sustainable source of local employment. However, many of the current uses do not seem to fit well within a residential area. These uses are here possibly due to rental levels or the benefits of clustering and space would need to be made for these elsewhere were the site to be redeveloped for lower impact uses. |
| **Any conditions required for future development** | Given the proximity to open space and residential areas the site any redevelopment needs to ensure that pollution (noise, light etc) is minimised.<br>The junction with Street End Road is poor and needs improving if the maximum benefit is to be obtained from the site |
| **General comments** | The site appeared generally cluttered from the parking on the road and also the untidy arrangements within many compounds. The storage of damaged cars awaiting repair on the road added to the general untidiness.<br>Litter and graffiti was also noticed. |




## 28: Second Avenue Industrial Estate, Chatham

10 0 10 20 30 40 50 60 70 80 90 100
Metres

Medway Council



24/11/06

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| **Site name** | **Appendix 1. 29: Temple Industrial Estate, Strood** |
| **Date of visit** | 24 October 2006 |
| **Brief description of site** | This is a relatively flat site comprising small estates and individual compounds, some of which are quite large, that have the appearance of having been developed over time as individual sites but which now form a substantial single site extending over 1 km in length. The northern end of the site is situated on the edge of Strood town centre. A section of the main A228 passes through the northern section of the site and a main feeder road leads off this into the site acting as a spine road.<br><br>The Strood to Maidstone railway also passes through the site and the site has different characteristics either side of the railway.<br><br>The bulk of the site lies west of the Strood to Maidstone railway and is the more conventional in appearance as an industrial area with some small estates of terraced units served by short culs-de-sac and larger individual compounds with detached buildings fronting direct onto the spine road. Buildings are of mixed ages, styles and construction but the general height is 2 storey. There is a major distribution depot (now vacant) at the southern end of the site.<br><br>The entire length Strood to Maidstone railway line through the site is on an embankment.<br><br>The section of the site to the east of the railway is relatively narrow and is accessed via a bridge of limited width under the railway. This section is bounded by the river on its east and is of an entirely different character. It is a mix of diverse uses with a poor overall environment. Buildings are a mixture of types but are all utilitarian. This section of the site houses a substantial timber yard operation and many waste recycling compounds.<br><br>The site has no gateway signage but the fascias of some units are visible from the A228. Additionally, within the site there are some signs fixed to walls and fences pointing to the location of some units. These all appear to be unofficial signs and some are not of good quality. Almost all compounds have their own fencing, mainly chain link, with floodlighting and CCTV.<br><br>This site is one of four separately detailed sites (Ballard Business Park, Commercial Road, Temple Industrial Estate and Medway Valley Park Industrial Estate), which make up an almost continuous employment zone southwest of Strood centre. |
| **Approx date built** | Pre-war to 1980 |

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| **Location** | Situated within the urban area and edge of Strood town centre.<br><br>The site is bounded on the west by the London to Kent coast main line railway. Beyond are residential areas. To the north the site abuts the Commercial Road industrial estate. To the east the site has an extended river frontage. To the south the site abuts Medway Valley Park industrial estate (west of the Strood – Maidstone railway) and part of Temple Marsh, an open area also part of the Strood Action Area designated on the Local Plan.. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>37.18 Ha<br>0 Ha |
| **Average size of unit occupied** | 1384 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 5%, B1: 17%, B2: 7%, B8: 70%, D2: 1% |
| **Amount of floorspace** | 143973 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 15386 - age 16-74; 11014<br>235412 |
| **Local Plan designation of site** | Part of an Action Area<br>ED2 (B1/B2/B8 uses), S10 (appropriate B1/B2/B8 uses), H1, H3, BNE20 |
| **Access into site** | The A228 passing through the site comprises Priory Road and part of Knight Road. Knight Road continues as a local road (1 lane single) into the site and serves as the main access for the units situated west of the Strood – Maidstone railway line and not served direct off the A228. This section has footways, street lighting and is tarmac and in good condition.<br><br>A second road leads off Knight Road leading to the part of the site between the Strood – Maidstone railway line and the river. This road is narrow and mainly concrete, is in poor condition and has neither street lighting nor footways but has speed humps. After rain there are substantial areas of both lying water and mud across the road. This road has to pass under the railway by way of a one vehicle wide bridge, the arch of which bears the marks of numerous impacts. This road also is used by a substantial number of skip and other waste lorries travelling to the waste recycling sites at the end of this road.<br><br>Both roads are culs-de-sac with no turning facilities.<br><br>No parking existed on the access roads. |
| **Buildings**<br><br><br><br><br><br><br><br><br><br>***General height*** | West of the Strood – Maidstone railway line, the buildings are generally in fair to good condition. The small estates mainly comprise terraces of modular, double height buildings mainly of brick with some upper cladding and with pitched roofs. The buildings within the individual compounds are generally detached and seem designed for specific purposes.<br>Between the Strood – Maidstone railway line and the river the buildings in the timber yard are generally corrugated sheds and appear to be in need of some maintenance. Otherwise any accommodation tends to be provided by cabins.<br>General height is 2 storey. |

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| **Layout** | The layout is relatively simplistic as the major concentration of buildings is served by one spine road. Despite this the layout is not easily understood and finding individual occupants is difficult. Some of the estates are located behind other buildings. The area east of the Strood – Maidstone railway line is not easy to locate initially and, once under the railway arch, finding any occupant is difficult - with the exception of a few units situated immediately after the arch.<br>There are no accesses other than the two access roads and the short culs-de-sac serving the estates, therefore permeability is limited. Additionally the road serving the area east of the Strood – Maidstone railway line is not suitable for pedestrian use due to the narrow width and the condition of the surface.<br>The road layout creates some limitation to the layout of the site but a major factor is the Strood – Maidstone railway line, which has only one narrow access penetrating its embankment. |
| **Locality** | The residential area west of the site is a mixture of private housing and social housing. Both are fair quality housing. The residential area to the north comprises mainly older Victorian terraces with some terraced bungalow development.<br><br>The River Medway is tidal and at low tide has extensive mudflats – average width of 130 metres. This section of river is just beyond the Rochester Bridge so cannot be reached by tall vessels. Excellent views across the river to Rochester are available. |
| **Car parking arrangements** | There is almost no parking on Knight Road or Priory Road as both have yellow lines. The access east of the Strood – Maidstone railway is not suitable for parking due to its width and amount of spray (muddy water) from passing lorries. Parking exists within compounds and generally this appears to be near capacity. |
| **Landmarks** | There are no landmarks on the site. |
| **Adaptability**<br>*Buildings* | The modular units have a degree of flexibility built in.<br>Other units, which tend to be purpose built, may not have such flexibility. However, following of the closure of one occupier who made castings the site has been re-occupied as a haulage depot involving the demolition of some buildings. This would imply that other uses can occur given certain conditions. |
| *Layout* | The Strood – Maidstone railway line imposes some restriction on the layout but there are substantial areas each side; linking the two areas is problematical. |
| **Connections** | The site is served by the A228 Knight Road and Priory Road. These form a single route (1 lane single main road). The road is in fair to good condition and is tarmac surfaced, with street lighting and footways.<br>The motorway J2 is 3 kms.<br>6 buses serve the site; maximum frequency is 1 to 2 hours but more frequent services are to be found in the town centre (150 metres from nearest point of the site).<br>No cycleways serve the site.<br>A railway passes through the site and another is at the side of the site but no unit is served by either railway, the nearest station is Strood (2 kms).<br>The site has a tidal river frontage that appears to be used by a yacht club and for mooring houseboats. |

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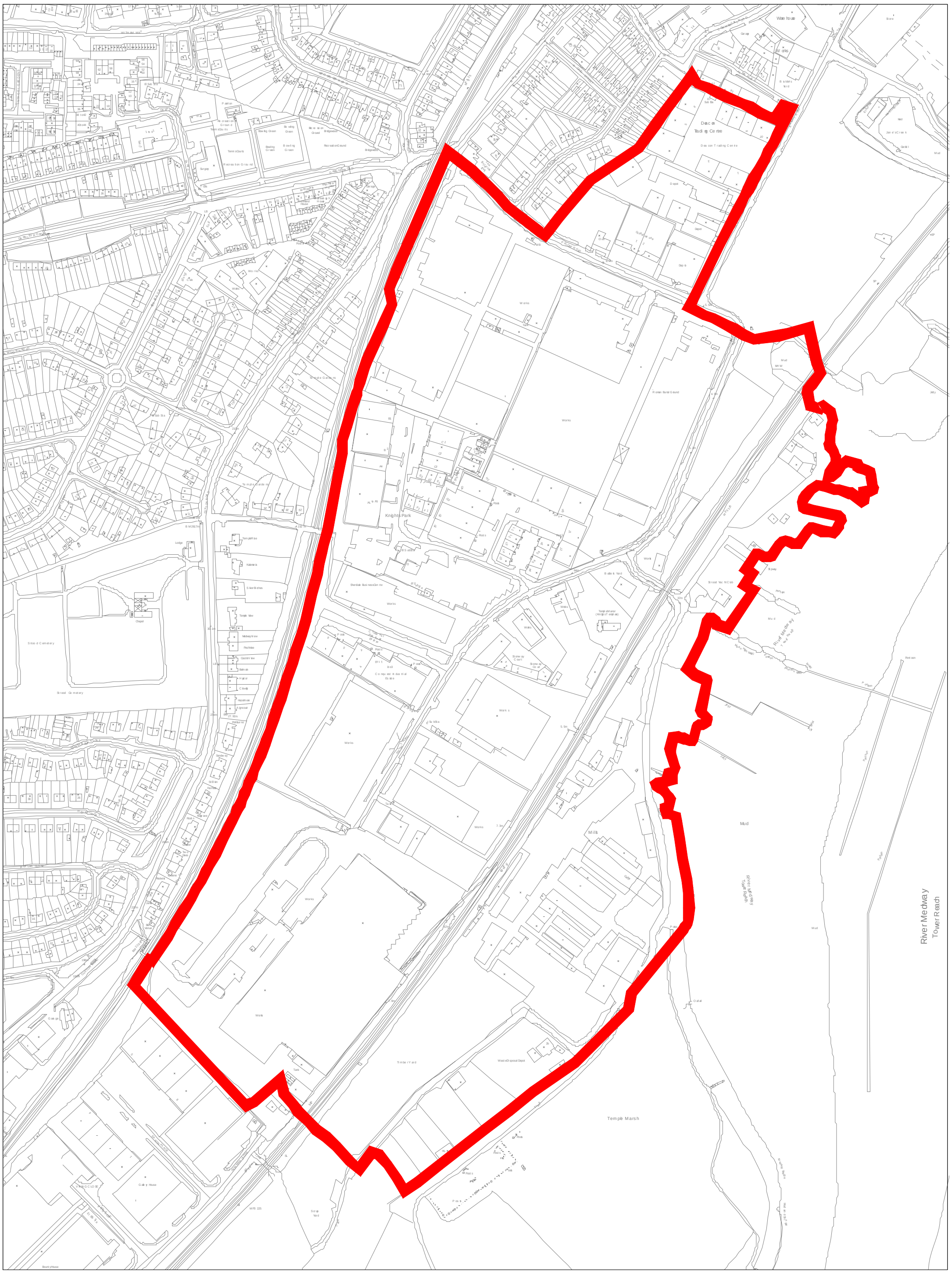
| **Restrictions** | The main restriction to the site is the lack of permeability through the Strood – Maidstone railway line. This has led to a site with two very different characteristics and no coherence. Additionally the site's current layout appears to have developed organically over a period of time. |
| **Environment** | Some noise was noticeable but no odours. Along the road past the saw mills there were considerable car tyres, which are apparently dumped. |
| ***Air quality*** | Air quality was clear. It should be noted that the survey was undertaken after a period of rain and hence no airborne dust would have been expected from the open waste transfer units or the areas processing mounds of soil. In dry weather the mud on the road may have also have caused a dust problem. |
| **Facilities and non B1-B8 uses** | The only facility noticed was a tea kiosk but this was closed at the time of survey.<br>Non B1-B8 uses include car breakers, a yacht club and houseboats, waste recycling and a fitness centre. |
| **Planning consents (sq.m.)** | Not started: B2: 774, B8: -626<br>Under construction: B2: 30 |
| **Potential future uses** | This is a major edge of centre site providing substantial employment and with some large companies operating from the site. The area west of the Strood – Maidstone railway is fully, and quite intensively, developed, thus change or improvement is difficult to achieve. An opportunity exists at present with the vacant distribution depot potentially providing 'buffer' space if suitable arrangements could be made.<br>The land between the Strood – Maidstone railway and the river is underused and the uses that are there all have an appearance of low quality. This riverside area has excellent views across the river and more appropriate development is needed to maximise the potential of this area. This may include uses other than employment but there is a need to ensure that these alternative uses do not give rise to potential conflict with the new employment uses, for example some marine related activities can create noise. The river at this point is not designated as a protected area and so needs to be sympathetically exploited without damaging its setting or the views across the river from either direction. |
| **Any conditions required for future development** | The site has much potential but an agreed masterplan is needed to maximise the use of the site and to optimise the benefit to the adjoining town centre.<br>The arch beneath the railway needs considering for improvement (it is acknowledged that new or widened openings in railway embankments are very expensive). |
| **General comments** | Both litter and a little graffiti were noticed at the time of survey. There was also some industrial clutter to be seen in the area west of the Strood – Maidstone railway. To the east of the railway the appearance of the area was poor and unwelcoming and this was compounded by the bad condition of the road, the areas of lying water and mud on the road and the untidy piles of old tyres. |




## 29: Temple Industrial Estate, Knight Road, Strood, Rochester

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| **Site name** | **Appendix 1. 30: Jenkins Dale, Chatham** |
| **Date of visit** | 25 August 2006 |
| **Brief description of site** | Situated within the main urban area and some 450 m from the High Street in Chatham town centre this small site is on land that slopes up considerably from Chatham but is, itself, relatively flat. This is a relatively small site comprising approximately 7 units mainly 2 storey with pitched roofs. The site may once have been part of a chalk pit; there is a vertical chalk face at the back of the site rising to some 12 m.<br><br>The site is served by a small central cul-de-sac with turning head and individual fenced and gated compounds leading direct off the road.<br><br>The site is signed from one road within the residential area near the turn off from a main road. No other signage was noticed and the site has no signs. All roads in the vicinity, except a single route to and from the site, have lorry bans and the access route has overnight restrictions on lorries.<br><br>The access road has street lighting and most compounds have their own floodlighting. No CCTV was noticeable. |
| **Approx date built** | Ages of buildings seem to vary from 1960s to relatively recent. |
| **Location** | The site is located in the main urban area. It has residential areas on all sides. The land slopes up from Chatham centre and some good views over parts of Medway are possible from this site. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>1.09 Ha<br>0 Ha |
| **Average size of unit occupied** | 560 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | A1: 8%, B1: 46%, B2: 20%, B8: 17%, D2: 9% |
| **Amount of floorspace** | 3920 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 13118 - age 16-74; 9333<br>249488 (236791) |
| **Local Plan designation of site** | White Land<br>ED3 |
| **Access into site** | A cul-de-sac single carriageway road leads into the site off Jenkins Dale, a residential road. Due to lorry restrictions on surrounding roads the site is left in and right out.<br>The cul-de-sac is tarmac and in fair condition and can accept LGVs. The road has footways on both sides, which are a mix of broken concrete and patched tarmac.<br>Parking existed on the road and the footways. |
| **Buildings**<br><br>***General height*** | All buildings appear in at least fair working order and some are in good condition.<br>General height of the buildings is 2 storey mainly double height with pitched roof. There is an odd unit that is only single storey and another which has an upper floor. Walls are all brick at ground level but mainly clad at the upper level. |

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| **Layout** | Legibility is fair; not all the units are visible from the entrance to the site and there is no signage to assist.<br>Each compound is secure so permeability is restricted to the access road. |
| **Locality** | The surrounding housing to the north, west and south is mainly social housing in fair to good condition. The houses have the appearance of being built around the 1960s. Some private ownership exists and this may be as a result of right to buy.<br>The residential area to the east and at the top of the vertical chalk face is older and in fair condition. |
| **Car parking arrangements** | Each compound has its own parking which does not seem to be fully utilised. Visitor parking was clearly defined in some units.<br>Some parking took place in the access road. |
| **Landmarks** | There are no landmarks within the site |
| **Adaptability**<br>*Buildings* | The buildings are currently used for a variety of purposes from children's nursery, builders' merchant through to a laboratory. Thus some flexibility within industrial uses exists. However the buildings do not seem to readily lend themselves to sub-division. |
| *Layout* | The layout is relatively fixed given the central access road |
| **Connections** | The site is served from a residential road, Jenkins Dale, (1 lane single local road). The all vehicle approach to this road is now only possible from the town centre via an underpass and makes for a convoluted approach. Jenkins Dale has footways and street lighting.<br>The motorway J3 is 7 kms.<br>No bus route serves the site.<br>There are no cycleways on the approach road.<br>No rail access, the nearest railway station is Chatham (1 km).<br>The site has no river frontage. |
| **Restrictions** | The site is within a residential area and also overlooked by it, which could lead to potential conflicts over use or pollution (noise, light or air).<br>The only approach for larger vehicles is uphill through a residential area; this may cause problems with noise or emissions. |
| **Environment** | No noise or odours were noticed at the time of survey. |
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | No facilities exist on the site except that provided within individual units. However, there is a public house almost immediately opposite the site.<br>Non B1-B8 uses include a children's nursery and a builder's merchant with retail showroom/sales. |
| **Planning consents (sq.m.)** | None |
| **Potential future uses** | This is potentially a sustainable site as it has the ability to provide a local source of employment. The level of occupation seems to indicate that the site is viable but uses are becoming wider. |
| **Any conditions required for future development** | The uses for which the site could be used may need to be controlled to protect the amenity of the residential area. |

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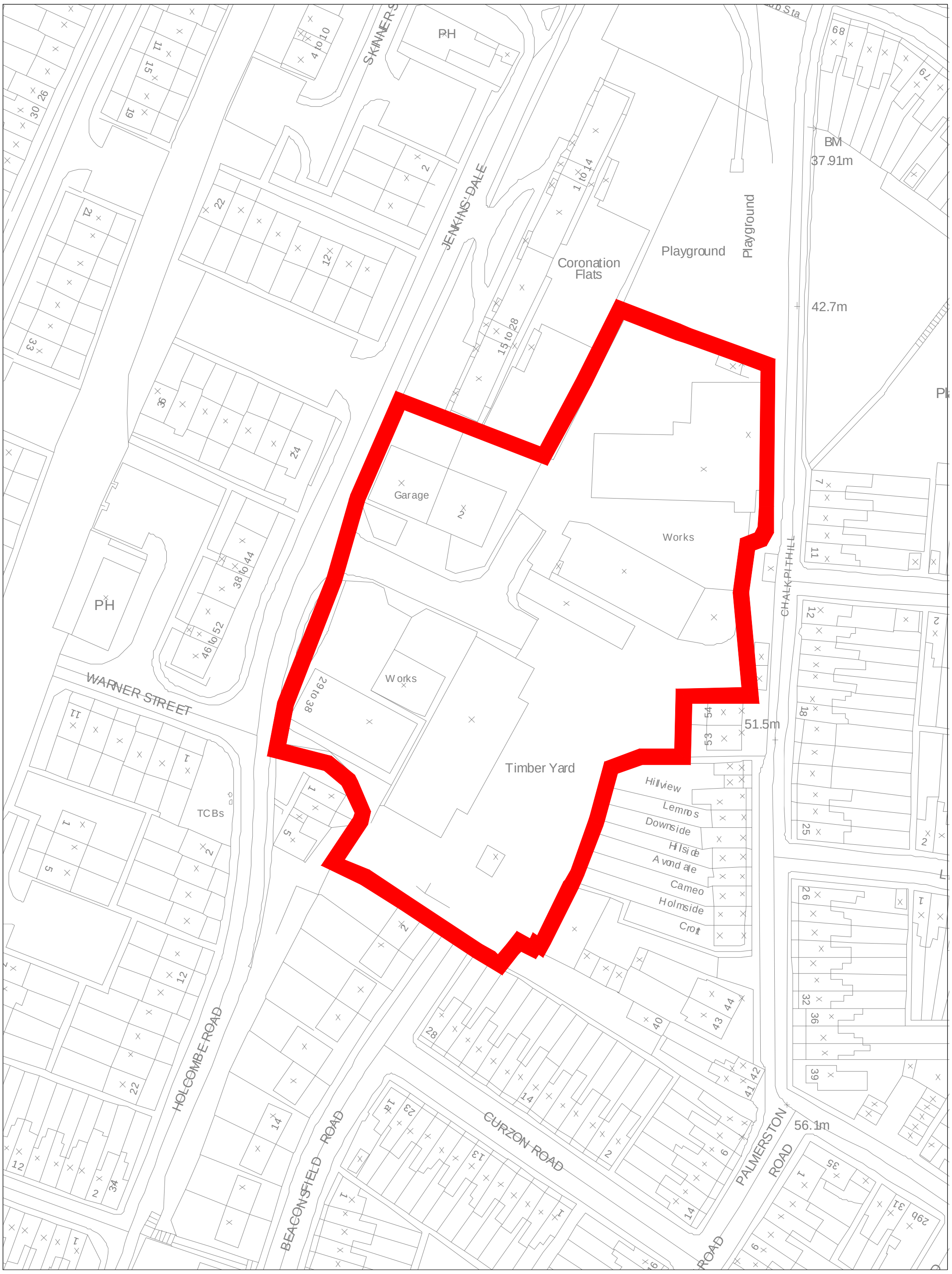
| **General comments** | The lorry ban in the surrounding area is relatively recent. Additionally, an overnight lorry and bus parking ban exists in the entire area.<br>The site and its immediate surroundings were both litter and graffiti free but both litter and graffiti were noticeable h nearer the town centre. The area around the site was also a Neighbourhood Watch area.<br>A small amount of industrial clutter was noticed at the back of two units but otherwise the site was very tidy.<br>From the patching visible on the footways, the cable network seems to have been taken into the site. |




## 30: Jenkins Dale, Chatham

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Metres



Medway Council

24/11/06

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| **Site name** | **Appendix 1. 31: Medway Valley Park Industrial Estate, Strood** |
| **Date of visit** | 24 October 2006 |
| **Brief description of site** | This is a sloping site located south of Temple industrial estate and near a leisure park. It comprises development along one side of a main access road. The site contains 4 large compounds with single large buildings, a compound containing two terraces of units facing onto a central forecourt and a separate small unit. Buildings mostly have a similar style, being brick lower and clad upper walling. Compounds are either block paved or concrete.<br><br>Each compound is fenced and has lighting. Some CCTV was noticed. The site has no gateway signage and very little other signage; fascias are not prominent.<br><br>The site is close to J2 on the M2 motorway.<br><br>This site is one of four separately detailed sites (Ballard Business Park, Commercial Road, Temple Industrial Estate and Medway Valley Park Industrial Estate), which make up an almost continuous employment zone southwest of Strood centre. |
| **Approx date built** | 1960 - 1980 |
| **Location** | The site is located within the urban area and near the southwestern end of the Strood Action Area as designated on the Local Plan.<br>To the northwest of the site is the London to Kent coast railway line. To the northeast is Temple industrial estate with the large vacant distribution depot being the adjoining property. To the southeast is the Strood – Maidstone railway line. To the southwest is Roman Way, a road leading off the A228 and serving as access to the site and the nearby leisure park and theme park. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>5.72 Ha<br>0 Ha |
| **Average size of unit occupied** | 1946 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | B1: 39%, B2: 3%, B8: 58% |
| **Amount of floorspace** | 27250 sq.m. |
| **Population** within -<br>*800m (½ mile)*<br>*8 kms (5 miles)* | <br>Total; 10034 - age 16-74; 7166<br>235412 (222715) |
| **Local Plan designation of site** | Part of an Action Area.<br>ED2 (B1/B2/B8 uses), S10 (appropriate B1/B2/B8 uses), H1, H3, BNE20 |

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| **Access into site** | One access serves the site; Norman Close. This road leads off Roman Way and is cul-de-sac. Two short spurs lead off Norman Close to serve units to the rear of those fronting Norman Close.<br><br>Norman Close is a wide tarmac road in good condition with street lighting. It has a footway on one side only. The development is on one side of Norman Close only; the other side of the road is a grass and abuts direct onto the railway fence.<br><br>Parking occurs all along Norman Close, both cars and LGVs. The cars park partially off the carriageway and obstruct the footway. |
| **Buildings**<br><br>***General height*** | Buildings are generally all relatively recent and appear in well-maintained condition. Some buildings are substantial single structures while one of the two short spurs serves a small estate type development with two terraces facing into a central courtyard. Almost all of the buildings are brick lower and clad upper with pitched roofs. There is a similarity of style making the site coherent.<br>Compounds are either block paved or concrete and are in good condition.<br>General height is 2 storey but one substantial building is 3 storey. |
| **Layout** | The layout is simplistic being a straight road leading in with two short straight spurs at right angles to it. This gives an open feel but the lack of signage hinders legibility.<br><br>Despite the simple layout, permeability is limited as movement is only available along the access roads.<br><br>The layout utilises the space effectively and the slope does not appear to have affected development significantly. |
| **Locality** | To the northwest, and beyond the main line railway, is the Ballard industrial estate. Beyond is the A228 and then a residential area. The land to the northwest is Temple industrial estate. To the south east beyond the Strood – Maidstone railway is part of Temple Marsh, an open area part of the designated Strood Action Area.<br><br>The leisure park, south of the site, contains a multiplex cinema, night club, bars and restaurants and a fitness centre. Southwest of the site, beyond Roman Way, is a theme park known as Diggerland, themed around mechanical excavators. |
| **Car parking arrangements** | Car parking areas exist within the compounds but by the level of parking in the roadway it has to be assumed that insufficient spaces are available within the compounds. |
| **Landmarks** | There are no landmarks on this site. |
| **Adaptability**<br>*Buildings*<br><br>*Layout* | The terrace units have some measure of flexibility in their design. Most of the others are substantial buildings that may subdivide. One unit, the three storey building, appears more purpose built.<br><br>There is little adaptability in the layout as the site is fully utilised. However, the amount of land used for road space is very low and significant changes may be needed to adapt the layout. |

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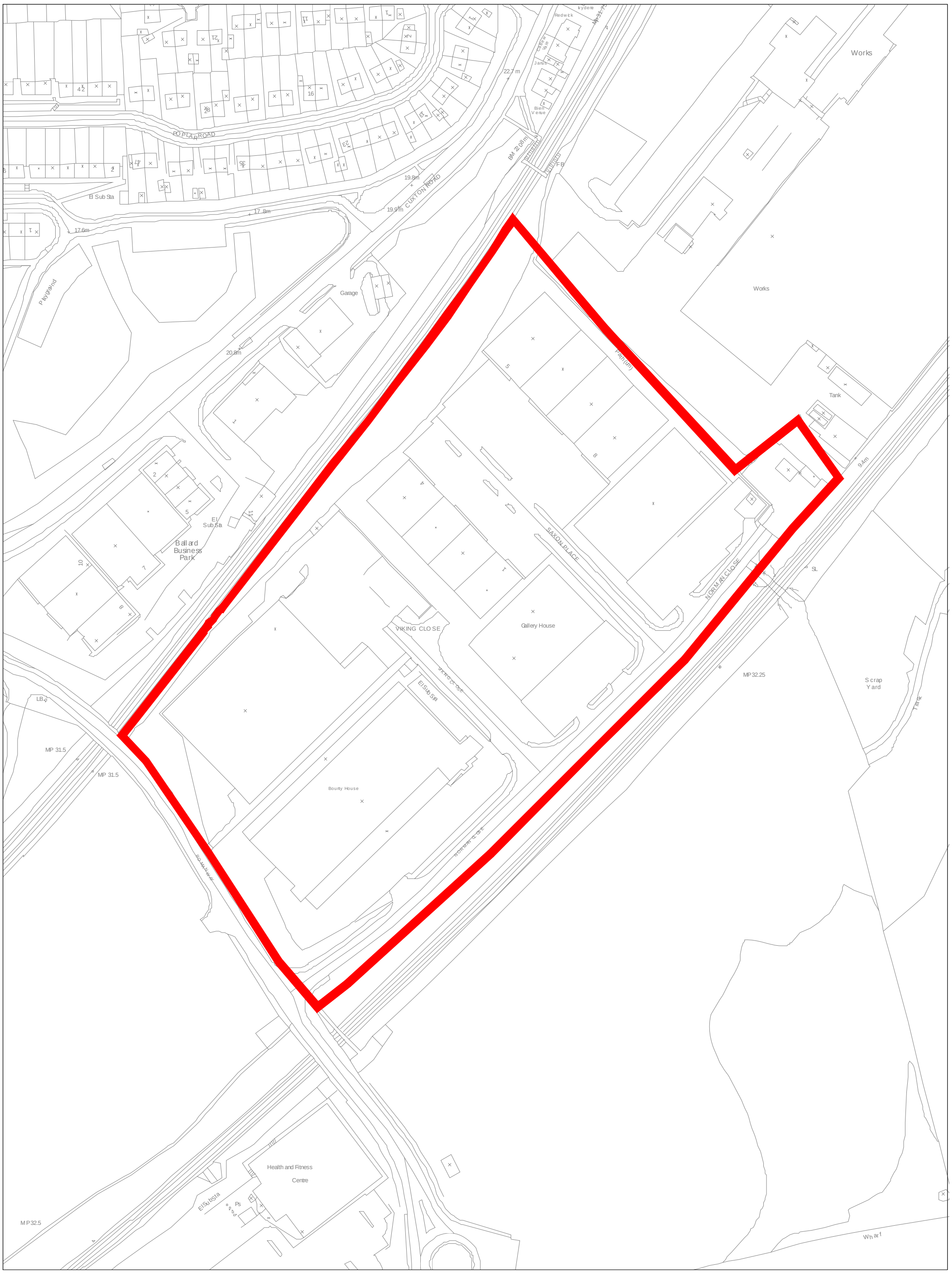
| **Connections** | The site is served from Roman Way (1 lane single local road). This road is tarmac, in good condition and has street lighting and a footway predominantly on one side only. At its northwestern end Roman Way connects direct onto the A228 at a roundabout junction.<br>The motorway J2 is 1 km.<br>6 buses serve the site; maximum frequency is 1-2 hours.<br>No cycleways serve the site.<br>Railway lines pass either side of the site but there are no connections. The nearest railway station is Strood (3 kms).<br>The site has no river frontage. |
| **Restrictions** | The sloping site may inhibit some operations but parts of the site are level. The development of terrace units is gated and secured out of normal hours; tenants need to make arrangements for out of hours activities. |
| **Environment** | Some noise was noticed from the activities on site and there was some noise from the railway. No odours were noticed |
| ***Air quality*** | Air quality was clear. |
| **Facilities and non B1-B8 uses** | No facilities were noticed on site. However, some catering is available in the nearby leisure park and units may contain staff facilities.<br>No non B1-B8 uses were noted. |
| **Planning consents (sq.m.)** | Not started: B1: -2649, B8: 2649 |
| **Potential future uses** | This is a useful employment site; its location between railway lines could raise amenity issues with other uses. New housing is being constructed nearby and this site will help provide local employment. Additionally, the buildings appear generally to be capable of many years of useful service. |
| **Any conditions required for future development** | Signage to the site could usefully be improved. There would not appear to be any need to impose restrictions on types of use within the B1-B8 categories of use. |
| **General comments** | The site appeared clean and tidy; no litter or graffiti was noticed. This is despite the parking along the road, which detracted slightly from the overall appearance. |




## 31: Medway Valley Park Industrial Estate, Strood

10 0 10 20 30 40 50 60 70 80 90 100
Metres



Medway Council

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| **Site name** | **Appendix 1. 32: Thameside Industrial Estate, Cliffe** |
| **Date of visit** | 31 August 2006 |
| **Brief description of site** | Situated in open countryside, this is the site of a former petrol storage depot that has been cleared and almost entirely redeveloped. A wide access cul-de-sac with footways and lighting leads into the site with parking to one side. The site is divided into a number of fenced compounds each with a small shed and substantial open storage area, some of which are unsurfaced.<br><br>The site has a substantial chalk face some 12-15m high at its rear (eastern side) but the site itself is level. Levelling of the site appears to have been achieved by piling works to part of the western boundary to raise the level on this side. Beyond the piling (westward) the ground level is substantially lower.<br><br>The site is gated and has signs indicating CCTV but none was visible. No gateway signs exist but there is signage from the B2000. |
| **Approx date built** | 2004/2005 |
| **Location** | Situated in the rural area on land designated in the Local Plan as ALLI within the tidal flood plain. To the west and north is open land and pools designated SSSI and ALLI and managed by the RSPB. To the east and south is open land designated ALLI. Further south is a pool formed from a disused pit and this is also SSSI. Beyond the pool in a southeast direction is an active mineral working site ('Bretts') and a 'Tarmac' depot. |
| **Quantity of land** (area)<br>*In use*<br>*Un-used* | <br>0.98 Ha<br>0 Ha |
| **Average size of unit occupied** | 179 sq.m. |
| **Composition of current use** *(only those classes with floorspace shown)* | B1: 32%, B2: 50%, B8: 18% |
| **Amount of floorspace** | 1250 sq.m. |
| **Population** within;<br>*800m (½ mile*<br>*8 kms (5 miles)* | <br>Total; 1603 - age 16-74; 1189<br>47605 |
| **Local Plan designation** | ALLI within the tidal flood plain<br>BNE34, CF13 |
| **Access into site** | The site has one wide single carriageway access, which is a cul-de-sac and acts as a spine road through the middle of the site.<br>The road is tarmac with block-paved footways and lighting. It is almost new and in very good condition.<br>No parking was seen in the road. |
| **Buildings**<br><br><br><br><br>***General height*** | Buildings appear to be new small units located in the corner of each compound. The only exception to this is a 2 storey modular with brick panels and flat roof building near the entrance. This is in need of maintenance and appears to be connected with the former use of this site.<br>General height of the buildings is 2 storey. General construction is double height with clad walls and a pitched roof. |

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| **Layout** | The layout is relatively simple with a curved central spine road, thus legibility is good. However, as each compound is securely fenced, then permeability is limited.<br>The buildings are quite small meaning that most of each compound is open storage/working area. |
| **Locality** | The land to the west and north is an important nature reserve managed by the RSPB with pools that support many waders both in winter and during the breeding season. Most of this land is at a lower level.<br>Land to the east is at a higher level. To the south is a strip, approximately 100m wide, of open land before the pool formed after mineral working. Beyond the pool in a southeast direction is an active mineral working site ('Bretts') and a 'Tarmac' company depot, both have some substantial structures within their sites rising to 3 to 4 storeys. The 'Bretts' site also has high-level conveyors and rail sidings. The structures from these activities are visible from a considerable distance from all directions except the east. In this vicinity is a trailer park comprising open ground, which also has tyres and old appliances stored on it. |
| **Car parking arrangements** | A parking area is provided near the entrance to the site and some parking also seems to take place in each compound. Spaces were available at the time of survey. |
| **Landmarks** | There are no landmarks on this site. |
| **Adaptability**<br>*Buildings*<br><br><br><br>*Layout* | The site as currently configured caters for 'land hungry' occupiers with limited building requirements. Buildings are relatively small and modular but are essentially more suited for supporting workshop activities<br>Some compounds are surfaced but others are not.<br>The layout is relatively simple and compounds could be merged or divided to suit needs. |
| **Connections** | The site is served from a country lane (1 lane single) that, in parts, is not of sufficient width to allow 2 LGVs to pass safely without one vehicle stopping. This road leads off the B2000, which is also 1 lane single.<br>The connecting road has no footways, no lighting and no speed limit.<br>The motorway J1 is 11 km.<br>No buses serve the site.<br>No rail access, the nearest railway station is Higham station (6 kms) while within Medway, Strood is the nearest (8 kms).<br>The site has no river frontage. |
| **Restrictions** | The road that connects the site to the B2000 passes by the entrance to the Tarmac site, opposite which is a row of cottages. Parking takes place in front of these cottages and the road alignment is such that there is poor forward vision at this point.<br>The length of the country lane leading to the site from the B2000 is 2.5 kms, this is a considerable length of country lane to be used as an LGV access route<br>The B2000 ultimately joins the A289 however, the junction does not have full movement; coming from the site it is not possible to join the A289 but only travel on into the residential area of Wainscott. Similarly the approach to the B2000 from the east requires travelling through Wainscott, as there is no turning off the A289.<br>There is a potential for conflict over the uses the site can be put to and the need to ensure the environmental protection of the adjoining SSSI. |
| **Environment** | Some noise was noticeable from the industrial activities. |

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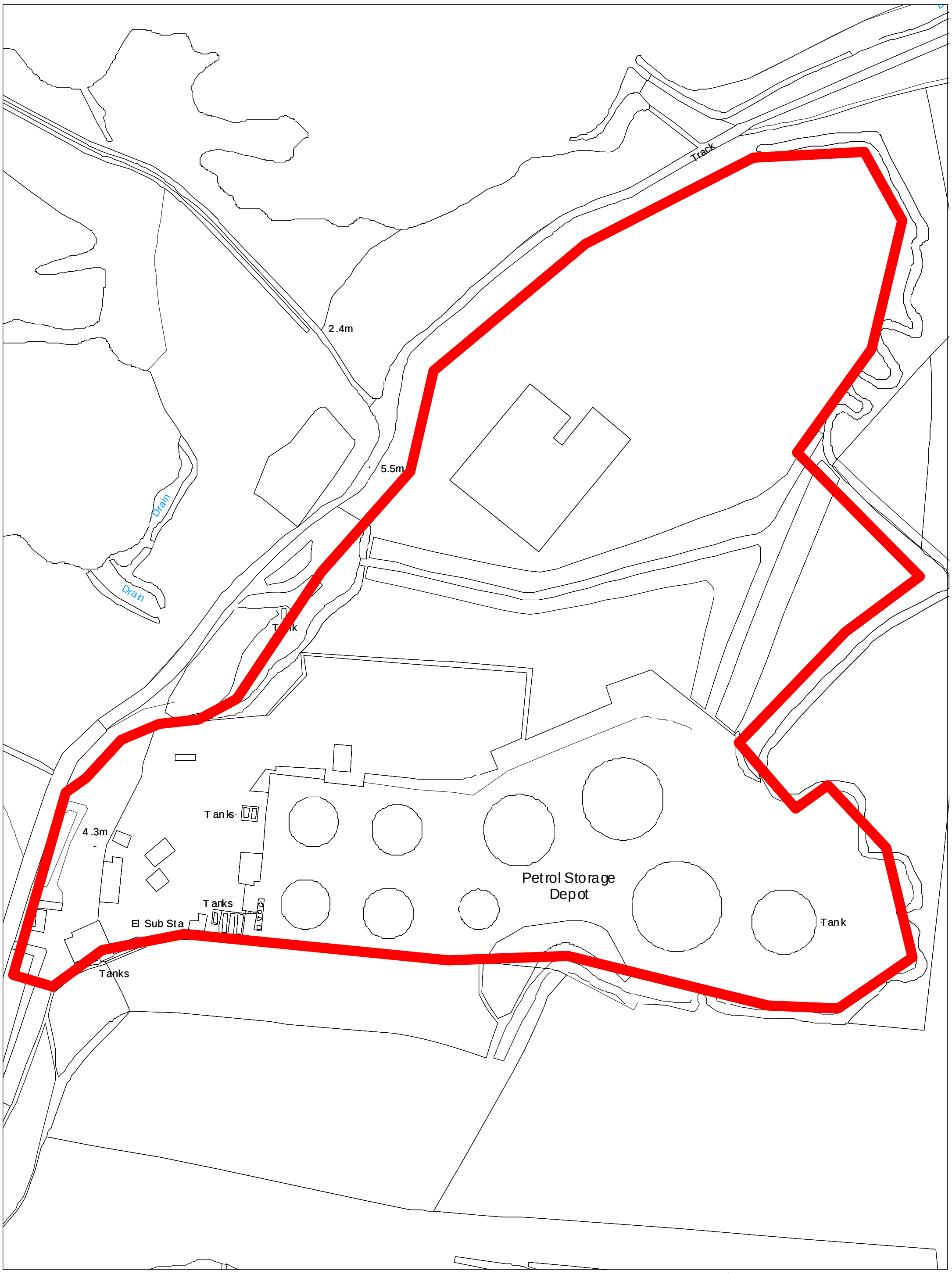
| **Air quality** | The air contained dust from activities on site. |
| **Facilities** | None - the buildings appear to be rather small to have much in the way of services. |
| **Planning consents** | None |
| **Potential future uses** | The site has tenants and so, presumably, is deemed viable. However, were its use as an industrial estate to be curtailed then, subject to the financial situation proving viable, this site has a potential use as the location for a visitor centre site to exploit the adjoining nature reserve. Due to level changes the site is higher than the surrounding reserve has good views over a substantial area of the reserve. |
| **Any conditions required for future development** | Subject to the resolution of any enforcement or regularisation of the planning situation the levels of pollution (noise, light, dust or fumes) should be regulated to protect the adjoining SSSI and nature reserve.<br>The country lane connection to the B2000 is poor for LGVs (a full length low-loader was followed to the site on the visit to the site) there may be a need to restrict the size of vehicles visiting the site. However, it should be borne in mind that ‘Bretts’ also use full size LGVs on this route and so controlling just this site cannot eliminate the problem. |
| **General comments** | This appears to be a remote and unsustainable location for an industrial estate. However, the site has tenants, therefore there appears to be a potential demand for this type of accommodation. The uses on the site, apart from being seemingly ‘land hungry’, could be classed as potentially ‘bad neighbour’ uses due to noise etc. Whilst siting these activities away from concentrations of population may have benefits, there are potential disbenefits to having these activities located close to the SSSI and nature reserve; other sites exist with the capacity to take these activities.<br>The site has been constructed without planning permission and it is understood that enforcement action is being contemplated.<br>It is not known whether the lighting installed at the site yields low levels of light pollution, this may be important at such an open and important nature conservation area.<br>No litter or graffiti was noticed at the site. |




## 32: Thameside, Cliffe

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Metres



Medway Council

Scale:1:2500 24/11/06

## Appendix 2: Notes and definitions

***Notes and definitions.***

1 **Population** figures are taken from the 2001 Census.
   a. The population figures are based upon the population within Medway. Certain sites, which are situated near the borough boundary, may have additional people within the 8 kms radius but which are not recorded.
   b. Data for the 800 metre radius based upon Census Output Areas and for 8 kms radius based upon ward information.
   c. 8 kms population figures in brackets are those where certain wards are excluded due to their centres of population being considerably further than the 8 kms radius even though part of the ward falls within the 8 kms radius.

2 **Roads** are described by number of lanes in each direction and whether dual or single.
   a. '1 lane single' represents a single carriageway road with one lane in each direction,
   b. 'wide single' represents a single carriageway road with the capability of on street parking on at least one side while still permitting a 2-way flow of traffic.
   c. '2 lane dual' represents a dual carriageway road with two lanes in each direction.
   d. 'country lane' indicates a road of more rural character potentially with both a width of less than 5.5 m and poor alignment, for example, hedges close to the carriageway.

3 **The tidal flood plain** designation in the Local Plan is only shown outside the urban area. Therefore some urban sites may also be within the tidal flood plain but are not noted as such. The tidal flood plain is based upon Environment Agency data and does not take into account any defences that may exist around a site.

4 **Permeability** of industrial sites will always have some restrictions due to the size of the units or complexes and the need for security. Where routes other than the industrial estate roads exist through a site this is noted.

5 **Approx date built** relates to the general construction date of most of the site. Business premises can be dynamic so later alterations or additions will always exist.

6 **Air quality -** no measuring device was used. The assessment was purely visual, based upon whether smoke or dust could be seen in the air or whether the air appeared clear. Odours were only noted if they could be smelled; no mechanical air monitoring took place to check for pollutants.

7 **Floorspace** is in square metres (sq.m.)

8 **Areas** are in hectares (Ha)

9 **Un-used land –** the amount of land identified as un-used is the area of the site currently not in apparent operational use. For many reasons, both operationally and environmentally, not all of this land may be developable.

10 **Adaptability** of the buildings considered in the context of this audit as the ability to be altered to another employment use. It is accepted that most buildings are capable of adaptation to other uses but the cost may be substantial requiring the new end use to be of considerably higher value if the proposition is to be viable. This audit considers buildings to be adaptable if the basic structure, fenestration and ease of revised internal partitioning would seem to be capable of alternative employment use without significant works to the structure of the building.

11 **Composition of current use –** the uses shown are based upon the actual use of the floorspace. Thus it is possible to have an element of office floorspace showing for a manufacturing company. All figures are rounded to the nearest whole percentage point meaning any use below 0.5% of total floorspace of site is not shown.

12 **Planning consents –** the development progress of all consents is shown as at 31 March 2006. The figures are broken down between those consents not started and those under construction. All figures are net and a negative figure indicates an overall loss.

## Appendix 3: Methodology

### *Methodology*

1. Each site will be visited. All visits will be by the same person.
2. No attempt will be made to use benchmarking or scoring for any aspect of the site. All aspects of the assessment will be as seen at the time of survey. This work is part of a technical assessment, the subsequent Commercial DPD will score the sites based on a set of criteria and assess their relevance to policy proposals on quantity of new/replacement jobs or sites, also their location and uses.
3. Tenure of the sites will be part of the Commercial DPD process.
4. All comments on quality of access/buildings will be factual. However, this is not intended to be a detailed building by building approach; comments will apply to the overall standard and condition of each site.
5. Population will be based upon the 2001 Census and derived from Census Output Area data.
6. An accommodation survey has been separately undertaken by the University of Greenwich. The results of the accommodation survey have been used to derive the composition of the floorspace details.
7. Road access will be described by
    - a. Amount
        - i. Number of LGV access
        - ii. Number of car accesses
    - b. Width
        - i. Dual carriageway
        - ii. Single carriageway with more than 1 lane each way
        - iii. Single carriageway with 1 lane each way
        - iv. Single carriageway with less than 1 lane each way
    - c. Condition/surfacing
    - d. Parking in roads
8. Buildings will be described by
    - a. Age and general condition of fabric
    - b. General height
9. Adaptability
    - a. Are the buildings fixed/purpose built or can the layouts vary for flexible sizing
10. Layout
    - a. Does the road layout permit changes of buildings or redevelopment
    - b. Are there any limitations.
11. Connections (the nature of the locality the site is located in, is separately identified in the audit)
    - a. This will look at, for the type of roads etc serving the site,
        - i. Are they main roads (A) or local roads,
        - ii. Width of roads serving site
        - iii. Distance to motorway
        - iv. Buses
            1. number of routes
            2. maximum frequency
        - v. cycleway access
        - vi. rail service
            1. freight
            2. passenger
        - vii. River access and use
12. Facilities are noted where they exist on or near the site, these will include catering, leisure and retailing facilities.

## Appendix 4: Schedule of Medway Local Plan 2003 policies

***Medway Local Plan 2003 policies***

| **Policy number** | **Title** |
|---|---|
| Policy S1: | Development strategy |
| Policy S2: | Strategic principles |
| Policy S3: | River Medway |
| Policy S4: | Landscape and urban design guidance |
| Policy S5: | Medway's "city" centre |
| Policy S6: | Planning obligations |
| Policy S7: | Rochester Riverside action area |
| Policy S8: | Chatham Maritime |
| Policy S9: | Chatham historic dockyard |
| Policy S10: | Strood waterfront action area |
| Policy S11: | Rochester Airfield |
| Policy S12: | Kingsnorth |
| Policy S13: | Isle of Grain |
| Policy S14: | Ministry of Defence estate, Chattenden |
| Policy BNE1: | General principles for built development |
| Policy BNE2: | Amenity protection |
| Policy BNE3: | Noise standards |
| Policy BNE4: | Energy efficiency |
| Policy BNE5: | Lighting |
| Policy BNE6: | Landscape design |
| Policy BNE7: | Access for all |
| Policy BNE8: | Security and personal safety |
| Policy BNE9: | Design of commercial frontages |
| Policy BNE10: | Advertisements |
| Policy BNE11: | Hoardings |
| Policy BNE12: | Conservation areas |
| Policy BNE13: | Demolition in conservation areas |
| Policy BNE14: | Development in conservation areas |
| Policy BNE15: | Advertisements in conservation areas |
| Policy BNE16: | Demolition of listed buildings |
| Policy BNE17: | Alterations to listed buildings |
| Policy BNE18: | Setting of listed buildings |
| Policy BNE19: | Advertisements on listed buildings |
| Policy BNE20: | Scheduled ancient monuments |
| Policy BNE21: | Archaeological sites |
| Policy BNE22: | Environmental enhancement |
| Policy BNE23: | Contaminated land |
| Policy BNE24: | Air quality |
| Policy BNE25: | Development in the countryside |
| Policy BNE26: | Business development in rural settlements |
| Policy BNE27: | Re-use of buildings in the countryside |
| Policy BNE28: | Farm diversification |
| Policy BNE29: | Farm shops |
| Policy BNE30: | Metropolitan green belt |
| Policy BNE31: | Strategic gap |
| Policy BNE32: | Areas of outstanding natural beauty |
| Policy BNE33: | Special landscape areas |
| Policy BNE34: | Areas of local landscape importance |
| Policy BNE35: | International and national nature conservation sites |
| Policy BNE36: | Strategic and local nature conservation sites |
| Policy BNE37: | Wildlife habitats |
| Policy BNE38: | Wildlife corridors and stepping stones |
| Policy BNE39: | Protected species |
| Policy BNE40: | Cliffe conservation park |
| Policy BNE41: | Tree preservation orders |
| Policy BNE42: | Hedgerow retention |

| Policy number | Title |
|---|---|
| Policy BNE43: | Trees and development sites |
| Policy BNE44: | Community woodlands |
| Policy BNE45: | Undeveloped coast |
| Policy BNE46: | Developed coast |
| Policy BNE47: | Rural lanes |
| Policy BNE48: | Agricultural land |
| Policy BNE49: | Agricultural dwellings |
| Policy BNE50: | Agricultural occupancy |
| Policy BNE51: | Equestrian developments |
| Policy ED1: | Existing employment sites |
| Policy ED2: | Employment in action areas and mixed use areas |
| Policy ED3: | Other employment sites |
| Policy ED4: | Elm court |
| Policy ED5: | Proposed employment areas |
| Policy ED6: | Small business complexes |
| Policy ED7: | Special industrial uses |
| Policy ED8: | Industrial uses not in a use class |
| Policy ED9: | Chatham port |
| Policy ED10: | Working from home |
| Policy ED11: | Existing tourist facilities |
| Policy ED12: | New tourist facilities |
| Policy ED13: | Hotels |
| Policy ED14: | Bed & breakfast accommodation and guest houses |
| Policy ED15: | Self-catering accommodation |
| Policy ED16: | Tourist facilities for walkers and cyclists |
| Policy H1: | New residential development |
| Policy H2: | Retention of housing |
| Policy H3: | Affordable housing |
| Policy H4: | Housing in urban areas |
| Policy H5: | High density housing |
| Policy H6: | Flat conversions |
| Policy H7: | Multiple occupation |
| Policy H8: | Residential institutions |
| Policy H9: | Backland and tandem development |
| Policy H10: | Housing mix |
| Policy H11: | Residential development in rural settlements |
| Policy H12: | Mobile home parks |
| Policy H13: | Gypsy caravan sites and travelling showpeople’s quarters |
| Policy R1: | Chatham – comparison retailing |
| Policy R2: | Chatham – convenience retailing |
| Policy R3: | Chatham – the Brook and High Street |
| Policy R4: | Retailing in Strood |
| Policy R5: | Retailing in Gillingham |
| Policy R6: | Retailing in Rainham |
| Policy R7: | Hempstead Valley Shopping Centre |
| Policy R8: | Rochester City centre |
| Policy R9: | Retail provision in new residential developments |
| Policy R10: | Local centres, village shops and neighbourhood centres |
| Policy R11: | Town centre uses and the sequential approach |
| Policy R12: | Mixed use schemes |
| Policy R13: | Retail uses and the sequential approach |
| Policy R14: | Ancillary retail development |
| Policy R15: | Amusement arcades, etc |
| Policy R16: | Restrictions on goods for sale |
| Policy R17: | A2 and A3 uses and change of use |
| Policy R18: | Takeaway hot food shops, restaurants, cafes, bars and public houses |
| Policy R19: | Vehicle sales and showrooms |
| Policy L1: | Existing leisure facilities |
| Policy L2: | New leisure facilities |

| Policy number | Title |
|---|---|
| Policy L3: | Protection of open space |
| Policy L4: | Provision of open space in new residential developments |
| Policy L5: | Open space in employment areas |
| Policy L6: | Open space allocations |
| Policy L7: | New playing fields |
| Policy L8: | Dual use of recreational facilities |
| Policy L9: | Country parks |
| Policy L10: | Public rights of way |
| Policy L11: | Riverside path and cycleway |
| Policy L12: | Golf courses |
| Policy L13: | Water based leisure |
| Policy T1: | Impact of development |
| Policy T2: | Access to the highway |
| Policy T3: | Provision for pedestrians |
| Policy T4: | Cycle facilities |
| Policy T5: | Bus preference measures |
| Policy T6: | Provision for public transport |
| Policy T7: | The rail network |
| Policy T8: | Route of the channel tunnel rail link |
| Policy T9: | River buses and piers |
| Policy T10: | Wharves |
| Policy T11: | Development funded transport improvements |
| Policy T12: | Traffic management |
| Policy T13: | Vehicle parking standards |
| Policy T14: | Travel plans |
| Policy T15: | Parking strategy |
| Policy T16: | Rainham town centre parking |
| Policy T17: | Park and ride |
| Policy T18: | New transport infrastructure |
| Policy T19: | Road schemes |
| Policy T20: | Development related road schemes |
| Policy T21: | Motorway service areas |
| Policy T22: | Provision for people with disabilities |
| Policy T23: | Aviation related development |
| Policy CF1: | Community facilities |
| Policy CF2: | New community facilities |
| Policy CF3: | Sites for local healthcare facilities |
| Policy CF4: | Primary healthcare facilities |
| Policy CF5: | Nursing and special care |
| Policy CF6: | Primary schools |
| Policy CF7: | Further, higher and adult education |
| Policy CF8: | Cemetery extension |
| Policy CF9: | Power stations |
| Policy CF10: | Overhead supply lines |
| Policy CF11: | Renewable energy |
| Policy CF12: | Water supply |
| Policy CF13: | Tidal flood areas |
| Policy CF14: | Telecommunications |

Further details on these policies are available from the Medway Local Plan 2003. This can be viewed on-line at www.medway.gov.uk/wwwlocalplan

## Appendix 5: Agent questionnaire form

# Medway Employment Land Study 2006

## Agent questionnaire

Medway Council is undertaking an Employment Land Study in accordance with government's current good practice guide "Employment Land Reviews: Guidance Note", published December 2004.

The study will be in two parts –
Part 1 will be a review of the current provision and accommodation and cover stage 1 and the understanding of market areas and segments element of stage 2 of the process outlined in the good practice guide.

Part 2 will cover the remainder of stage 2 and all of stage 3 in the guide.

This questionnaire is seeking your opinion on the current level of provision, quality and associated factors; it also includes some questions on current perceptions.

We would be grateful if you could:

1) submit a separate form in respect of any, or each, industrial estate or business park and/or
2) submit this questionnaire as a general commentary on the overall situation as you see it.

The report forming part 1 of the review will contain a technical annex that will provide a summary of the responses received from this survey.

A list of the specific industrial estates and business parks being audited is included at the bottom of this letter.

If you are responding on a paper format please use a continuation sheet for any explanations or clarifications you wish to add.

**If you would prefer an electronic version of this questionnaire is available, please telephone 01634 331629 or email ron.hoare@medway.gov.uk.**

| | |
|---|---|
| Company Name | |
| Address | |

We may wish to contact you to clarify any of your responses, could you kindly provide a contact name and telephone number/email address for this purpose.

| |
|---|
| |

1. Please specify whether this is a general comment on the situation in Medway or a specific response in respect of one of Medway's industrial estates or business parks.

| General comment | **Yes** | **No** |
|---|---|---|
| Specific estate or park (please specify) | | |

2. Could you provide your view of the following aspects:

| | | | **Good** | | **Aver age** | | **Poor** |
|---|---|---|---|---|---|---|---|
| | | | **1** | **2** | **3** | **4** | **5** |
| 1 | Buildings; | Suitability | | | | | |
| 2 | Buildings; | Quality | | | | | |
| 3 | Buildings; | Flexibility | | | | | |
| 4 | Buildings; | Amount | | | | | |
| 5 | Buildings; | Condition | | | | | |
| 6 | If 'Poor' please state reason | | | | | | |
| | | | | | | | |

| | | | **Good** | | **Aver age** | | **Poor** |
|---|---|---|---|---|---|---|---|
| | | | **1** | **2** | **3** | **4** | **5** |
| 7 | Car parking provision | | | | | | |
| 8 | If 'Poor' please state reason | | | | | | |
| | | | | | | | |

| | | | **1** | **2** | **3** | **4** | **5** |
|---|---|---|---|---|---|---|---|
| | | | **Good** | | **Aver age** | | **Poor** |
| 9 | The estate(s) in general; | Appearance | | | | | |
| 10 | The estate(s) in general; | Suitability for purpose | | | | | |
| 11 | The estate(s) in general; | Amount of space | | | | | |
| 12 | The estate(s) in general; | Quality of infrastructure | | | | | |
| 13 | The estate(s) in general; | Quality of support facilities | | | | | |
| 14 | If 'Poor' please state reason | | | | | | |
| | | | | | | | |

| | | | **Good** | | **Aver age** | | **Poor** |
|---|---|---|---|---|---|---|---|
| | | | **1** | **2** | **3** | **4** | **5** |
| 15 | Access; | Road (for freight purposes) | | | | | |
| 16 | Access; | Road (for car and cycle access, public transport access etc) | | | | | |
| 17 | Access; | Rail (for freight purposes) | | | | | |
| 18 | Access; | Rail (public transport access) | | | | | |
| 19 | Access; | Pedestrian | | | | | |
| 20 | Access; | River | | | | | |
| 21 | If 'Poor' please state reason | | | | | | |
| | | | | | | | |

3. Links and Synergies

| | | | Yes | No |
|---|---|---|---|---|
| 22 | Clusters | Are there any significant groups/clusters of which you are aware | | |
| 23 | Workforce location; | Is there a sufficient local pool of employment | | |
| 24 | Supply chain | Are there any known problems with the supply chains | | |
| 25 | Please supply further details to your answers (if possible) | | | |
| | | | | |

4. Perceived situation – general matters

| | | Good | | Aver age | | Poor |
|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4 | 5 |
| 26 | Council support for business | | | | | |
| 27 | Level of business rates | | | | | |
| 28 | Conflicts of use with surrounding locality | | | | | |
| 29 | Is it in the right location | | | | | |
| 30 | If 'Poor' please state reason | | | | | |
| | | | | | | |

5. Perceived situation – businesses

| | | | Yes | No |
|---|---|---|---|---|
| 31 | Currently have the right amount of space | | | |
| 32 | Would like to downsize; | On site | | |
| 33 | Would like to downsize; | At another location | | |
| 34 | Would like to increase expand; | On site | | |
| 35 | Would like to increase expand; | At another location | | |
| 36 | Please supply further details to your answers (if possible) | | | |
| | | | | |

6. Perceived situation – environmental

| | | Yes | No |
|---|---|---|---|
| 37 | Are you aware if companies are contemplating 'going green' | | |
| 38 | If Yes please supply further details | | |
| | | | |

| | | Yes | No |
|---|---|---|---|
| 39 | Are you aware of any conflicts of use with surrounding locality | | |
| 40 | If Yes please supply further details | | |
| | | | |

7. What commercial facilities would you like to see

| | | Yes | No |
|---|---|---|---|
| 41 | More seed units | | |
| 42 | Wider range of building size/type | | |
| 43 | More trade outlets | | |
| 44 | Provision for major distribution depot or other significant occupier | | |
| 45 | If Yes please supply further details | | |
| | | | |

8. Possible infrastructure changes

| | | | Yes | No |
|---|---|---|---|---|
| 46 | Social facilities; | Crèche | | |
| 47 | Social facilities; | Sandwich bar/cafe | | |
| 48 | Social facilities; | Health club/gymnasium | | |
| 49 | Social facilities; | Open leisure areas/green spaces | | |
| 50 | Social facilities; | Other (please specify): | | |
| 51 | If Yes please supply further details | | | |
| | | | | |
| 52 | Commercial facilities; | Improved internal access roads | | |
| 53 | Commercial facilities; | Greater provision of IT facilities/cabling | | |
| 54 | Commercial facilities; | Other (please specify): | | |
| 55 | If Yes please supply further details | | | |
| | | | | |
| 56 | External facilities; | Improved access | | |
| 57 | External facilities; | Improved signage | | |
| 58 | External facilities; | Other (please specify): | | |
| 59 | If Yes please supply further details | | | |
| | | | | |

9. Any further comments you may wish to add in respect of the current situation on existing industrial estates and business parks

| | |
|---|---|
| 60 | |

Thank you for your kind cooperation in completing this questionnaire. Your responses will provide a valuable view of the current provision from those representing the occupants of the estates and represents the situation from all perspectives.

10. Please return your completed forms, by 23rd June if possible, to:

Ron Hoare
Regeneration and Development
Medway Council
Compass Centre
Chatham Maritime
Chatham, Kent
ME4 4YH

Please send electronic responses with a subject heading of ‘ELS – Agent Response’ to ron.hoare@medway.gov.uk

### ***List of sites being audited***

1 2-10 Cuxton Road, Strood, Rochester
2 Ballard Business Park, Strood, Rochester
3 Beechings Way Industrial Estate, Gillingham
4 Bridgewood Business Park, Rochester
5 Castle View, Rochester
6 Chatham Maritime, Chatham
6a Historic Dockyard, Chatham Maritime, Chatham
7 Chatham Port, Chatham
8 Commercial Road, Strood, Rochester
9 Courteney Road, Gillingham
10 Cuxton Industrial Estate, Cuxton, Rochester
11 Elm Court Industrial Estate, Gillingham
12 Fenn Street Industrial Estate, Rochester
13 Formby Road, Halling
14 Fort Horsted, Chatham (located within an ancient monument site)
15 Gads Hill, (Incl Steelfields) Gillingham
16 Gillingham Business Park, Gillingham
17 Hoo Industrial Estate, Hoo, Rochester
18 Hopewell Drive, Chatham
19 Isle Of Grain, Grain, Rochester
20 Kingsnorth Industrial Estate, Hoo, Rochester
21 Lordswood Industrial Estate, Chatham
22 Lower Twydall Lane Gillingham
23 Medway City Estate, (Incl Commissioners Road) Rochester
24 Otterham Quay Lane, Rainham (including Canterbury Lane site)
25 Pier Road Industrial Estate, Gillingham
26 Railway Street Industrial Estate, Gillingham
27 Rochester Airfield Estate, Rochester (Including Laker Road)
28 Second Avenue Industrial Estate, Chatham
29 Temple Industrial Estate, Knight Road, Strood, Rochester
30 Jenkins Dale, Chatham
31 Medway Valley Park Industrial Estate, Strood

**Medway Council**

## Employment Land & Accommodation Study 2007

## Volume 4:
## Current Demand for Land and Accommodation

## Contents

## Summary of Key Findings

- This section of the study on the Current Demand for Land and Accommodation includes a literature review of the local planning context, an analysis of the face-to-face interviews with Medway business leaders and of the Medway business telephone survey.

- The Medway Local Plan 2003 is the current legal document against which planning decisions are made.

- An objective of the Local Plan is ‘to make provision for a range of sites to meet the needs of different types of business and tourism to encourage diversification in the local economy’. This gives it a crucial role in directing and controlling development.

- A smooth transition stage to full spatial planning is important for Medway. The introduction of a new national planning system coincides with a time when there is an urgent need to foster economic development through the planning system in order that the South East in general and Medway as part of Kent Thames Gateway in particular remain competitive in a global market place.

- Economic development in Medway has been successful.
    - 25% increase in Medway’s business stock to 13,000 businesses since 2000. (Regeneration Framework 2006-2016 October 2006)
    - Overall growth of company numbers between 1998 and 2003 of 9%. (Locate in Kent, 2005)
    - Long term annual business growth rate in Medway over a 20 year period of 1.3% (DEGW/ Innovacion, 2006)
    - Over the same 20 year period the Medway economy has grown by 29% in terms of employment. (DEGW/ Innovacion, 2006)

- The delivery of a ‘sustainable spatial vision’ through the strategic development of interrelated interwoven economic, social and environmental planning policies at local level within a Local Development Framework requires a sequence of sophisticated on-going responses to meeting current and future demands for employment land

- In short the challenge for Medway is making sense of the planning jigsaw and delivering on the current demand within the existing legal framework of the Local Plan whilst at the same time working in the context of the new national spatial development planning system and emergent *Core Strategy* for the Local Development Framework.

- There was remarkable synergy in the findings from the Employment Land Audit; Accommodation Survey; Business Telephone Survey & Interviews with Business Leaders. However, each piece of research was undertaken separately led by a different member of the Project Team

- Although Medway has had success in recent years in growing business, an increase of 25% since 2005, performance has fallen back against other places in the region.

- One important aspect of the consultation process for the Medway Employment Land Study 2007 has been interviews with the business community representing a broad cross-section of interests relevant to this study and whose judgements are informed by knowledge of working at the leading edge in Medway.

- The interviews with business leaders and the Business Telephone Survey yielded very similar results with a broad consensus of opinion on employment land and business needs.

- One overarching issue emerged; companies need to adapt quickly to changing circumstances to maintain profit margins. In particular businesses are required to expand or contract at accelerated rates to remain viable, far more so than in the 20th century. Businesses need to be able to respond to a changing economic climate to maintain a competitive advantage and that often means ensuring that the land, accommodation and location work to their maximum advantage in this respect.

- Strong views were expressed and revealed a deep commitment to Medway and its future. The recognition that Medway is a ‘good place to do business in 2006’ is revealed.

- Success is thought to be one reason why there may not be sufficient employment land and accommodation to meet future business needs.

- As one of the largest conurbation in the South East Medway has the opportunity to become a thriving successful and sustainable community. The business view was that if a clear coherent strategic vision could be developed and realised in consultation with, and commitment from, the business community, as well as the wider community, Medway should become a force to be reckoned with in the future. All the ingredients are there.

- The interviews with key opinion formers produced interesting results. The positive energy directed towards the future opportunities largely outweighed the frustrations felt by many of those interviewed about the current disjuncture, as they saw it, between long term aspiration, existing realities and the absence of a genuine discussion with the business leaders on how to bring these together.

- Above all, the willingness of all interviewees to become serious partners with Medway Council in future policy formulation was firm evidence of a commitment to Medway’s regeneration and business development

- In some manufacturing/ distribution companies there is a shift from a concentration of staff ‘on the shop floor’ to office work at the interface with the customer. After-sales service is an increasing necessity as a competitive advantage.

- This trend towards increased numbers of office staff also reflects the need to attend to ‘red tape’ issues.

- The general impression given by Medway businesses of the strength of business demand in Medway is supported by the facts. The long term annual growth rate has been 1.3%. This was largely better than Medway’s urban comparators - Portsmouth, Southampton, Brighton and Hove – with the exception of Milton Keynes. (ONS statistics/ Innovacion, Medway Renaissance, May 2006)

- Medway businesses consider that they have a unique role to play in the regeneration of Medway. Almost 50% of Medway businesses will be looking for additional accommodation over the next decade.

- The interviewees consider there is a lack of realistic planning policies to meet the needs of Medway businesses and inward investment in the short term. They consider that this creates the risk of a decline relative to competitors in the South East at best and business stasis at worst.

- Sustainable business development in Medway was a concern for all interviewees both through attracting new business to Medway and developing and retaining 'home grown' companies.

- Medway's poor physical image, unfocussed economic profile and negative branding have an impact on business development but are viewed as obstacles to be overcome.

- The interviewees felt that there is currently a cycle of planning uncertainty and an impasse in business decision making. Planning, in isolation from reference to future business needs, is seen as a major direct threat to the on-going development of successful Medway businesses.

- The conclusion, backed by the evidence in this study is that in respect of ensuring that sufficient employment sites are available has proved difficult due to events outside the Local Plan. Whatever the reasons for the delays in the development of sufficient new employment land this has had an impact on the negative perceptions within the business community in Medway.

- The employment land and accommodation currently in use in Medway is not seen in many respects as ideal although the perception amongst interviewees is of a high level of business activity. This is leading to traffic jams and access issues both on Industrial Estates and in the urban centres of Chatham and Rochester.

- The accommodation that is available is generally old and lacks the flexibility required for a modern business. Issues raised include:
    - Out of date tenure arrangements
    - Inappropriate size of unit/ office space or internal fit out
    - No moving on space to grow existing Medway businesses
    - No process in place to support businesses at the growth stage
    - Businesses are forced to move out of Medway.

- Demand for current and future accommodation represents a more dynamic business model than the one currently in operation in Medway. The requirements of businesses include:
    - small unit sizes;
    - high profile offices in prime locations;
    - affordable multi-purpose flexible workspace (for office, light industry or other business uses);
    - modern flexible office space;
    - quality affordable workspace for motor trades and engineering;
    - short lease structures of between 2-3 years;
    - serviced office accommodation;
    - additional freehold premises;
    - parking

- The in depth understanding of the development issues affecting Medway was noteworthy amongst all interviewees. They
  - Wanted to play an active role in the regeneration of Medway. and sought a two way forum with Medway Council where business representatives were equal partners in addressing business issues relating to employment land and accommodation
  - Were concerned that Medway Council should find additional employment land in the urban area
  - Thought Medway should be looked at as a whole, with consideration given to the idea of an inner and outer ring of business activity
  - Considered that there should be employment land and accommodation provision for manufacturing and distribution as well as the service sector
  - Viewed the improvement of existing business parks and industrial sites as a priority
  - Recognised the need for affordable workspace and an expansion in office accommodation in the urban centres as well as further afield
  - Proposed the strategies for sustainable development including
    - transport policies that would address sustainable recycling issues
    - the development of businesses from within Medway as part of an agenda for sustainable communities
  - Thought there needs to be delivery on expectations within a bigger bolder approach to planning for business development.

- Easy access to transport links is seen as a high priority: respondents to the telephone survey opted overwhelmingly for an edge of town situation as a business location. Alternative suitable public transport is currently seen as unavailable and may account for this extreme position: respondents frequently remarked on the complete absence of an effective public transport system. The survey reveals the stark reality that ‘green issues’ do not stretch to individual business decisions where car use and car parking is concerned.

- River transport is seen by some interviewees as a lost opportunity for ‘greening’ Medway. It is felt that using the river more effectively could possibly reduce traffic congestion on the roads in the urban areas. This could include the use of the river for shipping to increase the quantity of bulk imports and to develop sustainable re-cycling initiatives; as well as the chance to develop sustainable transport through a passenger ferry service between Rochester and Chatham

- Some successful high value, high prestige businesses prefer river frontage premises in a landscaped setting with cafes and restaurants and are prepared to pay a premium rate for the privilege. At present there is no suitable employment land or accommodation space available in Medway matching their needs.

- An increased emphasis on an attractive setting even for engineering firms – 46% of respondents – is evidence of a shift taking place already in expectations of Medway businesses to retain market profile, recruit skilled employees and provide a professional face to suppliers and customers.

- A variety of the issues raised by interviewees relating to employment land and accommodation are summarised below in random order:
  - accommodation with showers
  - smart outer face for manufacture
  - improved transport infrastructure

- places to expand on the same Estate/ or in the same area
- need for more space over 2000 square feet
- cost effective premises and space
- flexible offices/ flexible space
- wharfage/ quayside moorings with good transport links
- further mergers likely with nowhere to go
- nowhere to expand warehousing and distribution
- requirement for additional freehold land but none available in Medway
- expansion (and contraction) difficult when leasehold arrangements are so inflexible
- long 'short' lease tie in time is problematic in a fast changing business environment
- keeping costs down is essential to remain competitive – lack of short 3 year leases available
- council planning a problem for business development and entrepreneurship
- old buildings - not cost effective but difficult to change and adapt on the same site and continue the business

- Medway businesses expect regeneration to provide better shops, good cafes and restaurants, hotels, high quality, high profile office/ small business accommodation in a quality location (park or riverside) and also employment land for modern/ traditional engineering and distribution companies.

- On a larger scale they expect regeneration initiatives to produce
    - dedicated employment land for distribution
    - dedicated employment land for engineering
    - high profile land and accommodation at reasonable costs at c. £10.00 per square ft for hi tech and marketing companies
    - good transport infrastructure
    - dedicated riverside wharfage employment land for recycling, ship repair and imports by sea
    - a new river crossing will reconnect Medway with North of the river to prevent manufacture and distribution moving away

- Skills shortages were very high on the agenda when respondents were asked to look at the opportunities and threats to their Medway-based businesses.

- Many interviewees consider that neglecting the development of existing Medway businesses will continue the current cycle of businesses starting in Medway but then moving out because there is nowhere to go and no reason to stay. This in turn will be detrimental to wealth creation in Medway. Wealth creation is now recognised as driven by small business across the UK.

- Companies are increasingly mobile and will go where they are welcomed and supported. Through the vehicle of the telephone survey they hope their views will not just be recorded but also listened to by Medway Council.

## Introduction

3.0.1 The context of the Medway Employment Land Study 2007 is the DCLG's (formerly ODPM) Employment Land Reviews Guidance Note drawing on Regional Spatial Strategies (RSS) and Local Development Frameworks (LDFs).

3.0.2 This emphasises that the outcome of the Reviews should provide robust data that can inform the Local Development Framework (LDF) in balancing the competing demands for land in a 'sustainable, spatial vision'.

3.0.3 Medway Employment Land Study has involved cross-cutting research examining the interlocking needs of businesses and their realisation through the planning system. Few local authorities are able to achieve this successfully.

3.0.4 *Section 3: Current Demand for Land and Accommodation* comprises three parts each of which contributes to the acquisition and analysis of strong data sets as a basis for decisions on how the policies should be amended in the emerging LDF and to determine the appropriate policy framework to deal with employment sites.

Part I: Literature Review – Local Planning Context
Part II: Consultation 1: Analysis of the face-to-face interviews with Medway business leaders
Part III: Consultation 2: Medway Business Telephone Survey

## Synergies

3.0.5 There was remarkable synergy in the findings from the Employment Land Audit; Accommodation Survey; and Interviews with Business Leaders and Business Telephone Survey.

3.0.6 However, each piece of research was undertaken separately led by a different member of the Project Team. Although there were regular meetings of the Team throughout the duration of the project, there was no collusion in terms of the findings. This point in itself adds considerable weight to the data set as a whole as well as the individual parts.

**Medway Council**
**Employment Land & Accommodation Study 2007**

## Section 3: Part I

## Literature Review – Local Planning Context

### Medway Local Plan 2003

**Introduction**

3.1.1 One aspect of Medway Council's response to the DCLG's (formerly ODPM) Employment Land Reviews Guidance Note is a re-examination of planning policies for employment land adopted in Local Plans. This review in conjunction with other research for this report will contribute to a strong evidence base for decisions on how the planning policies for employment land should be amended in the emerging Local Development Framework. (See Section 4)

3.1.2 Medway Local Plan is reviewed in this report in the context of the current demand for employment land and accommodation as demonstrated by the findings of this study and in reference to three of the six criteria relevant to this study against which the performance of the Local Plan will be judged in meeting its aims with regard to economic development:

(1) The quality of employment sites available in the area and the range and amount of industrial and commercial uses that are being developed
(2) The volume of employment land and floorspace lost to other uses
(3) The level of unemployment (4.7.1)

**A legal document**

3.1.3 The introduction to Medway's Local Plan adopted on 14th May 2003 states its significance in an understated manner but recognises the Plan's 'crucial role in directing and controlling development':

3.1.4 Local plans have assumed a greater importance since the Town and Country Planning Act 1990, which makes the preparation of local plans a statutory requirement. It also makes it clear that where plans are up to date, proposals for development will generally be permitted only if they accord with the Development Plan.

3.1.5 Therefore local plans, as the most detailed layer in the plan-making system, have a crucial role in directing and controlling development. (1.1.4)

3.1.6 The messages within the Local Plan are couched in the language of sustainable development but more recent Medway documents produced for the Local Development Framework – the *Core Strategy* and *Housing Development Plan Document* (DPD) - have greater clarity and are more forceful in articulating the arguments.

**Links with Government Policy**

3.1.7 Government policy for planning and economic development is set out in Planning Policy Guidance 4 and Statements 12 and 13 which emphasise that local planning authorities must have regard to the importance of encouraging industrial and commercial development in the interests of the national as well as the local economy.

3.1.8 Medway Local Plan 2003 acknowledges government guidance and in particular recognises the need for policies that include economic priorities to provide for choice, flexibility and competition.

> *Development Plans must contain clear land use policies for different types of industrial and commercial development and positive policies to provide for the needs of small businesses. They should aim to ensure that there is sufficient land available to meet differing needs which is both capable of development and well served by infrastructure. (4.2.1)*

3.1.9 Options for economic development were fully met by the Medway Local Plan 2003 in line with government policy guidance. Although the site audit for this study has identified a lack of available undeveloped employment land in the urban area, it cannot be attributed to short comings in the Plan.

3.1.10 That said, planning takes place in a constantly changing policy environment. Government expectations for 80% brownfield sites for residential use in Medway as part of the Thames Gateway developments[1] - above the 60% target for South East regional planning as a whole; and limited use of urban extensions for housing as detailed in the Local Plan[2] and LDF Housing and Mixed Use DPD[3] following the sequential approach advocated in Policy Planning Guidance (PPG) 3 present growing pressures on the options for economic development on brownfield within the urban area of Medway through the planning system.

3.1.11 The Commercial Development Plan Document (DPD) for the Local Development Framework (LDF) will address future employment land and economic development issues in Medway (See Section 4).

**Employment Land**

3.1.12 The Local Plan (LP) strives specifically to ensure that sufficient land is identified to enable a variety of employment opportunities to come forward. It also aims to limit the release of fresh land for development outside the urban area.

[1] *Creating Sustainable Communities: Delivering the Thames Gateway*, ODPM (now DCLG), 2005, p2, p27). 'The Gateway will provide a choice of homes. These need to be well-designed and affordable for families and people on moderate incomes. In the Gateway, we expect 80% of new homes will be built on derelict, brownfield land …'

[2] *Medway Local Plan*, Medway Council, 2003, Chapter 5, Housing, Policy Context 5.2: '…full and effective use should be made of land within urban areas, including the use of neglected, unused or derelict land … At the same time "town cramming" should be avoided and green spaces which all towns need for recreation and amenity must be protected.' Also see Objective 5.4.1. (ii).

[3] *Medway LDF, Housing and Mixed Use DPD*, 4.1, Submission Stage, June 2006

3.1.13 The potential availability of extensive quantities of brownfield sites across Medway for employment uses was recognised. Therefore the Local Plan was able to meet the full allocation of employment land required by RPG9 and the Structure Plan. At the Public Inquiry the Inspector suggested that this goal was achievable without detriment to economic development or business interests. In fact, such an approach would underpin sustainable development including sustainable business development.

3.1.14 The Plan states its intention to endeavour to retain appropriate existing sites for employment use.

*More specifically, given the scale and nature of provision made here and elsewhere in the plan, the council sees no case for retailing and leisure development to be allowed on land identified for business, industrial or warehousing uses. (4.5.2)*

3.1.15 The Plan affirms its objective to combine support for a diverse portfolio of economic development within the principles of environmental sustainability, recognising the need for Medway to have a 'marketable land supply'.

*The allocation of land for different uses, promotes, encourages and protects industrial and commercial development and tourism, whilst ensuring that all development proposals accord with the principles of environmental sustainability.*

*It is important that sites are of suitable environmental and locational quality to provide Medway with a marketable land supply, which will prove attractive to business and increase the level of tourism. In this respect the key objective of the plan will be to make provision for a range of sites to meet the needs of different types of business and tourism, to encourage diversification in the local economy. (4.1.3)*

**A changing context for Employment Land**

3.1.16 The Local Plan, drafted a decade ago, was prepared within a different economic context, planning system and regeneration framework from the ones that exist today. The first draft of the Plan was prepared in 1997 and the final draft was completed in 1999: it went to Inquiry in 2000. It is the legal document at local level against which all current planning decisions are made pending the adoption of the documents associated with the Local Development Framework (LDF).

3.1.17 The Planning and Compulsory Purchase Act 2004 (The 2004 Act) introduced a new national spatial development planning system. The 2004 Act abolished Structure Plans and replaced Regional Planning Guidance with Regional Spatial Strategies (RSSs) with immediate effect. However, through the new Act regulations the government allowed for Local Plans to be extended to cover the transition period – in fact a three year life was granted to all Local Plans irrespective of their age at the time the Act first came into force.

3.1.18 There may be an argument that the Plan was too short dated – only running to 2006 – to be of real assistance to forward planning for business purposes but there were genuine reasons for such a short time span. With hindsight a view could also be taken that too much land was allocated outside the urban area. But while this land was considerable, the Isle of Grain did not count towards the Structure Plan targets so this was, in effect, over and above the land required to meet Structure Plan targets.

3.1.19 The Medway Local Plan allocated sufficient employment land to meet Structure Plan guidelines for the plan period to 2006. Actions by members in respect of the Rochester Airfield site and the decision taken by the planning inspector on the B& Q site where he considered Medway had sufficient Employment Land to meet foreseeable needs amounted in total to a loss of almost 30ha of employment land in the urban area.

3.1.20 This loss of employment land in the urban area was a direct result of changing perceptions of the political and economic environment and cannot be assigned to shortcomings in planning *per se* and in particular the Local Plan.

3.1.21 Allocations of employment land at the Isle of Grain were seen by some, including SEEDA and SEERA, as ‘the jewel in the crown’ for Medway for the sheer amount of brownfield available at one location.

3.1.22 During the plan period substantial development has taken place at Grain, Kingsnorth and within the urban area. But there is on-going and increasing pressure to speed up the delivery process and address new business concerns to support a growing and changing economy in Medway through the planning system.

3.1.23 In the midst of the pressures on the current planning system in terms of both the need to meet new business demands and also to work within the new national spatial planning system introduced by The 2004 Act, it is important to record and recognise the achievements of Medway’s Local Plan in developing employment sites.

3.1.24 Developments in rural areas were significant, if not on the scale originally envisaged in the Local Plan. Restrictions were placed on Kingsnorth and Grain as to the type of uses to be permitted. However, a new power station has been constructed at Kingsnorth and some other development and redevelopment has taken place. There has been extensive development linked to the new Liquefied Natural Gas (LNG) Depot on the Isle of Grain and some development within Thamesport.

3.1.25 New and existing employment land developed in the urban area since 1999 is listed below:

- Chatham Maritime: mostly moved forward (12 ha available,1999)
- Medway City Estate: available land mostly developed
- Fort Bridgewood: fully built out
- Rochester Airfield Industrial Estate – infill achieved
- Beechings Way: fully redeveloped
- Otterham Quay Lane: 70% built out and permission exists on the remainder.
- Gillingham Business Park: spare land almost all built out
- Health Authority land at Gillingham Business Park: about to be developed with c11,000 sq.m. of B1 usage

**Development of Existing Industrial/ Business Estates**

3.1.26 The Plan details proposals for existing estates in a piecemeal fashion reflecting the lack of an overall strategy for economic development through employment land allocations.

3.1.27 The claim for Gillingham Business Park as 'recognised as being amongst the finest of its kind in the South East' is partially correct, but even this estate has problems – lease structures, facilities. There is no room for complacency as is explored further in Section 4.

*Beechings Way Industrial Estate*: Future development is likely to include a range of different sized units suitable for B1, B2 and B8 uses, with particular emphasis on the opportunities to meet the needs of small businesses

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| Part of the site may be developed for non-employment uses (a mixed use zone) to encourage re-investment at an early date. |

*Courteney Road:* The area is fully developed, although scope may exist for selective redevelopment for Class B1, B2 and B8 purposes.

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| Some environmental improvements are also desirable |

- *Firmstart Estate:* The estate comprises a complex of small managed Class B1 units at Twydall.

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| Training facilities and workshop premises with administrative support, if required, and is aimed at small businesses, particularly those starting up. |

- *Gads Hill/Danes Hill*: Adjacent to the Medway Estuary, along the route of the Medway Towns Northern Relief Road, the site is dominated by older premises currently used for engineering purposes. The Medway Towns Northern Relief Road has greatly improved access to this area and enhanced its development potential.

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| There is potential to develop an area for small Class B1 units adjacent to a proposed residential site. On the remainder of the site Class B1, B2 and B8 development will be permitted. |

- *Gillingham Business Park:* This is a major development, which is recognised as being amongst the finest of its kind in the South East. It contains high quality modern buildings providing accommodation for offices, research and development facilities, manufacturing, storage and distribution. A retail park is situated in the north-eastern corner of the business park.

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| The site is considered suitable for B1 development and this is most likely to take the form of campus style offices. |

- *Pier Road:* This industrial area includes a development of small Class B1 units, a large chemical works and several other inappropriately located uses around Gillingham Pier. The Medway Towns Northern Relief Road has greatly improved access to the area.

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| There is potential at Gillingham Pier to construct further small Class B1 units and to consolidate provision for small firms. |

*Railway Street Industrial Park:* This small development of medium sized light industrial units is predominantly in Class B1 use, located close to Gillingham town centre and the railway station. The estate offers modern premises for an important sector of the industrial market.

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| There may be some potential for further Class B1 development, coupled with environmental improvements and the reconfiguration of the adjoining car and lorry park. |

*Formby Road:* This site at Halling is currently occupied by part of the Rugby Cement works. Approximately 10 hectares is used for coal storage and could be made available for development for Class B1, B2 and B8 uses.

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| The site has been identified in the Kent Waste Local Plan as a potential site for waste processing (including a waste to energy plant) but this designation is likely to be reviewed in the forthcoming Medway Waste Local Plan. |

*Fort Bridgewood:* This is a small site adjacent to the Rochester Airport Estate with land remaining to be developed for Class B1, B2 or B8 uses.

*Frindsbury Peninsula:* The peninsula, which includes the Medway City Estate, accommodates companies ranging from large owner/occupiers to small start-up businesses carrying out a wide variety of uses including storage and distribution, engineering, manufacturing, high technology, office and specialist retailing.

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| Access has been radically improved with the completion of the Medway Towns Northern Relief Road. Land is available for development, which is considered suitable for Class B1, B2 or B8 uses. |

*Hopewell Drive:* This small employment area near Luton contains a number of light industrial businesses. It is approached through a residential area and, in order to safeguard the amenity of the area, only Class B1 uses will be permitted.

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| The site was developed as a business village of small units in 1996. |

*Isle of Grain/ Thamesport:* The employment area is centred upon the former BP oil refinery. It is the location of the oil-fired Grain Power Station and the gas-fired AES Medway Power Station. BP has retained an area for oil storage, 80 hectares of land is occupied by Thamesport, a deep water terminal and container port, and an adjoining site is used by Foster Yeoman for the importation of aggregates. The area as a whole is served by a railhead and by the A228.

Substantial improvements are required to both the rail head and the A228 to enable the site to be developed to its full potential. The site is capable of accommodating port activities and large land users associated with these, in addition to uses within Use Class B1, B2 and B8.

The site, however, is unsuitable for B1 office and high technology uses, as it does not meet the locational tests for such uses as set out in PPG13 "Transport".

Consequently, development within use class B1 will be permitted subject to the imposition of conditions, or planning obligations being entered into, to restrict occupants to Class B1 (c) light industrial uses only. It is becoming increasingly accessible with the completion of the Medway Towns Northern Relief Road and the planned dualling of the A228 between Main Road and Ropers Lane, Hoo

*Kingsnorth:* The designated existing site includes the Kingsnorth Power Station, and Kingsnorth Industrial Estate, which contains a mixture of general industries.

Further development on adjacent land will be permitted for Class B1, B2 and B8 uses under Policy S12. However, in the light of the advice of PPG13 relating to accessibility of office uses, only those falling within subgroup B1 ( c ) will be permitted unless it can be demonstrated that the development makes provision for increased accessibility by means other than the private car. Specialist industrial uses will also be permitted subject to acceptable environmental standards being achieved.

A higher standard of design and landscaping will be required to improve the overall image of the area.

*Lordswood Industrial Estate:* This estate is a light industrial area lying adjacent to a residential suburb of Chatham. It is largely complete.

*Laker Road Industrial Estate:* This area is located on the northern and western periphery of Rochester Airport and contains a variety of employment uses, mainly in the B2 and B8 categories.

Capacity on two remaining sites for further development

*Second Avenue:* An old established light industrial estate, near the Luton local shopping centre.

A few small sites are available where, due to the proximity to residential properties, development will be restricted to Class B1 uses.

*Vicarage Lane, Hoo:* This area contains a variety of Class B1, B2, B8 and other employment uses, some of which are incompatible with the adjoining residential area of Hoo Marina Park.

In order to improve conditions for nearby residents the intensification of un-neighbourly uses will be limited, and development will be restricted to Class B1 business uses.

*Rochester Airport:* This extensive site lies close to the M2 in the south of the conurbation and is the location for a large research and development, assembly and manufacturing facility operated by BAE Systems.

The site has the potential to become an employment centre of the highest quality and, as such, is covered by policy S11.

*Chatham Port:* The port deals with the handling and distribution of materials, together with some ship repairing. Significantly, in the light of the Draft LDF *Core Strategy,* Chatham Port is recognised as an important active going concern with space for further development.

3.1.28 The continuing development of the port is covered in detail in policy ED9

*The Mersey Docks and Harbour Company owns the commercial port which covers an area of approximately 58.7 hectares of the former Chatham Naval Dockyard and includes Basin No.3, which has access to the River Medway. Vehicular access to the site is directly off the Medway Towns Northern Relief Road. Since its establishment in 1984 the port has significantly increased the volume of traffic that it handles, although expansion was limited by the restricted nature of the access arrangements to the site prior to the recent completion of the Relief Road. The port is best known for the handling of timber and paper related products, but also offers ship repairing facilities. (4.5.21)*

**Business Development**

3.1.29 Tensions have arisen within the business community in Medway in part because the original context of the Local Plan was more limited than the expectations created by the shift to a comprehensive spatial planning system.

3.1.30 In addition, successful economic growth in Medway during the past decade, the development of Chatham Maritime and recently the announcement of a PPP for Chatham Centre means Medway is on the cusp of delivering a Medway ‘Renaissance’.

3.1.31 Medway’s rapid development simultaneously in different directions, including expanded housing provision with an emphasis on using ‘neglected, unused or derelict land’ (5.2.1), has highlighted economic development issues relating to the Plan reflected in the frustrations of business leaders. In short from the business perspective the Local Plan no longer appears ‘fit for purpose’.

3.1.32 Comments from the business community focussed on

- The Proposals Map in the Local Plan which does not follow through with a platform for economic growth based on the current realities identified in the findings of this study.

- The difficulties in providing support through the Local Plan for the regeneration of the urban area combining economic development and environmental protection, already acknowledged in the document.

- Complexity involved in introducing alternative planning support for regeneration areas which are identified as strategy areas through Masterplans, Spatial Planning Guidance (SPG), Supplementary Planning Documents (SPDs).

- The size and remoteness of the large industrial sites on the Isle of Grain and at Kingsnorth seen as making them 'suitable for accommodating those employment uses which may not be easily accommodated elsewhere'.

- Kingsnorth and the Isle of Grain were considered 'out on a limb' in 2003 and still are, despite the partial dualling of the A228 trunk road. (See: Section 1, Land Audit)

- The area is a long way from the urban core where the majority of residents live and where there is the strongest demand for employment space. Public transport is almost non-existent.

- Even if land ownership issues are solved and the provision of services is resolved, the number of employees would be expected to be lower than in the urban area because of restrictions on the type of use.

- Retaining current uses on current employment sites as stated in the plan is considered a priority. There is one caveat in the plan that remains controversial: 'Priority will generally be given to the retention of existing employment uses, provided that local amenity is not jeopardised'. (4.5.1)

- Moreover, disappointment was expressed that although the plan states: 'The council will encourage the improvement of such areas to enhance both the image and efficiency of companies and the environment', this had not yet happened. (4.5.1)

- In some instances the Plan could be viewed as failing to protect sites where there has been encroachment onto employment land, as in the case of Akzo Nobel. However, in this case there was a stipulation that future employment levels should match previous employment levels.

3.1.33 The conclusion, backed by the evidence in this study, is that ensuring that sufficient employment sites are available in Medway has proved difficult due to events outside the Local Plan. Whatever the reasons for the delays in the development of sufficient new employment land this has had an impact on the negative perceptions within the business community in Medway.

**Regeneration & the awaited Commercial Development Plan Document (DPD)**

3.1.34 The regeneration of Medway in 2007 is creating a new scenario for planning for employment land on a different scale and within a different spatial planning system. Officially the Local Plan remains in place until the new Medway Development Plan takes over and the Commercial Development Plan Document (DPD) becomes a material consideration for development control. Regeneration is not at a standstill in the meantime: it is being taken forward through the creation of a number of SPGs and SPDs.

**Annual Monitoring Reports (AMRs)**

3.1.35 In parallel with the continued use of the Local Plan, parts of the new planning system are already in place. Medway produces Annual Monitoring Reports (AMRs) and through these is able to make minor alterations to policy on an annual basis. Thus the AMR becomes the vehicle to both review and keep the spatial vision on track. However; there is no public consultation on any changes presumably because the overall goal is already agreed. Altogether the limited scope of AMRs means the process appears to be a relatively crude tool.

3.1.36 AMRs may present barriers to enabling effective responses to situations where major policy changes could be required. In addition, AMRs are a likely to cause confusion amongst the general public since the layer of changes created by the AMR, however minor, will not be represented in the full set of printed Local Development Framework (LDF) documents. The ramification of the full introduction of the new planning system for managing significant economic development and regeneration remains to be tested.

# Medway Council
# Employment Land and Accommodation Study 2007

## Section 3: Part II

## Consultation 1: Analysis of the face to face interviews with Medway business leaders

**Context**

3.2.1 Decisions taken by Medway Council and Medway Renaissance Partnership will impact on the future prosperity of Medway. Medway Council recognises that it is critically important for the public and private sectors to work in partnership to achieve the best opportunities for Medway. This is only possible if decisions on Employment Land and Accommodation are grounded in a strong evidence base that is not only quantitative but qualitative and embraces the opinions, knowledge and understanding of the issues as they are perceived by Medway business stakeholders.

3.2.2 One important aspect of the consultation process for the Medway Employment Land Study 2006, therefore, has been interviews with key opinion formers from the business community selected by the Project Team as representing a broad cross-section of interests relevant to this study and whose judgements are informed by knowledge of working at the leading edge in Medway. Their views have been sought on the question of the total provision, quality and location of Employment Land and Accommodation in Medway both now and in the immediate future.

3.2.3 This section on the Findings from the Interview Research brings different issues together under a number of headings rather than on the theme by theme basis used both for the interviews themselves and the Report on the Feedback from the Face to Face Interviews. The headings of the sections in this analysis of the face to face interviews have been selected both to reflect the weight of interviewees concerns and for their relevance to the other sections of the Study.

**Research Methodology**

3.2.4 Face to face in depth interviews were considered by the Project Team as the best approach to qualitative research for this study in order to capture different viewpoints and different perspectives on the same themes.

3.2.5 Six interview themes were chosen to ensure the rigour of this research strategy and also to enable participants to provide a personal perspective on employment land and accommodation in Medway.

3.2.6 Individual interviewees or groups of interviewees were asked to respond to the six themes according to their professional interests and expertise but in any event to provide comment on each.

3.2.7 The six interview themes were:

- Issues relating to current and future Employment Land and Accommodation in use/ under-used or unused in Medway: quantity – quality – location
- Overview of the current and future manufacturing / service sector needs in Medway: floor space distribution – location – infrastructure
- Perceived current and future needs of individual businesses and types of businesses located in Medway: business environment – what barriers there are to development - type of accommodation and floor space – location – infrastructure
- Business opportunities lost and opportunities for inward investment for the future: issues relating to types of businesses lost; what the inward investment opportunities there are; what barriers there are to development; and how business development could be supported through the planning system
- Factors affecting current employment supply and demand and those likely to do so in the future: employment levels/ structure - commuting effect – occupations – education
- New Trends: green issues - multi purpose/flexible accommodation - home/flexible working

3.2.8 Further details of the research methodology, organisations which agreed to take part in the consultation exercise and full analysis of the interviews on a theme by theme basis are provided in Appendix A

**Interviewees**

3.2.9 Senior partners in surveying firms acting as land agents, managing directors of businesses based in Medway and the Chairman of the Kent and Medway Federation of Small Businesses (FSB) as well as the Chief Executives of business support agencies – Locate in Kent, the North Kent Chamber of Commerce – were invited to be interviewed.

3.2.10 The interviews were conducted on the basis of complete confidentiality. When quotations are used to illustrate a point they are not attributed to any individual organisation or interviewee.

3.2.11 The majority of those who agreed to be interviewed were extremely generous with their time. Instead of half an hour interviews as requested they were all between one hour and two hours in length and one even lasted three hours.

3.2.12 Strong views were expressed and revealed a deep commitment to Medway and its future. Frustrations, contradictory points of view and constructive comment were recorded by the interviewer as well as thoughtful observations about the redevelopment and regeneration process as it currently affects Medway businesses.

3.2.13 In our analysis we have sought to do justice to the interviewees' profound belief that whatever reservations they had about the process of planning and delivering a Medway 'renaissance' Medway deserves more attention.

3.2.14 Their view was that if a clear coherent strategic vision could be developed and realised in consultation with and commitment from the business community as well as the wider community Medway should become a force to be reckoned with in the future. All the ingredients are there. As one of the largest conurbation in the South East and the largest Local Authority in 2001 Medway has the opportunity to become a thriving successful and sustainable community building on its past glories and current strengths and not just a dormitory town for London.

3.2.15 The positive energy directed towards the future opportunities largely outweighed the frustrations felt by many of those interviewed about the current disjuncture, as they saw it, between long term aspiration, existing realities and the absence of a genuine discussion with the business leaders on how to bring the two together.

### Findings from the Interview Research

**Introduction**

3.2.16 The subjects discussed during the interviews covered a wide spectrum of business interests.

3.2.17 In looking at the quality, quantity and location of Employment Land and Accommodation it has been important to distinguish between land availability and buildings availability.

3.2.18 The employment land and accommodation currently in use in Medway is not seen in many respects as ideal although the perception amongst interviewees is of a high level of business activity. This is leading to traffic jams and access issues both on Industrial Estates and in the urban centres of Chatham and Rochester.

3.2.19 The general impression given by Medway businesses of the strength of business demand in Medway is supported by the facts. Over a 20 year period the Medway economy has grown by 29% and there are now an additional 19,200 jobs in an economy of over 85,000 jobs. The long term annual growth rate has been 1.3%. This was largely better than Medway's urban comparators - Portsmouth, Southampton, Brighton and Hove – with the exception of Milton Keynes.

3.2.20 One overarching issue emerged. Companies need to adapt quickly to changing circumstances to maintain profit margins. In particular businesses are required to expand or contract at accelerated rates to remain viable, far more so than in the 20$^{th}$ century. They need to be able to respond to a changing economic climate to maintain a competitive advantage and that often means ensuring that the land, accommodation and location work to their maximum advantage in this respect.

3.2.21 A significant number gave a strong indication that their views were noted, acknowledged but not listened to by Medway Council and that they would welcome the opportunity to engage more fully in the regeneration process as significant players. Vested interests which emerged during some of the interviews were balanced by an understanding of wider issues and constructive ideas.

3.2.22 The perceptions and impressions recorded in the interviews were not always borne out by the facts. A number of misconceptions had grown into what could be described as ‘common knowledge’. For example the general consensus that public transport is practically ‘non-existent’ revealed a number of issues for Medway. There is a public transport system. But the majority of employees prefer to use their cars possibly because, on the whole, parking is available at their place of work. Moreover, the rail stations are seen as unattractive, unsafe at night and therefore do not fit the visual image of a modern transport hub or inter-modal interchange.

3.2.23 Sustainable business development in Medway was a concern for all interviewees both through attracting new business to Medway and developing ‘home grown’ companies.

3.2.24 The interviews also revealed a number of potentially conflicting issues. Whereas there was a general desire to upgrade the accommodation and introduce ‘affordable workspace’, cost was seen as an important issue. Definitions of ‘affordable’ varied as much as did definitions of ‘workspace’. The need for future accommodation to be a cost effective attribute of future business models for all businesses whatever size means that although some businesses favour multi-purpose flexible space – 46.5% in the business survey - others had more specific requirements. Engineering and craft workshops, for example, also need to be made available on an affordable basis.

3.2.25 The skills debate highlighted another area of potential conflicts of interest. A shortage of engineers of all descriptions was identified; as well as a lack of trained chefs, skilled carpenters/ joiners; and semi-skilled workers for pipe laying, concrete laying and tarmac spreading and call centre staff. Employers in food processing manufacturing had other concerns. The successful regeneration of Medway including education regeneration would be likely to reduce the number of unskilled workers available, increase wages and therefore production costs.

## Section 1: Overview

### Medway: Image and perceptions

*'Medway is a gem but how do you unlock it?'*

3.2.26 Medway's poor physical image and unfocussed economic profile and negative branding have an impact on business development. Memories of a run down dockyard; entry points into the area by road and rail and the anonymity of Medway (it does not appear on a map) as well as the lack of identity and promotion of the Medway brand are factors viewed as detrimental to attracting investment. When prospective investors arrive either at the station or by road what they see confirms what they have heard: the place is unattractive.

*Case Study:* One international investment bank sent a delegation to Chatham by train. The negative image of the immediate environs of the railway station left them unimpressed. The delegation crossed the bridge and caught the next train back to central London

Quote: "Medway is a great place to work but major investors are not interested because Medway and in particular Rochester and Chatham do not convey a positive image despite good transport links, especially the rail services".

3.2.27 Established perceptions of Medway are also low in terms of asset values and economic growth. A number of interviewees emphasized that as the largest conurbation in the South East Medway still has one of the lowest GDPs. Although as a place to do business Medway does offer value for money compared with Maidstone and Tunbridge Wells. Small family run engineering companies operating on low cost industrial sites and other premises reinforce the stereo-type of Medway as an area 'locked in the past' with a cycle of low rents, low profile and low profits. However, they remain in business as viable companies.

### Business stasis

3.2.28 It is apparent to Medway businesses that there is currently a cycle of planning uncertainty and an impasse in business decision making. Medway has no firm plans for the immediate development of additional employment land. The accommodation that is available is generally old and lacks the flexibility required for a modern business either in terms of tenure arrangements, size of unit/ office space or internal fit out.

3.2.29 Modern buildings *per se* are not the answer. They need to be fitted out with up-to-date facilities and even then, if there is insufficient flexibility to adapt and grow the business the building can still be deemed as inappropriate. A separate but related issue from the business perspective is the type of lease available. The wrong tenure arrangements – even in the most modern building - can be equally stifling in terms of a business's ability to respond effectively to changing economic conditions.

3.2.30 There is a view that there is no moving on space to grow existing Medway businesses; or process in place to support businesses at the growth stage. Businesses are forced to move out of Medway.

Quote: “There is no ‘moving on space”. On Medway City Estate there are 580 businesses and 96 owners, 60% of whom are overseas consortia with little or no interest in developing the facilities.

Quote: “The public sector has not managed to adopt a process which helps small businesses to grow and change accommodation and floor space requirements as rapidly as they require. …What companies need are first opportunities at an Enterprise Village with 2 – 3 year leases; then the possibility to move on to small units with greater flexibility and standard 3 year leases”.

Case study: One company that had received funding from Medway Partners for Growth scheme won a Medway Small Business Award and then had to move to Tonbridge to expand.

3.2.31 For some owner occupied businesses there is little incentive to grow the business when land for housing fetches premium prices, especially on riverside sites.

*Case Study*: At least two MDs in owner-occupied premises in prime riverside locations - one on a 6 acre and the other on an 11 acre site - are aware that they could sell up and retire to play golf with far more money in the bank than they would ever earn through running a successful business and with less effort.

**High impact low volume development from SEEDA?**

3.2.32 Opinion amongst interviewees is divided on the benefits of Chatham Maritime as a development. The main criticism has been that speculative buildings suit only a few companies and are more a design statement than a practical solution for the generality of Medway business needs.

3.2.33 The determination of the development agency SEEDA to foster inward investment from multi-national companies is seen as misguided and unsustainable if it is at the expense of developing home grown businesses. Colonial, a global company moved into Medway and then quickly moved out, governed by the immediacies and fickleness of international business dynamics. Changing the name of the building the company had occupied in Medway to ‘Big Blue’ was important because the episode had left a temporary ‘bad taste’ within the Medway business community and contributed to latent insecurities.

Quote: “Existing businesses need support in moving to new premises. To some extent SEEDA has recognized the importance of growing local businesses but Chatham Maritime is too small a development”.

Quote: “Chatham Maritime is brilliant. But demand is a real issue. Demand for office accommodation is not there to match the product. Half a million square feet of space is available most days”.

Quote: “The Big Blue remains two thirds empty because no flexible management structures are in place and it is over-priced”.

*Quote:* “Hopewell offers space at £5.00 per sq ft increasing over 3 years with a whole package of support whereas the smallest room at Chatham Maritime is £25.00 per sq ft. SEEDA has invested £5 million but is not meeting the needs of existing businesses in Medway. … English Partnerships have no realistic idea of business needs…. Much space in Chatham Maritime remains empty waiting for inward investment whereas successful existing businesses are being forced out… What is needed is affordable work space”.

**Business Parks/ Industrial Sites**

3.2.34 There is the view that none of the current business parks or industrial sites or employment land clustered around the shopping centres of Chatham, Rochester and Gillingham are of the quality either to attract new businesses or to encourage existing companies to stay in Medway.

3.2.35 Kent Science Park in Sittingbourne is likely to continue to take business away from Medway if the appropriate space is available. Land agents report they are experiencing longer time frames and some difficulties in letting the 'bigger sheds' although small unit sales are buoyant.

3.2.36 Owners of the larger 'sheds' – mainly overseas consortia - appear uninterested in changing or altering their buildings to meet the real demand and pressure point – growing on space for small businesses.

3.2.37 Medway business parks and industrial sites are considered to be old and tired. Although Gillingham Business Park is recognised as being well managed and in the right place it is also now thought to be in need of some modernisation. Medway City Estate came in for heated criticism for its lack of management and the time taken queuing to get off the Estate at 4.30 pm.

*Case Study*: Medway City Estate (MCE)
MCE is not a business park. Multi-ownership brings with it structural problems that need monitoring. The Estate is currently allocated no management and maintenance budget and no one individual is responsible for its management

Under the Safer Business Parks scheme CCTV cameras were provided but no budget was allocated for their upkeep. The 'brown tailed moth' problem (a caterpillar problem for one logistics firm) was dealt with in part by individual companies and in part by Medway Council.

There are issues with gipsy encampments, absentee landlords, absentee agents as well as signage and the general upkeep of the public spaces.

The commonly held view amongst interviewees is that 'the Estate looks a mess and a dedicated manager should be appointed'.

Access in and out of the Medway City Estate is a major source of frustration and vociferous complaint.

*Quote:* "Gillingham Business Park is a good example of how to get a business location right. It is two miles from Chatham centre with excellent access by car from the M2 and adequate on-site parking…."

*Quote*: "Now Medway City is OK to get in but a nightmare to get out of! It takes 20-25 minutes to leave the estate at 4.30pm".

3.2.38 On the smaller industrial sites such as Cuxton it seems that the majority of those businesses that do stay are unlikely to be looking for growth opportunities. Here and at other estates where there are owner-manager family operated businesses, often relating to the automotive trades, there is no ambition to expand, but a firm desire to continue on a low cost, low return basis.

> *Quote*: “Medway businesses cannot afford £9.00 per square foot as charged at Crayford….The last thing they need is high rents…. Cuxton attracts owner managed businesses and there is no void with rents at £3.00 per square foot. Many are not looking for opportunities to expand.”

**Office space**

3.2.39 The quality of office accommodation is seen almost unanimously by those interviewed as poor from the point of view of current business needs in Medway. Offices either lack flexibility (the Big Blue at Chatham Maritime) or they are not designed for modern IT requirements (Sun Pier).

3.2.40 The majority of available office space is old: there is an inability to change the internal layout within the existing buildings.

3.2.41 In addition many have unattractive lease structures that are a significant barrier to economic growth but are issues beyond the power of the planning system to influence.

> *Quote*: “There is a desperate need for a new purpose built office campus for existing Medway businesses”.
>
> *Quote*:” At least 50,000 sq ft (possibly 70,000 sq ft or more) of office space is required in Medway but the question of where this is to be located has not been answered”.
>
> *Quote*: “The market will not deliver offices in Chatham Centre and offices without parking cannot be let in Chatham at the current time”.
>
> Note: The Hatchery is a successful venture in Chatham Centre because it appeals to young start-up businesses, often ex-students and micro-businesses where business support is the critical issue. Once these businesses grow to become small businesses ( if they do) they have employees who then want parking and so do the maturing Managing Directors.

**The wider environment**

3.2.42 There is little executive housing with the exception of the enclave of St Mary’s Island. There are no national chains of up-market shops restaurants and hotels. In short the quality of life in Medway does not match twenty-first century expectations.

3.2.43 This situation, added to negative perceptions of Medway’s image, makes the appointment of people with managerial skills and graduates more difficult. Interviewees reported problems in recruiting managers and specialist highly skilled engineers. Marine engineering craft skills trainees either fail to complete training programmes or leave when they have done so.

3.2.44 However, paradoxically, many of those interviewed also stated their reasons for staying in Medway are tradition – they had started there – and had established a loyal workforce.

**Inward investment**

3.2.45 Inward investment opportunities are lost to Medway for a combination of reasons detailed above. The story of the international investment bank is frequently recounted.

> *Case study*: In 2004 one national call centre company investigated the possibility of relocating in Medway but chose Kent Science Park in Sittingbourne instead for its new operations base. The stated reasons for their decision to relocate in Swale included a better overall quality of life and access to a local loyal workforce.
>
> *Case study*: A large international logistics company explored the possibility of Medway as part of an options appraisal but chose to go elsewhere.
>
> At the time of their enquiry there were no plans for a distribution park in Medway.

3.2.46 It is axiomatic that perceptions of a lack of a clear policy on the availability of employment land and a time frame for its immediate development is seriously affecting Medway's ability to attract large scale inward investment.

> *Case Study*: A steel stock holder with large contracts for the London Olympics 2012 needed to expand to a large deep water wharfage facility where the firm could import goods from overseas. The company required services, a compound, capacity for assemblage and manufacture and use of heavy lifting gear and was considering a Medway. However, the absence of progress on master plans for Kingsnorth & Grain and on-going land ownership issues at Grain meant that the project did not proceed.

3.2.47 There is an opportunity for Medway to communicate the wealth of major opportunities that are coming on stream on the Hoo peninsular both for inward investment and the growth of existing businesses outwards across the river from the urban area. In the minds of many the two separate sites of Kingsnorth and Grain are conflated.

3.2.48 At the other end of the spectrum one land agent interviewed reported that their company receives enquiries from the so-called 'metal bashing' firms that have a traditional base in Medway that cannot be accommodated. The opportunities emerging at Kingsnorth will have the potential to meet these demands.

**Support for existing Medway businesses**

3.2.49 The understanding amongst interviewees is that Medway Business Parks and Industrial Sites are relatively full and where accommodation is vacant it is either too large e.g. 10,000 sq ft on Medway City Estate; or too small e.g. 84 sq ft Chatham High Street; or there are issues relating to the lease and/or internal fit out.

3.2.50 Medway Council is seen as effective in encouraging business start ups but companies are forced to move out of Medway at the growth stage because the right type of light industrial, heavy industrial or office accommodation is not available.

3.2.51 What interviewees perceive is needed is a range of different types of affordable workspace – office, light industrial and heavy manufacturing – in the appropriate location to meet the business dynamic of the business/

industry sector in Medway if the area is to achieve its potential for economic growth and business success.

3.2.52 Some businesses are particularly sensitive to rising costs of rents including both traditional family owned established engineering/ motor trade companies, new start-ups and companies at the early growth stage. Therefore the issue of affordable workspace is critically important for Medway.

> *Quote*: "If businesses grow they will move out of Medway because Medway has not earmarked employment land. There is a need to re-investigate what has been planned. …Space may need to be redefined in conjunction with sustainable initiatives that offer support beyond the start-up stage
>
> *Quote*: "Metal bashing' does not have to take place in existing inappropriate buildings. Cost per square foot is an issue…When Alloy Wheels International was first established their buildings were state of the art."

**Medway success stories**

3.2.53 The positive picture of Medway as a business destination is also there to be told and celebrated.

3.2.54 Business and Industrial Units at Hopewell Business Centre, Pier Road Industrial Estate and Twydall Enterprise Centre managed by Medway Council offer a range of light industrial and business units catering for the needs of new and recently established small businesses with unit sizes and cost structures designed to provide opportunities for the gradual expansion of businesses. Business start-ups are encouraged and supported.

> *Case study*: Medway Enterprise Gateway (MEG) is a partnership development between SEEDA and Business Link and has a wide range of partners including Medway Council, North Kent Chamber of Commerce, the Universities at Medway, BAE Systems and other businesses. The 'Hatchery' in Chatham High Street run by MEG is successful in offering low cost office space, business support, training and meeting rooms.

3.2.55 An interviewee from one international company based on Medway City Estate confirmed its organisation is not planning to leave Medway and has recently expanded its operations on the Estate. Another international one has invested £3.5 million in infrastructure on its site on Medway City Estate.

3.2.56 On Gillingham Business Park an international plastics/ packing company has enlarged its floor space to increase production with the support of Locate in Kent and Medway Council.

3.2.57 One advanced manufacturing company with an international market for its products has grown within Medway from a small to a medium sized company moving accommodation and location to suit the needs of an expanding business. In fact this company provides a classic model for the growth of a successful 'home grown' business.

*Case study:* The record of the successful development of one of Medway's 'home grown' advanced manufacturing companies, classified as light industrial, illustrates what can happen with the right management, right product and right series of moves to the right new accommodation and floor space at the right time to meet the demands of a growing business.

Starting at the Historic Dockyard, the company then moved to Gillingham Business Park and is now based in new purpose designed premises on Chatham Maritime combining office, research and development and manufacturing under one roof on different floors. The company's philosophy and business model maximizes the use of space with open plan office accommodation on the top floor, R and D on the middle floor and manufacture and distribution on the ground floor.

The benefits of encouraging growth and retention of businesses started in Medway are shown in sustainable employment patterns. 90% of the staff of this company live within 5 miles of their riverside site at Chatham Maritime. Specialist engineers are recruited nationally and internationally.

However, the company is soon likely to outgrow its current premises. 18% of the company's turn-over is spent on R and D and an increase in the size of floor space will be necessary to support the on-going expansion in activity. The question is already being posed: Where can the company move in Medway in 3 – 4 years time?

The company sees Rochester Riverside mixed use development as the next possible opportunity. But it is uncertain what type of business accommodation is envisaged as being suitable on this new development designated 'a mixed use site'

**Small businesses micro-businesses and home working**

3.2.58 Small service sector and light industrial companies are looking for flexible accommodation in a variety and locations. Currently, in the main, their needs are not considered to be met in Medway.

3.2.59 The riverside offices currently available on Medway City Estate are considered to suffer from the poor image of their surroundings. Provision at Chatham Maritime is excellent but does not focus on the needs of small business. Professional firms such as surveyors and land agents favour an 'edge of urban area' location such as provided at Gillingham Business Park; or a riverside location on a mixed use development. But current provision is either fully occupied or unavailable. Car parking is seen as essential.

3.2.60 Both high profile flexible riverside office space for high cost, high turnover businesses (financial services and creative sector) as well as low cost affordable workspace in less conspicuous, safe, clean places (design and print) is required. Appropriate tenure agreements need to be in place which might be anything from one month to one year in serviced office accommodation; and 2-3 year leases for office space or small business units.

Quote: 'There is a danger of focussing on a particular kind of occupier. What is needed is flexible space, 2-3 storey buildings that can provide office space and could also be used for manufacturing rented at a modest cost.

3.2.61 There is also a lack of facilities and incentives for micro-businesses and home working. Kent (but not Medway) is creating meeting places and mapping ‘IT hotspots’ across the county. However, Medway Council is involved in the eKent Partnership activity on wireless hotspots

> Quote: Affordable workspace is needed with ‘hot desking’, computer software support, fax facilities and furniture provided as well as the opportunity to hire meeting rooms. The Regis model at Dartford is one option.

3.2.62 The Federation of Small Business in Kent and Medway emphasises the role of micro businesses in the region’s economy and the fact that their interests and those of home workers are not being addressed in Medway. The growth in the number of home based ‘micro businesses’ is seen as presenting two on-going challenges

- ICT provision and teaching in how to use the technology
- Walk-in business centres - providing places to feed into the support services - social interaction, networking, peer to peer mentoring and an exchange of ideas

> Quote: In Medway consideration should be given to locating business centres within the Universities of Medway and in less formal surroundings close to car parks to directly meet the needs of the new trend in young business entrepreneurs’.
>
> The Federation of Small Business biennial membership survey: Report 2006 *Lifting the Barriers to Growth in UK Small Businesses* reported: ‘More than one-third of respondents operate from home (38%), the most common form of business premises for South East England businesses. This is the highest proportion of any UK region. The next most significant types of premises are offices (21%), retail/shop unit (18%) and factory, workshop or business unit (15%).

## Section 2:
## Issues relating to Employment Land and Accommodation

**Employment Land – Current and Future Provision**

3.2.63 The overarching issues for businesses concerning the current provision of employment land and accommodation have been discussed in Section 1.

3.2.64 From the point of view of Medway Council, Medway Renaissance and business development agencies in Kent and Medway feedback from the interviews suggests that the upgrading of the existing business parks and industrial estates is a priority alongside decisions on the provision of additional employment land to meet the specific needs of business growth.

> *Quote:* There is an imperative to plan support for business development within the current urban area of Medway because urban land for commercial development is valued at between £3 -600,000 per acre whereas residential land is valued at between £1 million and £1.2 million per acre.
>
> *Quote*: "The planning process could determine freehold sites. These are now requested more frequently by companies. They are seeking freehold commercial sites as part of their pension planning and asset management portfolio".
>
> *Case Study:* A specialist company dealing in architectural products and related services currently occupies 1000 sq ft on Medway City Estate.
>
> The firm is looking for freehold options and has contacted Locate in Kent. To find what the company is looking for it will almost certainly have to move out of Medway.

**Existing Business Parks, Industrial Estates and Wharfs**

3.2.65 An outline of the issues interviewees consider should be addressed is identified below.

*Medway City Estate*
Management, signage and upgrading of the road/ roundabout infrastructure to resolve access issues including the provision of a slip road onto the Wainscott by pass.

*Gillingham Business Park*
Provision of cafes and additional retail outlets; replacement of the 15 acres allocated for employment land in the Local Plan but then lost to B & Q on appeal.

*Cuxton and Knights Road*
Upgrade the appearance and access to and from the Estates whilst retaining low cost units.

> *Case Study:*
> A marine engineering company based on Medway City Estate has concerns about infrastructure. The company has a need for access on and off the Estate. With 60 – 70 lorries moving in and out daily the absence of a slip road onto the Wainscott by pass (that, according to the interviewee, could be built at a cost of around £100,000) seriously affects deliveries and cost margins.

*Case study:*
Infrastructure can be a key factor in business decisions for logistics companies. One international firm moved to Medway City Estate 6 years ago as a base for operations across SE England. Relocation to Medway City Estate offered a purpose-built depot on a vacant site which with the new Strood by-pass was 5 minutes from the A2/M2. It now takes 20-25 minutes to leave the estate at 4.30pm.

The company has undertaken an infrastructure analysis but as yet has no plans to leave the Estate, although the company recognises as a result of the study that the depot is in the wrong place. Sevenoaks/ Orpington would provide better access across the South East.

*Case study:* The importance of a good road infrastructure is illustrated by one family owned large-scale manufacturing company has full order books and exports mainly to the Middle East. Its riverside site benefits from the excellent new road system which has cut costs according to the interviewee. There is also a good supply chain close by on Medway City Estate.

**Wharfage Sites**

3.2.66 As part of a sustainable transport policy the re-use of the existing wharfage sites at for cement wharfs appears to make sense, especially where there are established road and rail connections.

*Quote*: "Such sites are like gold dust….A policy such as the one implemented by Tonbridge and Malling to reuse wharves needs to be in place for Medway".

*Note: In Medway Policy (T10) is in place for protecting the wharves at Halling, Frindsbury, Kingsnorth, Cliffe and Grain.*

3.2.67 There is a larger issue that shipping is seen by many in Medway as an eyesore and not part of a sustainable transport agenda for sustainable communities. Interviewees hold the view that shipping has a major role to play in waste re-cycling and bulk cargo handling. In their view there is a need for a local planning decision to put business units rather than housing immediately opposite working wharves on the mixed use Rochester Riverside development. This would avoid the situation of people complaining about being disturbed by the noise of 24 hour working and yet allow them to have the visual interest of shipping and activity on the river.

*Quote*: "Medway Council has no perception of sea transport and what it requires. A container port is not the same as a port for general cargo. Our ships require enough water to get alongside a wharf.

New docks on the Isle of Grain would require an investment of at least £100 million or more and better road a rail transport links. Where is the money to come from?

**Business Parks, Industrial Estates, Mixed Use Sites and Office Courts**

*Business/ Science Park Rochester Airport*

3.2.68 Opinions varied as to whether Rochester Airport was the right location to establish a new Business/ Science Park particularly amongst the different land agents interviewed.

3.2.69 Those in favour of the proposal held the view that Rochester Airfield was as an ideal 'edge of urban area' location with excellent road transport links close to junction 3 on the M2. Topographically level with phase 2 of the Innovation Centre planned to be based there. In creating 2000 jobs, it would appear to be 'the preferred option for the expansion of allocations across all the B1 – B8 sectors'.

3.2.70 Whereas those against the proposal considered that the airport should stay. They envisaged the development of executive business and leisure flights, pilot training, and R & D into unmanned systems (UAVs).

*Kingsnorth*

3.2.71 Kingsnorth is unattractive and unsustainable to many businesses that rely on urban infrastructure. But it is considered to be an ideal location for heavy industry, chemicals, storage and distribution.

*Rochester Riverside*

3.2.72 The concept of mixed use sites such as at Rochester Riverside only works in a narrow band of employment uses. It does not cover manufacturing and distribution. Distribution would be best placed along the northern relief road close to the junction with the M2.

*Office Campus*

3.2.73 The need for 50,000 – 100,000 square feet (minimum) of office space has been identified by the interviewees; but the question of where this is to be located has not been answered. Whether an office campus is part of future planning for Medway and where it would best be located are issues that interviewees were uncertain had been addressed.

3.2.74 Medway has several office campuses planned including: 18,000 sq.m. - earmarked for Rochester Riverside; 50,000 sq.m. earmarked for Chatham Station Gateway and Chatham Waterfront; and options on redevelopment along Corporation Street in Rochester as well Planning consent also exists for 11,000 sq.m. at Gillingham Business Park.

**Accommodation Issues affecting current occupancy levels**

*Pricing structures*

3.2.75 Space in Chatham Maritime remains empty because it is thought to be too expensive at £25.00 per square ft and does not support flexible management structure. In contrast space cost £5.00 per square ft at Hopewell rising over 3 years and £3.00 per square ft at Cuxton

*Tenure*

3.2.76 Leases of 25 years tie companies into accommodation that can become redundant leaving them paying for space they are not using or contributing to their becoming less cost-effective through inappropriate use of space and/or overcrowding. (Note: relevant as it is, this issue is not under Medway Council's direct control.)

*Land Values*

3.2.77 Land values in the Thames Gateway have risen so rapidly during the past 12 years that absentee landlords charge high prices for their leases and are not concerned about attracting a letting. This is particularly evident on Medway City Estate. The feeling is that landlords are speculating that prices will go yet higher and that some employment land will be changed into land designated for housing.

*Unit size*

3.2.78 The 'big sheds' are difficult to rent out but smaller units are in demand but in short supply

*Changes in manufacturing*

3.2.79 Parts are often manufactured in China or the Far East and assembled in Medway. This shift in the manufacturing process means some manufacturing companies require less space than previously.

*Supply and demand*

3.2.80 There is a demand but an insufficient supply of multi-purpose, flexible workspace, office space and units accommodating the so called 'dirty trades'

*A healthy churn*

3.2.81 There is a need for some empty space according to one land agent to attract new business and those companies requiring a change of accommodation.

.

*Quote*: "There are too many empty buildings on Medway City Estate owned by international consortia interested only in land values."

*Quote:* "One warehouse property on Medway City Estate, owned by a Swedish pension consortium was worth £1million 10 years ago and is now worth c. £15 million. No public/ private partnership can afford to buy the premises and convert it either into exhibition space or flexible office space. Landlords are seeking one tenant not 20 – 30 businesses".

*Note:* There is some vacant space on Medway City Estate and Commissioners Road (the overall extent of the industrial area) but the vacant floorspace is only 9.5% of the total which is slightly above the ideal but commensurate with a 'healthy churn'. However, the previous unit survey in 1999 had a higher vacancy level for overall floorspace but the unit vacancy is now higher than in 1999.

*Accommodation: supply to meet demand*

3.2.82 The nature of the demands for current and future accommodation from interviewees represents a more dynamic business model than the one currently in operation in Medway.

3.2.83 It includes:

- small unit sizes
- high profile offices in prime locations
- affordable multi-purpose flexible workspace (for office, light industry or other business uses)
- modern flexible office space
- quality affordable workspace for motor trades and engineering
- short lease structures of between 2-3 years
- serviced office accommodation
- additional freehold premises
- parking

> *Quote:* Planning and building appropriate multi-purpose, flexible accommodation. Most companies - about 390 out of 400 successfully located by Locate in Kent are Small and Medium Enterprises with around 20 -30 employees - move into existing structures.
>
> *Quote:* Office 'court- style' accommodation: Grade A, flexible accommodation is required – purpose-built with raised floors, carpeted with suspended ceilings and air conditioning and adequate parking.
>
> Note: The Local Plan sets a maximum parking provision which is 1 car per 30 sq.m. This is in line with PPG 13 and cannot be exceeded.

*Live/ Work matrix*.

3.2.84 Interviewees feel that consideration needs to be given to designing the integrated delivery of urban centre loft-style living; high prestige river-front offices; and courtyard style restaurants and others close to green spaces to foster the development of the creative industries and high profile financial service companies.

*Two models of live/ work accommodation*

> *Case Study 1*:
> (Quote from the brochure provided by a Medway interviewee)
> *New development at Mulberry Place, SE9*
> At the junction of A2, A205 and A20 Mulberry Place represents a unique opportunity to invest in an exciting, brand new courtyard development of sixteen self-contained workspaces, studios, offices and home/offices designed by award winning architects. Strategically located for prime road and rail access to central London and Canary Wharf, Mulberry Place is a new business environment, offering generous floor space, light and airy working conditions and discreet security'. The buildings, made out of steel, glass and hardwood timber, boast full-height, energy-efficient glazed windows that provide a sense of spaciousness and sophistication. Units were available from 62.83 sq. m. (676 sq. ft.) to 188.5 sq. m. (2029 sq. ft.) autumn 2006.

*Case Study 2*:
(Information provided by an interviewee engaged in urban regeneration)
A design and development company working largely in northern cities in England – mainly Manchester and Liverpool - has developed its own unique philosophy for inner city living and job creation on mixed use sites. The basic ingredients are that it takes a non property view and considers end users; it is open to bright ideas and is not afraid to take risks.

Architectural rigour is applied to empty, unused historic commercial properties with the creation of office space bars and loft-style apartments such as at Concert Square Liverpool. This won an RIBA Award. Their successful formula has led the company to 12 years of ‘unfettered growth’ in the words of the interviewee

*Quote*: “Our development company was set up by urban design enthusiasts. Whereas developers are traditionally steeped in the logic of property thinking and talk in terms of mixed use developments such concepts are not in our thinking. We seek out architecturally challenging projects and create rather than follow the market.”

The company now has an impressive track record for re-populating inner city areas, previously dismissed as problematic through meeting the demand for quality designed, affordable and accessible work, retail, leisure and living spaces.

**Section 3**
**Proposals for strategic action through the planning system**

3/2/85 The impression amongst Medway businesses is that there needs to be delivery on expectations within a bigger bolder approach to planning for business development. Decisions on the nature of business development other than retail facilities on the mixed use site at Rochester Riverside; the strategic context of Kingsnorth as an industrial site; and position of Rochester Airfield as potential new Science/ Innovation Park need to be communicated as they are realised through the planning process.

3.2.86 The feedback from the interviews reflects the need for greater clarity and confirmation as to what Medway Council is actually planning to do as well as better communications. They – the business interests - want to make sure that Kingsnorth can be developed further for the engineering trades (Section 4). What is not clear to those interviewed is the relationship between the different planned new developments in terms of their target range of business types. Moreover, if live work units provide opportunities for start-up businesses at Rochester Riverside what happens when they grow?

**Sustainable transport infrastructure – road, rail, sea and air**

3.2.87 One of Medway's potential key competitive advantages is seen by certain interviewees as the possibility of developing a composite sustainable transport infrastructure – road, rail, sea and air.

- Rail/ station improvements - freight and passenger
- Roads - ring road within the M2
- Wharfage sites on the River Medway – support, retain and reuse
- Air - Rochester Airport - retain capacity for light aircraft and/ or a helipad

3.2.88 There is general recognition of the vital link between planning employment space and transport infrastructure.

*A review of existing wharfage sites*

3.2.89 A review of existing wharfage sites including Halling to explore how they might contribute to the development of recycling, sustainable business and sustainable transport policies within the Thames Gateway was proposed by several interviewees.

*Improvements to rail stations*:

3.2.90 There was consensus that there is a need to make the redevelopment of Chatham, Gillingham and Strood rail stations linked with a review of bus transport to create modern transport nodes a planning priority. Only then will it be possible to begin to attract major investors and enable companies to make business decisions that do not have a heavy emphasis on the availability of car parking space. Such improvements would add significant value to changing the image of Medway.

*Improvements to bus transport:*

3.2.91 There is a perception that there is no efficient way at present for employees to travel from one urban centre to another within Medway; or to reach the business and industrial parks with ease. There is also the view that there are no transport nodes or exchange points

3.2.92 The reality is somewhat different. Although there is a bus, No.136, connecting Rainham – Gillingham – Chatham – Rochester – Strood, this was not referred to by the interviewees. Gillingham Business Park has 10 separate bus routes along the A2 frontage of the site, maximum frequency is every 10 minutes. Gillingham Business Park also has cycleway serving the site

*Ring Road: Employment Land for Business/ Industrial Sites*:

3.2.93 This proposal combines a number of ideas put forward by land agents. There is now almost a ring road around Medway. This is already the focus for industrial/ business development, the best example being Gillingham Business Park.

3.2.94 In the view of a number of interviewees the concept could and should be expanded into formal planning policy. It could include the use of urban extensions for employment purposes; and could also, therefore, enable more imaginative planning of employment land and accommodation to suit business needs as is done elsewhere in Europe. It means ‘thinking outside the box’ to create viable employment land and in particular a distribution park close to transport infrastructure.

3.2.95 Such a development would complement the proposed developments at Rochester Airport, Kingsnorth and Chattenden

*Case Study:*
Gillingham Golf Course
This proposal is at an initial stage and has not been worked on in any detail. However, the idea has gathered some momentum amongst land agents and businesses. In the context of a master plan for employment land and accommodation on the ‘ring road’ the land currently occupied by Gillingham Golf Course could be used for business development making use of the road and rail infrastructure that already exists. As part of a planned strategy the golf course could be moved to an accessible, ‘out of town’ location.

## Medway Council
## Employment Land and Accommodation Study 2006

## Section 3: Part III

## Consultation 2: Medway Business Telephone Survey

3.3.1 The Business Telephone Survey for the Employment Land and Accommodation Study 2006 forms part of a wider consultation exercise designed to engage local businesses in the process of examining whether Medway has sufficient employment land and accommodation of the right kind and in the right place both now and in the future.

3.3.2 The general impression gathered from the Business Telephone Survey results was that Medway Council had consulted a lot but had not listened to business views or engaged businesses actively in seeking solutions to their immediate problems relating to employment land and accommodation.

3.3.3 However, some companies wanted to be 'left alone to get on with running their businesses' without what they saw as uninvited Council interference. An unforeseen level of cynicism about the regeneration of Medway was encountered on Medway City Estate.

**Research design methodology**

3.3.4 The telephone survey was designed to ascertain respondents' views on their company's needs in respect of running a successful business in a competitive local and global economic environment in terms of

- immediate land and accommodation requirements
- likely future land and accommodation requirements

3.3.5 Specifically, the questionnaire asked about the

- impact of the current provision of land and accommodation on business development
- likely future land and accommodation requirements in order to maximise business opportunities

**Methodology**

3.3.6 The questionnaire was designed both to gather factual information and to determine attitudes towards and views on current and future business needs in relation to employment land and accommodation.

3.3.7 The following questions were asked

What type of business do you run?
What is the size of your business?
Where is your business located?
What are the business advantages/ disadvantages of the current location?
What are your priorities for the future?
What type of business location would you prefer to meet your future business development plans?
What issues relating to employment land and accommodation do you see your business will face in the future?
What opportunities and threats do you consider your business will face as a Medway-based business over the next decade?
What effect do you consider the regeneration of Medway and North Kent will have on your business prospects and profitability?
Do you have any other points that you would like recorded that have not been covered by Sections 1 – 9 of this telephone business survey?

3.2.8 Responses to each question 1 – 10 are analysed in full in Appendix B.

**Comments on the implementation of the questionnaire**

3.3.9 The set of ten questions were appropriate and led to good quality quantitative and qualitative data capture.

3.3.10 There were some difficulties in reaching the appropriate interviewee and obtaining completed questionnaires because of the specific nature of the survey. This led to a decision by the project team during the course of the telephone survey to reduce the sample from 50-60 to 40 to 50 businesses during the time frame available.

3.3.11 The response rate was as follows

- o 67 (44%) businesses from a list of 151 Medway companies were contacted by phone and invited to participate in the telephone survey
- o 44 respondents (29%) agreed to participate by completing the questionnaire

3.3.12 This figure was slightly lower than the revised target figure of 50 (33%) for the reasons listed below

- o 11 (7%) of the non-respondents were contacted 3 times, first by phone and twice by email
- o 12 (7.9%) of the non-respondents were contacted 2 times or more by phone

3.3.13 A number of barriers were encountered amongst prospective interviewees and accounted for a good but hard won level of response. In some cases, but not all, they led to outright rejection of the completion of the questionnaire

- companies in Medway are busy in a buoyant economic climate and have little or no spare capacity to respond to questionnaires
- in addition, they were often over-stretched during the summer months due to annual leave
- the technical subject of the telephone survey - employment land and accommodation - was poorly understood by some prospective interviewees
- repeated return calls were necessary to reach the appropriate interviewee able to respond to the survey
- use of the terms ‘business development’ and ‘business improvement’ at the outset of the interview were more successful in reaching the right respondee and in attracting a higher level of response
- employees below the level of senior administrator, manager or managing director were unfamiliar with many of the issues and the interview was not followed through on the spot
- if an arrangement to send a follow on email questionnaire with a covering explanation was agreed after a phone call it was rarely seen as a priority for action and often forwarded to someone else who did not answer, possibly because they had no direct contact with the interviewer
- Medway ‘consultation fatigue’ gripped other businesses
- micro-businesses - sole traders and partnerships – working from home such as builders considered themselves largely unaffected by the survey issues
- companies providing a specific localised service such as health care and laundries with headquarters elsewhere in the UK were mostly uninterested in the issues in the Medway context although two were persuaded to take part
- there was also evidence of unwillingness to participate in a Council led initiative because ‘ it would do no good: the Council never listens’

3.3.14 The businesses that did agree to participate in the telephone survey included a wide range of different types of business spread across Medway geographically. The business clusters responding to the telephone questionnaire are listed in Table 1.

**Table: 1**
**Medway businesses clusters responding to the telephone questionnaire**

Food and catering
1. food manufacture
2. catering contractors

Engineering manufacture and services
3. electronic design engineers
4. marine engineering/ ship repair
5. marine services
6. hydraulic engineering services
7. aerospace design and manufacture
8. avionics and defence industry
9. design and manufacture of specialist industry ventilation equipment – nuclear
10. automotive replacement factory – clutches
11. garage oil waste processing

Building design manufacture and services
12. architectural metalwork
13. neon lighting/ cold cathode lighting components
14. lighting and digital dimming technology design and manufacture
15. wooden window fabrication

Civil engineering, construction and distribution
16. excavator manufacture and hire
17. fork lift truck service and sales
18. asphalt testing services
19. construction/ ground workers
20. cement importer and distributor
21. insulation distribution
22. building services
23. social housing provider

Waste management and recycling
24. waste management services
25. metal recycling and trading
26. environmental waste management
27. recycling - waste paper processors

Leisure products - distribution
28. sports optics distribution
29. specialist hi-fi, music and loud speaker distributors/ warehousing/ call centre
30. competition and brochure handling/ warehousing/ call centre
31. craft supplies

Finance and marketing
32. building society
33. internet marketing
34. marketing
35. insurance services

Health care, security and safety
36. hospital laundry
37. health care services
38. security and cleaning
39. fire prevention systems installation and service

Paper products manufacture packaging and distribution
40. manufacture of stationery products
41. design and print
42. warehousing and distribution of packaging materials
43. thermal transfer technology print - distribution
44. packaging materials distribution

Note: number 44 – the company distributing packaging materials was not included in the analysis of the Telephone Survey following the interview because it had already moved its operations to East Sussex

3.3.15 Respondents were divided into the following categories covering the UK Standard Industrial Classification of Economic Activities (UK SIC (92)):
- Manufacturing – 17
- Storage and distribution (non-retail) - 8
- Office e.g. research and development, finance, marketing - 4
- Light industry - 11
- Other – 4

3.3.16 Consistent with expectations certain types of question evoked different types of responses from employees at different levels in the organisation and with different roles

- The divergence between managing directors, managers and administrators was marked concerning the local business environment and issues such as the importance of shops and bus transport

- Evidence of gender bias was apparent although this was not monitored formally. With one exception company directors participating in the survey were male

3.3.17 In the Medway Employment Land Study Report 2007 each of the telephone survey questions is analysed separately in the appendices and the key findings are discussed below.

**Size and location of businesses**

3.3.18 From the sample of 44 respondents to the telephone survey 18 were single companies, 16 branches of national companies and 10 branches of international companies.

- Some companies have their headquarters in Medway but branches or franchises across the UK e.g. the clutch manufacture and repair business
- Other companies such as health care and laundry services have branches in Medway and head offices elsewhere in the south east including one in Basingstoke
- Only 4 ‘office only ‘businesses were surveyed – 2 marketing, 1 insurance, 1 building society. Together they employ 95 staff[4]
- In some manufacturing/ distribution companies there is a shift from a concentration of staff ‘on the shop floor’ to office work at the interface with the customer. After-sales service is an increasing necessity as a competitive advantage.
- This trend towards increased numbers of office staff also reflects the need to attend to ‘red tape’ issues. In this survey 1743 office staff are estimated to be working alongside 3164 other skilled, semi-skilled or unskilled employees.
- Some companies operate from Medway as a regional base and recruit staff to work across the South East. They include a
  - catering contractor employing over 220 staff
  - security and cleaning company with 35 office staff in Medway employing 700 people to work across London and Kent
  - construction company with 12 office staff in Medway employing 120 ground workers across Medway, Kent and Sussex.
- Two manufacturing businesses are likely to close down
  - thermal transfer printing
  - neon lighting components.
  - most but not all manufacturing has moved to the Far East – Japan and China respectively.
- Over the next 5 years
  - 21 businesses would like to expand

[4] Figures for the number of employees are indicative since they were taken from the oral testimony of interviewees.

- o 20 businesses have no immediate plans to expand or contract,
- o 1 business - moved out of Medway
- o 2 businesses - likely to close down

3.3.19 The businesses surveyed by telephone were located across the whole geographic area of the unitary authority of Medway in rural, semi-rural and urban locations as well as on business and industrial parks. They were divided as follows:

| | |
|---|---|
| o Gillingham Business Park | 7 |
| o Medway City Estate | 8 |
| o Gads Hill/ Danes Hill | 0 |
| o Chatham Maritime/ Dockyard | 2 |
| o Kingsnorth/ Isle of Grain | 2 |
| o Fort Bridgewood | 0 |
| o Knight Road Strood | 3 |
| o Rochester Airfield Industrial Estate | 2 |
| o Other | 0 |

3.3.20 In the foreseeable future half the businesses surveyed would consider relocating within Medway. Others see staying put in their current location or moving out as their only options.

- o 22 businesses would consider relocating within Medway
- o 14 businesses would consider relocating outside Medway
- o 5 port dependent businesses would not consider moving out of Medway or relocating elsewhere in Medway or Kent
- o 1 business - moved out of Medway
- o 2 businesses - likely to close down

3.3.21 There were 44 respondents to the telephone questionnaire. However, only 43 companies are used for the further analysis because the company, previously based at Rochester Airfield, moved to consolidate operations in a new purpose built multi-purpose distribution unit at Uckfield East Sussex before the survey was completed

**Physical Business Environment, business location and risk of flooding**

3.3.22 The recognition that Medway is a ‘good place to do business in 2006’ is revealed in the responses to questions on the physical business environment. Significantly despite the comments and criticisms that come out in other parts of the survey the economy of Medway is thriving and this is due in part to the positive business environment. In fact success is one reason why there may not be sufficient employment land and accommodation to meet future business needs.

3.3.23 In future the physical business environment is seen as a matter of increasing importance with over 80% of respondents seeing it as a high or very high priority.

| |
|---|
| Quote: ‘quality staff want a quality environment’ |

- 53.5% rated the physical business environment as a high or very high advantage of their current location
- 18.6% rated the physical business environment as a disadvantage placing it in the category low or very low.
- 83.8% considered the physical business environment would be a high or very high priority in the future
- 6.9% considered the physical business environment would be a low future priority

3.3.24 Linked to a strong emphasis on the future physical business environment 86% of respondents thought that the company’s business location was very important in terms of future planning particularly in terms of quality of life for employees and fitness for purpose for the particular business needs.

3.3.25 Respondents’ views on the risk of flooding depended on their geographical location within Medway. The risk of flooding was of concern only to those businesses located close to the river. Almost a third of respondents placed this in the high or very high category; but two thirds put it in the medium, low or very low category.

3.3.26 Minimising the risk of flooding was a future high or very high priority for 23% of respondents located primarily on Medway City Estate. The same percentage put risk of flooding in the medium level category. This related either to their marginal proximity to the river or the nature of the business sensitivity to the flood risk. Just over half the respondents located on higher ground, including Gillingham Business Park, rated risk of flooding as a low future priority.

**Type of accommodation provision, cost of floor space**

3.3.27 In parallel with a general level of satisfaction with the business environment reflecting Medway’s current generally healthy economic profile more than 50% of respondents were satisfied with the accommodation provision although the level of satisfaction varied widely from business to business and location to location within Medway.

3.3.28 However, conscious of the need for ever tighter margins in the future over 80% of respondents see accommodation as a key factor linked to on-going prosperity and only 2.4% of respondents consider it to be a low or very low priority.

3.3.29 The focus on a closer relationship between accommodation costs as well as the right type of accommodation to meet future business needs is strongly demonstrated through the results of this survey.

3.3.30 The current cost of floor space is seen as a medium level of concern: 55% of respondents consider the costs acceptable. But the position changes when interviewees were asked to look at future priorities.

- Almost 80% consider cost of floorspace a future priority
- None of the respondents place it in a low category

3.3.31 One of the major fears with reference to the regeneration of Medway for existing businesses is that their costs will rise incrementally.

**Availability of car parking**

3.3.32 There is wide-scale availability of car parking space adjacent to the majority of business accommodation in Medway. Moreover, the availability of parking is a critical decision-making factor in whether to locate/ relocate a business in Medway or whether to move elsewhere.

3.3.33 Chatham Maritime developed by SEEDA has provided ample parking space including 190 spaces for 200 office workers at the most recent riverside development. As noted earlier, this is in line with the stated requirements of the Local Plan - 1 parking space per 30 sq.m. of floorspace. Where parking is difficult, as for some businesses on Medway City Estate, it adds to the view that the premises are not attractive as a future business proposition. Some companies on the Estate choose to use their car parking areas for external storage rather than provide car parking for employees who are left to park on the street. Other parking issues on the Estate relate to LGV parking.

3.3.34 Overall, the survey reveals the stark reality that 'green issues' do not stretch to individual business decisions where car use and car parking is concerned. The fact that alternatives are currently perceived to be unavailable may account for this extreme position. Erroneously, respondents frequently remarked on the complete absence of an effective public transport system.

3.3.35 Almost 100% of respondents stated that the availability of car parking was a high or very high priority for the future.

- 76.7% rated the availability of car parking a high or very high advantage of their current location
- 9.3% considered the lack of availability of parking a disadvantage and placed it in the category low to very low.
- 97.6% considered the availability of parking would be a high or very high priority in the future
- 2.4% considered the availability would be a medium priority and none put it as a low priority.

**Information Technology Infrastructure***:*

3.3.36 All companies wherever they were based – on industrial estates, business parks or edge of town locations emphasised the importance of IT infrastructure but in almost every case there was no problem.

3.3.37 When IT was raised as an issue it was a question of skills development rather than actual IT infrastructure. This finding is confirmed by the statistics with 9.3% of respondents considering IT a low priority for both current and future locations.

3.3.38 Respondents' responses:

- 58.2% rated IT infrastructure a high or very high advantage of their current location
- 9.3% rated IT infrastructure a disadvantage placing it in the category low or very low.
- 69.8% considered IT infrastructure would be a high or very high priority in the future
- 9.3% considered IT infrastructure would be a disadvantage placing it in the category low or very low.

**Transport Infrastructure, links to the motorway system, links to Europe and proximity to suppliers/ customers**

3.3.39 Transport is an invidious question and resulted in mixed responses. A considerable level of frustration was felt amongst all respondents. The only companies where transport was not a major concern were small locally based firms with the flexibilities to 'work around the system'. Only just over 2% of respondents considered transport a low or very low future priority.

- 53.5% rated transport infrastructure a high or very high advantage of their current location
- 20.9% rated transport infrastructure a disadvantage in the same percentage relationship for the categories medium; low or very low.
- 76.7% considered transport infrastructure would be a high or very high priority in the future
- 2.4% considered transport infrastructure would be a low or very low priority in the future

3.3.40 At Gillingham Business Park and Rochester Airfield Industrial Estate access to the motorway system was considered good. At Medway City Estate access was potentially good but the reality of the situation was different. The level of frustration was high and exacerbated by access issues on - and especially off - the Estate. At Knights Road the traffic congestion in Strood was an issue.

'Strood is getting impossibly congested with traffic often at a stand still: getting to work on Knights Road is horrendous'. 'Knight Road Estate is getting more and more congested with lorries knocking over the bollards.'

Three proposals have been put forward by interviewees to solve the traffic problems at the roundabout onto Medway City Estate - traffic lights; a slip road onto the by pass; or an underpass.

3.3.41 On the one hand businesses recognised that Medway was located close to the motorway system - M2, M20 and M25. But manufacturing, service and distribution companies covering South East England or needing to get to the Midlands on a regular basis relying on this network are experiencing increasingly long delays in reaching their destinations adding to their costs and the likelihood of a move outside Medway.

3.3.42 Almost 50% of respondents consider close links to the M25 important for their current business needs, although only just over 40% consider it will be a future priority.

3.3.43 It is difficult to draw conclusions from this finding.

- Some distribution companies indicated that they may be forced to move north of the River Thames in order to be close to the Central England logistics base near Northampton.
- Others rely increasingly on European distribution centres such as the one at Tongeren in Belgium.
- The global economy may be more important than the European economy but this is only supposition
- Or with wealth creation having moved to some of the smaller companies and with an increasing reliance on IT the issue of motorway transport may be less significant

3.3.44 Public transport came in for a great deal of criticism. With the exception of Knights Road Industrial Estate the bus system was universally considered poor and particularly bad on Medway City Estate.

> Quote: Buses are too few and too infrequent; they do not link the Medway communities to enable a wide pool of staff recruitment

> Quote: 'We plan to bring all our operations under one roof – call centre and warehousing – want to consolidate on Knight Road Estate: need to stay in the same area because staff don't drive - at the moment operations take place between two buildings leasing accommodation from another company: assistance would be welcomed'.

3.3.45 The rail stations were viewed both as unattractive and having insufficient services. At present there is the perception that no modern rail/ bus/ taxi transport hubs/ multimodal interchanges exist. This is partially correct. Whereas there are hubs and interchanges at rail stations they are not attractive or designed to incorporate a wide range of service provision and as such do not encourage people to leave their cars at home. The heavy emphasis on car parking in the survey reinforces the picture of a car dependent business community both now and in the future.

3.3.46 River transport is seen as a lost opportunity for 'greening' Medway. Traffic congestion on the roads in the urban areas could be reduced by using the river more effectively. This would mean using ships to increase the quantity of bulk imports such as cement; and lighters to move materials such as gravel and to develop sustainable re-cycling initiatives; as well as the chance to develop sustainable transport through a passenger ferry service between Rochester and Chatham.

3.3.47 Close physical links to Europe is currently important for just over 25% of businesses and only just over 40% of businesses see proximity to Europe as a priority for the future with the majority of those being port-based industries with trade links with the Netherlands, Norway and the Baltic states.

3.3.48 The scenario that appears to be developing from these findings is that businesses are increasingly mobile and will be less dependent on their geographical location close to national and international road networks (with the exception of distribution companies).

3.3.49 This position is further supported by the replies to the question on the need for proximity to suppliers/ customers.

3.3.50 Whereas proximity to suppliers/ customers is important for locally and regionally based fabrication, civil engineering and service sector industries such as security and catering and will become increasingly important, the supply chain for many manufacturing industries is often global.

- 55.8% rated proximity to suppliers/ customers a high or very high advantage of their current location
- 14% rated proximity to customers/ suppliers as a disadvantage of their current location and placed it in the low or very low category.
- 65% considered proximity to customers/ suppliers to be a high or very high priority in the future
- 4.7% considered proximity to suppliers/ customers to be a low or very low priority for the future

3.3.51 When businesses were invited to state their views on the relative importance of clusters with suppliers and purchasers their responses were divided almost equally: high/ very high 32.6%; medium 34.8% and low/ very low 32.6%

**The intangible business environment, image for customers and quality of life for employers/ employees**

3.3.52 In contrast to the physical business environment where around half the respondents considered the current environment to be high or very high, over half the respondents saw the intangible business environment and quality of life for employers and employees in Medway as mediocre. 46.5% of respondents put the intangible business environment and 51.2% of respondents put quality of life for employers and employees in the middle category.

3.3.53 However, just over 30% thought both the current business environment and quality of life were high or very high. As might have been anticipated this result included Gillingham Business Park. But it also included companies based either on the edge of the urban area or outside the main conurbation altogether at Hoo, Kingsnorth and Rochester Airfield Industrial Estate.

3.3.54 In the future respondents considered the intangible business environment and quality of life for employers and employees would become more important with 65% and 67% respectively making them a high or very high priority; and only 5% and 2.5% respectively seeing them as a low or very low priority.

3.3.55 The image of Medway was a matter of an extensive discussion and a high degree of disquiet. Again companies based on the periphery such as at Chatham Maritime, Rochester Airfield Industrial Estate or Gillingham Business Park were more satisfied with the image of their immediate environment than those based on Medway City Estate, Knights Road and elsewhere in Medway. Concerns were expressed both with the image of the immediate environment where they were located and the general image of Medway.

3.3.56 Significantly over 80% of respondents thought improving the image of Medway was a future priority.

3.3.57 Responses to questions 4 and 5

- 25.6% rated Medway's image a high or very high advantage of their current location
- 41.8% rated Medway's image as a disadvantage of their current location and placed it in the low or very low category.
- 83% considered Medway's image to be a high or very high priority in the future
- 2.4% considered Medway's image to be a low or very low priority for the future

3.3.58 The mainly negative perceptions of Medway are viewed as an obstacle to be overcome. Small and Medium-sized Enterprises that become successful high value, high prestige businesses consider moving out. They require river frontage premises in a landscaped setting with cafes and restaurants and are prepared to pay a premium rate for the privilege. At present there is no suitable employment land and accommodation space available in Medway matching their needs.

**Availability of skilled labour force**

3.3.59 This question was possibly phrased the wrong way on the questionnaire. The lack of availability of a skilled labour force may have been a better way of phrasing the question. Notwithstanding this technical point the findings are illustrative of major issues facing Medway both now and in the future in terms of the availability of skilled labour.

3.3.60 Responses to questions 4 and 5

- 16.3% rated the current availability of skilled labour as high or very high
- 51.2% rated the current availability of skilled labour as low or very low.
- 71.2% consider the availability of skilled labour to be a high or very high future priority
- 11.6% consider the availability of skilled labour a low or very low future priority

3.3.61 It is important to note that some companies are not looking for skilled labour and are concerned that the regeneration of Medway will attract skilled labour but unskilled labour will become increasingly scarce.

3.3.62 When respondents were asked to look at the opportunities and threats to their Medway-based businesses skills shortages was very high on the agenda. They are summarised in tabular form in Table 2. They provide a Medway specific slant on the recent Leitch Report. (The Leitch Review of Skills, *Prosperity for all in the global economy - world class skills*, published on 5th December 2006.)

| Table: 2 Skills shortages | |
|---|---|
| **Current** | **Future** |
| o older workers are invaluable, in fact essential<br>o young people are unwilling to train as tradesmen in the metal industries even with wages above the market rate<br>o Eastern European workers are employed but language problems affect health and safety requirements<br>o engineers travel into Medway from London and Guildford<br>o lack of all engineering skills – 'currently we have vacancies for 6 toolmakers, one project design engineer and one service engineer '<br>o lack of marine engineering skills<br>o lack of mercantile marine captains (source: Netherlands/ Poland)<br>o shortage of all skilled labour (source: Poland/ Latvia)<br>o lack of semi-skilled workers<br>o 'we have our own training scheme: we require 3 levels of skills – computer controllers, medium and low level skills: all are difficult to fill'<br>o lack of skilled trades – welders, fitters and engineer<br>o lack of trained chefs.<br>o lack of skilled carpenters/ joiners<br>o lack of skilled design engineers<br>o lack of semi-skilled workers for pipe laying, concrete laying and tarmac spreading<br>o call centre staff: recruitment is a 'hit and miss' affair : some training is provided by banks | o 'skills shortages desperate in 5 years time when older employees retire'<br>o 'growing demand without the ability to recruit or train skilled workers to meet the quality essential to remain competitive'<br>o 'Our business is not Medway specific but we have a loyal established workforce; if we cannot replace their skills and dedication we can move elsewhere in Europe'<br>o 'lack of qualified engineers in Medway will get worse: they have moved and will continue to move with the bigger companies who have shifted production away from Medway'. |

**Business networking clusters and entrepreneurial support**

3.3.63 The opinions expressed on business networking clusters reflect the heavy concentration of recycling, distribution and service sector businesses in this survey sample. International and national companies have their own established 'networks of interest'. Those companies that are IT dependent use virtual links and networks. Locally based engineering companies have a strong reliance on networking clusters both now and in the future. For example there are 3 hydraulic engineering companies on Medway City Estate.

3.3.64 As a result views on the relative importance of business networking clusters are divided almost equally into one third of respondents placing this in the high or very high category, one third placing it in the medium category and just over a third putting it as a low or very low priority.

3.3.65 In terms of future priorities a quarter of businesses surveyed, less than at present, saw the importance of networking clusters as high or very high. Just under a third placed this in the medium category and 42%, more than previously, considered that it was a low or very low priority.

3.3.66 There was clearly some doubt amongst respondents as to what exactly was meant by entrepreneurial support with the exception of those companies that had participated in the Medway Partners for Growth Scheme.

3.3.67 On the question of the availability of entrepreneurial support the weight of opinion believed little was available. Over half, 58% of respondents, considered the availability of support to be either low or very low; only 19% rated it as high or very high. Respondents were almost equally divided as to the importance of entrepreneurial support in terms of future priorities. Almost a third considered this to be high or very high; under a third thought it was a medium priority and 42% rated it a low priority.

**Type of business location preferred to meet future business development plans**

3.3.67 The responses from the interviewees about the kind of business location they require for future development are remarkably consistent with each other given the range of different business clusters they represent. These clusters range from food and catering; engineering manufacture and services; leisure products – distribution; building design manufacture and services; civil engineering, construction and distribution; waste management and recycling; finance and marketing; health care, security and safety; paper products manufacture packaging and distribution.

3.3.68 The large majority of businesses participating in the telephone survey put easy access to transport links as a high priority – 93%; and overwhelmingly opted for an edge of town situation as a business location – almost 80%. Only just over 10% stated a preference for a central town situation with 76% placing it in the low or very low category. This may be because there were only 4 office-based industries.

3.3.69 Although the number of businesses favouring large business parks was small with just under 50% placing them in the low or very low category, the preference against a stand alone situation was even stronger with 60% putting it in the low or very low category, slightly below a mixed use development - 58% put mixed use in the low or very low category. Only 9.3% of respondents put mixed use development in the high or very high category. The implications of a mixed use development for their own business were unclear.

Quote: 'We do not know if the Rochester Riverside development will accommodate our particular business needs at reasonable prices per square foot'. … 'What does mixed use development actually mean?' This successful company is considering further expansion and requires larger 'new build' premises than those that are currently available for modern light industrial and office use.

3.3.70 The need for future accommodation to be a cost effective attribute of future business models means that although some businesses favour multi-purpose flexible space – 46.5% - others have more specific requirements.

3.3.71 The issue of quality of life for employees is recognised as increasingly important. But in Medway established routines mean that easy access to cafes, restaurants, sports and leisure facilities, and to a lesser extent shops, is not factored in. Short lunch breaks, mobile snack bars and driving to work are the norm. The largest private sector employer in Medway does provide sports facilities and a social club.

3.3.72 The ambivalence towards environmental sustainability is evidence of its growing place on future business agendas balanced by the realities of cost and the ability to achieve the goals in the areas of staff transport, energy sources and building design and construction. Another new idea – a virtual business hub – has not yet got onto the agenda of most businesses.

3.3.73 Half of the businesses consider they will soon be looking for additional floorspace and only 9.3% think they will require reduced floor space. This finding provides further confirmation of the underlying strength of the Medway economy noted earlier. Moreover, the increased emphasis on an attractive setting even for engineering firms – 46% of respondents – is evidence of a shift taking place already in expectations of Medway businesses to retain market profile, recruit skilled employees and provide a professional face to suppliers and customers.

**Table: 3**
**What type of business location would you prefer to meet your future business development plans?**
*(Responses to question 6 expressed in percentages)*

| | High/ very high | Medium | Low/ very low |
|---|---|---|---|
| Business Park - large | 23.3 | 30.2 | 46.5 |
| Business Park - small | 37.2 | 27.9 | 34.9 |
| Central ‘town’ situation | 11.6 | 11.6 | 76.8 |
| Edge of ‘town’ situation | 79.1 | 11.6 | 9.3 |
| Mixed use development | 9.3 | 32.6 | 58.1 |
| Stand alone situation | 18.6 | 20.9 | 60.5 |
| Multi-purpose/ flexible space | 46.5 | 16.3 | 37.2 |
| Clusters with suppliers/ purchasers | 32.6 | 34.8 | 32.6 |
| Easy access to cafés/ restaurants | 27.9 | 39.5 | 32.6 |
| Easy access to sports/ leisure facilities | 25.5 | 37.2 | 32.6 |
| Easy access to shops | 27.9 | 48.8 | 23.3 |
| Easy access to transport links | 93 | 7 | |
| Environmental sustainability | 23.3 | 53.4 | 23.3 |
| - buildings | 25.5 | 39.6 | 34.9 |
| - staff travel | 41.9 | 27.9 | 30.2 |
| - energy sources | 39.6 | 46.5 | 13.8 |
| Virtual business hub | | 25.5 | 74.5 |
| Additional floorspace | 48.8 | 11.6 | 39.6 |
| Reduced floorspace | 9.3 | 9.3 | 81.4 |
| Attractive setting | 46.5 | 41.9 | 11.6 |

**Issues relating to employment land and accommodation**

3.3.74 After a period of successful growth either mergers or the consolidation of different branches of existing businesses in one location is seen as offering major efficiency gains. However, although one insurance company has consolidated operations on Gillingham Business Park, many more consider that growth will necessitate a move out of Medway for their operational hub because no suitable employment land and accommodation is currently available.

3.3.75 The pace of change is increasingly fast. Companies must adapt or die. Some consider it is more profitable to sell industrial land for housing than to continue even successful business operations

3.3.76 A variety of the issues raised by interviewees relating to employment land and accommodation are summarised below in random order:

- accommodation with showers
- smart outer face for manufacture(2)
- improved transport infrastructure
- places to expand on the same Estate/ or in the same area
- need for more space over 2000 square feet
- cost effective premises and space
- flexible offices/ flexible space
- wharfage/ quayside moorings with good transport links (3)
- further mergers likely with nowhere to go
- nowhere to expand warehousing and distribution
- requirement for additional freehold land but none available in Medway (2)
- expansion (and contraction) difficult when leasehold arrangements are so inflexible
- long ‘short’ lease tie in time is problematic in a fast changing business environment
- keeping costs down is essential to remain competitive – lack of short 3 year leases available
- council planning a problem for business development and entrepreneurship
- old buildings - not cost effective but difficult to change and adapt on the same site and continue the business

3.3.77 The issue of long tie-ins to shorthold tenancies for established firms was raised by a number of respondents. The impact on two firms, one in Gillingham and one on Gillingham Business Park, has had a dramatic influence on the future viability of these manufacturing businesses.

3.3.78 Production for the most part has moved to China or Japan but the companies are saddled with excess floorspace and high business rates. They are unlikely to survive unless they are able to sub-let the extra space.

> Quote: ‘We have a 15 year lease still to run. This does not provide flexibilities for the future. Closure may be the only option.’… ‘We are tied into a short lease of 25 years with 17 years remaining and no possibility of getting out. We no longer need the space and still pay a high business rate. The company will probably not survive’.

3.3.79 Companies are increasingly looking to purchase freehold land to maximise their investments and reduce the cost of floor space.

| |
|---|
| One business is concerned that space is unavailable for expansion by the purchase of the freehold on Council owned land in the vicinity of Rochester Airfield. The question to be asked is whether an approach has been made to the landowner. Land transactions need two willing parties both aware of the likely benefits from successful negotiations. |

*Case Study:*
**Medway City Estate**

| **Issues – raised by respondents** | **Solutions/ Comments by respondents** |
|---|---|
| o image a serious disadvantage | o needs to improve to retain trade |
| o cannot admit offices are on Medway City Estate | o advantage of owning freehold |
| o security problematic | o controlled entry at night |
| o extremely low standards of maintenance especially litter collection | o improve maintenance<br>o improve signage |
| o 'an industrial jungle before you reach Riverside Court – it will get worse' | |
| o 'access issues will force us out' | o improve access at the roundabout |
| o 'access is a 'nightmare' : it affects businesses ability to deal with high rentals in a competitive market | |
| o need for 24/24 access without the constant closure of the Medway tunnel | o improve tunnel management regime |
| o imports by sea prior to manufacture/ distribution | o retain wharfage riverside berths |

*Case study:*
**Chatham Maritime/ Historic Dockyard**

**'**Relocation to Chatham Maritime with a depot on Medway City Estate has given us a chance to consolidate our operational base into one high profile building in a central location. Moving to high quality employment land and accommodation will enable us to act flexibly and cost effectively in future years'

- 'Our business would like to move on from The Historic Dockyard and take over the restored Pump House next to Chatham Maritime marina. This would give our high profile business the profile we need.' Currently the office base is in the Dockyard and manufacturing in Sittingbourne. This is unsatisfactory'.

*Case Study*:
**Kingsnorth and Hoo**

- 'Businesses do not know the type of development envisaged at Kingsnorth by the Council.' Note : The local Plan identifies uses
- 'Engineering needs somewhere where 'we can make a noise without disturbing other people -it does not look pretty. Kingsnorth is ideal.'
- 'We relocated recently to purpose-built premises in Hoo. The only issue will be if we need to expand, otherwise it is ideal - good transport links, and an edge of town 'rural' location for our national headquarters.'

**Medway-based businesses: opportunities and threats over the next decade**

3.3.80 In general Medway businesses are acutely aware of both the opportunities and threats they face over the next decade. They recognise that in all respects operational margins will be important to remain competitive. Therefore issues relating to employment land and accommodation are critically important to their business planning.

3.3.81 Medway businesses also acknowledge that some of the issues relating to employment land and accommodation are outside their control. They recognise that at the macro-level actions by Medway Council both in terms of strategic planning for employment land, housing and transport as well as their role as land owners can either support or prove detrimental to their business opportunities over the next decade. In this respect Medway Council planning decisions are both an opportunity and a threat.

3.3.82 Planning for new housing, in isolation from reference to future business needs, is seen as a potential threat to the on-going development of successful Medway businesses.

3.3.83 Many interviewees consider that neglecting the development of existing Medway businesses will continue the current cycle of businesses starting in Medway but then moving out because there is nowhere to go and no reason to stay. This in turn will be detrimental to wealth creation in Medway. Wealth creation is now recognised as driven by small business across the UK.

3.3.84 Almost unique in the south east region Medway has an established engineering tradition that is now tooled up with modern technology such as laser cutters.

One family firm based in Kingsnorth working at the cutting edge of tailor-made engineering production has just entered the Guinness Book of Records for making the largest disco ball in the world.

3.3.85 Companies engaged in the so-called ‘dirty trades’ are worried that in the search for new service sector business Medway will not support provision for the existing engineering manufacturing and repair businesses (including ship repair). These activities have specific not general employment land and accommodation requirements.

3.3.86 These Medway engineering companies consider that if they are supported both through training provision and the planning system they have a major role to play in delivering strategies for innovation, sustainable development and wealth creation.

**Table 4**
**Medway-based businesses: opportunities and threats over the next decade**

| Opportunities | Threats |
|---|---|
| o expansion of market demand<br>o new business with expansion of Medway population<br>o strong demand for building services<br>o growth in financial services<br>o growth in consumer demand for rice products<br>o growth of well managed recycling with community benefits<br>o using new technology with traditional engineering | o traffic and transport infrastructure unable to cope with developments<br>o inability to expand in the right location with the right accommodation<br>o no space/ accommodation available to consolidate e.g. R&D, office and manufacture in one place<br>o closure of Chatham Docks<br>o closure of riverside berths and Medway as a working river<br>o reduced facilities for imports by sea<br>o problems of management and getting on and off Medway City Estate getting worse<br>o business rates too high<br>o planning for housing by the Council a potential threat to business development<br>o unskilled labour supply disappears<br>o skilled labour supply scarce<br><br>*Note: There is a conflict of interest. If skilled labour increases who will undertake the unskilled jobs at low rates of pay?* |

**The impact of the regeneration of Medway and North Kent on businesses**

3.3.87 Current Medway businesses are concerned that the regeneration of Medway will not be handled with sensitivity to their business needs. The Council should look after business interests in their future plans not just provide housing.

3.3.88 The major opportunities for the companies interviewed presented by the regeneration of Medway in terms of improving the image of Medway, quality of life for employers and employees, ability to attract skilled staff and physical environment could be countered by the increased cost of floor space, increased traffic congestion and nowhere to expand the business in the right accommodation and in the right location.

3.3.89 Medway businesses consider that they have a unique role to play in the regeneration of the Medway ‘towns’. Almost 50% of Medway businesses will be looking for additional accommodation over the next decade. Companies are increasingly mobile and will go where they are welcomed and supported. Through the vehicle of the telephone survey they hope their views will not just be recorded but also listened to by Medway Council.

**Table 5**
**The perceived impact of the regeneration of Medway and North Kent on businesses**

| Opportunities | Threats |
| --- | --- |
| o business growth x 3<br>o more business opportunities<br>o increased demand for insurance<br>o Medway more attractive to sales and marketing staff<br>o better environment for recruiting skilled electronic engineers<br>o better environment therefore better sales performance<br>o greater demand for internet promotion from other businesses within Medway<br>o improved image for our business: therefore opportunities for growth<br>o business growth if the right employment sites and accommodation are available<br>o could be good if the Council listens to what businesses want<br>o relocation to Rochester Riverside a possibility<br>o firm growth due to increased demand for social housing - our business<br>o able to resume the processing of ship oil waste<br>o expecting support in training the next generation of engineers and trades people<br>o support to innovate and train skilled engineers through a Science Park | o industrial land shortages due to residential development<br>o no freehold industrial land available<br>o nowhere to expand: therefore forced to move out of Medway<br>o no suitable accommodation on short leases for expanding businesses<br>o no increase in business car parking facilities<br>o increased road congestion in and out of Strood and Medway City Estate<br>o planning decisions outside our control or influence<br>o putting up costs<br>o increased costs detrimental to small specialist businesses<br>o modern engineering threatened if developments at Kingsnorth drive out the dirty trades<br>o destruction of flourishing port-based recycling businesses<br>o threat of closure of Chatham Docks |
| **Neutral**<br>o depends on how Chatham is developed: cannot bring clients here at present<br>o very little except possibly higher wage and premises costs x 3<br>o no extra business: no customers in Kent<br>o very little – most of our business is outside Medway<br>o higher education is not producing the quality skilled engineers: hopefully it will not be too late when they do.<br>o growth opportunities but the threat of rising costs will make companies uncompetitive | |

3.3.90 Medway businesses hope that regeneration will provide better shops, good cafes and restaurants, hotels, high quality, high profile office/ small business accommodation in a quality location (park or riverside) and also employment land for modern/ traditional engineering and distribution companies.

3.3.91 On a larger scale they hope that regeneration initiatives will produce

- dedicated employment land for distribution
- dedicated employment land for engineering
- high profile land and accommodation at reasonable costs at c. £10.00 per square ft for hi tech and marketing companies
- good transport infrastructure
- dedicated riverside wharfage employment land for recycling, ship repair and imports by sea
- Improved connection with North of the river to prevent manufacture and distribution moving away

**APPENDIX A**

Sue Millar Associates

**Medway Council**

# Employment Land & Accommodation Study 2007

## Volume 4A:
## Feedback from Face to Face Interviews

Medway Council

Serving You

## Introduction

This appendix presents the results of the interviews carried out for the face to face interviews.  It is a record of the perceptions of the businesses in response to the themes covered.

# Employment Land & Accommodation Study 2007

## Feedback from Face to Face Interviews

One important aspect of the consultation process for the Employment Land Study 2007 has been interviews with key opinion formers from the business community selected by the Project Team as representing a broad cross-section of interests relevant to this study and whose judgements are informed by knowledge of working at the leading edge in Medway. Their views have been sought on the question of the total provision, quality and location of Employment Land & Accommodation in Medway both now and in the immediate future.

The Findings are analysed in the main body of the Employment Land Study 2007 using information from the Feedback from the Face to Face Interviews presented in this appendix on a theme by theme basis. Since the six themes chosen were designed to complement each other and in some cases overlapped the feedback includes some repetition. No attempt has been made to eliminate this as the repeated mention of some issues reinforces the strength of peoples' opinions and provides a valid evidence base.

*Interviewees*

Senior partners in surveying firms acting as land agents, managing directors of businesses based in Medway and the Chairman of the Kent and Medway Federation of Small Businesses (FSB) as well as the CEOs of business support agencies – Locate in Kent, the North Kent Chamber of Commerce – were invited to be interviewed. The interviews were conducted on the basis of complete confidentiality. When quotations are used to illustrate a point they are not attributed to any individual.

*Research Methodology*

Our aim in carrying out the consultation process partly through in depth interviews was to capture different viewpoints and different perspectives on the same themes. In order to ensure the rigor of this approach to qualitative research but also enable participants to provide an individual perspective on employment land and accommodation in Medway six interview themes were chosen. Individual interviewees or group of interviewees were asked to respond to the six themes according to their interests and expertise but in any event to provide comment on each.

Between July and September 2006 a phone call was made and a formal letter was sent to each of the 15 companies targeted by the Employment Land Study Project Team.

The majority of those who agreed to be interviewed were extremely generous with their time. Instead of half an hour interviews as requested they were all between one hour and two hours in length and one even lasted three hours.

11 face to face interviews were held and 1 telephone interview – a total of 12 respondents.

4 companies did not respond. Three named contacts had either moved or left the company and one general manager having seen the brief declined to be interviewed.

The six themes covered in the interviews were:

1. Issues relating to current & future Employment Land & Accommodation in use/ under-used or unused in Medway: quantity – quality – location;

2. Overview of the current and future manufacturing / service sector needs in Medway: floor space distribution – location – infrastructure;

3. Perceived current & future needs of individual businesses and types of businesses located in Medway: business environment – what barriers there are to development - type of accommodation & floor space – location – infrastructure;

4. Business opportunities lost & opportunities for inward investment for the future: issues relating to types of businesses lost; what the inward investment opportunities there are; what barriers there are to development; and how business development could be supported through the planning system;

5. Factors affecting current employment supply and demand and those likely to do so in the future: employment levels/ structure - commuting effect – occupations – education;

6. New Trends: green issues - multi purpose/flexible accommodation - home/flexible working.

**Theme 1:**
**Issues relating to current & future Employment Land & Accommodation in use/ under-used or unused in Medway: quantity – quality – location**

- *Quality*

  - *Business/ Industrial Parks.* There is the view that none of the current business/ industrial parks or employment land clustered around the shopping centres of Chatham, Rochester and Gillingham are of the quality either to attract new businesses or to encourage existing companies to stay in Medway. They are old and tired – even Gillingham. The Kent Science Park in Swale is likely to take business away from Medway if the appropriate space is available.

  - *Poor quality office accommodation.* The quality of office accommodation is seen almost unanimously by those interviewed as poor from the point of view of current business needs in Medway. Offices either lack flexibility (the Big Blue at Chatham Maritime) or they are not designed for modern IT requirements (Sun Pier). The majority of available office space is old, with the wrong lease structure. Provision for business growth is lacking. There is no brokerage for lease transfer schemes to support changing needs; or the ability to change the internal environment within the existing buildings.

  - *In Medway there is nowhere of quality to ' move on' to at the growth stage:* Medway Council is seen as effective in encouraging business start ups but companies are forced to move out of Medway at the growth stage because the right type of light industrial or office accommodation is not available. One example was of a company that had received funding from Medway Partners for Growth scheme, won a Small Business Award and then had to move to Tonbridge to expand.

    The 'Hatchery' in Medway Enterprise Gateway (MEG) in Chatham High Street developed through a Public and Private Sector Partnership (PPP) including SEEDA and Business Link and North Kent Chamber of Commerce is successful in offering low cost office space, business support, training and meeting rooms.

  - *The impact of pricing structures:* Business & Industrial Units at Hopewell Business Centre, Pier Road Industrial Estate and Twydall Enterprise Centre managed by Medway Council offer a range of light industrial and business units. All three cater for the needs of new and recently established small businesses with unit sizes and cost structures designed to provide opportunities for the gradual expansion of businesses.

    *Quote:* "Hopewell offers space at £5.00 per sq ft increasing over 3 years with a whole package of support whereas the smallest room at Chatham Maritime is £25.00 per sq ft. SEEDA has invested £5 million but is not meeting the needs of existing businesses in Medway. … English Partnerships have no realistic idea of business needs…. Much space in Chatham Maritime remains empty waiting for inward investment whereas successful existing businesses are being forced out… What is needed is affordable work space".

- *Quantity*
  -
  - *Occupancy levels:* The understanding amongst interviewees is that Medway Business/ Industrial Parks are relatively full and where accommodation is vacant it is either too large e.g. 10,000 sq ft on Medway City Estate; or too small e.g. 84 sq ft Chatham High Street; or there are issues relating to the lease and/or internal fit out. According to one land agent smaller units are readily rented out both on and off the Estates.

  - *Office space:* Office space is in demand in Medway and yet many locations have empty offices.

  - *A healthy 'churn'*. There is a need for some empty space according to one land agent. In future government targets for both the density of use of employment land and higher occupancy levels suggest that there will be less empty space and less churn.

  - *Tenure*: Tenure issues affect the occupancy and usage of accommodation. Leases of 25 years tie companies into accommodation that can become redundant leaving them paying for space they are not using or contributing to their becoming less cost-effective through inappropriate use of space and/or overcrowding. The preferred options: short leases of between 2-3 years duration and owner-occupation are less readily available. Both models provide flexibilities and engender opportunities for growth and contraction; but few are available.

    Quote: "We are losing business because there is no elasticity."

  - *Land values:* Land values in the Thames Gateway have risen so rapidly during the past 12 years that absentee landlords charge high prices for their leases and are not concerned about attracting a letting. This is particularly evident on Medway City Estate. Landlords are speculating that prices will go yet higher and that some employment land will be changed into land designated for housing.

    *Quote*: "There are too many empty buildings on Medway City Estate owned by international consortia interested only in land values."

    *Quote:* "One warehouse property on Medway City Estate, owned by a Swedish pension consortium was worth £1million 10 years ago and is now worth c. £15 million. No public/ private partnership can afford to buy the premises and convert it either into exhibition space or flexible office space. Landlords are seeking one tenant not 20 – 30 businesses".

    For owner-occupied businesses land values can be a strong disincentive to invest in business development – plant and training.

    *Case Study*: At least two MDs in owner-occupied premises in prime riverside locations - one on a 6 acre and the other on an 11 acre site - are aware that they could sell up and retire to play golf with far more money in the bank than they would ever earn through running a successful business and with less effort.

- *Location*

  - *Access - infrastructural issues* impact on logistics firms. Whereas Medway City Estate is well connected to the A2/M2/M25 via the Strood by-pass, access is a major issue. Getting in and out of Medway City Estate is a problem at the peak times of 4.00 – 6.00 pm and to some extent from 8am to 9.30 pm.

  - *Loyal Employees*. Some companies remain on the business / industrial parks in Medway because of tradition and a loyal workforce when the quality of the location and nature of the accommodation are wanting. This finding is also backed by the telephone survey.

  - A loyal workforce is considered to be a major asset and an important factor in a company's decision to 'stay put' or move within Medway rather than elsewhere in Kent. Micro-medical is a particularly good illustration of the pattern of development.

  - *Parking* is seen as an overriding essential by all interviewees given that public transport in Medway –bus and train services - is considered to be 'woefully inadequate' for perceived business needs.

**<u>Theme 2:</u>**
**Overview of the current and future manufacturing / service sector needs in Medway: floor space distribution – location – infrastructure**

- *Manufacturing*

  - *Changing needs*. The needs of manufacturing industries are changing rapidly according to those interviewed.

  - *Floor space & the move of manufacture in the Far East.* The move of the majority of manufacture to the Far East particularly China, means that some companies on Gillingham Business Park are out sourcing the manufacture of parts. Therefore, the changing focus of these established businesses means they have too much floor space but are tied into 'long' short leases that they cannot get out of.

  - *Science Parks.* High Tech industries are looking for accommodation that is a flexible mixture of office, research and manufacturing accommodation. Much of the manufacture in these industries involves the assemblage of parts made in the Far East and/or distribution.

  - *Affordable work space.* Small engineering companies are attracted to Knights Road and Cuxton Industrial Sites because of the low cost per sq ft. However, in the view of one interviewee the 1930s buildings are 'low value and attract low quality employers'.

    | |
    |---|
    | *Quote*: from one land agent*:* "Metal bashing' does not have to take place in existing inappropriate buildings. Cost per square foot is an issue… |

  - *Supply & demand.* The so-called 'dirty trades' have an established base in Medway and require a location where noise pollution is tolerated. Another land agent reinforced the mismatch between supply and demand. Their company receives enquiries from the so-called 'metal bashing' firms that it cannot accommodate.

  - *Infrastructure:*

    | *Case study:* |
    |---|
    | The importance of a good road infrastructure is illustrated by one family owned large-scale manufacturing company has full order books and exports mainly to the Middle East. Its riverside site benefits from the excellent new road system which has cut costs according to the interviewee. There is also a good supply chain close by on Medway City Estate. |

- *Service sector (including distribution)*

  - *Office space:* Serious consideration needs to be given to the provision of an office campus.

    | |
    |---|
    | Quote from one interviewee: "There is a desperate need for a new purpose built office campus for existing Medway businesses". |

| |
|---|
| Quote from another interviewee:" 50,000 sq ft of office space is required in Medway but the question of where this is to be located has not been answered". |

- *Infrastructure:*

| *Case study:* |
|---|
| One international firm moved to Medway City Estate 6 years ago as a base for operations across SE England. Relocation to Medway City Estate offered a purpose-built depot on a vacant site which with the new Strood by-pass was 5 minutes from the A2/M2. It now takes 20-25 minutes to leave the estate at 4.30pm.<br><br>The company has undertaken an infrastructure analysis but as yet has no plans to leave the Estate, although the company recognises as a result of the study that the depot is in the wrong place. Sevenoaks/ Orpington would provide better access across the South East. |

| Case Study: |
|---|
| A marine engineering company based on Medway City Estate has concerns about infrastructure. The company has a need for access on and off the Estate. With 60 – 70 lorries moving in and out daily the absence of a slip road onto the Wainscott by pass (that, according to the interviewee, could be built at a cost of around £100,000) seriously affects deliveries and cost margins. |

- *Location. Small and Medium Enterprises:*
  Service sector companies are looking for a variety of locations. Both high profile flexible riverside office space for high cost, high turnover businesses as well as small affordable workspace in less conspicuous, safe, clean places is required. The riverside offices currently available on Medway City Estate suffer from the poor image of their surroundings. Provision at Chatham Maritime is excellent but does not focus on the needs of Small and Medium Enterprises. Professional firms such as surveyors and land agents favour an 'edge of urban area' location such as provided at Gillingham Business Park; or a riverside location on a mixed use development. Car parking is seen as essential. Urban centre locations are considered problematic unless they have ease of access and sufficient car parking.

**Theme 3**

**Perceived current & future needs of individual businesses and types of businesses located in Medway: business environment - type of accommodation - floor space – location – infrastructure**

- *Business environment*

    - *Perceptions of Medway.* Established perceptions of Medway are low in terms of asset values and economic growth although it does offer value for money compared with Maidstone and Tunbridge Wells.

    - *Business stasis*. For some owner occupied businesses there is little incentive to grow the business when land for housing fetches premium prices, especially on riverside sites.

    - *High impact low volume development from SEEDA?*

> Quote: "Existing businesses need support in moving to new premises. To some extent SEEDA has recognized the importance of growing local businesses but Chatham Maritime is too small a development".

    - *No suitable employment land and accommodation for businesses at the growth stage*. Some businesses have outgrown their current premises but are either reluctant to move, e.g. Jubilee Clips Ltd, and/ or have nowhere suitable to move on to in terms of either an appropriate location or the right type of space and accommodation'

- *Barriers to growth for existing businesses*

    - *Family engineering firms*. Small family run engineering companies operating on low cost industrial sites and other premises reinforce the stereo-type of Medway as an area 'locked in the past' with a cycle of low rents, low profile and low profits.

    - *Tight margins: low expectations*. Margins for engineering companies and manufacturing and production companies are tight.

> Quote: "Medway businesses cannot afford £9.00 per square foot as charged at Crayford….The last thing they need is high rents…. Cuxton attracts owner managed businesses and there is no void with rents at £3.00 per square foot. Many are not looking for opportunities to expand."

    - *No process in place to support growing businesses*.

> Quote: "The public sector has not managed to adopt a process which helps small businesses to grow and change accommodation and floor space requirements as rapidly as they require. …What companies need are first opportunities at an Enterprise Village with 2 – 3 year leases; then the possibility to move on to small units with greater flexibility and standard 3 year leases".

- *Nowhere to go to grow a business in Medway.*

| |
|---|
| Quote: "There is no 'moving on space". On Medway City Estate there are 580 businesses and 96 owners, 60% of whom are overseas consortia with little or no interest in developing the facilities. |

- *Limited number of freehold options available*.

| Case Study: |
|---|
| A specialist company dealing in architectural products and related services currently occupies 1000 sq ft on Medway City Estate.<br><br>The firm is looking for freehold options and has contacted Locate in Kent. To find what the company is looking for it will almost certainly have to move out of Medway. |

- *No planning proposals by Medway Council for additional employment land*.

| |
|---|
| Quote: "If businesses grow they will move out of Medway because Medway has not earmarked employment land. There is a need to re-investigate what has been planned. …Space may need to be redefined in conjunction with sustainable initiatives that offer support beyond the start-up stage". |

o *Type of accommodation and floor space*

| *A Case Study:* |
|---|
| The record of the successful development of one of Medway's 'home grown' advanced manufacturing companies, classified as light industrial, illustrates what can happen with the right management, right product and right series of moves to the right new accommodation and floor space at the right time to meet the demands of a growing business.<br><br>Starting at the Historic Dockyard, the company then moved to Gillingham Business Park and is now based in new purpose designed premises on Chatham Maritime combining office, research and development and manufacturing under one roof on different floors. The company's philosophy and business model maximizes the use of space with open plan office accommodation on the top floor, R and D on the middle floor and manufacture and distribution on the ground floor.<br><br>The benefits of encouraging growth and retention of businesses started in Medway are shown in sustainable employment patterns. 90% of the staff of this company live within 5 miles of their riverside site at Chatham Maritime. Specialist engineers are recruited nationally and internationally.<br><br>However, the company is soon likely to outgrow its current premises. 18% of the company's turnover is spent on R and D and an increase in the size of floor space will be necessary to support the on-going expansion in activity. The question is already being posed: Where can the company move in Medway in 3 – 4 years time? |

- *Location*
  -
  - *Gillingham Business Park*

    | |
    |---|
    | Quote: a land agent's view: "Gillingham Business Park is a good example of how to get a business location right. It is two miles from Chatham centre with excellent access by car from the M2 and adequate on-site parking"…." |

  - *Industrial Sites & Motor Trades*. Almost uniquely in southeast England Medway is the location for a number of niche companies associated with the Motor Trades and manufacturing companies that are offering 'added value' production. These could be further fostered and encouraged with appropriate business development planning and allocations of suitable employment land and accommodation rather than seen as redundant in the drive to develop the service sector and especially the creative industries.

- *Infrastructure*
  -
  - *Access & Car parking*: Professional companies have particular concerns relating to road access, car parking and IT requirements. Proximity to shops and cafes seemed to be less of an issue. Sandwich vans visiting offices are to be seen on Chatham Maritime and Gillingham Business Parks and seen as satisfactory in terms of staff catering arrangements. There is 'a good deli café on Medway City Estate that makes excellent sandwiches'. However, expressions of satisfaction with these arrangements came from top/ senior managers who were mostly male which may be a factor in influencing their views.

**<u>Theme 4</u>**
**Business opportunities lost & opportunities for inward investment for the future: issues relating to types of businesses lost; what the inward investment opportunities there are; what barriers there are to development; and how business development could be supported through the planning system**

- *Lost opportunities for inward investment*

  - *The impact of Medway's poor image*. The memory of a run down dockyard; current physical image of Chatham/ Rochester at the entry points and anonymity of Medway (it does not appear on a map) are viewed as detrimental to attracting investment. When prospective investors arrive either at the station or by road what they see confirms what they have heard: the place is unattractive.

| |
|---|
| Quote: from a land agent: "Medway is a great place to work but major investors are not interested because Medway and in particular Rochester and Chatham do not convey a positive image despite good transport links, especially the rail services. |

  - *The impact of a lack of a Medway brand*.

| |
|---|
| Quote: from a land agent: "Medway is a gem but how do you unlock it?" How do you attract the top agents? Only DTZ, Knight Frank, FPD Savills and CBRE take Kent seriously. |

  - *Chatham Maritime – a speculative project.*

| |
|---|
| Quote: from a land agent. "Chatham Maritime is brilliant. But demand is a real issue. Demand for office accommodation is not there to match the product. Half a million square feet of space is available most days". |

| |
|---|
| Quote: "The Big Blue' remains two thirds empty because no flexible management structures are in place and it is over-priced". |

  - *Inappropriate accommodation provision*. In Medway land agents agree that there is a 'struggle to let the bigger sheds but small sales are buoyant'.

- *Types of businesses lost*

  - Frequently recounted it is often hard to judge whether this story is real or apocryphal. The definitive account and verification of its authenticity came from an interviewee. Their comment was that the point of entry is very important and the use of trains is on the increase.
  -

| *Case Study:* |
|---|
| An Investment Bank sent a delegation to Chatham by train. The negative image of the immediate environs of the railway station left them unimpressed. They crossed the bridge and caught the next train back to central London. |

| *Case Study*: |
| --- |
| A steel stock holder with large contracts for the London Olympics 2012 needed to expand to a large deep water wharfage facility where the firm could import goods from overseas. The company required services, a compound, capacity for assemblage and manufacture and use of heavy lifting gear and was considering a Medway. However, the absence of progress on master plans for Kingsnorth & Grain and on-going land ownership issues at Grain meant that the project did not proceed. |

- A call centre chose Kent Science Park Sittingbourne rather than Medway as its new call centre operations base in Kent in 2004. The reasons for their decision included a better overall quality of life and access to a loyal, local workforce.

- A logistics company explored Medway as a possibility for their logistics warehousing as part of an options appraisal.

o *New opportunities inward investment*

- *Low rental accommodation*. Cuxton Industrial Estate attracts new businesses because of the low rents charged. Theatrical scenery and bus part businesses work alongside each other. One company moved from Romford where rents were £10.00 per square foot.

- *High quality accommodation.* High quality office accommodation is available at Chatham Maritime for companies prepared to pay premium rents.

o *Barriers to development*

- *The Kent factor*.

| Quote: a land agent: “Kent is a long term business development prospect. There is not the level of demand as in West London. The Kent problem is exacerbated in Medway”. |
| --- |

- *Insufficient Executive Housing*: Lack of sufficient executive housing stock. Another land agent is convinced that Chattenden’s development as a quasi freestanding community will provide the answer but this has to include high quality including housing, open spaces with views, schools and retail. Only then can Medway expect to attract companies such as Pfizers the largest research and development site of any foreign-owned pharmaceutical company in the United Kingdom.

- *Lack of attractive facilities and incentives for micro-businesses*: The Federation of Small Business in Kent and Medway emphasised the role of micro businesses in the region’s economy and the fact that their interests are not addressed in Medway after the start-up stage and this inhibits growth potential by the move of business into Medway.

- *Planning system support for business development*

  - *Cost differential between commercial and residential land*.

    > Quote: a land agent: There is an imperative to plan support for business development within the current urban area of Medway because urban land for commercial development is valued at between £3 -600,000 per acre whereas residential land is valued at between £1 million and £1.2 million per acre.

  - *Mixed Use Sites*: The concept of mixed use only works in a narrow band of employment uses. It does not cover manufacturing and distribution. Distribution would be best placed along the northern relief road close to the junction with the M2.

  - *Kingsnorth is not the whole answer*. Kingsnorth is unattractive and unsustainable to many businesses that rely on urban infrastructure. Gillingham Business Park was allocated 15 acres of extra land in the Local Plan but this has now been ear marked for B & Q**.**

  - *Office 'court- style' Accommodation*. Grade A, flexible accommodation is required – purpose-built with raised floors, carpeted with suspended ceilings and air conditioning and parking.

    > Quote: a land agent. "There is a desperate need for a new purpose built office campus for existing Medway businesses".The market will not deliver offices in Chatham Centre and offices without parking cannot be let in Chatham at the current time. Therefore, serious consideration needs to be given to the provision of an office campus.

    > Quote: " 50,000 sq ft of office space is required in Medway but the question of where this is to be located has not been answered".

  - *Setting a challenge to Kings Hill*. Medway would have a competitive advantage over Kings Hill in terms of attracting inward investment with lower costs per square foot – Kings Hill £21.50 per sq ft; Medway £17.50 per sq ft – if there was planned development of commercial land and accommodation

  - *A new Science Park at Rochester Airport*. Opinions varied as to whether Rochester Airport was the right location to establish a new Business/ Science Park particularly amongst the different land agents interviewed. Rochester Airfield was seen as an ideal 'edge of urban area' location with excellent road transport links close to junction 3 on the M2. Topographically level with phase 2 of the Innovation Centre planned to be based there. In creating 2000 jobs, it would appear to be 'the preferred option for the expansion of allocations across all the B1 – B8 sectors'. In addition the Innovation Centre would act as a catalyst for developing technology companies. Companies would typically stay in the innovation centre for three years and then graduate to one of the follow-on buildings.

  - *Alternative locations for a new Science Park*. An alternative location for an Innovation Centre & Science Park was proposed – one closer to the

Universities of Medway. This would then leave the actual airfield in tact on the Council owned site. Those keen to retain an airport envisage the development of executive business and leisure flights, pilot training, and R & D into unmanned systems (UAVs).

- *Freehold Sites*.

> *Quote*: “The planning process could determine freehold sites. These are now requested more frequently by companies. They are seeking freehold commercial sites as part of their pension planning and asset management portfolio”.

- *Planning and building appropriate multi-purpose, flexible accommodation.* Most companies - about 390 out of 400 successfully located by Locate in Kent and Small and Medium Enterprises with around 20 -30 employees move into existing structures.

- *Small and Medium Enterprises:* Medway’s planning of business accommodation should directly address the needs of Small and Medium Enterprises. Flexible workspace is essential coupled with appropriate tenure agreements which might be anything from one month to one year in serviced office accommodation; and 2-3 year leases with further accommodation available to move on to.

- *Improved management of Medway City Estate.* Medway City Estate is currently allocated no management and maintenance budget and no one individual is responsible for its management. Under the safer Business Parks scheme the North Kent Chamber of Commerce provided CCTV cameras but cannot afford their upkeep. The ‘brown tailed moth’ problem was dealt with in part by individual companies and in part by Medway Council. There are issues with gipsy encampments, absentee landlords, absentee agents as well as signage and the general upkeep of the public spaces. The commonly held view amongst interviewees is that the Estate looks a mess and a dedicated manager should be appointed.

- *A bigger bolder approach to planning Employment Land & Accommodation* There needs to be delivery on expectations within a bigger bolder approach to planning for business development. Decisions on the nature of the mixed use site at Rochester Riverside and strategic context of Kingsnorth and Rochester Airfield as potential new Science/ Business/ Industrial Sites need to be made and realised through the planning process.

- *Sustainable transport infrastructure – road, rail, sea and air.* One of Medway’s potential key competitive advantages is the possibility of developing a composite sustainable transport infrastructure – road, rail, sea and air. Rail transport for freight and passengers could be improved. A ring road with the M2 could be constructed: it is almost in place now. Unused wharfage sites on the River Medway could be put back into use. Rochester Airport is recognized as being poised for redevelopment. If the political will is there, Medway Council could develop the site with a capacity for light aircraft and/ or a helipad as a priority in the context of a broad portfolio for business and leisure amenities.

- *Wharfage Sites:* As part of a sustainable transport policy the re-use of the existing wharfage site near Cuxton for cement wharfs appears to make sense to one interviewee. There are established road and rail connections.

  A review of existing wharfage sites and how they might contribute to the development of recycling, sustainable business and sustainable transport policies within the Thames Gateway was proposed by several interviewees.

- *Improvements to rail stations:* It was a strongly held view that there is a need to make the redevelopment of Chatham, Gillingham and Strood rail stations linked with a review of bus transport to create transport nodes a planning priority. Only then will it be possible to begin to attract major investors and enable companies to make business decisions that do not have a heavy emphasis on the availability of car parking space. Such improvements would add significant value to changing the image of Medway.

- *Improvements to public transport.* There appears to be no efficient way at present for employees to travel from one urban centre to another within Medway or to reach the business and industrial parks with ease. There are no perceived transport nodes or exchange points. According to one interviewee based on Medway City Estate Arriva provides one bus in the morning and one in the evening to Maidstone. It can take 3 buses to get to Medway City Estate from Gillingham.

- *Improvements to motorway junctions*.

  > Quote: from a land agent: The regeneration of the urban centres and the development of Chattenden will change perceptions of Medway if the road routes from the M2 are improved at Junction 2 (Strood/ Rochester) and Junction 3 (Chatham Town Centre).

- *Ring Road: Employment Land for Business/ Industrial Sites.*
  This proposal combines a number of ideas put forward by land agents. There is now almost a ring road around Medway. This is already the focus for industrial/ business development, the best example being Gillingham Business Park. In the view of a number of interviewees the concept could and should be expanded into formal planning policy. It could include the use of urban extensions for employment uses; and could also enable more imaginative planning of employment land and accommodation to suit business needs as is done elsewhere in Europe. It means ‘thinking outside the box’ to create viable employment land and in particular a distribution park close to transport infrastructure.

Two examples were provided.

| *Case Study: Medway Magna*. |
| --- |
| This proposal comprised the development of the area north of the M2 between Hempstead and Lordswood would require the use of 40% green belt and the completion of the southern by pass road. The proposal includes 9,250 houses; new employment areas (business parks) and a Southern Peripheral Road (linking Hempstead and Lordswood).<br><br>*Note; Medway Council's view at the Kent and Medway Structure Plan Examination in Public on 7th September 2004 was that the proposal is for greenfield development and that this scale of development is simply not required – even in the Thames Gateway.* |

| *Case Study: Gillingham Golf Course.* |
| --- |
| This proposal is at an initial stage and has not been worked on in any detail. However, the idea has gathered some momentum amongst land agents and businesses. In the context of a master plan for employment land and accommodation on the 'ring road' the land currently occupied by Gillingham Golf Course could be used for business development making use of the road and rail infrastructure that already exists. As part of a planned strategy the golf course could be moved to an accessible, 'out of town' location. |

- *Live/ Work matrix:* Consideration needs to be given to designing the integrated delivery of urban centre loft-style living; high prestige river-front offices; restaurants and green spaces to foster the development of the creative industries and high profile financial service companies.

**Theme 5**

**Factors affecting current employment supply and demand and those likely to do so in the future: employment levels/ structure - commuting effect – occupations – education**

- *Employment- supply and demand.*

  - Business owners in Medway along with other business owners in the South East England report shortages of advanced IT skills and managerial skills amongst their current staff.

  - Locate in Kent promotes Chatham as having a reputation as one of the best call centre locations in the UK with a high calibre of buildings at Chatham Maritime matched by the calibre of available personnel. Call Centre staff are trained by the National Westminster Bank, Halifax and Provident Financial plc

  - Medway fares reasonably well in terms of customer service skills but there is a large deficit the area of managerial skills.

  - The demand for trade's people with hot metal skills – fabricators and welders - is high but the supply is non-existent. Similarly this situation applies to mechanical engineering trades. Demand outstrips supply.

  - There is an HGV driver shortage. Employees attracted by the high rates of pay offered by one company come from elsewhere in Kent – Margate, Ashford, and Ramsgate. Many are older workers aged over 55 years selected for their experience and track record of reliability.

  - There is a demand for highly trained engineers - computer hardware, software and mechanical - that cannot currently be met from within Medway even with the presence of the universities.

- *Employment levels and structure*

  - There are a large percentage of businesses operating from home in Medway.

    > *Written quote from an interviewee*: "In general in South East England 'More than one-third of respondents operate from home (38%), the most common form of business premises for South East England businesses. This is the highest proportion of any UK region. The next most significant types of premises are offices (21%), retail/shop unit (18%) and factory, workshop or business unit (15%)'".
    >
    > Federation of Small Business Report 2006 biennial membership survey: report '*Lifting the Barriers to Growth in UK Small Businesses*.

  - The benefits of encouraging growth and retention of businesses that started in Medway are shown in sustainable employment patterns. 90% of the staff of one company live within 5 miles of their site at Chatham Maritime.

  - 18,000 people are employed on Medway City Estate.

- *Commuting effect:* a considerable number of those working in the financial services and other professions commute to London drawn by high levels of pay especially the new residents on St Mary's Island.

- *Occupations:* There is a well established workforce serving businesses on Gillingham Business Park and Medway City Estate including call centre, factory and office workers. The main shortage areas noted by interviewees are specialist engineers (software and marine), management, HGV drivers and fabricators and welders.

- *Education and skills:*

| *Case Study: Fabricators & Welders* |
| --- |
| One company employs 20 fabricators and 4 welders as part of its workforce. But the firm has to look overseas, particularly to Poland and Latvia for trained fabricators. Working with hot metals the language barrier is an issue. The North Kent Chamber of Commerce has been unable to help.<br>Quote: "The lack of training schemes in the UK and in particular in Medway is seriously affecting business development and hampers the ability of the company to deliver a quality product on time…. Training schemes are non-existent". |

**<u>Theme 6</u>**
**New Trends: green issues - multi purpose/flexible accommodation - home/flexible working**

- *Green issues*

  - Responses to this question focussed exclusively on matters relating to recycling and sustainable transport and have been highlighted under Theme 4.

  - Indirectly the concerns about space/ accommodation requirements needing to be a tight fit with business activity reflect on the need to contain energy costs as well as rents and business taxes in order to maintain competitiveness.

- *Multi-purpose/ flexible accommodation*

> Quote: 'There is a danger of focussing on a particular kind of occupier. What is needed is flexible space, 2-3 storey buildings that can provide office space and could also be used for manufacturing rented at a modest cost.

> *Case Study*:
>
> *New development at Mulberry Place, SE9.*
> At the junction of A2, A205 and A20 Mulberry Place represents a unique opportunity to invest in an exciting, brand new courtyard development of sixteen self-contained workspaces, studios, offices and home/offices designed by award winning architects. Strategically located for prime road and rail access to central London and Canary Wharf, Mulberry Place is a new business environment, offering generous floor space, light and airy working conditions and discreet security'. The buildings, made out of steel, glass and hardwood timber, boast full-height, energy-efficient glazed windows that provide a sense of spaciousness and sophistication. Units were available from 62.83 sq. m. (676 sq. ft.) to 188.5 sq. m. (2029 sq. ft.) autumn 2006

  - Affordable workspace is needed with 'hot desking', computer software support, fax facilities and furniture provided at a cost of £120 - £150 per month as well as the opportunity to hire meeting rooms. The Regis model at Dartford was considered useful by some interviewees and inappropriate by others.

> *Case Study:*
>
> A design and development company working largely in northern cities in England – mainly Manchester and Liverpool - has developed its own unique philosophy for inner city living and job creation on mixed use sites. The basic ingredients are that it takes a non property view and considers end users; it is open to bright ideas and is not afraid to take risks.
>
> Architectural rigour is applied to empty, unused historic commercial properties with the creation of office space bars and loft-style apartments such as at Concert Square Liverpool. This won an RIBA Award. Their successful formula has led the company to 12 years of 'unfettered growth' in the words of the interviewee.

Quote: “Our development company was set up by urban design enthusiasts. Whereas developers are traditionally steeped in the logic of property thinking and talk in terms of mixed use developments such concepts are not in our thinking. We seek out architecturally challenging projects and create rather than follow the market.”

The company now has an impressive track record for re-populating inner city areas, previously dismissed as problematic through meeting the demand for quality designed, affordable and accessible work, retail, leisure and living spaces.

- *Home/ flexible working*

  - Business development should not exclusively address the issue of employment land and accommodation for business parks/ science parks and urban office developments.

*Written quote from an interviewee*. ”Nearly one-quarter of South East England businesses operate from a residential area in the suburbs (24%). A further 19% operate from a town centre, 16% from a farm/other rural property, 16% from a business park / industrial estate and 14% operate from a village centre”.

Federation of Small Business Report 2006 biennial membership survey: report ‘*Lifting the Barriers to Growth in UK Small Businesses*.

  - The growth in the number of home based ‘micro businesses’ was seen as presenting two on-going challenges – the provision of ICT and walk-in business centres to provide teaching in how to use the technology; a place to feed into the support services; social interaction; networking, peer to peer mentoring and an exchange of ideas. Kent (but not Medway) is creating meeting places and mapping ‘IT hotspots’ across the county.

Quote: In Medway consideration should be given to locating business centres within the Universities of Medway and in less formal surroundings close to car parks to directly meet the needs of the new trend in young businesses’.

- *Young businesses*

  - Young businesses are a new trend according to North Kent Chamber of Commerce. Young entrepreneurs join networking events and skills development programmes and operate in a flexible manner from the outset.

**APPENDIX B**

SMA
Sue Millar Associates

**Medway Council**

# Employment Land & Accommodation Study 2007

## Volume 4b:

## Feedback from Telephone Survey Interviews

Medway Council
Serving You

**Introduction**

This appendix presents the results of the interviews carried out for the telephone survey element of the Employment Land Study 2007. It is a record of the perceptions of the businesses in response to the questions asked.

# Employment Land & Accommodation Study 2007

## Feedback from Telephone Survey Interviews

Between July and September 2006 the telephone survey was undertaken with 44 companies targeted by the Employment Land Study Project Team.

The Findings are analysed in the main body of the Employment Land Study 2007 using information from the feedback from the interviews presented in this appendix on a question by question basis. Since the questions were designed to complement each other and in some cases overlapped the feedback includes some repetition. No attempt has been made to eliminate this as the repeated mention of some issues reinforces the strength of peoples' opinions and provides a valid evidence base.

The following main questions were asked:

1. What type of business do you run?
2. What is the size of your business?
3. Where is your business located?
4. What are the business advantages/ disadvantages of the current location?
5. What are your priorities for the future?
6. What type of business location would you prefer to meet your future business development plans?
7. What issues relating to employment land and accommodation do you see your business will face in the future?
8. What opportunities and threats do you consider your business will face as a Medway-based business over the next decade?
9. What effect do you consider the regeneration of Medway and North Kent will have on your business prospects and profitability?
10. Do you have any other points that you would like recorded that have not been covered by Sections 1 – 9 of this telephone business survey?

Some sub-questions were included and these are noted against the responses.

| 1. What type of business do you run? | | Total 44 |
|---|---|---|
| Manufacturing | 17 | |
| Storage and distribution (non-retail) | 8 | Note: 1 distribution company has moved away.<br>Survey analysis features 43 companies. |
| Office e.g. research and development, finance, marketing | 4 | |
| Light industry | 11 | |
| Other: | 4 | |
| Manufacturing<br>1. food manufacture,<br>2. manufacture of stationery products<br>3. electronic design engineers<br>4. lighting and digital dimming technology<br>5. marine engineering/ ship repair<br>6. design and manufacture of specialist industry ventilation equipment – nuclear<br>7. wooden window construction<br>8. aerospace design and manufacture<br>9. design and print<br>10. neon lighting/ cold cathode lighting components<br>11. excavator manufacture & hire<br>12. fork lift truck service and sales<br>13. avionics and defence industry<br>14. architectural metalwork<br>15. automotive replacement factory – clutches<br>16. hydraulic engineering services<br>17. marine services<br><br>Storage and distribution (non-retail)<br>18. sports optics distribution<br>19. packaging materials - warehousing & distribution<br>20. packaging materials distribution ( now moved to E Sussex)<br>21. cement importer and distributor<br>22. insulation distribution<br>23. specialist hi-fi, music and loud speaker distributors/ warehousing/ call centre<br>24. competition and brochure handling/ warehousing/ call centre<br>25. thermal transfer technology print - distribution | | Office<br>26. building society<br>27. internet marketing<br>28. marketing<br>29. insurance services<br><br>Light industry<br>30. craft supplies<br>31. building services<br>32. hospital laundry<br>33. health care services<br>34. asphalt testing services<br>35. catering contractors<br>36. construction/ ground workers<br>37. security and cleaning – London & Home Counties<br>38. garage oil waste processing<br>39. fire prevention systems installation and service<br>40. social housing provider<br><br>Other<br>41. waste management services<br>42. metal recycling and trading<br>43. environmental waste management<br>44. recycling - waste paper processors |

| 2. What is the size of your business? | |
|---|---|
| Company | |
| Single | 18 |
| Branch/ franchise of national | 16 |
| Branch/ multi-national | 10 |
| Number of employees in Medway at the sample 43 businesses – figures are indicative only | |
| Office only | 95 |
| Office: with manufacturing, warehousing, distribution, light industry | 1743 |
| Workers (skilled, semi-skilled and unskilled) - trades & manufacturing, warehousing or distribution | 3164 |
| **2a. Do you expect to expand or contract this business in Medway over the next 5 years?** | |
| 1 - business has moved out of Rochester Airfield site<br>(Details are not recorded for Questions 4-10).<br>Consolidation of operations at Uckfield East Sussex<br>Purpose built multipurpose distribution unit. | 2 - businesses likely to close down<br><br>21 - businesses would like to expand<br><br>20 - businesses have no immediate plans to expand or contract |

Notes:

i. Some companies have their headquarters in Medway but branches or franchises across the UK e.g. the clutch manufacture and repair business
ii. Only 4 ‘office only ‘businesses were surveyed – 2 marketing, 1 insurance, 1 building society.
iii. In some manufacturing/ distribution companies there is a shift from a concentration of staff ‘on the shop floor’ to office work at the interface with the customer. After-sales service is an increasing necessity as a competitive advantage. This trend also reflects the need to attend to ‘red tape’ issues. A manufacturer on Gillingham Business Park has 50 office staff and 250 manual ‘blue collar workers’; an engineers has 13 office staff ( including 3 sales) and 7 design engineers; sports optics distribution company has 6 office staff and 2 warehouse staff
iv. Some companies use Medway as a regional base and recruit and work with staff across the South East. They include a contractor employing over 220 staff; a company which has its headquarters on Medway City Estate with 35 office staff and employs 700 people across London and Kent; a company employing ground workers has an office staff of 12 on Knights Park Industrial Estate responsible for 120 workers across Medway, Kent and Sussex.
v. Two businesses likely to close down. Both are now distributors with manufacturing moved to the Far East – Japan & China respectively.

| 3. Where is your business located? | |
|---|---|
| Gillingham Business Park | 7 |
| Medway City Estate | 8 |
| Gads Hill/ Danes Hill | |
| Chatham Maritime/ Dockyard | 2 |
| Kingsnorth/ Isle of Grain | 2 |
| Fort Bridgewood | |
| Knight Road Strood | 3 |
| Rochester Airfield Industrial Estate | 2 |
| Other | 20 |
| **3a. Would you consider relocating your business within/ outside Medway?** | |
| 5 - port dependent businesses would not consider moving out of Medway or relocating elsewhere in Medway<br>2 - businesses on Gillingham Business Park threatened with closure<br>1 - business has moved out | |
| 22 - businesses would consider relocating in Medway<br>14 - businesses would consider relocating outside Medway | |

| 4. What are the business advantages/ disadvantages of the current location? | | | | | |
|---|---|---|---|---|---|
| | **very high** | **high** | **medium** | **low** | **very low** |
| Business environment - physical | 15 | 8 | 12 | 8 | |
| Transport infrastructure | 13 | 12 | 9 | 6 | 3 |
| IT infrastructure | 13 | 13 | 13 | 4 | |
| Type of accommodation provision | 11 | 12 | 12 | 8 | |
| Cost of floorspace | 2 | 7 | 24 | 7 | 3 |
| Risk of flooding | 7 | 6 | 11 | 6 | 13 |
| Availability of car parking | 21 | 12 | 6 | 3 | 1 |
| Proximity to suppliers/ customers | 16 | 8 | 13 | 5 | 1 |
| Close physical links to Europe | 6 | 6 | 8 | 6 | 17 |
| Close physical links to M25 | 12 | 9 | 8 | 2 | 12 |
| Business environment - intangible | 3 | 10 | 20 | 9 | 1 |
| Availability of skilled labour force | 1 | 6 | 14 | 16 | 6 |
| Quality of life for employers/ employees | 8 | 5 | 22 | 7 | 1 |
| Image for customers | 1 | 10 | 14 | 16 | 2 |
| Business networking/ clusters | 5 | 9 | 14 | 14 | 1 |
| Entrepreneurial support | 2 | 6 | 10 | 17 | 8 |

Notes:

i. Medway is seen as a good place to ‘do business’ by many companies but one that is increasingly under pressure from external competition and internal development

ii. Transport infrastructure (roads - not public transport) combined with a large quantity of available car parking space is seen by many as an advantage despite increasing traffic congestion within the urban area.

iii. Risk of flooding - affects only those on riverside locations where the risks are perceived as high

iv. Close links to Europe by road are increasingly less important in a global economy and are not relevant to local firms providing direct services. Port based industries have strong European links

v. Absence of a local supply of skilled/ semi-skilled labour is a source of increasing concern

vi. Image is important and lacking for many in Medway

vii. Entrepreneurial support – for established businesses which have not benefited from the Medway partners for growth scheme or SEEDA grants entrepreneurial support is ‘invisible’.

viii. Quality of life for employees is recognised as mediocre to poor

| 5. What are your priorities for the future? | | | | | |
|---|---|---|---|---|---|
| | **very high** | **high** | **medium** | **low** | **very low** |
| Business environment - physical | 25 | 11 | 4 | 3 | |
| Business location | 28 | 9 | 5 | 1 | |
| IT infrastructure | 13 | 17 | 9 | 4 | |
| Proximity to suppliers/ customers | 16 | 12 | 13 | 1 | 1 |
| Transport infrastructure | 23 | 10 | 9 | 1 | |
| Type of accommodation provision | 26 | 10 | 6 | 1 | |
| Cost of floorspace | 20 | 14 | 9 | | |
| Minimising risk of flooding | 6 | 4 | 10 | 11 | 12 |
| Availability of car parking | 30 | 12 | 1 | | |
| Close physical links to Europe | 8 | 4 | 8 | 5 | 18 |
| Close physical links to M25 | 13 | 5 | 10 | 7 | 8 |
| Business environment - intangible | 10 | 18 | 13 | 2 | |
| Availability of skilled labour force | 19 | 12 | 7 | 4 | 1 |
| Quality of life for employers/ employees | 11 | 18 | 13 | 1 | |
| Image for customers | 20 | 16 | 6 | 1 | |
| Business networking/ clusters | 5 | 6 | 14 | 16 | 2 |
| Entrepreneurial support | 5 | 8 | 12 | 13 | 5 |
| Other | | | | | |

Notes:

i. Maintaining the overall business environment is a strong priority
ii. Finding exactly the right location with the appropriate accommodation at the right price is essential for individual businesses to remain competitive
iii. IT infrastructure is important but has presented no problems in Medway and therefore is assumed as 'not a real issue for the future'
iv. Transport infrastructure and car parking are still high future priorities
v. Concerns over the dwindling supply of skilled / semi-skilled labour is reflected strongly
vi. Quality of life for employees is recognised as important for recruitment and retention of skilled staff
vii. Image is important for the majority of businesses and is linked to quality of life for employees
viii. For businesses seeking to restructure to meet changing market demands, entrepreneurial support would be a distinct advantage. Others see it as interference; they have never had it and remain suspicious.

| 6. What type of business location would you prefer to meet your future business development plans? | | | | | |
|---|---|---|---|---|---|
| | very high | high | medium | low | very low |
| Business Park - large | 5 | 5 | 13 | 13 | 7 |
| Business Park - small | 8 | 8 | 12 | 10 | 5 |
| Central 'town' situation | 2 | 3 | 5 | 5 | 28 |
| Edge of 'town' situation | 23 | 11 | 5 | 3 | 1 |
| Mixed use development | 2 | 2 | 14 | 11 | 14 |
| Stand alone situation | 5 | 3 | 9 | 19 | 7 |
| Multi-purpose/ flexible location/ accommodation | 12 | 8 | 7 | 11 | 5 |
| Clusters with suppliers/ purchasers | 4 | 10 | 15 | 14 | |
| Easy access to cafés/ restaurants | 2 | 10 | 17 | 14 | |
| Easy access to sports/ leisure facilities | 3 | 8 | 16 | 12 | 4 |
| Easy access to shops | 1 | 11 | 21 | 8 | 2 |
| Easy access to transport links | 29 | 11 | 3 | | |
| Environmental sustainability | 6 | 4 | 23 | 8 | 2 |
| buildings | 1 | 10 | 17 | 14 | 1 |
| staff travel | 11 | 7 | 12 | 13 | |
| energy sources | 5 | 12 | 20 | 6 | |
| Virtual business hub | | | 11 | 19 | 13 |
| Additional floorspace | 13 | 8 | 5 | 12 | 5 |
| Reduced floorspace | 3 | 1 | 4 | 26 | 9 |
| Attractive setting | 12 | 8 | 18 | 5 | |

Notes:

i. The nature of the sample selected for the telephone survey meant it was unlikely that many, if any businesses, would be attracted to a central town location

ii. There was some confusion over what was meant exactly by 'mixed use' although a number of businesses expressed a wish to relocate on Rochester Riverside if the accommodation/ cost structures were appropriate

iii. The need to be close to suppliers still holds true for some heavy manufacturing/ engineering but increasingly supplies are sourced globally. Only industries providing a direct service need to be close to their customers

iv. Sports and leisure is not yet high on the list of priorities for SMEs.

v. Environmental sustainability issues were seen as mainly OK only if they offered cost savings or are cost neutral.

vi. Few interviewees saw the benefits of a virtual business hub: they wanted more information

vii. The importance of an attractive setting is moving up the agenda for many businesses, even the so-called 'dirty trades' have moved into a new era using laser technology and requiring an attractive environment at the front

**7. What issues relating to employment land and accommodation do you see your business will face in the future?**

**Chatham**
- 15 year lease still to run: does not provide flexibilities for the future: closure may be the only option

**Gillingham Business Park**
- tie into a short lease of 25 years with 17 years remaining: no possibility of getting out : no longer need the space and still pay a high business rate: company will probably not survive

**Rochester Airfield Industrial Estate**
- space unavailable for expansion by purchase of the freehold in the vicinity of Rochester Airfield

**Medway City Estate**
- image a serious disadvantage: needs to improve to retain trade
- security problematic: controlled entry at night
- extremely low standards of maintenance especially litter collection: not good for business
- ‘an industrial jungle before you reach Riverside Court – it will get worse’
- ‘access issues will force us out’
- access is a ‘nightmare’: affects businesses ability to deal with high rentals in a competitive market
- maintaining wharfage riverside berths is a priority for imports by sea prior to manufacture/ distribution
- need for 24/24 access without the constant closure of the Medway tunnel: this is just bad management
- cannot admit offices are on Medway City Estate: advantage of owning freehold

**Chatham Maritime/ Historic Dockyard**
- ‘relocation to Chatham Maritime with a depot on Medway City Estate has given us a chance to consolidate our operational base into one high profile building in a central location - moving to high quality employment land and accommodation will enable us to act flexibly and cost effectively in future years’
- ‘our business would like to move on from The Historic Dockyard and take over the restored Pump House next to Chatham Maritime marina - this would give our high profile business the profile we need ( currently office base in dockyard and manufacturing in Sittingbourne – unsatisfactory) - who do we talk to?

**Chatham Docks**
- ship repair is about sustainable development and should be encouraged otherwise ships will go to Poland or the Netherlands for repair
- ‘following an investment of £5 million in Chatham Docks our company’s growth is up by 130%: we make a major contribution to sustainable development as both importers and exporters by sea and employers of local people –the threat of closure of Chatham Docks will destroy our business’
- ideal for expansion of the recycling business essential for sustainable development
- a logistically sound position, good transport links by rail and road, with waterside base and wharfage berths for easy loading
- ‘our company needs the waterside facilities available in Chatham Docks - the alternative is to move out of Kent altogether’

**Knight Road Industrial Estate**
- ‘Strood is getting impossibly congested with traffic often at a stand still: getting to work on Knights Road is horrendous’
- Knight Road Estate is getting more and more congested with lorries knocking over the bollards: no good for lorry access
- plan to bring all our operations under one roof – call centre and warehousing – want to consolidate on Knight Road Estate: need to stay in the same area because staff don’t drive - at the moment operations take place between two buildings: assistance welcomed

**Rochester Riverside**
- do not know if the Rochester riverside development will accommodate particular business needs at reasonable prices per square foot
- what does mixed use development actually mean?

**Kingsnorth Industrial Estate**
- need a location away from residential sites for our processing
- concerned that businesses do not know the type of development envisaged at Kingsnorth
- engineering needs somewhere where ‘we can make a noise without disturbing other people -it does not look pretty’

**Hoo**
- relocated recently to purpose-built premises in Hoo: the only issue will be if we need to expand, otherwise it is ideal - good transport links, an edge of town ‘rural’ location for our national headquarters

**General issues**
- accommodation with showers
- smart outer face for manufacture (2)
- improved transport infrastructure
- need to expand but no room to expand on the current site
- places to expand on the same Estate/ or in the same area
- need for more space over 2000 square feet
- cost effective premises & space
- flexible office/ flexible space
- wharfage/ quayside moorings with good transport links (3)
- further mergers likely with nowhere to go
- nowhere to expand warehousing and distribution
- requirement for additional freehold land but it is unavailable in Medway (2)
- expansion (and contraction) difficult when leasehold arrangements are so inflexible
- long ‘short’ lease tie in time is problematic in a fast changing business environment
- keeping costs down is essential to remain competitive – lack of short 3 year leases available
- council planning a problem for business development and entrepreneurship
- old buildings are not cost effective but difficult to change and adapt on the same site and continue the business
- no high quality high profile reasonably priced accommodation to move on to for a small business in the service sector - likely to move out
- expansion more likely in the far east where cost of land and accommodation is lower

| 8. What opportunities and threats do you consider your business will face as a Medway-based business over the next decade? | |
|---|---|
| **Medway specific**<br><br>**Opportunities**<br>- expansion of market demand<br>- new business with expansion of Medway population<br>- strong demand for building services<br>- growth in consumer demand for rice products<br>- growth of well managed recycling with community benefits<br>- using new technology with traditional engineering<br><br>**Threats**<br>- traffic & transport infrastructure unable to cope with developments<br>- inability to expand in the right location with the right accommodation<br>- no space/ accommodation available to consolidate e.g. R&D, office and manufacture in one place<br>- closure of Chatham Docks<br>- closure of riverside berths and Medway as a working river<br>- no longer able to source imports by sea<br>- problems of management and getting on and off Medway City Estate getting worse<br>- business rates too high<br>- planning for housing by the Council a direct threat to business development<br>- unskilled labour supply disappears<br><br>**General issues**<br>- increased global internet competition for craft supplies<br>- increased competition from the far east<br>- poor UK distribution networks<br>- traffic issues getting to Midlands<br>- keeping operating costs down<br>- poor road infrastructure and congestion | **Skills shortages**<br><br>**Current**<br>- older workers are invaluable, in fact essential<br>- young people unwilling to train as tradesmen in the metal industries even with wages above the market rate<br>- Eastern European workers are employed but language problems affect health and safety requirements<br>- engineers travel into Medway from London and Guildford<br>- lack of all engineering skills – ‘currently we have vacancies for 6 toolmakers, one project design engineer and one service engineer ‘<br>- lack of marine engineering skills<br>- lack of mercantile marine captains (source: Netherlands/ Poland)<br>- shortage of all skilled labour (source: Poland/ Latvia)<br>- lack of semi-skilled workers<br>- ‘we have our own training scheme: we require 3 levels of skills – computer controllers, medium and low level skills: all are difficult to fill’<br>- lack of skilled trades – welders, fitters and engineer<br>- lack of trained chefs.<br>- lack of skilled carpenters/ joiners<br>- lack of skilled design engineers<br>- lack of semi-skilled workers for pipe laying, concrete laying and tarmac spreading<br>- call centre staff: recruitment is a ‘hit and miss’ affair : some training provided by banks<br><br>**Future**<br>- ‘skills shortages desperate in 5 years time when older employees retire’<br>- growing demand without the ability to recruit or train skilled workers to meet the quality essential to remain competitive<br>- ‘Our business is not Medway specific but we have a loyal established workforce; if we cannot replace their skills and dedication we can move elsewhere in Europe’<br>- lack of qualified engineers in Medway will get worse: they have moved and will continue to move with the bigger companies who have shifted production away from Medway. |

| 9. What effect do you consider the regeneration of Medway and North Kent will have on your business prospects and profitability? | |
|---|---|
| **Opportunities**<br>- Business growth (3)<br>- more business opportunities<br>- increased demand for insurance<br>- Medway more attractive to sales and marketing staff<br>- better environment for recruiting skilled electronic engineers<br>- better environment therefore better sales performance<br>- greater demand for internet promotion from other businesses within Medway<br>- improved image for our business: therefore opportunities for growth<br>- business growth if the right employment sites and accommodation are available<br>- could be good if the Council listens to what businesses want<br>- relocation to Rochester Riverside a possibility<br>- firm growth due to increased demand for social housing - our business<br>- able to resume the processing of ship oil waste<br>- expecting support in training the next generation of engineers and trades people<br>- support to innovate and train skilled engineers through a Science Park<br><br>**Neutral**<br>- depends on how Chatham is developed: cannot bring clients here at present<br>- very little except possibly higher wage and premises costs (3)<br>- no extra business: no customers in Kent<br>- very little – most of our business is outside Medway<br>- higher education is not producing the quality skilled engineers: hopefully it will not be too late when they do.<br>- growth opportunities but the threat of rising costs will make companies uncompetitive | **Threats**<br>- industrial land shortages due to residential development<br>- no freehold industrial land available<br>- nowhere to expand: therefore forced to move out of Medway<br>- no suitable accommodation on short leases for expanding businesses<br>- no increase in business car parking facilities<br>- increased road congestion in and out of Strood & Medway City Estate<br>- planning decisions outside our control or influence<br>- putting up costs<br>- increased costs detrimental to small specialist businesses<br>- modern engineering threatened if developments at Kingsnorth drive out the dirty trades<br>- threat of closure of Chatham Docks.<br>• loss of expanding sustainable businesses<br>• loss of recycling as a growth industry<br>• loss of an opportunity to reduce congestion on the roads<br>• loss of employment (2)<br>• one company's investment of £7-8 million lost<br>• no alternative available berths in Medway with quayside moorings $4^1/_2$ to 5 metres draft at high tide (2)<br>• loss of ship repair facilities<br>- noise from increased development disturbing employees quality of life |

| **10. Do you have any other points that you would like recorded that have not been covered by Sections 1 – 9 of this telephone business survey?** |
| --- |
| - better trains and stations<br>- more and more frequent buses<br>- good restaurants<br>- high quality, high profile office/ small business accommodation in a quality location (park or riverside)<br>- important to reconnect Medway with north of the river or all manufacture and distribution will move away<br>- Council should look after business interests in their future plans not just provide housing<br>- distribution businesses need good transport infrastructure and dedicated employment land<br>- river Medway wharfages are an essential ingredient in the development of the Thames Gateway. Medway should value the benefits of the waters edge for imports by sea.<br>- small businesses growth requires high profile land and accommodation at reasonable costs at c. £10.00 per square ft |

**Medway Council**

# Employment Land & Accommodation Study 2007

## Volume 5:
## Future Demand for Land & Accommodation

## Contents

# Summary of Key Findings

## Literature Review

- National and regional planning and economic strategies and employment and socio-economic trends provide the context in which decisions relating to employment land and accommodation in Medway will be taken.

- A report by DEGW[1] points out

  > Medway as an enterprise opportunity is complicated to understand. It is not nationally legible and therefore difficult to market.

- Medway's strength lies in its unique position in the Thames Gateway: it is also one of the largest conurbations in South East England.

- Geographically, historically and economically different, this differentiation offers unparalleled opportunities for Medway to lead the way in the South East in the field of sustainable business development.

- One key issue that emerges is the need to negotiate a fine line in planning decisions between two complementary objectives - inward investment and internal business growth - in order that they both remain a common catalyst for wealth creation. Positive interventions may be needed for three groups: business start ups; existing businesses looking to grow; new companies to the area.

- In short the challenge for Medway is making sense of the planning jigsaw and delivering on the current demand within the existing legal framework of the Local Plan whilst at the same time working in the context of the new national spatial development planning system and emergent *Core Strategy* for the Local Development Framework.

- Medway Council will have difficult choices to make in conflicting planning time frames, adapting and adjusting decision-making frequently, to meet new and often competing pressures for land use.

- Strong leadership and a comprehensive but focussed strategic vision will be necessary if Medway is to modernise, grow in size, retain its unique character and prosper economically in the face of global, regional and local competition.

- The issue of allocations of employment land in relation to the expansion of residential housing has been creeping up the list of planning priorities over the past five years at regional, sub-regional and local levels. This new emphasis is linked to a renewed focus on sustainable development and the adoption of spatial planning policies.

- The synergies and alignment between the stated positions in different regional, sub-regional and local planning documents covering South East England are deliberate policy, designed to support the implementation of a coherent vision. But they also have a tendency to serve to reinforce the validity of the same options and highlight the same concerns.

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[1] An Enterprise Vision for Medway, The starting point for Medway Renaissance, DEGW/ Innovacion, 2006

- An assessment of the documents reviewed here indicates that the benefits of a common approach to strategic planning at different levels within the South East Region needs to be balanced by the need for flexibilities and freedoms in support of local decision making and in particular planning for employment land in Medway.

- The possible need for rapid robust demand-led responses to employment land requirements at local level in Kent Thames Gateway is noted in the South East Plan (Draft): ‘in Medway and Swale if the existing sites fail to provide readily and immediately available land for a variety of business types, the use of the land should be reviewed and alternative sites allocated’.

- The *Regional Economic Strategy* 2006 (RES) also recognises the importance of employment land in order to improve the sustainability of communities, reduce congestion and stem the emergence of dormitory towns and villages.

- The *South East Plan Kent Thames Gateway Spatial Strategy* highlights the urgency of issues relating to employment land. It makes connections between the quantity and ready availability of employment land and the ability of local authorities to boost the local economy

**National and Regional Planning**.

- The Planning and Compulsory Purchase Act 2004 (The 2004 Act) introduced a new national spatial development planning system. The 2004 Act abolished Structure Plans and replaced Regional Planning Guidance with Regional Spatial Strategies (RSSs) with immediate effect.

- Research for this report (2006-7) was undertaken during the transitional stage to full spatial planning. The South East Plan (Draft) was subject to an Examination in Public (EIP) at the end of 2006. Therefore the Kent and Medway Structure Plan remains the statutory strategic planning framework. In parallel, Regional Planning Guidance for the South East (RPG9) and the Planning Framework for the Thames Gateway (RPG9a) stay operational until the South East Plan is adopted in 2008.

- Regional Spatial Strategies (RSS) are prepared by the Regional Assemblies. The RSS provides a statutory spatial framework, incorporating a Regional Transport Strategy, to inform the preparation of Local Development Documents, Local Transport Plans and regional and subregional strategies and programmes that have a bearing on land use activities.

- The Regional Spatial Strategy (The South East Plan) (SEP) (Draft 2006) is a full revision of Regional Planning Guidance 9 (RPG9) - the current Regional Spatial Strategy for the South East. It is not considered a minor amendment of RPG9. The Plan expands on the statutory Planning Framework for the Thames Gateway, Regional Planning Guidance 9a (RPG9a) including the Kent Thames Gateway (KTG) subregion.

- The *South East Plan* sets out a vision for the future of the South East region to 2026 outlining how to respond to the challenges facing the region. Medway is defined as one of the main economic locations to be promoted in the context of Thames Gateway developments.

- The scale of new business development currently planned for Kent Thames Gateway (KTG) is as follows: Business floorspace committed (square metres: 2004). Data is for whole districts - Dartford 959,000; Gravesham 431,000; Medway 785,000; Swale 1,036,000; Kent Thames Gateway 3,211,000.

- Regional Planning Guidance for the South East (RPG9) (2001) currently provides the statutory spatial planning framework for the South East region. RPG9 offers specific guidance for use in the preparation of local authority development plans and, in London, for the Mayor’s Spatial Development Strategy.

- RPG9 also provides the spatial framework for other strategies and programmes. These include the preparation of local transport plans by local authorities, and the regional strategies of the South East of England Development Agency (SEEDA)

- A key feature of the RPG9 is guidance to concentrate of development in urban areas and make better use all the available urban land, including previously developed land.

- The Planning Framework for the Thames Gateway was established in Regional Planning Guidance 9a (RPG9a) (1995). The spatial framework is based around the consolidation of the existing regional pattern of town and country, maximising the potential offered by the area's supply of brownfield land and exploiting the opportunity offered by the new Channel Tunnel Rail Link (CTRL) and the river.

- At the core of the framework are two new regional commercial and business hubs directly served by the new Channel Tunnel Rail Link (CTRL). One is at the western end of the Gateway, around Canary Wharf/ Stratford, and the second at the centre of the Gateway in Kent Thameside, centred on the new CTRL station at Ebbsfleet, and the adjoining major brownfield sites at Eastern Quarry, Swanscombe and Northfleet.

- The Kent and Medway Structure Plan provides a strategic planning framework for the protection of the environment, major transport priorities, and the scale, pattern and broad location of new development including provision for new housing and major economic development across Kent and Medway.
- The use of individual sites is not specified – this is the role of the Local Plan or Local Development Framework (LDF). The purpose of the Structure Plan is to guide the preparation of Local Plans and LDFs and provide a framework within which decisions can be made. It also guides and informs investment decisions made in both the private and public sectors.

### National and Regional Economic Development and Regeneration

- The Regional Economic Strategy (RES) (2006) is unequivocal. Strong language is used to spell out the choices and realities facing the region over the next decade.

- The vision in the RES 2006 is for the South East to maintain its status as a world class region. Recognising that by any conventional economic measure the South East is one of Europe’s most successful regions, deep concern for the future prosperity is evident throughout the Strategy. It proposes
    - Vigilance against any tendency towards complacency
    - Spreading economic prosperity more evenly geographically across region
    - Public sector interventions in favour of accelerating business growth and sustainable prosperity in the region.

- The importance of the provision of an adequate supply of employment land located in a close relationship to housing is emphasised. Provision should be sufficient to 'improve the sustainability of communities, reduce congestion and stem the emergence of dormitory towns and villages' …'Space provided must include a range of provision, from flexible workspace for enterprise to the preservation of working waterfronts for use by the region's marine sector'.

- Despite relatively high skills profiles at the regional level highlighted in the RES 2006, many employers in the region encounter persistent difficulties in finding workers with relevant basic, technical and specialist skills.

- The Thames Gateway Growth area is the largest regeneration project of its type in Europe.

- Improving the performance of the Thames Gateway will have a significant impact on raising levels of prosperity across the South East region as a whole. Priority targets include skills-led growth and encouragement for new employers from the knowledge intensive and high growth sectors to come to the area.

- Medway benefits from multiple economic development and regeneration initiatives. Identified as a Regional Hub within The Thames Gateway Diamond for Investment and Growth (RES 2006) and defined as within the Kent Thames Gateway sub-region in terms of the South East Plan. Medway is a focus for development as a regional city.

- 2012 Olympic Games and Paralympics Games are seen as a major opportunity and driver of regeneration in Kent Thames Gateway as well as East London.

### National and Regional Socio-economic and Employment trends

- The changing face of work in Britain over the past 25 years from a manufacturing to a mainly service sector economy is having a strong influence on the type of demand for employment land and accommodation.

- Increasing mobility of companies with global supply chains; rapid changes in communications technologies; increased demand for flexible working patterns with more women in the work place and an older workforce as well as the blurring of the boundaries between work and home are additional influences on this changing pattern of 'locational loyalty'

- If companies can move easily, then many will do so if the quality of working life and cost effective business opportunities are not readily available. The total package has to be attractive and remain so

- Globalisation, changes in the labour market and employment patterns, technological advancements and changes in the structure of organisations have all contributed to diversity in modern career paths and varied work experiences

- Research by Professor Richard Scase *Beyond 2000: Scenarios of personal lifestyles socio-economic structure and demographic change*, (ESRC, Foresight, 1999), has identified macro-trends that are likely to affect the future social and economic structure of Britain include:
    - Globalisation: global supply chains – using information and communication technologies
    - International division of labour
    - Growth of 'specialist' local and regional economic clusters.

- These trends, according to the research, are becoming more apparent in different industrial sectors and reinforce the need for the United Kingdom to
    - Upgrade the skill base
    - Improve the level of industrial productivity
    - Enhance the quality of management

- The population of the UK is growing as is the number of homes that people live in. Families and households are changing as more people are living alone, and more young people are living with their parents for longer.

- Based on Labour Force Survey statistics and combined with the Government and Pension Commission's warnings on who will be affected by the pension's crisis, City & Guilds predicts that by 2020, more than one in five (22 per cent) people will be working well into their 60s

- In 2006 the main growth sectors were services. The largest contribution to growth was from other business services. This includes the activities of recruitment agencies, architects and engineers. (*Economic Trends* No. 636, ONS, November 2006, HMSO)

- However competitors from other developed and emerging economies such as China or India are increasingly attracting this type of investment, which implies that greater policy effort may be needed to retain the South East position as one of the leading European locations.

- Endogenous growth theory has been practised over the past 10 years and proven to be effective according to empirical research findings. Cities and their hinterlands as key drivers of regional economic growth is an on-going trend.

- According to this theory, growth results from enhanced local productivity and innovation through investment in human capital and R&D in leading areas of the economy. Implementation has resulted in an emphasis on
    - Creating environments necessary for higher business start-ups and survivals
    - Clusters organised at the city level
    - Fostering of innovation, institutional learning and the knowledge spillovers (the exchange of creative ideas)

- World class regions will develop and retain their international status and competitive advantage through a combination of creative business environments and focused high level skills development countered and complemented by a global supply chain and global skills market.

## Local Planning: Spatial & Economic Development and Regeneration

- The Planning and Compulsory Purchase Act 2004 (The 2004 Act) provided for the replacement of Local Plans and Unitary Development Plans with a single form of plan called Local Development Frameworks (LDFs). The Local Development Framework will form part of the future Development Plan for Medway.

- Medway in common with all local planning authorities in England is required to respond to The 2004 Act by producing spatial development plans that are more broadly based than their predecessors and more closely linked with other appropriate strategies, in particular the local Community Strategy.

- As noted above, research for this report (2006-7) was undertaken during the transitional stage to full spatial planning. Medway Local Plan (2003) remains legal document against which planning decisions are made and continues to play a crucial role in directing and controlling development.

- The Department of Communities and Local Government (DCLG) directive requires local authorities to produce a series of Development Planning Documents (DPDs) within a Local Development Framework (LDF).

- The Government's insistence that only the *Core Strategy* DPD and *Housing and Mixed-use* DPD are produced first does not fit Medway's local circumstances.

  > *There is a need to respond to a much wider change agenda. In particular DCLG itself is funding a dedicated delivery unit, Medway Renaissance, to address the broad Thames Gateway agenda and the Ministry of Defence is looking to the Council to provide a timely response to its nationally important public/private partnership contract (PPP) for the Royal School of Military Engineering (RSME) which involves the development of large areas of surplus land.*
  > (Medway Council *Core Strategy* Submission Stage, June 2006, 1.23)

- The Medway LDF *Core Strategy* (Draft) identifies a range of key issues relevant to this study:
  - Improve the image of Medway
  - Increase business activity by retaining and growing existing businesses and attracting new ones
  - Develop the skills of the workforce so they can take advantage of increased business activity
  - Increase the number and quality of the jobs
  - There maybe a link, in addition to other factors, between the gap between incomes and house prices and the ability to attract people with the right skills to fill jobs and economic prosperity of the area.
  - Medway unemployment levels are comparable to England, although they are higher, at 3.0% compared to the South East in general at 2.4% (May 2006 ONS)
  - Concerns have been expressed that there has been a shortage of employment land well related to the urban area
  - The economy needs a key sector theme such as cutting edge environmental technologies, and the development of growth sectors such as creative industries and spin offs, sub-contractors and services
  - Improved business support structures revised as there were some typos

- Around 90,000 people are currently employed in Medway but these jobs are not all filled by Medway residents. Medway exports 41% of its workforce (nearly 50,000 people) to the London and South East economies on a daily basis, with less than 20,000 people commuting into Medway. On average, workers in Medway also travel further to work than workers from any other area of the South East

- There are strong economic as well as environmental arguments to reduce the current high levels of commuting out of Medway. All three Regional Planning Bodies (RPBs) associated with the regeneration of the Thames Gateway wish to reduce the need to travel by offering resident workers a sufficient range and quality of accessible local employment opportunities. (Interregional Planning Statement 2004)

- Manufacturing, engineering and construction have greater productivity and are estimated to contribute around a third of Medway's GVA, making them very significant sectors in terms of wealth creation. However, Medway's Gross Value Added (GVA) *per capita* of population is very low in national terms at 66% of the average for England.

- Actions to improve wealth creation identified in the Medway Economic Development Statement (EDS) (2006) include: specialist manufacturing; marine and construction industries; business services; environmental technologies; enterprise support; entrepreneurship; increased land values; major employment sites and employment land. However, increasing land values is problematic as many companies are attracted to Medway because of lower costs.

- Medway EDS outlines the position, ambition, and priorities for the Medway economy for the longer term. The supporting action plan sets out a number of objectives to be delivered within a shorter term three year timescale aligned to those set out in the Medway Regeneration Framework.

- Medway is considered capable of sustaining economic growth rates of twice the national average (achieved by Brighton & Hove in recent years) and sets an ambitious target of 40,000 jobs reflecting both renewed confidence in the regeneration process and a need to increase the jobs to workers ratio to avoid encouraging commuting.

- Four priorities are listed in the Medway EDS: (1) employment space; (2) increasing the provision of office space (3) fostering greater competitiveness; (4) support for key growth sectors.

- Employment space is recognised as needed to create jobs: 'jobs cannot be created in Medway without the allocation of the necessary employment space, which is currently scarce in Medway'. The 'appropriate and effective use of regeneration sites for employment uses is therefore imperative'.

- The shortage of suitable employment land particularly within the urban core and 'difficulties that exist with bringing forward the major potential employment sites of the Isle of Grain and Kingsnorth' is seen as a serious block to job creation. The direct relationship between employment space and job creation is recognised. (EDS 2006)

- The *Medway Regeneration Framework 2006-2016* (Version 2, 2 October 2006) identifies that bringing employment sites forward, without additional intervention, would on past experience create of another 7,500 jobs by 2016. However, Medway is aiming for a further 19,000 new jobs (including 1,350 quality jobs), total 26,500 jobs by 2016.

- *An Enterprise Vision for Medway, The starting point for Medway Renaissance* (DEGW) recommends a focussed rather than a scattergun approach in defining sectors for future development in Medway
    - Education: 'Medway's emerging university quarter and its potential for R&D links into local firms has the potential to be a driver of new firm formation and a technical capacity'.
    - New Energy and Environmental Technologies: 'Medway has a unique concentration of energy, utility and waste services and could be the Thames Gateway centre of these activities'.
    - Niche manufacturing / engineering: 'Medway has a unique concentration of a number of small engineering sectors. Their future potential should be investigated. Both of these sectors have clear linkages to Medway Innovation Centre'.
    - Financial and business services: 'Given Medway's proximity to the City of London and future demand levels, this should remain a target sector'.
    - Transport and logistics: 'Building on Medway's port history, local representation and access to the road network / London there is potential to expand the logistics sector especially linked to retail and building product supply chains.'
    - River Sector: the river is seen 'as a key asset and differentiator: 'a 'Medway River Sector' focus could be cross-cutting to accommodate leisure, marine engineering, housing and retail'.

## Introduction

4.0.1 National and regional planning and economic strategies and employment and socio-economic trends provide the context in which decisions relating to employment land and accommodation in Medway will be taken. Although significantly, as the DEGW report[2] points out

> *Medway as an enterprise opportunity is complicated to understand. It is not nationally legible and therefore difficult to market.*

4.0.2 The unique position that Medway finds itself in may mean that the aspiring city is 'difficult to market' in the short term. However, an alternative positive scenario is also presented by this eclecticism.

4.0.3 *Section 4: Future Demand for Land and Accommodation* takes the form of an extensive literature review comprising four parts. Each contributes to the 'bank' of evidence that will provide a basis for decisions on how employment land policies in the Local Plan should be amended in the emerging LDF and determining the appropriate policy framework to deal with employment sites.

4.0.4 The Employment Land Review guidance note published by DCLG (formerly ODPM) is the pivotal focal point for the literature review in Section 4 of the Medway Employment Land Study 2007. The guidance note places Employment Land Reviews in the general context of sustainable development and the changing business, employment and economic environment in England.

4.0.5 The transitional stage in the implementation of the Planning and Compulsory Purchase Act 2004 (The 2004 Act) and renewed impetus for the regeneration of the Thames Gateway including the establishment of Medway Renaissance has meant that a plethora of planning strategies and guidance at regional and local levels were introduced during the course of research for the Medway Employment Land Study (2006-7). A series of documents were published in rapid succession in the latter part of 2006 and led to the need for a cut off point for this literature review.

4.0.6 The Medway Employment Land Study project team decided the review should cover the period up to October 2006. Therefore although Planning Policy Statement 3: Housing (PPS3) was published in November 2006 (cancelling Planning Policy Guidance 3: Housing - and subsequent amendments (PPG3) it is not covered in the literature review or referred to elsewhere in the Employment Land Study Reports.

[2] An Enterprise Vision for Medway, The starting point for Medway Renaissance, DEGW/ Innovacion, 2006

4.0.7 This report is in four parts:

| | |
|---|---|
| Part I: | Literature Review - National and Regional Planning |
| Part II: | Literature Review - Medway Development Plan |
| Part III: | Literature Review - Economic Development and Regeneration |
| Part IV: | Literature Review - Socio-economic and Employment Trends |

## Medway Council
## Employment Land & Accommodation Study 2007

## Section 4: Part I

## Literature Review – National & Regional Planning

### The Introduction of a new national development planning system

4.1.1 The Planning and Compulsory Purchase Act 2004 (The 2004 Act) introduced a new national development planning system. All local planning authorities are required to produce spatial development plans that are more broadly based than their predecessors and more closely linked with other appropriate strategies, in particular the local Community Strategy.

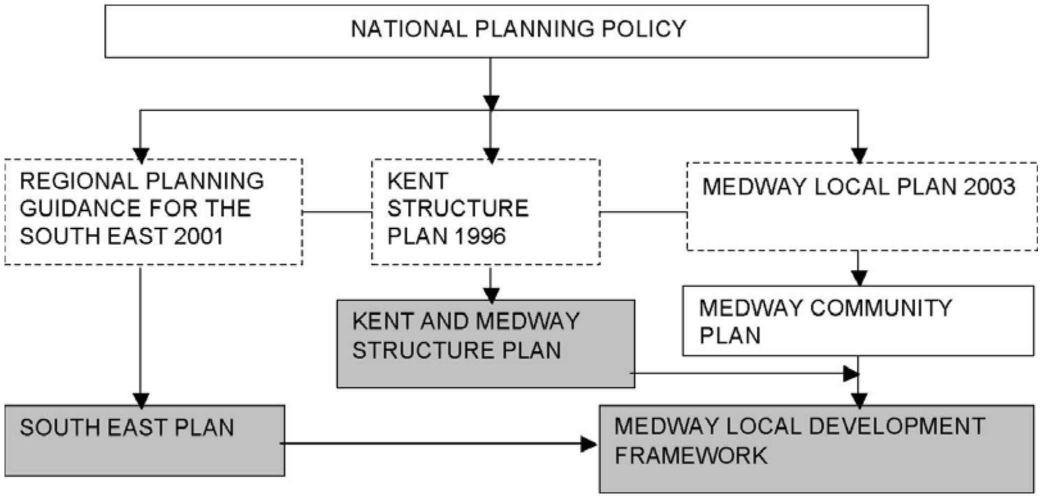
4.1.2 The Planning Officers' Society has summarised some of the key characteristics of spatial planning as follows:

> *Traditional land-use planning has an approach to development that focuses upon the regulation and control of land. Spatial planning has a wider, more inclusive, approach and it aims to ensure the best use of land by weighing-up competing demands. It is still concerned with the physical aspects of location and land use but by taking account of economic, social and environmental matters, it considers aspects that influence space as well as place. These aspects may include access and movement (as now), health, education, employment, crime prevention etc. By bringing together such a wide range of factors, spatial planning becomes a key delivery mechanism for achieving sustainable development*
>
> *(Policies for Spatial Plans, July 2005)*

4.1.3 The 2004 Act abolished Structure Plans and replaced Regional Planning Guidance with Regional Spatial Strategies (RSSs) with immediate effect. It also provided for the replacement of Local Plans and Unitary Development Plans with a single form of plan called Local Development Frameworks (LDFs). The Local Development Framework will form part of the future Development Plan for Medway.

4.1.4 Regional Spatial Strategies (RSS) are prepared by the Regional Assembly, and replace Regional Planning Guidance. Incorporating a Regional Transport Strategy, the RSS provides a statutory spatial framework to inform the preparation of Local Development Documents, Local Transport Plans and regional and subregional strategies and programmes that have a bearing on land use activities.

4.1.5 RSSs provide a broad development strategy for a region for a 15 to 20 year period. They cover the identification of the scale and distribution of provision for new housing, priorities for the environment, such as countryside and biodiversity protection, and transport infrastructure, economic development, agriculture, minerals' extraction, waste treatment and disposal.




**Kent and Medway Structure Plan (2006)**

4.1.6 The Kent and Medway Structure Plan (KMSP), produced jointly by Kent County Council and Medway Council, provides for development and change in Kent and Medway up to 2021.

4.1.7 The structure plan is a long-term statutory land-use policy document which guides development, protects important features of the environment, and influences the location and type of private and public investment. Structure plans set out general policies and proposals of strategic importance. They do not contain detailed policies or site specific proposals.

4.1.8 The Kent and Medway Structure Plan provides a strategic planning framework for the protection of the environment, major transport priorities, and the scale, pattern and broad location of new development including provision for new housing and major economic development across Kent and Medway.

4.1.9 The Structure Plan does not specify the use of individual sites – this is the role of the Local Plan or Local Development Framework (LDF). The purpose of the Structure Plan is to guide the preparation of Local Plans and LDFs and provide a framework within which decisions can be made. It also guides and informs investment decisions made in both the private and public sectors.

4.1.10 KMSP provides fully for the area's contribution to new housing in the South East and maintains generous provisions for new economic development. Kent and Medway's economic performance continues to lag behind that of other parts of the South East. The need for housing to go hand in hand with business growth, job creation and a widening range and quality of employment is an essential requirement for development. The Plan emphasises the importance of these relationships to balanced and sustainable growth.

4.1.11 The importance of proximity to London as a source of Kent and Medway’s prosperity is recognised. A significant proportion of the capital’s working population commutes from Kent into central and outer London. Almost 100,000 of the Kent and Medway workforce (13.5%) commute to London with the proportion as high as 39% (16,700) in Dartford and 33% (17,400) in Sevenoaks.

4.1.12 As a result of the Planning and Compulsory Purchase Act 2004 this will be the last Structure Plan for Kent and Medway. In future, statutory strategic planning for the South East region and Kent will be provided through the Regional Spatial Strategy (the *South East Plan*). However, until this is finalised the Structure Plan remains part of the development plan for the Kent and Medway area.

**Regional Planning Guidance for the South East (RPG9)**

4.1.13 The primary purpose of the Regional Planning Guidance 9 (RPG9) (2001) is to provide a regional framework for the preparation of local authority development plans and, in London, for the Mayor's Spatial Development Strategy.

4.1.14 A secondary purpose is to provide the spatial framework for other strategies and programmes. These include the preparation of local transport plans by local authorities, the regional strategies of the South East of England Development Agency (SEEDA)

4.1.15 The vision outlined in RPG9 embraces encouraging economic success throughout the Region, ensuring a higher quality of environment with management of natural resources, opportunity and equity for the Region's population, and a more sustainable pattern of development.

4.1.16 The growing understanding that economic, social and environmental issues are inextricably linked has influenced a more rigorous approach to sustainable development. In particular, there is an emphasis on concentrating development in places well served by public transport, especially town centres, within urban areas and on previously developed sites, before considering the option of developing on greenfield sites. (2.5)

4.1.17 A key feature of the guidance strategy is the concentration of development in urban areas and the better use all the available urban land, including previously developed land. (3.1, 3.6, 3.8)

4.1.18 The regeneration of the Thames Gateway is identified as a regional and national priority. Whilst recognising the complexity of the area's structural problems the guidance also emphasises the potential for Thames Gateway to make a vital and major contribution to the growth of the regional economy and the enhancement of its environment. (4.9)

4.1.19 This guidance

- Does not replace or duplicate the policies set out in RPG9a, but provides the wider spatial framework for Thames Gateway.

- Emphasises on the importance of maximising opportunities in the extended Thames Gateway to develop strong and diverse sub-region and ‘to enable the Thames Gateway to compete effectively, offering a comprehensive transport system and a quality environment for new businesses and homes’. It states categorically: that the ‘Implementation of RPG9a remains a priority’. (4.13)

- Has an important role in influencing the economic development strategies of Regional Development Agencies, economic partnerships and businesses in respect of growing indigenous businesses and targeting suitable inward investment.

- Recognises the responsibilities of the private sector and the need for business interests to appraise local authorities of changing spatial requirements and to seek innovative solutions jointly.

4.1.20 The Regional Economy (Chapter 7) determines the scope and direction of development plans to support business interests.

- Growth sectors of the economy should be supported including through encouragement of business clusters across local authority boundaries.

- The importance of maintaining a broadly based economy and retaining sectors such as manufacturing and warehousing is acknowledged.

- New sources of demand for industrial land, especially in urban areas, may arise from the development of new products such as those derived from recycled materials or appliances which enable more efficient use of water and energy.

4.1.21 The guidance states that allocations of employment land should be made in the context of strategies for urban renaissance and rural development.

*Development plans should:*

- *allocate employment land within an overall strategy for urban renaissance and rural development, providing a range of premises and sites to meet the varied needs of business;*

- *include policies and proposals which result from a review of existing and potential sites considering various factors including:*
  - *current use and scope for intensification;*
  - *scope for optimising the use of previously developed land;*
  - *scope for mixing employment uses with other land uses such as housing and education;*
  - *availability of land within built up urban areas suitable for development and redevelopment;*
  - *potential for increasing access by sustainable transport modes;*
  - *marketability; and*
  - *the resources required to bring sites forward for development.*

4.1.22 The guidance states that economic diversity should be encouraged, measures taken to facilitate the growth of small and medium enterprises, and support given to grow a variety of economic sectors including manufacturing.

*Development plans should:*

- *assess the requirements of the various sectors of the local economy and ensure that provision is made for a balanced economy in both urban and rural areas;*
- *provide for a range of sites for small and medium sized businesses including, for example, incubator units and innovation centres; and*
- *in areas with an over-dependence on one sector such as the service sector, take specific action to preserve industrial sites where a need for such sites has been identified; and*
- *continue to pursue the implementation of proposals identified in RPG9a with emphasis on ensuring good design combined with efficient use of land, integration of transport and land use, and mixed use development wherever possible;*

**The Thames Gateway Regeneration Area**

4.1.23 The Thames Gateway was first recognised as a major planning concept in the 1980s and has increased its importance since then. From the outset the fundamental theme has been the regeneration of large previously developed sites, the improvement of poor urban environment and stimulus to the economy.

4.1.24 Three Regional Planning Bodies (RPBs) are responsible for planning in the Thames Gateway - London, through the Mayor of London; and the East and South East of England Regional Assemblies. The emergent regional plans are gradually replacing regional planning guidance. The London Plan (2004) replaced Regional Planning Guidance 3 (RPG3). Regional Planning Guidance 6 RPG6) (2000) and Regional Planning Guidance 9 (RPG9) (2001) form the initial Regional Spatial Strategies for East and South East of England respectively.

4.1.25 The Thames Gateway is identified as a major Growth Area through the Government's *Sustainable Communities Plan* (2003) and subsequent implementation plan *Creating Sustainable Communities: Delivering the Thames Gateway* (ODPM, 2005)

4.1.26 Plan-making, master-planning and development control throughout the Gateway is intended to support high quality and more intensive sustainable development and resist sub-standard applications.

4.1.27 A non-statutory document, *Growth and Regeneration: the Interregional Planning Statement* (2004) provides the three Regional Planning Bodies (RPBs) whose regions include parts of the Gateway with a common basis for regional strategy making within the current statutory processes.

4.1.28 Thames Gateway, which includes Medway, is expected to accommodate 120,000 new homes by 2016 of which approximately 40,000 dwellings are above current regional planning guidance provision. The distribution of these additional dwellings amongst the Thames Gateway authorities is outlined in an inter-regional planning statement

4.1.29 All three RPBs are seeking to maximise the economic potential of the Gateway. All three intend to reduce the need to travel by offering resident workers a sufficient range and quality of accessible local employment opportunities.

**Thames Gateway Planning Framework - Regional Planning Guidance (RPG) 9a**

4.1.30 The Planning Framework for the Thames Gateway was established in Regional Planning Guidance (RPG) 9a in 1995. Its main principles include:

- Making best use of the area's strengths and resources for growth and regeneration.
- Creating a vibrant, inclusive and sustainable pattern of communities.
- Making the most of transport facilities and especially public transport.
- Raising environmental standards and the quality of development and bringing life to the river.
- Promoting sustainable development in which employment, housing, transport and other activities are planned in a mixed and co-ordinated way.

4.1.31 In practice, the Thames Gateway spatial framework is based around the consolidation of the existing regional pattern of town and country, maximising the potential offered by the area's supply of brownfield land and exploiting the opportunity offered by the new Channel Tunnel Rail Link (CTRL) and the river.

4.1.32 At the core of the framework are two new regional commercial and business hubs directly served by the new Channel Tunnel Rail Link (CTRL). One is at the western end of the Gateway, around Canary Wharf/ Stratford, and the second at the centre of the Gateway in Kent Thameside, centred on the new CTRL station at Ebbsfleet, and the adjoining major brownfield sites at Eastern Quarry, Swanscombe and Northfleet.

4.1.33 Existing urban settlements targeted for expansion include Dartford, Gravesend, Swale and Medway, south of the River Thames in Kent and Thurrock, Basildon and Southend north of the river in Essex.

4.1.34 Brownfield sites close to these urban areas (and others in London) are identified as having the capacity for high density housing growth. Economic expansion is to be supported by a programme of business area improvement and innovation focused on the Gateway ports at Tilbury, Sheerness, Thamesport and Medway.

**Update to Planning Policy Guidance 3: Housing (PPG3) - supporting the delivery of new housing**
*Note: this guidance was replaced by Planning Policy Statement 3: Housing (PPS3) in November 2006 (cancelling Planning Policy Guidance 3: Housing - and subsequent amendments (PPG3) but fell out of the scope of this report.*

4.1.35 The new paragraph 42 (a) of PPG3 offered local authority planners the flexibility to balance housing development with economic development and regeneration. It states that 'local planning authorities should consider favourably planning applications for housing or mixed use developments which concern land allocated for industrial or commercial use in saved policies and development plan documents or redundant land or buildings in industrial or commercial use, but which is no longer needed for such use.'

4.1.36 However, three caveats were stipulated when sympathetic consideration in favour of planning applications for housing or mixed use developments should not be given.

- First, planning applications for housing or mixed use developments should not undermine either the planning for housing strategy set out in the Regional Spatial Strategy or the Development Plan Document and lead thus to an over provision of housing

- Second, planning applications for housing or mixed use developments should not be viewed favourably if it can be demonstrated, preferably through an up-to-date review of employment land, that there is a realistic prospect of the allocation being taken up for its stated use in the plan period

- Third that development for housing would undermine regional and local strategies for economic development and regeneration.

**Planning Policy Guidance 4: Industrial, commercial development and small firms (PPG4)**

4.1.37 Policy Planning Guidance 4 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

4.1.38 PPG4 provides the underpinning for development plans in respect of industrial, commercial development and small firms. It encourages the re-use of urban land, mixed use developments, warns against the juxtaposition of incompatible uses and advises on balancing the needs of business with public interest.

4.1.39 The locational demands of industry are recognised as a key consideration in drawing up plans. Development plans should weigh the importance of industrial and commercial development with that of maintaining and improving environmental quality

4.1.40 Planning authorities are able to propose policies in development plans aimed at channelling particular types of business development into particular locations, although in each such case a clear justification for the distinction should be made.

4.1.41 The characteristics of industry and commerce are recognised as 'evolving continuously', and many businesses can be carried on in rural and residential areas without causing unacceptable levels of disturbance.

4.1.42 However, PPG4 recognises that the juxtaposition of incompatible uses can cause problems for the occupiers. For example, where residential development is proposed in the vicinity of existing industrial uses, the expectations of the residents may exceed the standards applied by the planning authority.

4.1.43 PPG4 also notes that local authorities and statutory undertakers have a major part to play by releasing under-used or vacant sites from their own land holdings as well as encouraging other major landowners to review their land holdings with the aim of releasing sites for development.

## The South East Plan (SEP) Draft) 2006

4.1.44 The *South East Plan* (SEP) will become the Regional Spatial Strategy for the South East once it is adopted in 2008 replacing existing the current Regional Planning Guidance and Structure Plans. The SEP has been prepared by the South East England Regional Development Agency (SEEDA) and is a full revision of Regional Planning Guidance 9 (RPG9) (2001) - the current Regional Spatial Strategy for the South East. It is not considered a minor amendment of RPG9. The Plan expands on the statutory planning framework for the Thames Gateway, Regional Planning Guidance 9a (RPG9a) (1995) for the Kent Thames Gateway subregion.

4.1.45 The *South East Plan* (SEP) sets out a vision for the future of the South East region to 2026 as a healthier region with a more sustainable pattern of development and a dynamic and robust economy, the benefits of which are more widely shared.

4.1.46 The aim of the *South East Plan* is to ensure that the South East remains economically successful and an attractive place to live for future generations. It outlines responses to the future challenges facing the region focusing on four major issues - housing, the economy, transport, and protecting the environment.

4.1.47 The Plan's core objectives are to balance continuing economic and housing growth with rising standards of environmental management and reduced levels of social exclusion and natural resource consumption. The Plan provides a framework for the region's development for the next 20 years. As such it complements other regional strategies for economic development and public housing investment. The inclusion of an Implementation Plan means there is a strong focus on delivery.

4.1.48 The Draft Plan was submitted to Government on 31 March 2006 after more than two years' development work. The next stage is for the Plan to be assessed by an expert panel at an Examination in Public begun in November 2006.

**Key position statements from the South East Regional Assembly (SEERA)**

4.1.49 The quotation (below) from the South East Plan highlight the views of the South East Regional Assembly on first the importance of investment in physical and community infrastructure 'if the region is not to grind to a halt' and second the significance of both 'technical and public opinion evidence' in taking the South East Plan forward in its entirety into the implementation phase.

> *One key theme cuts right across the policies of the Plan as it now stands: infrastructure. Our own analysis, echoed very strongly by public and business opinion, shows that growth cannot be sustained in the South East without significant investment, by the Government as well as by developers, in physical and community infrastructure. Without such investment, which we and others have taken significant steps to define and detail, the region will grind to a halt, quality of life and economic performance will suffer and communities will not be sustainable'. (Foreword)*

**Kent Thames Gateway Sub-region Plan - SEP**

4.1.50 Eight key issues have been identified as particularly pertinent to Kent Thames Gateway. Significantly 'a flourishing economy' is first on the list.

| | |
|---|---|
| *A flourishing local economy* | *Good public and other transport, both locally and linking to other centres* |
| *Effective engagement and participation of local people* | *A well integrated mix of decent homes* |
| *A safe and healthy environment with well designed public and green space* | *Good quality services including education, training and health* |
| *Sufficient size and scale and density to support basic amenities* | *A  sense of place* |

**Spatial Strategy and Sub-regional Policies - South East Plan**

4.1.51 The South East Plan points to the practical difficulties in achieving the maximum capacity for major sites, particularly employment sites highlighting infrastructures and market demand as factors likely to inhibit the pace of growth.

> *The pace of progress with essential infrastructure and market demand are likely to mean that the rate of development of some major sites is more gradual than the maximum capacity indicated by the Interregional Planning Statement. This may apply particularly to employment sites.*

*Kent Thames Gateway Spatial Strategy*

4.1.52 Kent Thames Gateway Spatial Strategy has a number of key features directly relevant to Medway:

- Concentrations of new dwellings, employment and services at major regeneration locations within the Medway urban area at riverside sites, and to the north on Ministry of Defence land at Chattenden
- Consistency with policies for the use of previously developed land before new greenfield sites, specifically to meet the policy of 60% new housing on brownfield sites (policy H3)
- Employment land and other economic development projects if successfully developed will substantially provide the employment required and can be matched by new housing
- Development is particularly concentrated near the transport hubs of Ebbsfleet and Chatham, and investment in bus and rail links within the sub-region are critical.

*PolicyKTG3: Core Strategy*

4.1.53 The future change in employment will be monitored to help assess changes in the sub-regional economy, and to inform future policy development. The Inter-regional Planning Statement suggests that there is site capacity for 40,000 additional jobs in Kent Thames Gateway over the period 2001 to 2016.Two options were considered for future employment provision: a rolling forward of this figure to 2026 and an alternative growth at a higher rate (+20% post 2016).This higher rate gives a forecast of the creation of 58,000 jobs for 2006 to 2026. (2.13)

*Policy: KTG4: Economic Growth and Employme*nt

4.1.55 Stated objectives are unequivocal

> *The development of the economy in Kent Thames Gateway will be dynamic and widely based, to provide employment for the community as whole. Provision will be made for the expansion of the existing economic functions of the area and for the introduction of new office, manufacturing and service functions on a large scale, with an emphasis on higher value activity including knowledge industries and research and development to address current under performance.*

4.1.56 The role of Medway is defined as one of the main economic locations to be promoted in the context of Thames Gateway developments as a whole:

- Medway will further develop the functions of a city centre within Thames Gateway, providing higher education, retail and other services

- Major sites identified in Medway will be developed to their full potential, building on the existing high technology aerospace and automotive sectors and attracting new high value activity, or accommodating the expansion of transport, energy, distribution and manufacturing.'

- The scale of new development currently planned is as follows: Business floorspace committed (square metres: 2004). Data is for whole districts - Dartford 959,000 Gravesham 431,000 Medway 785,000 Swale 1,036,000 Kent Thames Gateway 3,211,000.

- The amount of employment land provided in Kent Thames Gateway should be generous to enable the concentration of new housing in the area, and the need to widen and revitalise the local economy.

- The above quantities are the minimum to be provided by Local Development Frameworks. Some major sites, such as the development surrounding the Ebbsfleet station, are fixed locations, but in Medway and Swale if the existing sites fail to provide readily and immediately available land for a variety of business types, the use of the land should be reviewed and alternative sites allocated.

*Policy KTG5: Criteria for the provision of new employment land.*

4.1.57 Criteria for the provision of new employment land:

- Land and premises for business and other employment uses will be provided for each urban area on a scale sufficient to match the growth in housing and labour supply and reduce the need to travel long distances for work.

- A range of readily available sites and premises will be provided to meet the needs of new business start-ups, growing businesses and inward investors.

*Policy KTG6: Locations for New Employment*

4.1.58 The following issues are identified:

- There is a need to attract and retain higher ‘added value’ professional, technical and service jobs, and high quality proposals for intensifying or expanding the technology and knowledge sectors should be supported at established and suitable new locations.
- In Medway, the high level of commuting to London calls for new employment provision, in conjunction with new housing.
- Local Development Frameworks should confirm the broad scale of new business and related developments already identified; and give priority to completion of major employment sites at the following locations: Dartford, with access to the M25 and the A2, Ebbsfleet, Medway and Sittingbourne and the Isle of Sheppey.
- In addition, new employment locations should be provided at Medway, in conjunction with new housing land.
- High quality proposals for intensifying or expanding the technology and knowledge sectors will be supported at established and suitable new locations, unless there are overriding environmental impacts which cannot be adequately dealt with. These locations include Medway - at Chatham Maritime and adjacent to Rochester Airfield.
- Town centres and inner urban areas will be given greater emphasis as locations for regeneration and employment growth in services and cultural activity.
- Chatham and Ebbsfleet are identified as transport hubs.
- Medway is identified as a major location for the expansion of higher and further education.

*Policy KTG7: Locational Criteria for subregionally significant development*

4.1.59 Criteria for the location of major development:

- To exploit the potential for housing and business at locations served by the CTRL domestic services, especially Ebbsfleet and Chatham
- To locate housing and employment at the urban areas and where they are accessible by a choice of transport
- To develop previously developed land before greenfield sites, except when there are clear planning advantages from the development of an urban extension or new community.

**Smart Growth**

4.1.60 The *South East Plan* also advocates 'smart growth'. It is often interpreted as economic growth that does not require the importing of extra labour or the use of extra land. This is achieved by increasing the economic activity rate, increasing the skills base of the workforce, promoting the use of technology to improve productivity or the out-sourcing of lower value jobs that do not have to be based in the area. Medway has the potential to be a major player in 'smart growth' due to its large resident workforce and low cost base. (See also the *South East Regional Economic Strategy,* October 2006)

# Medway Council
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## Section 4: Part II

## Literature Review – Medway Development Plan

4.2.1 Medway Development Plan is made up of those plans which have been statutorily adopted and which cover the unitary authority. The Development Plan for Medway currently consists of three documents: the Kent & Medway Structure Plan 2006, the Medway Local Plan 2003, and the Regional Planning Guidance for the South East (RPG9) 2001 (and subsequent amendments). Ultimately, the Kent and Medway Structure Plan and Regional Planning Guidance will be replaced by the new South East Plan when it is adopted in 2008.

4.2.2 The Planning and Compulsory Purchase Act 2004 (The 2004 Act) provided for the replacement of Local Plans and Unitary Development Plans with a single form of plan called Local Development Frameworks (LDFs). The Local Development Framework will form part of the future Development Plan for Medway.

4.2.3 Research for this report (2006) was undertaken during the transitional stage to full spatial planning. Therefore Medway Local Plan (2003) remains important. It has crucial roles both in directing and controlling development; and as a legal document against which planning decisions are made. (For an analysis and review of the Local Plan see: Section 3, Part I: Literature Review - Local Planning Context)

4.2.4 Medway in common with all local planning authorities in England is required to respond to The 2004 Act by producing spatial development plans that are more broadly based than their predecessors and more closely linked with other appropriate strategies, in particular the local Community Strategy.

**Medway Community Plan (CP)**

4.2.5 The Medway Community Plan 2004 – 2007 was produced by the Medway Local Strategic Partnership (LSP) which brings together all the main organisations representing the community of Medway including businesses, voluntary and community organisations and public bodies. The Local Strategic Partnership is made up of almost 200 partner organisations. The Community Plan is currently being re-written and will facilitate the production of a Local Area Agreement (LAA).

4.2.6 A Local Area Agreement is a three year agreement that sets out the priorities for action for a local area agreed between central government, represented by the Government Office, and a local area, represented by the local authority and LSP and other key partners at local level. Current Government priorities are grouped round 4 blocks including Economic Development and Enterprise

4.2.7 The second Medway Community Plan (Community Plan 2004-2007) sets out Medway Local Strategic Partnership's commitment to transforming Medway. It will help develop Medway into a fine and welcoming city: a city where people want to achieve in all aspects of their life, through work, leisure and learning. Medway will be a healthy, safe and exciting place with a good environment and major cultural attractions, yet its communities will be recognised for their care, fairness and vibrancy: where people work together to realise their needs and ambitions.

4.2.8 The Community Plan highlights the key role of waterfront regeneration in achieving an urban renaissance.

**Medway Local Development Framework (LDF)**

4.2.9 Medway LDF is being prepared in accordance with a programme and timetable incorporated in a Local Development Scheme (LDS). The single Medway Local Plan will be replaced with a portfolio of separate Local Development Documents (LDDs) and a Statement of Community Involvement (SCI) which will set out the local planning authority's policies on how and when the public can expect to be involved in the preparation of Local Development Documents and significant planning applications.

4.2.10 A critical feature of the LDF process is wide and continuous engagement. In Medway throughout the process the Local Strategic Partnership has been heavily involved and the work of the officer team has been guided by an LDF Advisory Group, which includes members of the Regeneration and Development Overview and Scrutiny Committee and the Portfolio Holder for Strategic Planning and Economic Growth. The LDF will need to be in conformity initially with the Kent and Medway Structure Plan (KMSP) and then with the South East Plan.

4.2.11 In accordance with the requirements of DCLG, GOSE and the Planning Inspectorate, Medway Council has so far prepared the first two documents of the LDF, namely the *Core Strategy* and *Housing Development Plan Documents* (DPDs). Other site specific documents, action area plans, and development control policy documents will come forward at a later date. (See: Environment and Frontline Services Overview and Scrutiny Committee, Thursday 13th October 2005)

4.2.12 The Government directive to produce the *Core Strategy* DPD and *Housing and Mixed-use* DPD first does not fit Medway's local circumstances.

> *There is a need to respond to a much wider change agenda. In particular ODPM (now DCLG) itself is funding a dedicated delivery unit, Medway Renaissance to address the broad Thames Gateway agenda and the Ministry of Defence is looking to the Council to provide a timely response to its nationally important public/private partnership contract (PPP) for the Royal School of Military Engineering (RSME) which involves the development of large areas of surplus land.*
>
> (MC *Core Strategy* Submission Stage 1.23, 15th June 2006)

**Medway Local Development Documents (LDDs)**
**Medway Core Strategy Development Planning Document (Draft) (DPD)**

4.2.13 Medway Core Strategy is a spatial core strategy. It goes well beyond a traditional land use policy document by addressing the Council's corporate agenda drawing from the wide range of plans and strategies that are currently in place, including the Community Plan. The Strategy places a high priority on sustainability and quality of design and also seeks to provide a basis for all subsequent development plan documents.

4.2.14 Medway Core Strategy identifies a range of key issues:

- Improve the image of Medway
- Increase business activity by retaining and growing existing businesses and attracting new ones
- Develop the skills of the workforce so they can take advantage of increased business activity
- Increase the number and quality of the jobs
- There maybe a link, in addition to other factors, between the gap between incomes and house prices and the ability to attract people with the right skills to fill jobs and economic prosperity of the area.
- Medway unemployment levels are comparable to England, although they are higher, at 3.0% compared to the South East in general at 2.4% (May 2006, ONS.)
- Concerns have been expressed that there has been a shortage of employment land well related to the urban area
- The economy needs a key sector theme such as cutting edge environmental technologies, and the development of growth sectors such as creative industries and spin offs, sub-contractors and services
- Improved business support structures

*Spatial strategy objectives*

4.2.15 The spatial strategy for Medway is to give priority to the redevelopment and utilisation of under-used and derelict land in the urban area, focusing on the regeneration of Chatham Centre & Waterfront and the riverside areas of Strood, Rochester and Gillingham. Specific measures will be put in place to ensure that local needs are fully met whilst also fulfilling the area's role within a national growth area.

4.2.16 Development requirements will be accommodated within the existing urban boundaries and at a new mixed-use community at Chattenden / Lodge Hill.

4.2.17 Provision will be made to meet employment requirements, including the development of technology and knowledge based clusters at Rochester Airfield, Chatham Maritime and Chattenden / Lodge Hill and unlocking the strategic scale industrial and commercial land allocations at Grain and Kingsnorth.

4.2.18 The first Area Action Plans (AAPs) included in the *Core Strategy* submission document June 2006 are for Chattenden and Strood.

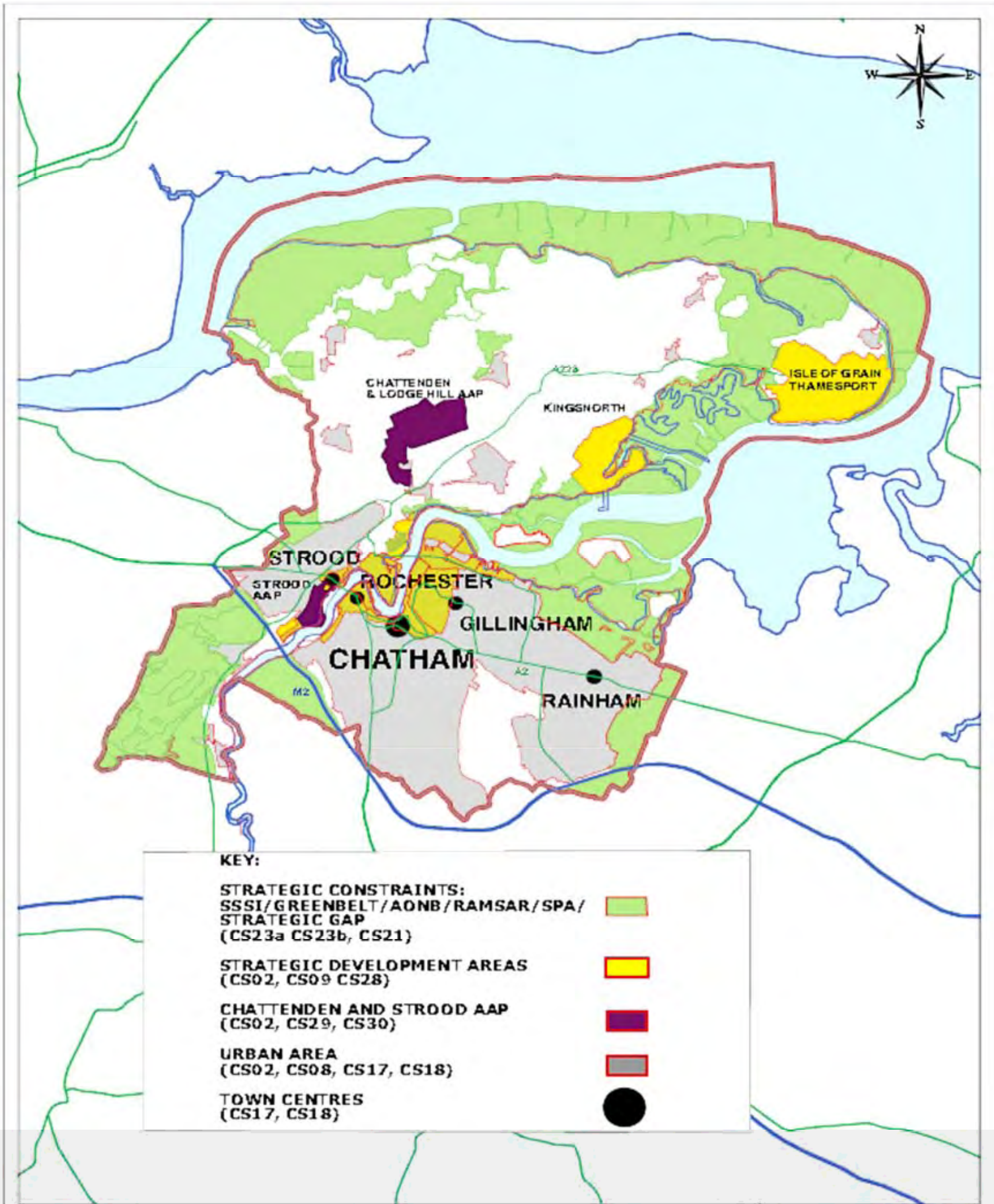



**Figure 4:**

**Medway Core Strategy Key Diagram**



Medway Council

Scale: 1:150000 31/08/06



4.2.19 The *Core Strategy* refers to key sectors of the Medway economy and the need for regular review. As would be expected of a strategic overview document, there is no attempt to relate sector activity to employment land issues other than for specific strategic clusters.

4.2.20 The *Core Strategy* states clearly:

> *The economy of the Kent Thames Gateway differs from most other sub-regions in the South East in the relatively high proportion of jobs in manufacturing and distribution, and the presence of ports and power generation. These are essential functions for the region, London and the nation, and provision should continue to be made for their future capacity and viable operation.*
>
> *The Medway economy is constantly evolving, and throughout the lifetime of the Plan the nature and requirements of sectors will change, new business sectors will emerge, and others decline. Sectors identified as key to the future of the region, the opportunities that exist for cluster development, and relevant support mechanisms, will therefore need to be regularly reviewed.*

4.2.21 Specific opportunities for business growth identified within the *Strategy*:

- BAE Systems at Rochester Airfield. ‘This is by some way the area’s largest private sector employer and the site is a global leader in its field. The company itself has identified opportunities for spin-off activities and land is available to develop complementary operations’.

- The Universities at Medway Campus at Chatham Maritime, as it develops, has obvious opportunities for spin-off activities and value added research. The range of institutions on the site provides an unparalleled opportunity to develop a cluster of at least Thames Gateway wide significance.

- The proposed site for the new settlement at Chattenden/Lodge Hill is highly attractive and the opportunity is available to take advantage of the proposals for a sustainable settlement form. The location is also suitable to accommodate any ‘overspill’ from the proposed cluster at Chatham Maritime

**Beacon award for best practice in the field of business support**

4.2.22 Medway is at the forefront of best practice in the field of business support and has been recognised nationally by its beacon council award for business support.

4.2.23 Medway Enterprise Gateway (MEG) enables the Council to interact with the business community, aspirant entrepreneurs and new and growing businesses. Through its Managed Workspace and Wired Medway – e-business support – projects it offers specialist one-to-one advice, hot desks with computers and training courses. Medway is developing its own enterprise students by building enterprise into the school curriculum and developing links with the University of Greenwich.

**Housing & Mixed Use Development Plan Document (DPD)**

4.2.24 The primary purpose of this document is to allocate sufficient land to meet the area's housing requirement as set out in the South East Plan and to replace the housing chapter in the Medway Local Plan. As the South East Plan has not yet been approved the final position on housing numbers is likely to be an estimate.

4.2.25 The assessment that many regeneration sites are now coming forward and the long established principle of developing a new settlement at Chattenden/Lodge Hill, Medway does not propose any land releases beyond the existing urban boundaries. It concludes:

- *The healthy housing supply position means that allowance can be made for possible non-delivery or late delivery of sites.*

4.2.26 The most significant new addition in terms of sites since earlier drafts were considered is Chatham Docks, which was submitted at the Preferred Options stage of the process. A contingent approach to its possible redevelopment is proposed. It was noted at this cabinet meeting that the Regeneration and Development Overview and Scrutiny Committee had considered the matter on 27 April 2006. Comments included:

*The need for a cautious approach in relation to the possible redevelopment of the Chatham Docks site.*
*(Local Development Framework: Submission Stage Development Plan Documents, Medway Council Cabinet 16th May 2006, 3.6 – 3.8)*

4.2.27 Both the Core Strategy and Housing & Mixed Use Development Plan Document were presented to a meeting of the full Council on 15 June 2006 with the reservation of the right to make minor changes prior to submission.

## Medway Council
## Employment Land & Accommodation Study 2007

## Section 4: Part III

## Literature Review – Economic Development and Regeneration

### Regional Economic Strategy for South East England 2006 – 2016
### A Framework for Sustainable Prosperity

4.3.1 The Regional Economic Strategy (RES) sits within the overall context of the Integrated Regional Framework for sustainable development in the South East, and alongside the draft South East Plan as the region's spatial strategy.

4.3.2 Recent planning reform has focused strategic planning powers at regional level, and synergies between the Regional Spatial Strategy, the Regional Transport and Housing Strategies and the Regional Economic Strategy are a statutory requirement. Implementation of these strategies needs to recognise the links between land use, economic prosperity and travel demand. A positive planning framework is required to support efficient competitive and innovative businesses, commercial and industrial sectors. The increased devolution of decision-making, for example through the Regional Funding Allocations process, allows greater alignments of priorities.

4.3.3 The Regional Economic Strategy 2006 (RES) follows two earlier Strategies in1999 and 2002. This third strategy responds to a new global context. Targets are set to ensure that success is more widely accessible and quality of life is seen as an important competitive advantage.

4.3.4 In 1999 the original Regional Economic Strategy for the South East emphasised the inter-relationship between economic success and environmental sustainability. The 2006 Strategy reinforces and elaborates on this position.

> *It has only become clearer that quality of life is a competitive advantage, and that to undermine this is to damage a key source of the region's success. The challenge is to achieve sustainable prosperity within environmental limits.*

4.3.5 The vision in the RES 2006 is for the South East is to maintain its status as a world class region. Recognising that by any conventional economic measure, the South East is one of Europe's most successful regions, a note of calculated concern is evident throughout the document. Vigilance against any tendency towards complacency is recommended and the uneven geographical spread of economic prosperity across region is analysed.

4.3.6 The Strategy is unequivocal. If the South East is to maintain its status as a world class region it must achieve sustainable prosperity which in turn must be predicated on sustainable development. There are no alternative options. Strong language is used to spell out the choices and realities facing the region over the next decade.

> *'It would be folly to assume that the South East's current position as a world class region is assured. The biggest challenges of all are to overcome complacency in areas of affluence; to recognise that the South East has the potential to spread economic prosperity and quality of life to many more of its residents, by raising productivity and economic activity across all communities, and by releasing the untapped economic potential of all parts of the region; and to face the choices necessary to maintain quality of life through sustainable prosperity'.*

4.3.7 Sustainable development strategies detailed in the Regional Economic Strategy 2006 underpin actions in favour of economic growth that are followed through in the Medway Economic Development Statement.

4.3.8 The 'bigger picture' in the Regional Economic Strategy assesses the integrated impact of current environmental, social and economic factors and describes future planned public sector interventions in favour of accelerating business growth and sustainable prosperity in the region. It is supported by an impressive evidence base some of which is referred to here.

4.3.9 Significantly there are relatively few direct references to Kent Thames Gateway (KTG). The Strategy does however provide an overarching context for decision making in Medway both within and beyond the Council's own Economic Development Statement.

**Sustainable Development**

> *'Sustainable development lies at the heart of the Regional Economic Strategy and runs through it as a continuous, unifying thread.' (RES 2006)*

4.3.10 Sustainable development is defined in this document as 'enabling all people to satisfy their basic needs and enjoy a better quality of life, without compromising the quality of life of future generations'. Sustainable development is commonly measured by social, environmental and economic factors. Increasingly measures of behavioural change are used, such as rate of household recycling.

4.3.11 The *UK Strategy for Sustainable Development 'Securing the Future'*, revised in 2005 proposed that sustainable development should be pursued through a 'sustainable, innovative and productive economy that delivers high levels of employment, and a just society that promotes social inclusion, sustainable communities and personal well-being' in ways that protect and enhance the physical and natural environment and use resources and energy as efficiently as possible.

4.3.12 Sustainable Development 2005 - Guiding Principles

- Achieving a Sustainable Economy
- Promoting Good Governance
- Using Sound Science
- Responsibly Living within Environmental Limits
- Ensuring a Strong, Healthy and Just Society

*Source: DEFRA (2005)*

**Growth Areas - Hubs and Diamonds**

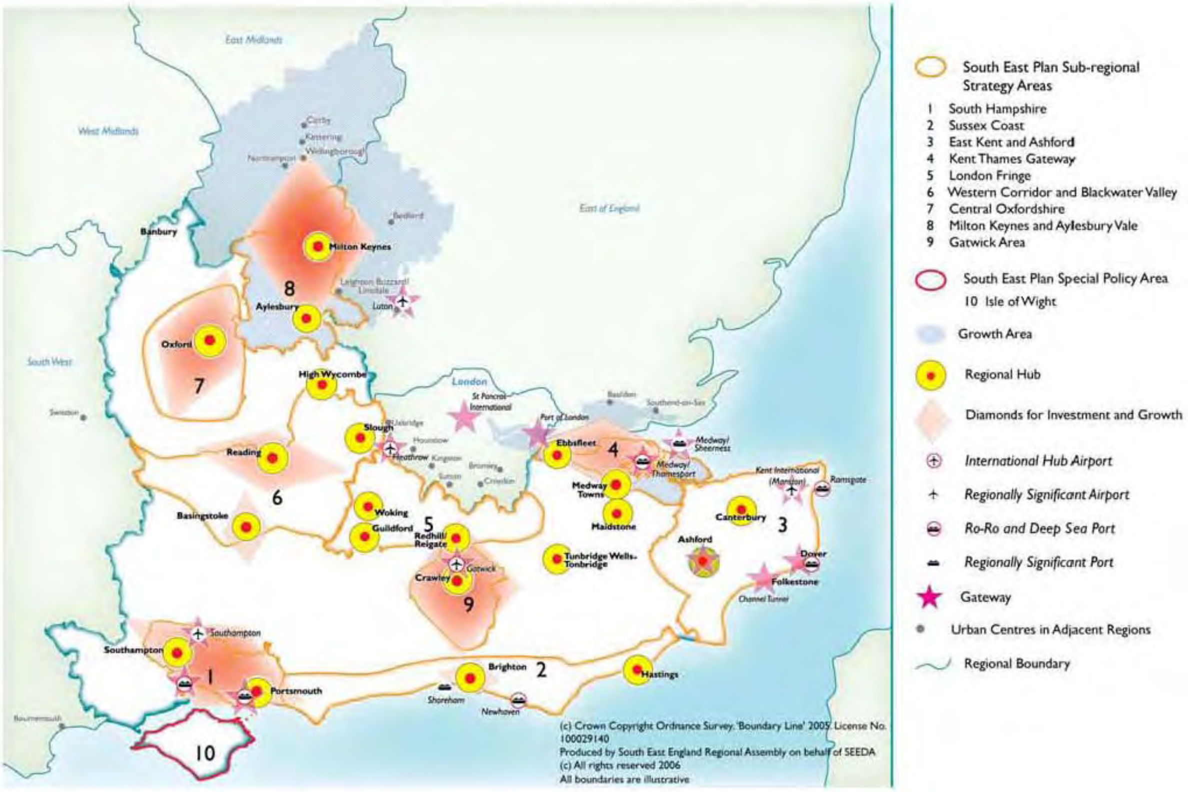
4.3.13 Hubs and Diamonds for Investment and Growth were identified in the Draft South East Plan (SEP). The Regional Economic Strategy supports the development and implementation of their plans to unlock the potential for sustainable growth and create a network of centres of economic activity.

4.3.14 The Draft South East Plan states that 'the prime focus for development in the South East should be urban areas in order to foster accessibility to employment, housing, retail and other services, and avoid unnecessary travel' (policy CC8a: Urban Focus and Urban Renaissance) . The Plan identifies twenty-one towns and cities as focal points for accommodating sustainable growth as Regional Hubs. Within these are eight major concentrations - Diamonds for Investment and Growth - capable of acting as catalysts to stimulate prosperity across wider areas, and with the potential for further sustainable growth through targeted investment in infrastructure. Medway is a Regional Hub within the Kent Thames Gateway Diamond.

4.3.15 All eight areas were highlighted as a focus for investment in infrastructure in the Regional Funding Allocation guidance submitted to central government by partners in the South East in January 2006. During the summer of 2006, local authorities in several of the Diamonds negotiated proposals for Growth Point funding with the Department for Communities and Local Government (DCLG), in each case focusing on proposals to unlock additional sustainable growth potential.

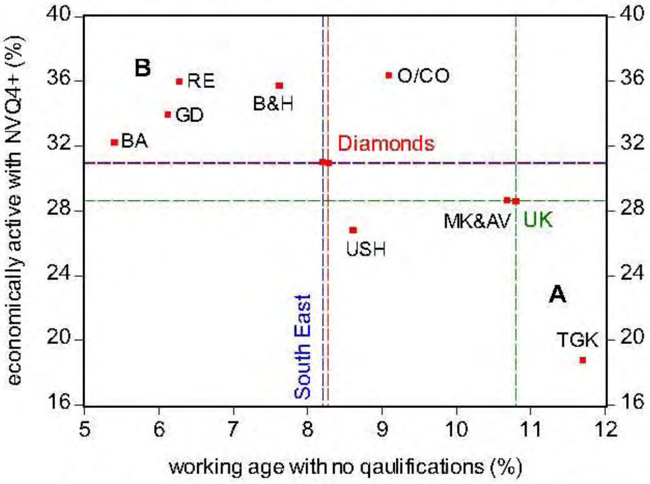
4.3.16 The cities and towns at the heart of these areas account for over half of the region's population and a similar proportion of its GVA. The average workplace-based GVA per head of £18,860 is some 7% above the regional average. However, there are significant variations between individual Diamonds, with GVA in the Reading area some 45% above, and Kent Thames Gateway some 31% below, the regional average. In each case there is a close relationship with surrounding areas, which is recognised in the relevant sub-regional strategies of the draft South East Plan.

Figure 4.44: Areas of the South East




4.3.17 The Thames Gateway Growth Area – a Diamond for Investment and Growth - is the largest regeneration project of its type in Europe. Improving the performance of the Thames Gateway will raise the prosperity of the Greater South East and the UK on the international stage contributing up to an additional £30 billion GVA to the UK economy by 2021. Targets have been set for the development of 120,000 new homes and up to 180,000 new jobs by 2016.

Figure 4.63: Skills profile
South East Diamonds for Investment and Growth




Source: SEEDA 2006 estimates derived from ONS (2003) data

4.3.18 The challenges are substantial – there are 62,000 unemployed people in the Thames Gateway, more than in Wales or Northern Ireland. In terms of skills, 31 per cent of people aged 16-74 have no qualifications compared to an average of 18 per cent in England and Wales.

4.3.19 The Regional Economic Strategy 2006 is structured around three interlinked objectives:

- Global Competitiveness: achieving it
- Smart Growth: spreading the benefits of competitiveness
- Sustainable Prosperity: ensuring that competitiveness is consistent with the principles of sustainable development

4.3.20 Headline targets

- Achieve an average annual increase in GVA per capita of at least 3%
- Increase productivity per worker by an average 2.4% annually, from £39,000 in 2005 to at least £50,000 by 2016 (constant prices)
- Reduce the rate of increase in the region's ecological footprint (from 6.3 global hectares per capita in 2003, currently increasing at 1.1% per annum, stabilise it and seek to reduce it by 2016

4.3.21 In addition eight transformational actions have been identified both to achieve these objectives and potentially impact across the breadth of the Strategy. They will be developed by SEEDA with partners as appropriate

1. 100% Next Generation Broadband Coverage – to improve business efficiency and transform the way people work and learn
2. Science and Innovation Campuses – to establish new world class research facilities in the South East
3. Skills Escalator – to ensure that people at all skill levels are continually equipped to progress in the labour market
4. Regional Infrastructure Fund – to harness new sources of funding for infrastructure investment
5. Raising Economic Activity Rates – by addressing barriers to employment and increasing incentives to work
6. Global Leadership in Environmental Technologies – to exploit the business opportunities created by reducing carbon emissions and waste generation
7. Education-Led Regeneration – to harness the catalytic effect of new Further and Higher Education facilities on releasing untapped potential
8. Making the Most of 2012 – to ensure that the 2012 Olympic Games and Paralympics Games leave a positive and lasting legacy for the South East

*Pursuing and attaining sustainability*

4.3.22 Pursuing and attaining sustainability is recognised as one of the major challenges faced by the South East

- Sustainability is achieved through commitment to safeguarding quality of life as a competitive advantage.
- Sustainability is fundamental to the success of both meeting the global challenge and to achieving each of the drivers of smart growth
- Sustainability underpins a number of themes such as culture and rural issues
- Sustainability forms an objective in its own right, with a focus on what the region can do in practical terms to reduce the ecological footprint while simultaneously tackling the pressing issues of security of water and energy supplies and reducing waste

**Approaches to meeting the challenges – the Lisbon Strategy (RES 2006)**

4.3.23 One of the approaches to meeting the challenges identified in the RES 2006 is for the region to become an exemplar in implementing and leading the delivery the Lisbon Strategy.

4.3.24 The re-launched Lisbon Strategy provides a European context with a central aim 'to deliver stronger, lasting growth and create more and better jobs in the context of sustainable development'. It focuses on three strategic goals:

- Knowledge and innovation for growth
- Making Europe a more attractive place to invest and work
- Creating more and better jobs

4.3.25 The South East will work with comparable regions elsewhere in Europe to understand best practice, exchange experience and collaborate to influence EU policies. Through its contribution to the UK National Reform Programme, the South East has already demonstrated that it is at the forefront of practical work to deliver the Lisbon Strategy at regional, national and European levels, and is acting as a test bed for responding to the global challenge.

*Impacts on the South East Region's Economy*

4.3.26 *Interdependency with London* – the overall health of the London economy, economic growth rates and projected job growth in London, and housing provision in the capital impact strongly on the South East.

**Thames Gateway Kent (RES 2006)**

4.3.27 Thames Gateway Kent forms a major part of the Thames Gateway. The RES 2006 considers that 'its regeneration will have a major impact on the overall economic performance of the South East'. The area has the advantage of close proximity to London and is the UK's main gateway to Europe. But at present the economy lags behind most of the South East and has many similar features to other areas within the Coastal South East.

> *The area has seen major investment over recent years, and the continuing commitment of the DCLG, local government and SEEDA will be instrumental to ensuring the area achieves a step change in economic performance.*

4.3.28 Thames Gateway Kent has distinct characteristics and priorities:

- *Transport infrastructure and connectivity* – the development of the CTRL and the opening of the international rail station at Ebbsfleet in 2007 (domestic rail services starting from 2009) is key to the development of the new major office and business centre at Ebbsfleet, with a focus on public transport

- *Large supply of brownfield development sites* - the area has the largest supply of brownfield sites in the South East which offer a unique opportunity for the sustainable development of both housing and employment opportunities

- *Knowledge intensive and high growth sectors* – attracting new employers in more productive employment sectors, stimulating innovation and encouraging entrepreneurship will help raise productivity

- *High quality buildings and a green environment* – there is a strong commitment towards high quality buildings and creating attractive environments along the Gateway

- *Sustainable communities* – it is recognised that the social, cultural, economic and environmental needs of both new and existing communities have to be addressed equally to ensure the development of stable and sustainable communities

- *Skills-led growth* – skill levels will need to be raised to both attract new higher value added employers into the area and to ensure that existing residents can take advantage of the economic benefits of regeneration

- *2012 Olympic Games and Paralympics Games* – the close proximity to Stratford and with the introduction of CTRL international and domestic rail services between Ebbsfleet and Stratford with journey times of approximately eight minutes, means that the Games has the potential to be a major driver for regeneration in North Kent. SEEDA is currently working closely with partners to identify the economic development priorities for Thames Gateway Kent, and is contributing to the Thames Gateway Strategic Framework being developed by the Department for communities and Local Government for publication in November 2006.

**Regional Skills Profile, Education & Training (RES 2006)**

4.3.29 Despite relatively high skills profiles at the regional level highlighted in the RES 2006, many employers in the region encounter persistent difficulties in finding workers with relevant basic, technical and specialist skills. Skills gaps identified by employers in the South East equal UK average levels, with over a fifth of South East employers reporting skills gaps in their workforces in 2003.

4.3.30 The Regional Skills for Productivity Alliance has a key responsibility in ensuring that current and future skills provision and labour market services meet the needs of businesses, and in stimulating demand for higher level skills. The role of Sector Skills Councils will be to engage with education and training providers to ensure qualifications and learning opportunities reflect current industry practice. A network of 30 ‘Action for Business’ Colleges is in the process of being established.

4.3.31 A series of new actions is proposed in response to the Leitch Review defining the UK skills profile and future needs

*Skills Escalator:* The Skills Escalator will raise awareness and encourage take up of Vocational Diplomas (aimed at the 14-19 age group and covering all sectors of the economy) and Foundation Degrees as major opportunities for promoting vocational as well as academic learning opportunities. This will need to be supported through an effective, integrated and accessible Information Advice and Guidance system. The Skills Escalator approach will help support the development of the workforce needed to deliver the ‘Every Child Matters’ agenda.

*Actions for smart growth:* include an improved skills brokerage, responding to the Leitch Review of future skill needs; vocational & work based learning opportunities

*Multiversity projects: the Universities at Medway*: demonstrate that the catalytic effect of Higher Education on regeneration is an essential part of the delivery of the vision of an enterprising, innovative and creative region. The Universities at Medway is a pioneering element of a growth and regeneration project involving three university partners and one Further Education partner, which will increase the numbers of Higher Education students at Medway by 3,300 full-time equivalents, generating an economic benefit to the region of £50 million annually.

**Infrastructure – Housing and Employment Space (RES 2006)**

4.3.32 The RES 2006 states:

*‘The region’s position is that further growth in housing and employment space requires investment in infrastructure alongside that growth’.*

*Housing:*

4.3.33 The current target for 60% of housing to be built on brownfield land is being achieved. The RES considers brownfield sites need to continue to be the focus of future development, along with better use of empty buildings, which are a 'wasted resource and are often a blight on local environments.'

- The relationships between housing supply, population growth, labour supply, productivity and GVA are complex. However, it is vital to ensure that plans for housing provision (in terms of numbers, location, type and quality) meet the needs of the region's economy and the people who live here.

- Affordability continues to be a key issue for the region, and the challenge is demonstrated by the falling number of people joining the housing market for the first time. The proportion of house purchases accounted for by first time buyers in the South East has fallen from 48% in 1993 to 18% in 2003.

- This already has a damaging impact on the ability of employers to attract and retain staff. Whilst Government funding must contribute to the supply of affordable housing, the role of the private sector is increasingly significant.

*Employment Land*:

4.3.34 The importance of the provision of an adequate supply of employment land located in a close relationship to housing is emphasised. Provision should be sufficient to 'improve the sustainability of communities, reduce congestion and stem the emergence of dormitory towns and villages' …'Space provided must include a range of provision, from flexible workspace for enterprise to the preservation of working waterfronts for use by the region's marine sector'.

*Quality Sustainable Design*

4.3.35 SEEDA's aim is to create a balanced approach by mixing a physical demonstration of sustainable prosperity - including supporting and creating the infrastructure and locations that promote business in the region and are exemplars of 'best practice' in areas of design and sustainability - and taking a policy lead in capacity building to directly influence the behaviour of partners and stakeholders on the quality of the developments

*Environmental infrastructure & sustainable construction*

4.3.36 The RES 2006 highlights the opportunity provided by the Growth Areas to deliver 'the highest standards of sustainable construction – including a requirement for sustainable infrastructure, especially transport, water, waste, energy and community facilities'.

*Index of Sustainable Economic Well-being (ISEW)*

4.3.37 Economic Growth is measured in terms of Gross Value Added. This measures economic activity, but does not measure the type or nature of that activity; it cannot therefore offer any indication of the sustainability of the region. A range of broader measures have been proposed to complement GVA, many giving more emphasis to quality of life and levels of individual satisfaction. A new Index of Sustainable Economic Well-being (ISEW) offers the prospect of valuable insights into the sustainability of the region. A regional ISEW index for the South East has been developed, and SEEDA will adopt the ISEW as an additional regional indicator of progress towards sustainable prosperity.

**Regional Infrastructure Fund (RIF) (RES 2006)**

4.3.38 There is currently no provision at a regional level for funding of infrastructure initiatives related to services such as water, power and waste, and no current mechanisms to enable these issues to be addressed to support the sustainable development of the region. 'In all, current levels of funding fail to enable infrastructure to be delivered in a pro-active and timely manner to facilitate planned levels of growth'.

4.3.39 In their Regional Funding Allocations submission to the Government, SEEDA, the South East England Regional Assembly and the Government Office for the South East therefore proposed to create an investment vehicle and revolving loan fund, to be known as the Regional Infrastructure Fund (RIF). This will be the catalyst for unlocking growth potential and economic competitiveness. An initial proposal envisaged that the fund would be pump-primed by adding an additional 10% to existing regional funding allocations (around £70 million per annum at current levels).

## Medway Economic Development Statement 2006 (EDS)

4.3.40 The Medway Economic Development Statement was produced to provide strategic direction in support of the existing Economic Development Strategy and the Community Plan. The statement comes out of the mid-term review process of the Medway Economic Development Strategy 1999-2010. On a regional and sub-regional level, the statement feeds into the South East Regional Economic Strategy and Kent and Medway Economic Framework.

4.3.41 The Medway Economic Development Statement outlines the position, ambition, and priorities for the Medway economy for the longer term. The supporting action plan sets out a number of objectives to be delivered within a shorter term 3 year timescale aligned to those set out in the Medway Regeneration Framework.

4.3.42 Medway is considered capable of sustaining economic growth rates of twice the national average (achieved by Brighton & Hove in recent years) and sets an ambitious target of 40,000 jobs reflecting both renewed confidence in the regeneration process and a need to increase the jobs to workers ratio to avoid encouraging commuting.

4.3.43 Actions to improve wealth creation identified in the Medway Economic Development Statement (EDS) (2006) include: specialist manufacturing; marine and construction industries; business services; environmental technologies; enterprise support; entrepreneurship; increased land values; major employment sites and employment land. However, increasing land values is problematic as many companies are attracted to Medway because of lower costs.

4.3.44 Four priorities are listed in the Medway EDS: (1) employment space; (2) increasing the provision of office space (3) fostering greater competitiveness; (4) support for key growth sectors.

4.3.45 Employment space is recognised as needed to create jobs: ‘jobs cannot be created in Medway without the allocation of the necessary employment space, which is currently scarce in Medway’. Therefore the ‘appropriate and effective use of regeneration sites for employment uses is therefore imperative’.

4.3.46 An increase in the provision of office space will enable Chatham to become an employment hub in its own right with the town centres of Gillingham and Strood performing sub-ordinate but complementary satellite functions to Chatham as the Medway economy expands. Chatham will become Medway’s central finance and business services district.

4.3.47 There is considerable emphasis on business competitiveness. Actions taken by Medway Council to support this aim will help the economy become more robust and less vulnerable to external economic conditions. This includes support for entrepreneurship, encouraging more efficient processes and advocating increased use of new technology. ‘Medway needs to increase the amount of business activity, and for existing business to become more competitive.

4.3.48 Key growth sectors to be supported for the benefit of the Medway economy have been identified as:

- specialist manufacturing
- engineering;
- construction;
- health/social care;
- Higher Education (HE);
- leisure/tourism
- cultural and creative industries.

4.3.49 Specific objectives have been identified to improve skills, knowledge transfer, supply chain activity, and productivity within these sectors. Other important sectors have been identified as retail, marine and environmental technologies. Over the long-term the most viable options for inward investment are seen as financial services (if transport infrastructure is improved) and business services.

**Jobs to workers ratio (Medway EDS 2006)**

4.3.40 With a forecast population growth from 250,000 to 300,000 the EDS identifies that the current target of 23,000 jobs would result in Medway’s jobs to workers ratio worsening, meaning that the proportion of out-commuting in Medway would increase.

4.3.41 Prior to the EDS 2006 the job targets were:

| | |
|---|---|
| Central sites development | 8,000 |
| HE/FE related development | 2,000 |
| Retail/Leisure/Tourism | 4,500 |
| Growth companies | 1,500 |
| Strategic sites (2009+) | 7,000 |
| Total | 23,000 |

4.3.42 The EDS revised the figure upwards to 40,000 as follows:

| | |
|---|---|
| New central office development (2009+) | 10,000 |
| HE/FE related development | 3,000 |
| Key Sector development | 4,000 |
| Retail/Leisure/Tourism | 6,500 |
| Growth companies | 1,500 |
| New businesses (4,000 new businesses) | 8,000 |
| Strategic sites (2009+) | 7,000 |
| Total | 40,000 |

4.3.43 The EDS considers the second option possible within the 15-year timescale.

4.3.44 Two observations are worth noting. First, the more confident optimistic picture is grounded on anticipated higher levels of private sector investment and planned public sector interventions. Second, the level of growth companies has not been changed from a relatively low target figure of 1,500 in both scenarios. Yet research for this study shows that Medway benefits to a high degree from companies that stay and grow in Medway.

**The workforce (Medway EDS 2006)**

4.3.45 Currently Medway has a working population of 158,000, and an economically active population of 126,000. This is a significantly sized active workforce that is larger than the economically active population of Newcastle.

4.3.46 Around 90,000 people are employed in Medway, although Medway exports 41% of its workforce (nearly 50,000 people) to the London and South East economies on a daily basis, with less than 20,000 people commuting into Medway. On average, workers in Medway also travel further to work than workers from any other area of the South East.

4.3.47 The 90,000 jobs in Medway currently are in the following sectors:

| | |
|---|---|
| • Public sector administration and health | 27.4% |
| • Retail and distribution | 26.2% |
| • Finance and business services | 17.9% |
| • Manufacturing and engineering | 11.6% |
| • Leisure and tourism | 7.2% |
| • Construction | 4.9% |

4.3.48 The figures above show a predominance of employment in the service sector, which is in common with national and regional industrial profiles. Almost half of the companies created in Medway over the past few years have been in the business services sector.

**Wealth Creation (Medway EDS 2006)**

4.3.49 Wealth creation is a key issue for Medway. The main employment sectors in Medway are not high wealth creating sectors.

- As a consequence of the large numbers of workers commuting out of Medway and a predominance of low wages, Medway's Gross Value Added (GVA) *per capita* of population is very low in national terms at 66% of the average for England.

- This is the situation despite the fact that there has been a 25% increase in Medway's business stock to 13,000 businesses since 2000. The picture is further complicated unstable, sometimes rising levels of unemployment.

- Manufacturing, engineering and construction have greater productivity and are estimated to contribute around a third of Medway's GVA, making them very significant sectors in terms of wealth creation.

4.3.50 Actions to improve wealth creation outlined in the Economic Statement include:

*Specialist Manufacturing*: Building on the established successful industries Medway can foster further growth in the relatively high wealth creating specialist manufacturing, automotive engineering and instrumentation sectors. There are over 900 manufacturing and engineering businesses in Medway, which are responsible for over £1bn of Gross Value Added per annum.

*Marine and construction industries*: Other opportunities for economic growth and employment building on existing strengths are in the construction and marine sectors. There are over 1,000 VAT registered construction companies in Medway. With the opening of the British Gas terminal on the Isle of Grain, Medway will become the eleventh largest port in the country.

*Business Services*: Business services are a key growth sector nationally - 47% of new businesses in Medway are registered as business services. Work to develop the business services sector is anticipated from 2009, once other key sectors have been properly established. (5.10)

*Environmental Technologies:* There is potential for the development of an environmental technologies cluster combining the expertise at the University of Greenwich and fact that DEFRA had identified the Isle of Grain as the only suitable site for a Biomass hub in the South East of England. Environmental technologies are anticipated to become a more important sector for the Medway economy from 2009 onwards. (5.11)

*Enterprise support*: Medway has two initiatives designed to generate the development of high growth start-up businesses focused on high tech and high value-added sectors - Medway Innovation Centre and Medway Enterprise hub. It is also considering how to foster innovation in lower added value sectors with a supply chain management initiative. (4.7)

*Entrepreneurship:* Improve the number of businesses to people ratio. The current low ratio is seen as a legacy of the lack of entrepreneurship that occurs in large previously industrial urban areas. The issue of fostering entrepreneurship needs to be addressed, according to the Statement, particularly in schools and through an improved business environment (increases in hotel stock, for example). (6.6)

*Increase land values?* Medway needs to become more competitive: it needs to close the gaps that still exist in terms of GVA per capita and wages with comparator areas. Controversially, the EDS suggests that 'Medway also needs to continue to increase land values locally'. (6.5)

*Major employment sites*: The major employment sites Grain and Kingsnorth are seen as long term options requiring the resolution of adequate utility provision and road connections. They are large sites with potential for the creation of large numbers of employment opportunities (albeit with low employment density). (4.6)

*Employment Land:* The scarcity of suitable employment land (particularly within the urban core), and 'difficulties that exist with bringing forward the major potential employment sites of the Isle of Grain and Kingsnorth is seen as a serious block to job creation. If Medway's aim to narrow the gap between jobs and workers is to be realised, it is vital that Medway's capacity for jobs is increased. To create this capacity effectively planning for the type of employment space that will be required over the long term is needed e.g. mixed uses on key developments should include adequate A2/B1 provision; land-intensive commercial uses should be encouraged outside of the urban core; and Chatham should increase its role as the natural central business district for Medway (6.9)

### Medway Waterfront Renaissance Strategy (September 2004)

4.3.51 Medway Waterfront Renaissance Strategy was prepared by Medway Council in association with the Medway Renaissance Partnership. It sets out a development strategy for the waterfront for the next 20 years which brings together, and builds upon, other planning guidance already in place.

4.3.52 The Waterfront was chosen as the focus for the first part of the regeneration programme because it contains the greatest concentration of brownfield sites. The area comprises over 900 hectares of brownfield land across 14 sites, spanning 11 kilometres of the River Medway. It extends from the new M2 bridge in the west, encompassing Strood, Rochester, Chatham Historic Dockyard and Fort Amherst, Chatham Maritime and the universities, to Gillingham Waterfront in the east. Chatham Centre and waterfront provide the focal point.

> *For the waterfront to play a more meaningful role in the structure of Medway it must harness its intrinsic assets to create new opportunities, whilst also retaining its traditional economic role as a corridor for river-related business and industry.*

4.3.53 The document notes that Medway Waterfront and Chatham Centre have been identified as a regional transport hub within the south-east region. The Sustainable Communities Plan has allocated £41.6 million for the regeneration of Chatham Centre and Waterfront and Rochester Riverside and for the development of proposals for a major transit scheme in Medway.

4.3.54 The Strategy, it states, will play a major role in meeting the Government's

> *Ambitious targets for housing and jobs in Medway with a potential capacity for 16,000 homes and 23,000 additional jobs. It will achieve this by encouraging a mix of industrial, recreational and leisure uses on the river, whilst protecting its important ecological and landscape character.*

4.3.55 Medway Renaissance Partnership (MRP) aim to generate over 10,000 additional jobs on Medway Waterfront, by earmarking strategic employment sites and encouraging mixed uses as a basis for inward investment. The emphasis is on creating start-up and grow-on space for small and medium-sized businesses at key locations, and establishing a creative and cultural industries quarter within the Star Hill to Sun Pier area.

## Medway Regeneration Framework 2006-2016 (Version 2, 2 October 2006)

4.3.56 This Regeneration Framework embraces the Community Plan and provides the strategic context for the whole of Medway widening out from the urban core covered by the Waterfront Renaissance Strategy addressing Medway's development over the next 10 years.

4.3.57 The vision .of Medway as city of learning, culture, tourism and enterprise is the one put forward in earlier documents and recent RES. The section on enterprise confirms the picture presented in the EDS and notes that compared with other parts of the South East region Medway remains a low-wage, low skilled economy.

4.3.58 Enterprise in Medway is defined as

> *…the growth and success of specialist manufacturing sectors, the knowledge economy based around the Further and Higher Education institutions, environmental technologies, creative industries, specialist manufacturing and innovation and growth within existing businesses. It means local people being able to secure better-paid jobs locally, and unemployed people getting back into the workforce.*

4.3.59 There is also an emphasis on developing Medway as a major retail and cultural centre for the region and providing 'an employment market of choice and growing prosperity'. Since unemployment is rising again after several years of better statistics Medway is focusing on new opportunities and growth sectors.

4.3.60 The new £41 million Medway Innovation Centre to develop specialist manufacturing on a 10 acre site in Rochester was launched in 2006. It is expected to create approximately 2000 jobs. Other Initiatives are underway to widen business support, address basic skills provision and support sector growth. However a focused programme of promotion, image development, sector development, business support, skills provision and infrastructure provision is considered necessary to build on the opportunities for Medway.

4.3.61 The Area Investment Framework (AIF) delivery programme reflects the priorities of both the Regeneration Framework and Community Plan by focusing on three themes of activity: business development, education and skills and social regeneration.

4.3.62 Thames Gateway Kent Partnership (KTGP) as the sub regional partnership in the Thames Gateway, covering North Kent, has been responsible for developing this programme in association with the Local Regeneration Partnerships, SEEDA and DCLG.

4.3.63 Priorities for investment are those that have been identified in the Economic Development Statement.

4.3.64 The section on the economy focus on employment and innovation as part of economic development

4.3.65 A development matrix will be developed for each growth sector

| | |
|---|---|
| Sites | People Skills |
| FE/HE<br>LSC | Transport &<br>Infrastructure |

4.3.66 The document provides details of how it proposes to support job creation and business development. It is quoted at length here because of the relevance to this study:

> *Medway Council has set a target of creating 40,000 jobs by 2026. Although Medway has had some success in recent years in growing business (an increase of 25% since 2005) performance has fallen back against other places in the region.*
>
> *Bringing employment sites forward, without additional intervention, would on past experience create of another 7,500 jobs by 2016. However, the total interim target is 26,500 jobs by 2016. Therefore Medway is aiming for a further 19,000 new jobs (including 1,350 quality jobs) by 2016.*

4.3.67 A four-step approach is planned including the provision of attractive employment space – the important issue for this study – targeting certain development sectors; promotion; and increasing skills levels within the community. Interventions to ensure the full delivery of incubation initiatives are also planned.

4.3.68 Specialist sector development to promote high value-added employment include

- High tech manufacturing/engineering (including software, Unmanned Aviation Vehicles, and the security sector)
- Creative industries (particularly in convergence with other industrial disciplines)
- Environmental technologies (mainly through inward investment in a new BioMass hub, and a possible range of activities, on the Isle of Grain)
- Higher Education sector activity on research, convergence, and integration with the business community and international development

4.3.69 Other sectors with growth potential to be supported are health/social services; construction; transport/logistics; business services and tourism/ retail/ leisure.

4.3.70 There is an emphasis on an appropriate balance of employment use and a focus on transport projects to improve accessibility linked to the development of quality business space and managed workspace at each urban centre.

4.3.71 Priority actions include this present Employment Land Study.

# Medway Council

# Employment Land & Accommodation Study 2007

## Section 4: Part IV

## Literature Review – Socio-economic and employment trends

### National socio-economic and employment trends

4.4.1 The changing face of work in Britain over the past 25 years from a manufacturing to a mainly service sector economy is having a strong influence on the type of demand for employment land and accommodation.

4.4.2 The increasing mobility of companies with global supply chains; the rapid changes in communications technologies; the increased demand for flexible working patterns with more women in the work place and an older workforce as well as the blurring of the boundaries between work and home are additional influences on this changing pattern of 'locational loyalty'. If companies can move easily, then many will do so if the quality of working life and cost effective business opportunities are not readily available. The total package has to be attractive and remain so.

4.4.3 A seminal report was published in 2000 by University of Kent Professor, Richard Scase. As intended it sparked vigorous debate which led to a great deal of public and private sector reflection on the future of work in British society in the first decade of the 21st century.

*Personal lifestyles socio-economic structure and demographic change*[3]

4.4.4 Research for 'Beyond 2000: Scenarios of personal lifestyles socio-economic structure and demographic change' gathered evidence principally from the General Household Survey and British Household Panel Study. The project re-analysed both longitudinal and cross-sectional patterns of demographic, social and economic behaviour to identify both continuities and discontinuities in likely future trends in British society.

4.4.5 The aim of the project was to explore future directions in the social structure of Britain and explore a number of alternative scenarios of future social structure and lifestyles. These were to be constructed on the basis of contrasting assumptions about changing demographics and household forms; work and employment patterns; lifestyles and changing forms of personal consumption; and the impact of information and communication technologies. Decision making for both public and private sector organisations were assessed. A book was also published at the conclusion of the project: 'Britain in 2010: the new business landscape', R. Scase, Capstone, 2000.

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[3] Beyond 2000: Scenarios of personal lifestyles socio-economic structure and demographic change, research funded by the Economic and Social Research Council (ESRC), Report 1999

**Macro-trends in Britain in the early 21st century (Beyond 2000: ESRC)**

4.4.6 Macro-trends that are likely to affect the future social and economic structure of Britain include:

- Globalisation
- Global supply chains – using information and communication technologies
- International division of labour
- Growth of 'specialist' local and regional economic clusters.

4.4.7 These trends, according to the research, are becoming more apparent in different industrial sectors and reinforce the need for the United Kingdom to

- Upgrade the skill base
- Improve the level of industrial productivity
- Enhance the quality of management.

4.4.8 These will require 'joined-up' initiatives in terms of interdepartmental government action as well as collaboration between private and public sector organisations.

*Major trends in Britain likely to affect industries, lifestyles and work patterns Britain in 2010 (Beyond 2000: ESRC)*

4.4.9 These would likely to be characterised by:

*Individuality* - Traditional family forms are becoming more fluid. More of the population will be living in single person households. This trend, evident among all age groups, will have important ramifications for both lifestyles and work patterns.

*Mobility* - Individuals will be more mobile in all spheres of their lives particularly in terms of work and employment patterns. They will move more frequently between jobs both within and between organisations. They will need more 'fluid' personal skills, putting a heavy emphasis upon life long learning strategies.

*Personal Choice* - With more transient household forms, individuals will be able to exercise greater choices in terms of how and where they live and work. This will lead to a greater diversity of lifestyles.

*Personal Identity* - 'personal branding' through consumer spending rather than relying upon their occupations as anchors for their personal identities.

*Independence* - With the declining significance of 'permanent' work patterns and personal relationships, a growing number of individuals will place a higher premium on their personal independence.

*Anxiety and Risk* - Individuals, perceiving themselves to belonging in a more rootless and unstructured society, will feel more insecure.

*Source: Beyond 2000: Scenarios of personal lifestyles socio-economic structure and demographic change, research funded by the Economic and Social Research Council (ESRC), Foresight, 1999*

4.4.10 Research for this study indicates that there is widespread employment of older workers in supervisory and semi-skilled jobs and a wide-scale skills shortage across all trades and engineering professions and provides evidence of the macro-trends industrial trends described above backed by recent statistics including those produced in publications such as *Social Trends* from the Office for National Statistics (ONS).

*Social Trends*

4.4.11 The ONS annual publication *Social Trends* brings together a wide range of statistics on many aspects of contemporary British society and how it has changed over the years. In short, the population of the UK is growing, as is the number of homes that people live in. Families and households are changing as more people are living alone, and more young people are living with their parents as opposed to moving out of the parental home.

In spring 2005, nearly one in five full-time employees in the United Kingdom usually worked over 48 hours a week, with a higher proportion of men (23 per cent) than women (11 per cent) usually working these longer hours

Although the income gap between men and women is still substantial in Great Britain, it narrowed between 1996/97 and 2003/04. Median income for women increased by 29 per cent (to £151 per week) compared with an increase of 13 per cent for men (to £250 per week)

The number of households in Great Britain increased by 30 per cent between 1971 and 2005 from 18.6 million to 24.2 million

The proportion of one-person households in Great Britain increased by 9 percentage points between 1971 and 1991, and a further 2 percentage points to 29 per cent in 2001 and then remained at this level to 2005

In 2004, there were 11.6 million people aged under 16 in the United Kingdom, a decline of 2.6 million since 1971, and 9.6 million people aged over 65, an increase of 2.2 million

In 2004, life expectancy at birth in the United Kingdom was 77 years for men and 81 years for women

Source: Social Trends – 36th edition ONS, 2nd February 2006, HMSO

*Economic Trends*

4.4.12 The ONS quarterly publication *Economic Trends* provides a snapshot of the current situation. The main growth sectors in Britain were services, with a marked growth in business services and finance which rose by 1.4 per cent, the same as the growth in the previous quarter. The largest contribution to growth was from other business services. This includes the activities of recruitment agencies, architects and engineers. Other sectors that experienced growth in this quarter were transport, storage, communication and construction.

| |
|---|
| *Overview of latest economic statistics*, Anis Chowdhury<br><br>GDP rose by 0.7 per cent in the third quarter of 2006, maintaining similar growth to the previous three quarters<br><br>The main contribution to the growth came from services. There was a slight deceleration in this sector, but this was offset by a strengthening of production<br><br>Production rose by 0.3 per cent, compared with zero growth in the previous quarter. The stronger growth was mainly due to energy supply. Manufacturing output continued at a similar rate to the previous quarter<br><br>Services rose by 0.8 per cent compared with 0.9 per cent in the previous quarter. The small deceleration in growth was mainly due to weaker growth from retailing<br><br>This is reflected in the growth of distribution, hotels and restaurants, which increased by 0.2 per cent in the third quarter compared with 0.9 per cent in the second quarter<br><br>Transport, storage and communication rose by 0.6 per cent, maintaining similar growth to the previous quarter. There was growth in post and telecommunications, land transport and air transport industries<br><br>Business services and finance rose by 1.4 per cent, the same as the growth in the previous quarter. The largest contribution to growth was from other business services, which includes activities of recruitment agencies and architects and engineers<br><br>Government and other services grew by 0.3 per cent in quarter three compared with 0.4 per cent in the previous quarter.<br><br>Construction rose by 0.5 per cent, the same rate of growth as in the second quarter.<br><br>*Source: Economic Trends No. 636, ONS, November 2006, HMSO* |

**The world of work**

4.4.13 This section of the literature review reveals the extent to which the modern experience of work has changed and continues to change in response to the impact of economic, cultural, technological and organisational changes. However, work remains an important aspect of people's everyday lives, providing access to categories of experience that are important for mental health and well-being.

*The Changing Face of Work*

4.4.14 The traditional model of the "corporate career" is becoming less applicable to modern work. The provision by the employer of job security and incremental advancement, linked to increases in authority, status and pay in return for commitment to the organisation and the achievement of productive goals is changing and the trend is likely to continue.

4.4.15 Globalisation, changes in the labour market and employment patterns, technological advancements and changes in the structure of organisations have all contributed to diversity in modern career paths and varied work experiences.

4.4.16 The pressure to restructure work processes and the design of organisations in order to meet increased demands for cost effectiveness and quality have led to the introduction of improvement initiatives which have changed the experience of modern work.

***21st century model of work***

- leadership
- flatter structured organisations
- team-based functioning
- downsizing
- automation
- performance measurement
- competency-based progression
- networking
- indirect communications

*Source: SMA Consultancy*

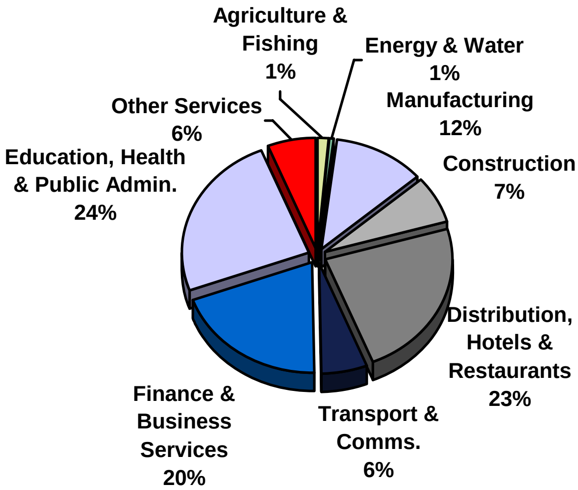
4.4.17 The study of human-computer interaction and the effectiveness with which computers support cooperative working practices have become an increasingly important interest in terms of both how people work, the nature of their engagement with a company and their resulting ‘productivity’.

**Employment distribution patterns**

4.4.18 The expansion of the service sector at the expense of manufacturing has been the story of the last 25 years across the UK. The remarkable success of the financial & business services means that it represented 20 per cent of the UK occupational sector distribution in 2004. Taken together with the growth of leisure and retail – distribution, hotels and catering – 23 per cent; and adding transport and communications – 6 per cent – the picture is one where half the employment in the UK is ‘non-productive’ in the traditional sense of manufacturing production. A quarter of employment is in public services and of the remaining quarter only 12 per cent is manufacturing.

4.4.19 This changing pattern of employment and increasing numbers of women in the workplace has also had an influence on attitudes to work and the nature of work.

**Distribution of employment by occupational sector (Sept 2004)**




*Source: Economic and Social Science Research Council 2006*

**Older Workers**

4.4.20 There is a growing trend for both men and women to work to work beyond Standard Pension Age (SPA). According to the Older Workers Employment Network's (OWEN) analysis of Labour Force Statistics (Department for Work and Pensions, Pensions Commission) two thirds of men have retired by SPA. However, employment in the post-Standard Pension Age group is growing fast and is 10% of the `pensioner' population. One factor that has a bearing on current statistics is the different retirement age for men and women: currently - men 65 years; women 60 years.

*Employment Trends – Older Workers*
The employment rate of the 50 to Standard Pension Age group reached a low of 64% in the mid-1990s after a 30 year decline. In the last eight years it has risen to 70% (Labour Force Statistics)

This 70% compares to the employment rate for 25-49 year-olds of 81% and the Government aim of an overall employment rate of 80% (Labour Force Statistics)

The increased employment rate of the last 8 years equals 1.3 million extra people in work, two-thirds of the increase in the workforce since 1997 (Labour Force Statistics)

In the 1970s, the employment rate for males aged 50 to Standard Pension Age was 85% compared to 58% for females aged 50 to Standard Pension Age. Now the gap is reduced - to 72% for men and 68% for women - but many more women work part time (Labour Force Statistics)

The improved employment rate is concentrated in the South and East rather than in Scotland, Wales, the North and West (Labour Force Statistics)

People with higher qualifications are more likely to stay in work: 81% of the 50 to Standard Pension Age cohort with a degree are in employment compared to 52% of people with no qualifications (Labour Force Statistics)

Business services, healthcare, retail, tourism/leisure and education sectors have led the employment growth. Employment in manufacturing has declined 37% in 20 years (Halifax / Office for National Statistics)

An increase in the 50 to Standard Pension Age employment rate from 70% to 75% would add 0.5 million over-50s to the workforce (TAEN)

Employment in the post-Standard Pension Age group is growing fast and has now reached 1 million, 10% of the `pensioner' population (Labour Force Statistics)

90% of retirements happen in the age range 48-65. But only 17% of men and 10% women retire in the year they reach their State Pension Age. Two-thirds of men have retired by Standard Pension Age. Average retirement age is about 61 (Labour Force Statistics, Department for Work and Pensions, Pensions Commission).

*TAEN Third Age Employment Network (now OWEN Older Workers Employment Network) www.taen.org.uk, accessed 08.10.06*

4.4.21 A report by City & Guilds[4] identifies that over the next two decades the number of people aged 60 and over in the UK workforce is set to double.

4.4.22 Based on Labour Force Survey statistics and combined with the Government and Pension Commission's warnings on who will be affected by the pension's crisis, City & Guilds predicts that by 2020, more than one in five (22 per cent) people will be working well into their 60s.

4.4.23 City & Guilds believes that employers can do a lot more to allay the fears of older workers despite many employers valuing the experience and knowledge of their 'silver staffers' and recognising a skills shortage among younger people. It warns companies that they need to prepare for a maturing workforce as financial anxieties and increasing longevity force people to work longer.

[4] *Working in the Third Age'*, City and Guilds of London Institute, 2005

## Regional Employment Trends
## (South East Regional Economic Strategy 2006)

4.4.24 The South East has one of the highest employment rates in Europe but there are large sub-Regional variations. In 2003 economic activity stood at 82%, 7% higher than the UK as a whole.

**Service Sector Growth**

4.4.25 Service sector activity is forecast to be the main driver of growth over the next decade. The South East as a whole tends to attract knowledge-intensive high value-added businesses such as research and development (R&D) or headquarter functions.

*Although other developed and emerging economies such as China or India are increasingly attracting this type of investment, which implies that greater policy effort may be needed to retain the South East position as one of the leading European locations.*

4.4.26 Between 1995 and 2005 the South East grew at an average of 3.9 per cent per annum and the majority of this annual growth was attributable to service sector activity following a trend that had been evident since the 1980s.

- private and public sector services account for just under 80% of all employment in the region
- manufacturing and production industry jobs together account for 21%
- since 1982 manufacturing and production's share of regional employment have fallen from around 34 per cent to just over 21 per cent.
- public sector services account for a broadly similar share in 2005 to 1982

4.4.27 In order of priority the following sectors account for the main employment opportunities in the South East.

- public sector
- financial and business services
- distribution, hotels and catering
- construction
- transport and communications

**Sub-regional variation**

4.4.28 There is wide sub-regional variation.

- workplace-based GVA per capita in Reading is around 66 per cent above the national average (45 per cent above regional average)
- GVA per capita in Thames Gateway Kent is around 25 per cent below the national average (31 per cent below regional average)

**Trends in Industrial Structure (RES 2006)**

4.4.29 The trend towards the decline in manufacturing and production and growth in private sector services looks set to continue. Manufacturing and production's contribution to total value added in the South East have been falling since the late 1980s.

4.4.30 Over the past decade in value added terms private sector services have increased their share of output.

- Driven by financial and business services private sector services moved from just over 40 per cent in 1982 to 55 per cent in 2005
- Although private sector services growth in share of output slowed over the last decade relative to the previous 10 years they accounted for well above half of all gains from other sectors
- Public services and construction were the only other sectors accounting for a greater share of employment in 2005 than in1985
- Transport and communications, and distribution, hotels and catering realised little change in share
- Engineering and other manufacturing showed the steepest decline.

4.4.31 These trends in industrial structure are expected to continue over the next decade, with a continuing shift towards financial and business services away from manufacturing industry.

**Manufacturing ( RES 2006)**

4.4.32 The manufacturing sector continues to play a central role in the performance of the South East economy although its share of total output has been declining,

- Manufacturing contributed around 0.4 per cent towards the 3.9 per cent average annual growth recorded over the last decade.
- Quote: 'This may seem small in magnitude, but take this growth away and the positive gap in growth between South East and UK would have been reduced by half'. (Source RES 2006)

**Creative and cultural industries (RES 2006)**

4.4.33 Creative and cultural industries are one of the fastest growing sectors of the UK economy and play a significant role in the regional economy.

- South East England and London account for 54 per cent of the total creative and cultural employment in England.
- 19% of the total creative and cultural employment in England is in the South East, while an additional 90 to 100,000 self-employed people work in the sector.
- Creative and cultural industries' share of the regional workforce increased from 10.9 per cent in 1995 to 13.2 per cent in 2002.

**Cities and their hinterlands as key drivers of regional economic growth (RES The Evidence Base 2006)**

4.4.34 Endogenous growth theory has been practised over the past 10 years and proven to be effective according to empirical research findings. Cities and their hinterlands as key drivers of regional economic growth is an on-going trend.

4.4.35 Growth, according to this theory, results from enhanced local productivity and innovation through investment in human capital and R&D in leading areas of the economy. Implementation has resulted in an emphasis on

- creating environments necessary for higher business start-ups and survivals
- clusters organised at the city level
- the fostering of innovation, institutional learning and the knowledge spillovers (the exchange of creative ideas)

**The significance of housing in relation to employment (RES The Evidence Base 2006)**

4.4.36 The latest research shows the significance of housing in relation to jobs in the South East

- 26% of businesses consider the cost of housing to be one of the most restrictive factors on business growth against just one per cent in West Midlands. (Source: RES The Evidence Base, 2006/CBI 2005)
- The quality of housing in addition to location and connectivity (such as transport) proximity to customers and competitors; and skills and universities impacts on inward investment (RES The Evidence Base, 2006/ DTI/DTZ 2005)
- At present inward investment to the South East region and in particular Foreign Direct Investment (FDI) is concentrated principally in the Thames valley area to the west of the region. (Source: RES The Evidence Base 2006).

Key Points:

*Significant Demographic Change* – The population of the South East is set to become older on average as people live longer. This means a lower proportion of the population will be of working age in years to come.

*Slower Employment Growth* – Equally, as a smaller proportion of the population is likely to be economically active (activity rates decrease with age), there is likely to be a smaller pool of labour available to the region and less scope for employment growth.

*Polarised Employment Structure* – As a result of a changing industrial structure the occupations people are engaged in are changing. The profile of employment is becoming increasingly polarised, as more and more workers are engaged in either high-end white collar or low-end low-skill occupations.

*Growth in Productivity* – Productivity growth in the region is likely to be strong. Forecasts suggest the South East will outperform most UK regions and most comparable areas of the EU. This is important not least because if a higher proportion of the population are not engaged in employment, output growth from productivity is required to contribute towards standards of living in the region.

*Slower Output Growth* – Although productivity growth is likely to be strong, employment growth will be some way short of levels seen historically. As a result, over the next decade real GVA growth in the region is set to average around 3 per cent per annum, lower than historical averages.

*Differing Prospects Within the Region* – Differing circumstances in sub-regions of the South East affect prospects for growth. Whilst labour market tightness is unlikely to pose a problem for Kent, its current industrial structure means productivity growth is likely to be low.

*Source: The Evidence Base RES 2006*

**Changes in the structure of the South East's population (RES The Evidence Base 2006)**

4.4.37 The population shift is to one where there will be an increasing number of older people in the region. In 2007, for the first time, more people will retire than enter the labour market from school or University.

4.4.38 Demographics play an important part in long-term economic growth. The evidence shows that economic activity and employment rates among older workers are generally lower and if economic activity and employment rates amongst older workers do not increase, the demographic shift will lead to a shrinking workforce, lower employment rates and with it labour shortages.

- By 2016 almost one in five of South East residents will be over the age of 65
- People over the age of 65 will account for over half of all population growth in the region over the next 20 years
- Over-50 age cohort is also projected to experience strong growth.
- Total number of people over the age of 85 is expected to almost double over the next two decades

4.4.39 Although the number of older workers will increase because the view is taken that productivity decreases with age and it is envisaged that many older workers will work part time no analysis has been undertaken to work out whether this shift to an older workforce will be sufficient to compensate for the loss of younger people.

4.4.40 The growth in population will come primarily from migration (largely from other parts of the UK) and a continuation of the trend towards a steady increase in life expectancy.

- Number of children and young people in the region will grow but at a very slow pace and only after falling in the short term
- Number of those aged under 20 is projected to decline by around two per cent by 2015, before starting to increase in the third decade of the 21st Century.

## Medway – Future business profile

**Demographic and company profile**

4.4.41 In Medway the population is generally younger than elsewhere in the South East although the profile is projected to be changing in line with the rest of the region. The population is aging here too. However, there are some issues with how accurate the projections by ONS are for Medway.

*Population of Medway In 2001*
The resident population of Medway, as measured in the 2001 Census, was 249,488 of which 49 per cent were male and 51 per cent were female

- 22 per cent of the resident population were aged under 16
- 60 per cent were aged between 16 and 59
- 17 per cent were aged 60 and over.

The mean average age was 36, compared with an average age of 39 for all of England and Wales.
*Source: Medway Council website*

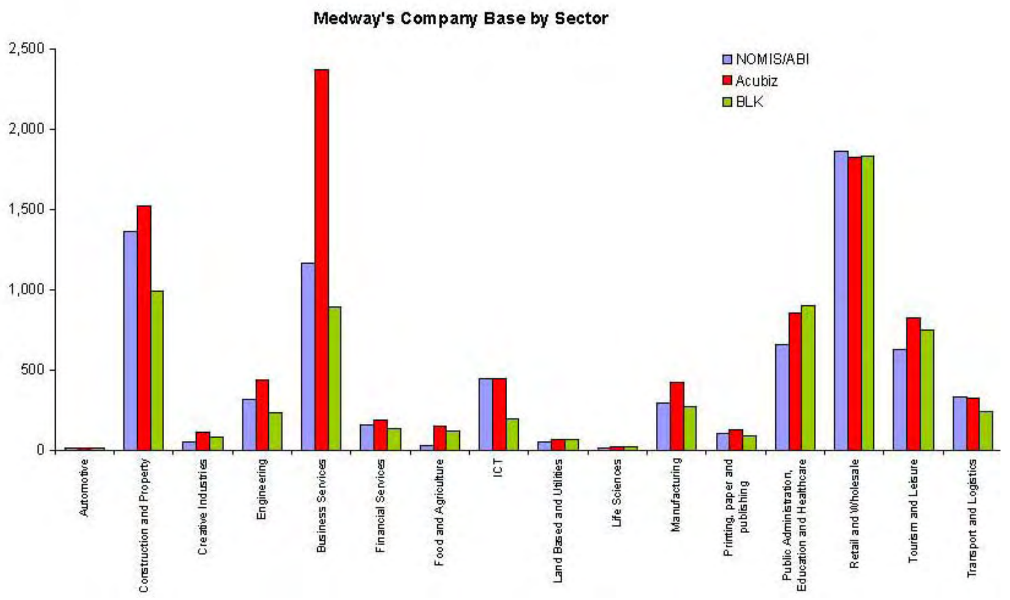
4.4.42 According to an analysis undertaken by Locate in Kent in 2005[5] the key sectors in Medway by company base are

- retail/wholesale
- construction and property
- business services
- public sector
- tourism and leisure

to a lesser degree

- transport and logistics
- manufacturing and engineering
- ICT.

*Table: Medway's Company Base by Sector*




*Source: Locate in Kent*
*Sector Analysis of companies and employment in Medway, 2005, comparing NOMIS/ABI, Acubiz & BLK data*

[5] Sector Analysis of companies and employment in Medway: Analysis of Medway's sector strengths to inform Medway Council's inward investment strategy 2005-6 Locate in Kent, 15th March 2005

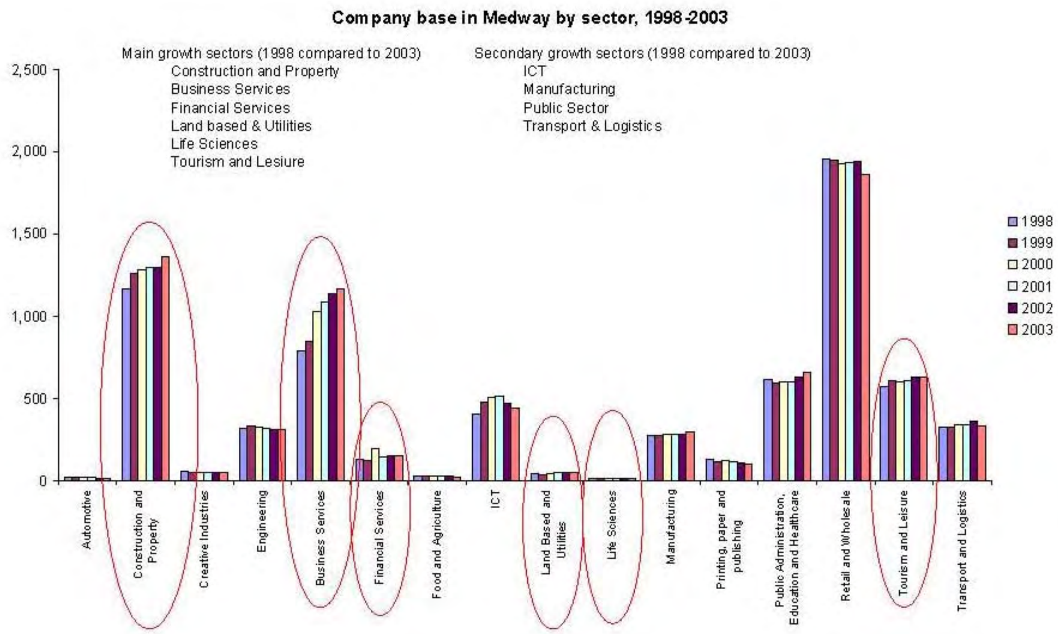
*Growth Sectors*

4.4.43 The Locate in Kent *Sector Analysis of companies and employment in Medway Part 2*[6] examined the percentage change for the main growth sectors between1998-2003.

- Business services 47%; construction & property 17%; financial services 14%; land based & utilities 13%; life sciences 13%; tourism & leisure 10%
- To a lesser degree, in ICT 8%; manufacturing 7 %; public administration, education & healthcare 7%; transport & logistics 2%.
- Declining sectors - automotive -25%; printing, paper & publishing -21%; creative Industries -3%; food & agriculture -7%; retail & wholesale -5%; engineering -2%

4.4.45 In Medway, the report estimates, there has been an overall growth of company numbers between 1998 and 2003 of 9%.

*Table: Company base in Medway by sector, 1998-2003*




*Source: Locate in Kent*

**An Enterprise Vision for Medway (DEGW & Innovacion)**

4.4.46 Innovacion working in association with DEGW confirmed Medway's success as a business community over the past 20 years in comparison with other competitors in the South East region.

[6] Sector Analysis of companies and employment in Medway Part 2 Analysis of growth sectors in Medway, Kent & Medway and Great Britain to inform Medway Council's inward investment strategy 2005-6 29th March 2005

4.4.47 The long term annual business growth rate in Medway over a 20 year period of 1.3% has been largely better than Medway's comparators with the exception of Milton Keynes. In employment terms over the same 20 year period the Medway economy has grown by 29% and there are now an additional 19,200 jobs in an economy of over 85,000 jobs

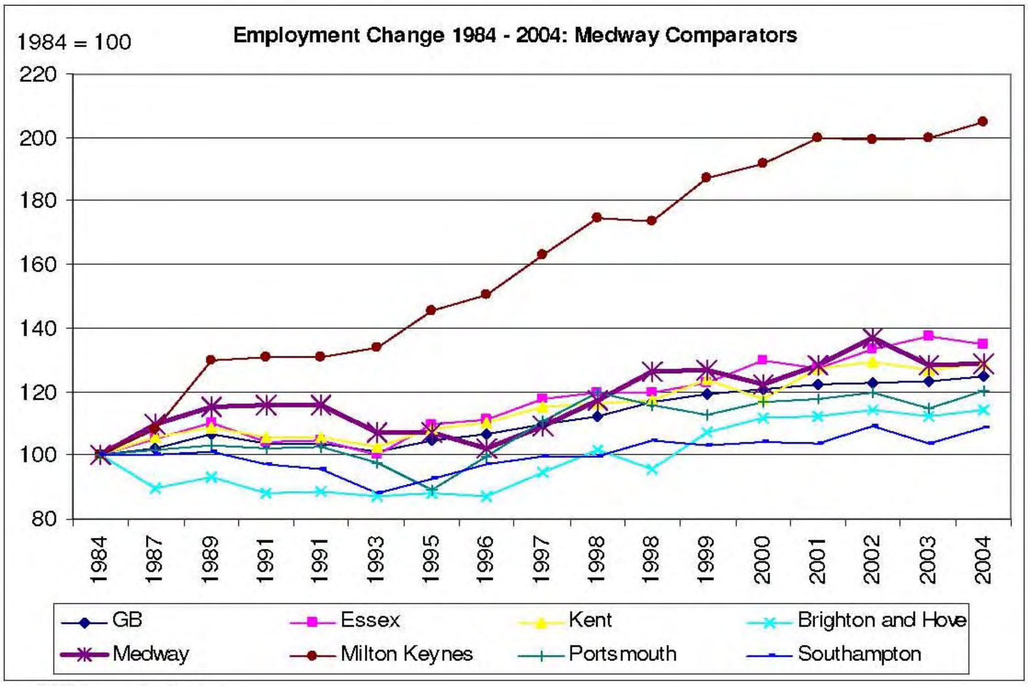
4.4.48 Innovacion also analysed the employment creation drivers of the Medway economy in an average year. These are set down in the table below.

| Demand Source | Average Annual Demand (98 -04) |
|---|---|
| New Firm Foundation | 1,200 new firms<br>260 net additional firms<br>390 jobs ~**30%** |
| Inward Investment | 4 new firms<br>275 additional jobs ~**20%** |
| Business expansion | 610 additional jobs ~ **50%** |

*Source: Innovacion estimates*

4.4.49 So-called 'troublesome sectors' are identified in the main DEGW report in terms of their future growth potential. These are the retail sector which faces strong competition nearby; the media and creative sector with its close proximity to London; and healthcare where 'investment will reduce over the next few years'

*Table: Employment Change 1984 – 2004: Medway comparators*



Source: ONS, Innovacion Analysis

4.4.50 There are warnings in the report against generic 'any town' responses to regeneration issues including business growth

> Those cities and towns that have made the most progress in their economic transformation and urban renaissance have done so for several reasons.
>
> Firstly, a courageous focus on a small number of prioritised areas. The enterprise strategy should focus on a small number of sectors with growth potential where the region has some degree of competitive advantage or specialisation.
>
> Secondly, strong leadership and decision taking is needed to achieve this focus and to ensure the alignment with other activities.
>
> Finally, the strategic direction must be consistently maintained for long periods of time, say 10-20 years, to ensure the delivery of tangible results.
>
> In defining the notion of 'growth' in the local context we must recognise that positive improvements in lifestyle do not always relate directly to growth but can have an indirect impact on repositioning places (i.e. Thames Gateway and green/open countryside context).
>
> *Source: An Enterprise Vision for Medway, p8, DEGW, 2006*

4.4.51 The Innovacion review and sector prioritisation study recommends a focus on six sector/ themes:

- Financial and business services
- Education
- New Energy and Environmental Technologies
- Niche manufacturing/ engineering
- Transport & logistics
- River sectors

4.4.52 DEGW took forward this analysis and identified a 5 sector focus in their final report with the original 6th sector based on the river becoming a 'cross-cutting asset and differentiator':

1. *Education:* Medway's emerging university quarter and its potential for R&D links into local firms has the potential to be a driver of new firm formation and a technical capacity. This also supports the development of vibrant range of town centre attractions.

2. *New Energy and Environmental Technologies:* Medway has a unique concentration of energy, utility and waste services and could be the Thames Gateway centre of these activities. This could be a key differentiator of the area if the current activities are retained, future developments are nurtured. It is a theme that integrates with other areas (e.g. zero energy building and office developments).

3. *Niche manufacturing / engineering:* Medway has a unique concentration of a number of small engineering sectors. Their future potential should be investigated. Both of these sectors have clear linkages to Medway Innovation Centre.

4. *Financial and business services:* Given Medway's proximity to the City of London and future demand levels, this should remain a target sector. Functionally this should cover future contact /shared service centres, low/mid level processing and business continuity services though this should be validated.

5. *Transport and logistics:* Building on Medway's port history, local representation and access to the road network / London there is potential to expand the logistics sector, especially linked to retail and building product supply chains.

4.4.53 The river is seen as a key asset and differentiator.

*A 'Medway River Sector' focus could be cross-cutting to accommodate leisure, marine engineering, housing and retail, for example. All sectors will rely on Medway the place to attract and retain graduates, key staff, business startups and established businesses.*

4.4.54 DEGW also proposes a 'growth matrix' with three themes cutting across the sectors - 'Greening' Medway; Innovation and Knowledge and Lifestyle and Workstyle.

*'Greening' Medway*

4.4.55 The Report puts forward a growth matrix (below) and a map of initiatives including a proposed Biomass Hub.

*The Growth Matrix: themes across the sectors*

| SECTOR FOCUS | | 'GREENING' MEDWAY | INNOVATION AND KNOWLEDGE | LIFESTYLE AND WORKSTYLE |
|---|---|---|---|---|
| 1 | Education | • Environmental education in schools<br>• Testing ideas and proto-typing | • R&D links with local firms<br>• Driver for new firm formation<br>• Retention of graduates<br>• Initiate flagship projects | • Life-long learning and the retention of skills |
| 2 | New Energy and Environmental Technologies | • Challenge attitudes to sustainable technology<br>• Sustainable agriculture | • Develop new environmental technologies<br>• Grow though export of knowledge and technologies | • Sustainable residential construction<br>• Flood defence strategies<br>• Organic food provision |
| 3 | Niche Manufacturing and Engineering | • Clean and lean manufacture and product design<br>• Locally produced building and construction materials | • Innovate to increase GVA per worker<br>• Capitalise on engineering specialisms in Universities<br>• Capturing location trends of high-value industries | • Develop land use policy to manage retention of industrial policy<br>• Retain new graduates through lifestyle /internships |
| 4 | Financial Services and Businesses | • Remodelling and revising expectations of work patterns<br>• Capitalise on physical and virtual communication corridors | • New strategies for sustainable and cost-effective service delivery<br>• Risk management | • Potential for quality of lifestyle<br>• Quality of sites and potential workplaces<br>• Connectivity to the City |
| 5 | Transport and Logistics | • New types of hubs and distribution models<br>• Greening of retail supply distribution<br>• River-based bulk transport | • Multi-modal supply chain management<br>• Promote radical policy change | • Promoting local production and consumption |

*Source: DEGW*

*Delivering regeneration*

4.4.56 The DEGW report also suggests (somewhat controversially in Medway's case given the evidence in the Medway Employment Land Study 2007) that since 'regeneration strategies aim to improve places where the market has failed' there is a need to consider deliverability and accept that unconventional approaches will be required for economic transformation.

4.4.57 Amongst the list of exploratory tasks proposed by DEGW is one to 'construct a workplace map of Medway highlighting preferred workplace typologies and localities for the validated sectors'.

**Medway Council**

# Employment Land & Accommodation Study 2007

## Volume 6:

## Conclusions

# Medway Council
# Employment Land & Accommodation Study 2007

## Section 5: Conclusions

**Contents**

## Employment Land & Accommodation Study 2007

5.0.1 The Employment Land & Accommodation Study 2007 is an innovative study produced through collaborative research involving the University of Greenwich, Sue Millar Associates and Medway Council staff designed to create a robust baseline study of current employment land use and accommodation together with the views of local businesses in Medway.

5.0.2 The Study will support and inform:

- the Local Development Plan (LDF)
- economic development strategies/ policy
- regeneration strategy

5.0.3 The Study is a technical research report and follows the guidance contained in the DCLG's (formerly ODPM) Employment Land Reviews Guidance Note drawing on Regional Spatial Strategies (RSS) and Local Development Frameworks (LDFs). It emphasises that the outcome of the Reviews should provide robust data.

5.0.4 It is anticipated that the Study will also provide a foundation for multiple future analyses: internal departments within Medway Council will be able to select appropriate data to interpret and benchmark against their own criteria.

## Key Findings

### Image

***Medway lies in a unique position in the Thames Gateway but to continue to develop successfully there is a need for new prestige employment sites and an improved image.***

5.1.1 Medway's strength, according to interviewees, lies in its unique position in the Thames Gateway: it is also one of the largest conurbations in South East England.

5.1.2 Geographically, historically and economically different, this differentiation offers unparalleled opportunities for Medway to implement sustainable development initiatives responding to national and regional policies

5.1.3 A shift in the expectations of Medway businesses is taking place in order to retain market profile and competitiveness, recruit skilled employees and provide a professional face to suppliers and customers.

5.1.4 Mainly negative perceptions of Medway, poor physical image, unfocussed economic profile and negative branding, have an impact on business development. They are viewed as obstacles to be overcome.

5.1.5 Small and Medium-sized Enterprises that grow to be successful high value, high prestige businesses consider moving out and some do.

5.1.6 Some successful high value, high prestige businesses prefer river frontage premises in a landscaped setting with cafes and restaurants and are prepared to pay a premium rate for the privilege. At present there is no suitable employment land or accommodation space available in Medway matching their needs.

5.1.7 Even for engineering and manufacturing companies there is an increasing emphasis on an attractive setting.

**The Business Community**

***The business view is that Medway has the potential to become an increasingly thriving, successful and sustainable business community building on its past glories and current strengths and not become only a dormitory town for London.***

5.2.1 Medway businesses consider that they have a unique role to play in the regeneration of Medway. Almost 50% of Medway businesses will be looking for additional accommodation over the next decade.

5.2.2 Local business leaders are keen to play a more significant role in the regeneration of Medway

5.2.3 Medway has the opportunity to lead the way in the South East in the field of sustainable business development, particularly but not exclusively, in the area of the development of port-based industries and sustainable energy

5.2.4 The business community consider that the rapid speed of change planned for Medway linked to regeneration agendas does not always match current economic and social realities.

5.2.5 A clear coherent strategic vision should be developed and realised in consultation with, and commitment from the business community, as well as the wider community. This will enable Medway to become a force to be reckoned with in the future. All the ingredients are there.

5.2.6 There is a need to develop existing Medway businesses to negate the current cycle of businesses starting in Medway but then moving out because there is nowhere to go and no reason to stay.

5.2.7 This in turn will contribute to wealth creation in Medway. Wealth creation is now recognised as driven by small business across the UK.

5.2.8 The employment land and accommodation currently in use in Medway is not seen by the business community as ideal in many respects although the perception amongst interviewees is of a high level of business activity and accompanying traffic congestion.

5.2.9 The study data backs the observations of the business community

- The Accommodation Survey shows an overall growth of 9% between the 1999 and 2006 surveys
- Medway's long-term annual business growth rate over a 20-year period has been 1.3%. This was largely better than

Medway's urban comparators - Portsmouth, Southampton, Brighton and Hove**.**

- o Locate in Kent estimates there has been an overall growth of company numbers in Medway of 9% between 1998 and 2003

5.2.10 Successful incremental growth is thought to be one reason why demand will exceed supply to meet future business needs.

5.2.11 Medway businesses expect regeneration to provide better shops, good cafes and restaurants, hotels, high quality, high profile office/ small business accommodation in a quality locations (park or riverside setting) and affordable workspace in more discreet locations

5.2.12 Dedicated employment land for modern/ traditional engineering and distribution companies and riverside wharfage sites for recycling, ship repair and imports by sea are also seen by some of the business community as essential for sustainable business development

5.2.13 Companies are increasingly mobile and will go where they are welcomed and supported. Through the vehicle of the telephone survey businesses expressed the view that they hope their views will not just be recorded but also listened to by Medway Council.

**Employment space**

***Businesses need an adequate supply of land for employment. Most sites in the urban area are fully developed and vacancy rates on non-estate sites are very low***

5.3.1 Most sites in the urban area are fully developed.

5.3.2 Vacancy rates on non-estate sites are very low. This is potentially as a result of the differential in land values between residential and commercial uses.

5.3.3 The Regional Economic Strategy 2006 also recognises the importance of employment land in order to improve the sustainability of communities, reduce congestion and stem the emergence of dormitory towns and villages, 'Businesses need an adequate supply of land for employment. An appropriate level and range of industrial and commercial space is vital, as is its location in relation to housing'

5.3.4 The Medway Economic Development Statement 2006 states that 'Jobs cannot be created in Medway without the allocation of the necessary employment space, which is currently scarce in Medway'.

5.3.5 The potential shortage of suitable employment land particularly within the urban core is noted in the Medway Economic Development Statement 2006 as a serious block to job creation.

5.3.6 The South East Plan Kent Thames Gateway Spatial Strategy highlights the urgency of issues relating to employment land. It makes connections between the quantity and ready availability of employment land and the ability of local authorities to boost the local economy

5.3.7 To break through any potential impasse, the South East Plan states: 'in Medway and Swale if the existing sites fail to provide readily and immediately available land for a variety of business types, the use of the land should be reviewed and alternative sites allocated'. (Policy KTG4)

5.3.8 The synergies and alignment between the stated positions in different regional and local planning documents serve to reinforce the validity of the same limited options.

5.3.9 Within the urban area, the options for expanding employment land appear to be limited. Most brownfield sites seem to be allocated or potentially identified for other or mixed use. There is the potential for conflict concerning amenity between some general employment uses and adjoining residential areas.

**Work and employment**

***Medway currently has a successful economy but there is a need to address the changing nature of business activity and skills.***

5.4.1 Around 90,000 people are currently employed in Medway, although Medway exports 41% of its workforce (nearly 50,000 people) to the London and South East economies on a daily basis, with less than 20,000 people commuting into Medway. On average, workers in Medway also travel further to work than workers from any other area of the South East.

5.4.2 In general there is satisfaction with the supply of administration and office workers in Medway (mainly women) and the older workers in semi-skilled trades (mainly men)

5.4.3 A shortage of skilled and semi-skilled workers is seen as one of the threats to the future of Medway-based businesses

5.4.4 Research by Professor Richard Scase, Beyond 2000: Scenarios of personal lifestyles socio-economic structure and demographic change, has had a strong impact on the formulation of strategic development plans across Britain. Major trends identified in the research likely to affect industries, lifestyles and work patterns in Britain in 2010 are characterised by: individuality; mobility; personal choice; personal identity; independence; anxiety and risk taking

5.4.5 In some manufacturing/ distribution companies in Medway there is a shift from a concentration of staff 'on the shop floor' to office work at the interface with the customer. After-sales service is seen as an increasing necessity as a competitive advantage.

5.4.6 This trend towards increased numbers of office staff attached to manufacturing or distribution also reflects the need to attend to 'red tape' issues. In the telephone survey 1743 office staff are estimated to be working alongside 3164 other skilled, semi-skilled or unskilled employees. Four 'office only' companies were included in the survey employing 95 staff.

5.4.7 The trend of the growth in services in Britain is expected to continue over the next decade, particularly in the area of business services, although fierce competition for an increased market share is anticipated from the emerging economies of China and India.

5.4.8 City & Guilds predicts that by 2020, 22% of people will be working well into their 60s. This is based on Labour Force Survey statistics combined with the Government and Pension Commission's warnings on who will be affected by the pension's crisis.

**Transport infrastructure and access**

***Improvements in the road infrastructure and public transport – bus and rail – were considered important priorities.***

5.5.1 The majority of businesses participating in the telephone survey put easy access to transport links as a high priority – 93%; and overwhelmingly opted for an edge of town situation as a business location – almost 80%.

5.5.2 Business growth is seen to be leading to traffic congestion and access issues both on and off the business/ industrial estates, particularly Medway City Estate, and in the urban centres of Chatham and Rochester

5.5.3 Improvements in the road infrastructure and public transport – bus and rail – were considered important priorities including major improvements to the rail stations at Chatham and Gillingham, more frequent and better bus services and the introduction of further transport nodes

5.5.4 The stark reality is that 'green issues' do not stretch to individual business decisions where car use and car parking is concerned

5.4.5 Alternative public transport is currently seen as unavailable and may account for this extreme position. Respondents frequently remarked on the complete absence of an effective public transport system.

5.4.6 River transport is seen by some interviewees as a potential lost opportunity for 'greening' Medway. Traffic congestion on the roads in the urban areas could possibly be reduced by using the river more effectively. This could include

- The use of river for shipping to increase the quantity of bulk imports and to develop sustainable re-cycling initiatives;
- A passenger ferry service between Rochester and Chatham

## Issues and conclusions

**Companies need to adapt quickly to changing circumstances to maintain profit margins. In particular businesses are required to expand or contract at accelerated rates to remain viable, far more so than in the 20$^{th}$ century.**

5.5.1 Businesses need to be able to respond to a changing economic climate to maintain a competitive advantage and that often means ensuring that the land, accommodation and location work to their maximum advantage in this respect.

5.5.2 Important influences on changing patterns of 'locational loyalty' have been identified. Not all can be addressed through the planning system but include:

- the increasing mobility of companies with global supply chains;
- the rapid changes in communications technologies;
- increased demand for flexible working patterns with more women in the work place;
- an older workforce and
- the blurring of the boundaries between work and home.

5.5.3 There is currently a cycle of planning uncertainty and an impasse in business decision-making.

5.5.4 The qualitative evidence in Section 3 of the Study suggests that interviewees consider there is a lack of realistic planning policies to meet the needs of Medway businesses and inward investment in the short term. They consider that this creates a risk of a decline relative to competitors in the South East at best and business stasis at worst.

5.5.5 Whatever and however valid the reasons for any delays in addressing the development of sufficient new employment land or improving existing employment sites, this tardiness is felt to have had an impact on the negative perceptions within the business community in Medway.

5.5.6 Evident, often stark contradictions are revealed in this literature review. There is a need for a clear vision if regeneration is to be effective.

5.5.7 Businesses feel that confidence has been undermined and a note of scepticism has been introduced as to Medway Council's real commitment to plan for sustainable business development.

5.5.8 The delivery of a 'sustainable spatial vision' through the Local Development Framework requires a sequence of sophisticated on-going responses to meeting current and future demands for employment land

5.5.9 This will be necessary if Medway is to maximise its capabilities and sustain its target for economic growth rates of twice the national average (achieved by Brighton & Hove in recent years).

5.5.10 Some interviewees see the possibility of planning in isolation from reference to future business needs as a potential threat to the on-going development of successful Medway businesses.

5.5.11 Some of the accommodation available in Medway is old and lacks the flexibility required for a modern business or has no moving on space to grow existing Medway businesses. As a result many businesses are forced to move out.

5.5.12 Demand for current and future accommodation represents a more dynamic business model that currently exists in Medway.

5.5.13 The requirements of businesses include:

- small unit sizes;
- high profile offices in prime locations;
- affordable multi-purpose flexible workspace (for office, light industry or other business uses);
- modern flexible office space;
- quality affordable workspace for motor trades and engineering;
- short lease structures of between 2-3 years;
- serviced office accommodation;
- additional freehold premises;
- parking

5.5.14 The literature review confirms that Medway Council will have difficult choices to make in conflicting planning time frames, adapting and adjusting decision-making frequently, to meet new and often competing pressures for land use.

5.5.15 A key issue that comes out from the literature review is the need to negotiate a fine line in planning decisions on employment land and accommodation between two complementary objectives - inward investment and internal business growth - in order that they both remain a common catalyst for wealth creation

5.5.16 Medway has a structural problem in terms of the immediate and short-term availability of sufficient urban employment land. There is also the need to plan for the right type of accommodation in the right place with the right cost structures.

5.5.17 Strong leadership and a comprehensive but focussed strategic vision will be necessary if Medway is continue successfully while also being able to modernise, grow in size, retain its unique character and prosper economically in the face of global, regional and local competition

5.5.18 In short the challenge for Medway is making sense of the planning jigsaw and enable delivery on the current demand for employment land within the existing legal framework of the Local Plan whilst at the same time working to develop future provision in the context of the new national spatial development planning system.

**Recommendations for future work**

5.6.1 This study has highlighted the need for future research and potential new approaches to managing employment growth in Medway in respect of employment land and accommodation.

- ‘A bigger bolder approach’ to employment land when planning for business development,
- A review of where new employment land might be located to meet the space requirement for the proportion of the 40,000 new jobs identified in the EDS.
- This could including an examination of the idea of an ‘outer ring’ of business activity around the urban centre complementing the future developments at Chattenden, Kingsnorth and Grain
- A review of workspace locations
- Exploring mechanisms for establishing specialist business clusters in the right location, in the right accommodation, with the right cost and legal structures
- Planning priority improvements to existing industrial/ business sites
- Investigating the potential for setting up a high level strategic economic forum involving local business leaders and key opinion formers
- A seminar to review of the legal tenure of employment land and accommodation in Medway involving landlords, agents and landowners with a view to facilitating a more fluid and responsive business community.

## Scope

5.7.1 The research has identified a number of issues that are beyond the scope of this Study and prevent a full assessment of the extent, or otherwise, of a ‘healthy churn’ of employment land and accommodation in Medway. These include:

- Time-scales. A shortage of grow-on space has been identified and yet there is vacant land and vacant accommodation. There is a potential issue of time-scales as well as inappropriate provision
- Legal matters. The disadvantages of long shorthold lease structures and a lack of freehold land has been noted but it is difficult to gauge the impact on business growth
- Rapidly rising land values. The extent to which the impact of the prospect of the conversion of employment land to residential use is affecting occupancy level.